



# 21<sup>st</sup> SHARED SERVICES & OUTSOURCING WEEK



**850+** Shared Services, GBS, Outsourcing and Transformation leaders onsite

**55%** New Practitioner Organizations Onsite

**85%** New Speaker Faculty

**Transitioning Business Services for the Smart and Automated Business Environment**

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Dear Colleague,

**The shared services and outsourcing market stands on a precipice.** In the background is a land filled with transactional processes, cost metrics, siloed functions and lengthy outsourcing contracts; while just below lies a modern utopia with sleek end-to-end processes, digital transformation, intelligent automation and business critical insight. Many shared service leaders have already made the leap, reaping heretofore unheard of productivity and cost gains. Others are hovering on the edge waiting to see if technologies like robotics process automation are worth the hype.

This year's event comes at just the right time, as many shared services leaders find themselves rapidly moving into uncharted territory. Although challenging, this smart and automated business environment provides immense opportunities for shared services that have a plan and know how to manage that transformation.

But let's not forget what made shared services great! The shared service journey is one of continuous improvement and cutting edge technology will have little impact if the fundamentals aren't robust. That's why the North America SS&O Week has specific tracks with case studies on end-to-end process excellence, getting and keeping stakeholder buy-in, change leadership and pricing, amongst dozens of other topics integral to your SSC's success. Plus for the first time, brand new tracks designed explicitly for shared services in the mid-cap space, and for sourcing and supplier relationship management.

To reflect this dynamic market shift our conference focuses on the following core themes:

- **Embedding Robotics into your SSC** to automate transactional work, increase productivity and eliminate errors
- **Driving Strategic Value** through data analytics to aid decision support
- Adapting your operating model to enhance productivity and governance: **GBS, Global Process Ownership** and **utilizing your BPO provider better**
- Automation, Digitization and the Four Generation Workplace: **How can Shared Services adapt to the Future Workforce?**
- **Leadership Transformation:** Inspiring your team through change and challenge; as your SSC remits expand and shift
- **Benchmarking Exclusive!** Exploring data to set the right KPIs within finance, talent and automation

As the North American Shared Services and Outsourcing Week turns 21, we celebrate our "adult hood" and our continued growth along with the industry. Alongside cutting-edge presentations by **leading SSOs such as P&G, Colgate-Palmolive, Mars, Vodafone, Prudential, Facebook and Starbucks**, this year SS&O Week North America gets even more interactive as we provide you with one-to-one tailored advice via our Interactive Discussion Groups (IDGs). **The only thing that could stop you from getting personal guidance from one of the worlds top SSO Leaders, is you!**

Don't make that mistake. This year is poised to be the biggest in our 21 year history. Don't you want to be a part of it?

We look forward to welcoming you to the Loews Royal Pacific next March!



Heather King  
Portfolio Head  
SSON Americas



Sally Fletcher  
Event Director, SSOW North America  
Global Head of Content and Events  
SSON

## Advisory Board:



Lee Coulter  
SVP, CEO, Shared Services  
**Ascension Health**



Cindy Gallagher  
SVP Global Controller  
**Discovery Communications**



Paul Bartley  
Director Global Shared  
Services  
**BD**



Graham Russell  
BPO Director  
**WPP**



Eric Simonson  
Managing Partner, Research  
**Everest**



Bob Cecil  
Partner  
**KPMG**



Scott Manning  
Partner  
**ScottMadden**



Deborah Kops  
Founder  
**Sourcing Change**



Ed Hansen  
Partner  
**Morgan Lewis**



# The 2017 Expert Speaker Faculty



**NEW**

**Manny Korakis**  
Chief Financial Officer  
**S&P Dow Jones Indices**



**NEW**

**Vesta Bovair**  
Managing Director, Head Global  
Service Operations  
**Swiss Re**



**NEW**

**Steven Larrabee**  
Former President of Global  
Business Services and CIO  
**Mars**



**NEW**

**Filippo Passerini**  
Former Group President Global  
Business Services and CIO  
**P&G**



**Mark Simon**  
Senior Director, Global Business  
Services  
**Dell Technologies**



**NEW**

**Tracey Ruff**  
VP GBS, Deputy GM  
**Viacom**



**NEW**

**Paul McLean**  
VP Head of US Centralized  
Business Services  
**Prudential**



**NEW**

**AJ Wijesinghe**  
Chief Shared Services  
Center Officer  
**JLL**



**NEW**

**Jean-Claude de Vera**  
VP GBS  
**Lafarge**



**NEW**

**Caesar Parlade**  
Chief Operating Officer  
**ANZ Global Services**



**NEW**

**Bobby Abraham**  
Executive VP, Global Head of  
Finance  
Shared Services  
**Vodafone**



**NEW**

**Jerry Yerardi**  
CIO, Campus Shared Services IT  
University of California  
**Berkeley**



**NEW**

**Rodney Bergman**  
SVP Global Business Services  
**Celestica**



**Jay Desai**  
Senior Director, Enterprise  
Outsourcing Strategies  
**Abbvie**



**NEW**

**Tom Greene**  
Chief Information and Business  
Services Officer  
**Colgate-Palmolive**



**NEW**

**Antonio Lozano**  
Director Shared Services  
**Ameren**



**NEW**

**Paul Runyan**  
SVP, Head of HR Shared Services  
and Total Rewards  
**Bank of America Merchant  
Services**



**NEW**

**Martin Ford**  
Futurist, New York Times  
Bestselling Author, Speaker and  
**Silicon Valley Entrepreneur**



**NEW**

**Robert J. Yeldell**  
VP of Global Payroll Services  
**Turner Broadcasting**



**NEW**

**Craig McKenney**  
Managing Director - Head of  
Global P2P Operations  
**Citi**  
*SSON 2016 Practitioner of the Year*



**NEW**

**Caroline Basyn**  
SVP, Global Business Services  
Leader  
**Mondelēz International**



**NEW**

**Janine Albano**  
Director Shared Services,  
NA Fire & Security,  
**Johnson Controls**



**NEW**

**Steve Bott**  
Manager Treasury Technology  
Services  
**Ameren**



**NEW**

**Cindy Pekrul**  
SVP and Deputy Controller  
**Turner Broadcasting**



**Richard Rowan**  
VP Global Shared Services  
Organization  
**ZF TRW**



**NEW**

**Michael Morack**  
SVP Global Finance and IT  
Operations  
**ConvaTec**



**Tom Nesteruk**  
Executive Director and Center Site  
Leader  
**BAE Systems**



**NEW**

**Steven Jo**  
Head of Procurement  
**Silicon Valley Bank**



**NEW**

**Anthony Ippolito**  
Senior Director Shared Services  
**Tribune Publishing**



**NEW**

**Viral Chhaya**  
Director Global Business Services  
**General Motors**



**NEW**

**Pam Gabel**  
Executive Director of Shared  
Service Center  
**University of Michigan**



**NEW**

**Richard Schmidt**  
VP Finance - Global Shared  
Service, Procurement,  
Business Process  
**Hitachi Data Systems**



**NEW**

**Jean-Claude de Vera**  
VP GBS  
**Lafarge**



**NEW**

**Cynthia Haug**  
Director of AP  
**Starbucks**



**Lee Coulter**  
SVP, CEO, Shared Services  
**Ascension Health**



**NEW**

**Christie Shepard**  
Head of Finance and Accounting,  
Global Shared Services  
**BG Group**



**NEW**

**Jean Clemson**  
US Accounting Operations  
Director  
**FLSmidth**



**NEW**

**Satish Bengari**  
Global IT Lead  
**Cargill**



**Tony Filippone**  
SVP Vendor Management Office  
**Axis**



**NEW**

**Mike Webb**  
VP, Head of North America  
**Solvay Business Services**



**NEW**

**Jimmy Zhang**  
Head of People Operations  
**Biogen**



**NEW**

**Michelle Bautista**  
Deputy Director Campus Shared  
Services IT  
**UC Berkeley**



**Richard E. Arbuthnot**  
SVP, Director Shared Service  
Center  
**SAIC**



**Cindy Gallagher**  
SVP Global Controller  
**Discovery Communications**



**NEW**

**Jack Brassell**  
Director Financial Shared Services  
**The William Carter Company,**  
**Osh Kosh B'Gosh**



**NEW**

**Lori Bondar**  
Vice President, Controller & Chief  
Accounting Officer  
**Avery Dennison**



**NEW**

**Stephanie Giron**  
VP HR and Payroll Operations  
**Nielsen**



**NEW**

**Jamie Marchland**  
VP HR Operations  
**Pall Corporation**



**NEW**

**Tom Peyton**  
VP Service Excellence, NA  
Accounting Center  
**Wolters Kluwer**



**Paul Bartley**  
Director Global Shared Services  
**Becton Dickinson**



**Vijay Rao**  
Global HR Operations Leader  
**Facebook**



**NEW**

**Curt Burghardt**  
Senior Director HR Shared  
Services  
**Walgreens**



**NEW**

**Stephanie Ernsting**  
Director Global Business Services  
**Bemis**



**NEW**

**Tomasz Brzostowski**  
Senior Director, Global Finance  
Shared Services  
**Hitachi Data Systems**



**NEW**

**John Hopkins**  
Director Finance Shared Services  
**Abbott**



**NEW**

**Chris Langley**  
Head Business Services North  
America  
**Syngenta**



**NEW**

**Joe Rafter**  
Former Senior Director Enterprise  
Change  
**PG&E**



**NEW**

**Brian Martin**  
VP and Site-Lead US SSC  
**Pfizer**



**NEW**

**Tim Westendorf**  
SVP, Group Head Financial Systems  
and Shared Services Strategy  
**MasterCard**



**Kim Bryant**  
Senior HR Operations  
**Lenovo**



**NEW**

**Vanessa Bui**  
VP Finance Shared Services  
**MGM Resorts International**



**NEW**

**Christina Critzer**  
SVP Enterprise Shared Services  
**SunTrust Bank**



**NEW**

**Daniel Cruceana**  
Head US Shared Services  
**Embraer**



**NEW**

**Sandeep Arora**  
Global Operations and Capabilities  
Lead  
**Mondelez Business Services**



**Mike Koehler**  
VP, HR  
**Express Scripts**



**Philip Woodburn**  
VP, FiSS  
**Schneider Electric**



**NEW**

**Sarah Davie**  
SVP Operations and Shared  
Services  
**Dining Alliance**



**NEW**

**Daniel Stuart**  
Chief Business Processes Officer  
**Breakthru Beverage Group**



**NEW**

**Shashi Mandapaty**  
VP Procurement Shared Services  
**Johnson and Johnson**



**Graham Russell**  
BPO Director  
**WPP**



**NEW**

**Paul Rodwell**  
Finance Director -  
Global Shared Services  
**Experian**



**Dona Linthicum**  
Managing Director, Head -  
Enterprise Supply Chain Systems  
**Citi**

# SSOW is where you... Network with your true peers

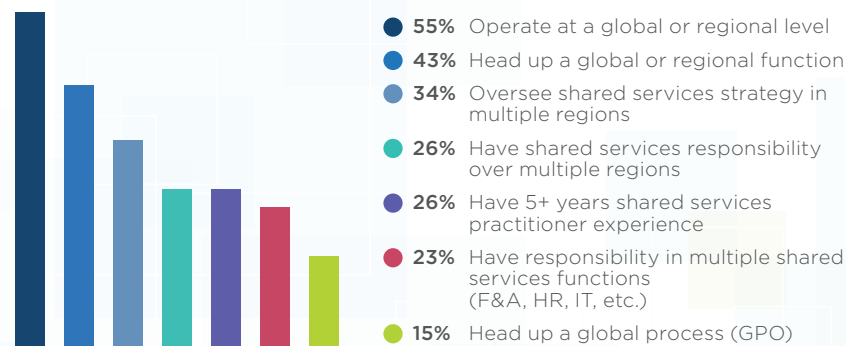
850+ Attendees

100+ Speakers

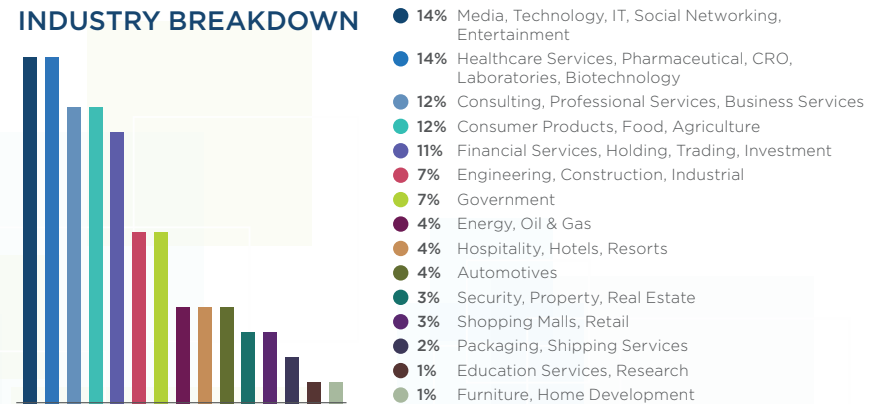
75 Sponsors

70% SSO Practitioners

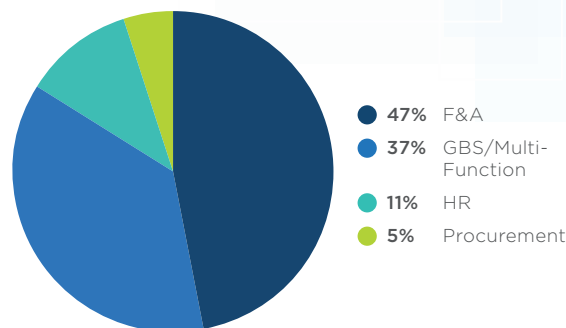
## ATTENDEE RESPONSIBILITY & OPERATION



## INDUSTRY BREAKDOWN

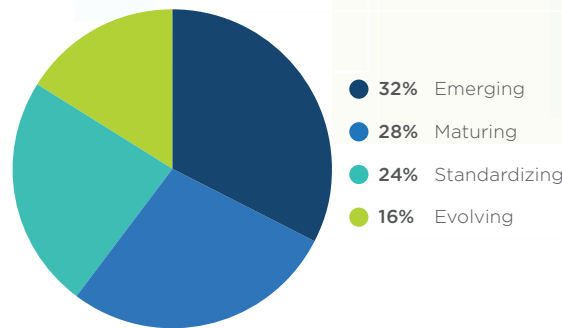


## ATTENDEE JOB FUNCTION

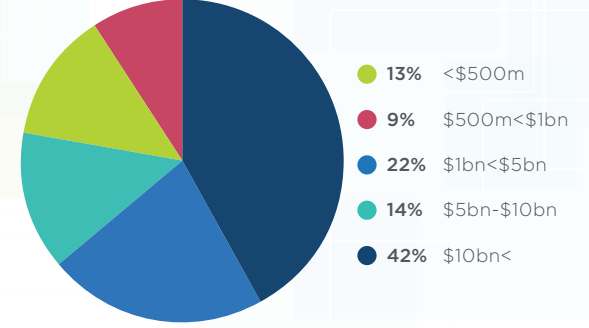


F&A, Multifunction and Procurement functions all saw attendee increases at SSOW between 2015 and 2016.

## MATURITY LEVEL OF SSCS



## ORGANIZATIONAL REVENUE



SMEs/Mid-Cap companies want shared services too and they want it more than ever...we saw this category grow 5% between 2015 and 2016!



# Who attended last year?

## FORTUNE 500 COMPANIES:



## PLUS!

Aecon Group  
 Al Jazeera America  
 Alliance Health Services  
 AOL  
 Ascension Health  
 Bacardi  
 BAE Systems  
 Blood Centers of America  
 Bloomin' Brands  
 BMW Manufacturing Corp  
 Brasken  
 Breakthru Beverage  
 Buck Consultants International  
 Buckman  
 Canfor  
 Canon USA  
 Cargill  
 Catholic Health Initiatives  
 Chubb Corporation  
 Cognizant  
 Core-Mark International  
 Corporacion Multi Inversiones  
 Daiichi Sankyo  
 Dana  
 Delaware North Companies  
 Deloitte  
 Dow Corning Corp.  
 EnPro Industries  
 Equifax  
 Fiserv  
 General Services Administration  
 GoDaddy.com  
 Gordon Food Service  
 HCL Technologies  
 Health First  
 iheartmedia  
 Hospice of Central Ohio  
 IKEA  
 IMB Services  
 Indigo Books and Music  
 Interstate Batteries  
 John Hancock Financial  
 Kaiser Permanente  
 Lear Corporation  
 Lennox International  
 Mabe Integra SA de CV  
 Masonite International  
 McGill University  
 Mercedes-Benz  
 Mondelez International  
 Mosaic Life Care  
 NASA  
 Nielsen  
 Ontario Power Generation  
 Pitney Bowes  
 Ports America  
 Protiviti  
 Public Service Credit Union  
 PricewaterhouseCoopers  
 Resolute Forest Products  
 Revera Inc.  
 Reyes Holdings  
 Roche Diagnostics  
 Rolls-Royce  
 SABMiller  
 SAE International  
 Sanofi  
 Saudi Electricity Company  
 Schneider Electric  
 SeaWorld  
 Sephora  
 Siemens  
 Skanska USA Civil  
 Sonae Center Serviços II, S.A.  
 Spectrum Brands  
 Stanley Black & Decker  
 Syngenta  
 The World Bank  
 Turner Broadcasting  
 Tyco International  
 Uber  
 UNICOMER  
 Universal Weather & Aviation, Inc  
 University of California San Diego  
 University of North Carolina  
 University of Tennessee  
 University of Washington  
 US Department of Health & Human Services  
 US Government  
 USAA  
 W. L. Gore & Associates  
 West Marine  
 West Virginia University  
 World Bank Group  
 Zurich Insurance



# Big Ideas Speakers

Every year SSON invites global innovators to give their views on trends in the wider-world that are disrupting the way that you do business. The idea is to inspire you to sit up, listen, and think outside of the daily grind – and maybe get your next 'Big Idea.'

## Filippo Passerini

Former Group President Global Business Services and Chief Information Officer  
**Proctor and Gamble**

### Transforming the Way Business is Done

As one of the worlds most innovative and forward-thinking CIOs, Filippo Passerini led the integration of P&G's IT and services groups to form their GBS, one of the largest and most progressive shared services organizations in the world. Innovative in structure, scope and philosophy, GBS continues to be a competitive advantage for P&G. Filippo was ultimately responsible for leading a team of 6,000 colleagues and 8,000 partners delivering more than 170 services and solutions to P&G's employees in 70 countries worldwide. In this session he talks about how you can stay ahead-of-the-curve through agility, responsiveness, innovation, ever increasing employee productivity, and flawless operations. A truly inspiring session, not to be missed!

**Want some one-on-one time with this industry guru?**  
**He'll be hosting a lunch-and-learn on Wednesday, March 8th. Only 30 seats available!**

## Martin Ford

Futurist, New York Times Bestselling Author  
Speaker and Silicon Valley Entrepreneur

### The Rise of the Robots

We've known for a long time that robots have replaced many manual labour jobs. But through artificial intelligence they are now taking over complex jobs we previously thought only humans could do. In Rise of the Robots, Martin Ford looks at how the accelerating pace of new technologies and AI will change, for better and worse, the economy, the job market, the education system, and society at large.

Martin Ford is the founder of a Silicon Valley-based software development firm and the author of two books: New York Times bestselling Rise of the Robots: Technology and the Threat of a Jobless Future and The Lights in the Tunnel: Automation, Accelerating Technology and the Economy of the Future. Rise of the Robots received the Financial Times/McKinsey Business Book of the Year Award and was named one of Business Insider's Best Business Books of the Year. It has also been translated into 19 languages. In this session he offers a realistic view of what the future of work—and your place in it—will look like.

**Martin will be signing his book at the first networking break on Wednesday, March 8th.**  
**First 75 attendees will get this exciting souvenir!**



**SEE FILIPPO'S  
SESSION  
ON DAY 2,  
Wednesday  
March 8th  
6:15pm**



**SEE MARTIN'S  
SESSION  
ON DAY 2,  
Wednesday  
March 8th  
8:50am**

# New and Noteworthy!

**Brand New Tracks for Mid-cap and Sourcing and Supplier Relationship Management**



**Site Tours:** Don't miss the PWC tour and RPA How-to-Guide



**Expo Hall and Tech Demo Drive:** Explore cutting-edge technology with the chance to win prizes



**SSO Excellence Awards –** Honor your partners and colleagues' achievements and nominate them for an excellence award



**Interactive Benchmarking Sessions:** Access data on cost-per-invoice, AP cycle time, attrition and much more, to ensure you set the right metrics for your SSC



**Lunch and Learn from GBS Expert Filippo Passerini,** the man who made P&G Global Business Services one of the largest and most progressive in the world!



**Pool-Side Reception and On-Site 21st Birthday Party –** with over 850+ SSC leaders on-site don't miss your opportunity to make new business contacts and life-long friends



**No On-Stage Sales Pitches –** For the 3rd year running SSON provides you with an all practitioner speaker faculty, ensuring 100% of your time is well spent





# GBS Evolutions

Hosted by: **KPMG**

Global Business Services have started to move into uncharted territory. Rapid changes in technology, data and workforce demographics are requiring GBS leaders to rethink how they benefit from the change and evolve their organizations. KPMG's research with leading and emerging GBS organizations suggests a strong correlation between GBS maturity and the ability of the enterprise to extract maximum value from emerging technologies and labor market changes.

The GBS Evolutions track is a rare chance for individuals leading a Global Business Services model at a regional or global level meet to in a closed-door environment to discuss and debate the direction of the industry and the challenges keeping them awake at night.

The senior level of the group means that the format of the session will be highly interactive and involve a significant degree of analysis and discussion. Participants are encouraged to come prepared to present real-life GBS challenges for lively discussion, problem-solving and debate.

The GBS model represents for many, the pinnacle of shared services excellence; combining improved global alignment, increased visibility, control and risk management, improved analytics, agility and global scale.

## Therefore, this discussion will cover:

- **GBS maturity: Why are many companies stuck and unable to move up the maturity continuum?**
- **Evolving to support the middle and front offices in marketing, sales and service functions?**
- **Digital labor and security risk**
- **Unique talent challenges facing GBS leaders today?**
- **Good governance combined with intelligent change and program management**

## WANT TO JOIN? HERE ARE THE PREREQUISITES

Access to the GBS Evolutions Room is available solely to individuals who meet at least one of the two criteria below:

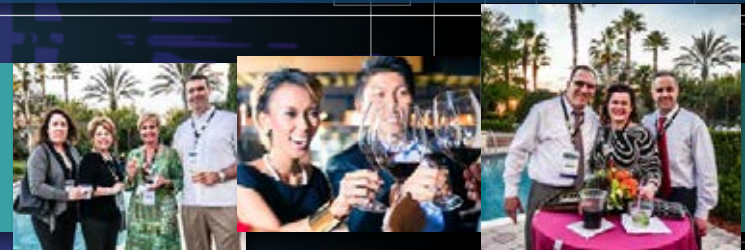
- ✓ Have responsibility over multiple regions of shared services
- ✓ Have responsibility over multiple functions in Shared Services (i.e. F&A, HR, IT, etc.)

And meet at least three of the following criteria:

- ✓ Have 5+ years and experience in strategic Shared Services roles (practitioner led)
- ✓ Have organizational revenues of \$1 billion
- ✓ Have shared services organizational revenues of \$10 million
- ✓ Have minimum 750 FTEs in the Shared Services Organization

## FOLLOWED BY A CHEESE AND WINE RECEPTION

Hosted by: **UHY**



# SSOW is where you...Tackle cutting edge trends Robotic Process Automation and Intelligent Automation

There is no doubt about it; both Robotic Process Automation and Intelligent Automation are changing the way shared services do business in a dramatic fashion. Decreased cycle time, flexibility and scalability, improved accuracy and detailed data capture—the benefits of these types of technologies are now well established. But how exactly do they fit into your shared service center? In the myriad of supplier options how does one differ from the other? How will your workforce be affected, and how can you re-deploy them in the right way? These questions all need answering. SSOW has gathered together a range of sessions and experts designed to answer everything you need to know about RPA and the next stage of development, Intelligent Automation.

## ATTEND THESE SESSIONS:

### RPA TRACK

A range of practical case studies and panel discussions on RPA for the finance and HR processes. Topics discussed include: Practical Implementation Guides, Intelligent Automation Security Governance (How to Ensure Your BOT Doesn't Go Terminator) and AI within Shared Services.

Hosted by



### RPA INTERACTIVE DISCUSSION GROUPS

Sign up and reserve your place on one of our RPA interactive discussions: The Truth (And Myth) behind Robotics Process Automation or Removing Manual Activities from your Period-End Close via Enterprise Robotics.

### PRE-CONFERENCE RPA MASTER CLASS - OPERATIONALIZING RPA - TOP 10 CHALLENGES (AND HOW TO OVERCOME THEM!)

Using a variety of case studies this master-class focuses on; a) collaboration with IT on architecture, infrastructure, security and change management, b) communication planning, stakeholder management and organizational redesign, c) governance, compliance, controls, audit and measuring success and d) RPA COE organizational structure.

Hosted by



### SITE TOUR AND ROBOTICS HOW TO GUIDE

See first hand the impact of PWCs robotics process automation pilot in their Finance, HR and Procurement functions, and understand how, as one of the US's biggest recruiters, RPA had a significant impact on their hiring process.

Hosted by



### HR AND ROBOTICS

Explore Walgreens' recent RPA transformation within its HR function and understand how you can use Robotics for recruiting, payroll, scheduling, talent management and much more.



### KEYNOTE PRESENTATION, THE RISE OF THE ROBOTS, MARTIN FORD

Futurist, New York Times Bestselling Author, Speaker and Silicon Valley Entrepreneur



## RPA Experts:



Lee Coulter  
SVP, CEO, Shared  
Services  
**Ascension Health**



Mihir Shukla  
CEO and Co-Founder  
**Automation Anywhere**



Paul McLean  
VP Head of US  
Centralized Business  
Services  
**Prudential**



Curt Burghardt  
Senior Director  
HR Shared Services  
**Walgreens**



Satish Bengari  
Global IT Lead  
**Cargill**



Derek Toone  
Managing Director,  
RPA Advisory Services  
**Alsbriidge**



Christina Critzer  
SVP Enterprise Shared  
Services  
**SunTrust Bank**



Adam Devine  
VP  
**WorkFusion**



Dona Linthicum  
Managing Director,  
Head - Enterprise  
Supply Chain Systems  
**Citi**



# Your 2017 Agenda at a Glance

## PRE-CONFERENCE SITE TOUR DAY • MONDAY, MARCH 6, 2017

9:00 - 2:00 **PricewaterhouseCoopers Site Tour**

2:00 - 6:00 **Johnson and Johnson Site Tour**

9:00 - 2:00 **Coca-Cola HR Site Tour**

2:00 - 6:00 **Citi Site Tour**

## PRE-CONFERENCE WORKSHOPS • TUESDAY, MARCH 7, 2017

8:15 - 10:30 **Workshops A-D**

10:45 - 1:00 **Mid-Cap Master Class**

10:45 - 1:00 **Workshops E-H**

## MAIN CONFERENCE DAY ONE • TUESDAY, MARCH 7, 2017

1:10 **SSON Chairman Opening Remarks**

3:30 **Track Sessions – Maturity Curve Groups Begin plus GBS Evolutions Track**

1:30 **Opening Keynote Presentation with S&P Dow Jones Indices and plenary presentations**

5:35 **Live Benchmarking Session!**

2:10 **Client Presentation Hosted by Automation Anywhere**

5:45 **Plenary Session with Vodafone**

2:50 **Networking Break in the Exhibit Hall**

6:20 **“Yes, We’re Legal!” 21st Annual SSOW Poolside Reception**

## MAIN CONFERENCE DAY TWO • WEDNESDAY, MARCH 8, 2017

8:40 **Opening Remarks**

2:00 **Functional Fast Tracks, RPA Masterclass and GBS Evolutions Stream**

8:50 **Big Idea Keynote Presentation - The Rise of the Robots**

4:00 **Networking Break and Demo Drive**

9:30 **Plenary Sessions**

5:40 **SSOW Excellence Awards Part 1**

10:50 **Morning Coffee and Networking Break**

6:15 **Big Idea Keynote Presentation – Filippo Passerini, P&G**

11:30 **Interactive Discussion Groups**

7:00 **SSOW Exhibit Hall Reception**

## MAIN CONFERENCE DAY THREE • THURSDAY, MARCH 9, 2017

9:00 **Opening Remarks**

10:55 **Morning Coffee and Networking Break**

9:10 **Opening Panel: The Big Talent Conversation!**

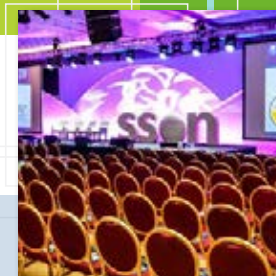
11:40 **Track Sessions Begin**

9:50 **Plenary Session – Colgate Palmolive**

1:30 **The Winner Takes It All Prize Giveaway**

10:35 **SSOW Excellence Awards Part 2**

1:50 **Close of Main Conference**





*"Energizing to hear what other companies have done and see people who are experts and passionate about SS."*  
- Turner Broadcasting



*"A lot of knowledge sharing. A lot of new technology to explore."*  
-CardinalHealth



*"The highlight for me is always hearing how other shared services are growing and evolving."*  
-Loews Financial Services Center



*"An excellent 3 days full of well-presented, thought out content & a fantastic networking opportunity for anyone in the SS world."*  
-Finance Director, BPO & Global Shared Services, Ferro Corp.

*"Excellent networking opportunities & ideas you can put into action."*  
-BAE Systems

*"Lots of great sessions and lots of meaningful conversations with Fortune 500 customers, practitioners, providers and advisors together on a single platform."*  
-Automation Anywhere

*"An excellent & must-have experience to all emerging BPOs."*  
-Accountant, Shared Services, IMBServices



*"I was really excited by the new technologies and forward thinking strategies."*  
-Schneider Electric



*"By far this was the best event I've attended to meet objective buyers and decision makers in the Shared Services world."*  
-Infosys

SSOW is where you...

# Get true hands on experience

Every year SSOW invites global innovators to give their views on trends in the wider-world that are disrupting the way that you do business. The idea is to inspire you to sit up, listen, and think outside of the daily grind – and maybe get your next ‘Big Idea.’

MONDAY, MARCH 6, 2017 • 9:00AM-2:00PM

## Business Services Site Tour and RPA Pilot Review

In Tampa, PwC houses a concentration of its Business Services to deliver strategic and operational competencies to staff and partners. More than 2,500 personnel design and build systems and services for over 49,000 internal customers throughout the US and PwC's network of firms around the globe.

Groups operating in Tampa include Information Technology and Cyber-security, Finance & Accounting, Human Capital Shared Services, Talent Acquisition, Ethics & Compliance, Global Demand Management Services, Learning and Education, Marketing and Sales, and National Benefits, among others. These teams innovate and work together to provide end-to-end processes to the business. As the strategy has evolved, non-traditional functions have also been added, such as the virtual Administrative Support Concierge group serving US partners.

Along-side these activities, PwC has recently undertaken a robotics process automation pilot in their Finance, HR and Procurement functions. A major employer, PwC hired almost 19,000 employees last year. On this tour, they will discuss how RPA has had a significant impact on their hiring process, as well as within their finance close and procurement activities. This is an unrivaled chance to speak to the team about process and technology selection, lessons learned from implementation, and crucial business outcomes of the pilot.

The Tampa office is a high-tech facility that has been designed to foster maximum collaboration across various business services teams on site and in remote locations. During this site tour, PwC will share with you their journey from strategy through execution, from shared services and beyond to RPA and Global Business Services.

The site tour consists of:

- Presentation from site leader
- Walk through and RPA Pilot review in functional groups
- Interactive Q&A with functional heads and refreshments



Hosted by:  
**Joe Killian**  
Partner - US Finance and Shared Services Leader  
**PWC**

OR

MONDAY, MARCH 6, 2017 • 9:00AM - 1:00PM

## Coca-Cola Refreshments HR Shared Services Site Tour

In 2009, Coca-Cola Enterprises opened a North American HR Shared Services Center in Brandon, Florida. The center has evolved over the last 6 years with technology and process improvements, amidst company integration work as the North American operations were acquired by The Coca-Cola Company in 2010. The center currently has 250 employees and expects to continue along a technology and process optimization journey. This site tour will take you through this widely benchmarked center presenting these areas of focus, including:

- Customer Service – view the call center in action along with related metrics of speed to answer, service level, first call resolved, and a drive to tier 0.
- Learn about the first point of contact specialization in the areas of Payroll, Compensation, Employee Relations, and Benefits
- HR Operations – view the metric boards and learn about operations of HR Master Data, Organizational Management, Talent Acquisition Services, and Benefits & Pension as well as how the team continues to provide higher value support to the organization
- Payroll Operations – learn about the in-house payroll operation, which is the most mature since it originated over 14 years ago within Finance Shared Services. Highlights and the payroll evolution will be explained
- HR Services Support – understand the roles of quality assurance, workforce optimization, knowledge management, reporting, governance, and project management for the entire HR Shared Services organization

Hosted by:  
**Karla Younger**  
VP, HR Services  
**Coca-Cola Refreshments**

MONDAY, MARCH 6, 2017 • 2:00PM – 6:00PM

## Citi Global Business Services Site Tour

Sitting alongside 20+ business and front office operations, Citi's Global Business Services center in Tampa is a strategic North and Latin American hub for the bank. Citi's GBS Tampa hub is designed for experimentation in order to create an optimal workplace of the future, integrating virtual offices, remote desk sharing and on-site collaboration workspaces to create more flexible and productive working environments. It also acts as a hub for emerging technology in Smart Automation, Cognitive Agent, and Advanced Analytics pilots. Alongside exploration into some of the industry's most cutting-edge technology, the Citi Tampa GBS is heavily focused on talent management, culture creation and fostering a collaborative global team.

The tour is designed for shared services professionals with 10+ years maturity and limited to 25 seniors, in order to create a dynamic interactive experience. This tour goes beyond planning and launching to discussing emergent & disruptive technical shifts, digital user experience transformation and future planning.

OR

MONDAY, MARCH 6, 2017 • 2:00PM – 6:00PM

## Johnson and Johnson Site Tour

This year Johnson & Johnson offers an exclusive peek into one of the most innovative and collaborative SSC workspaces available. Consisting of four “neighborhoods”, their brand new multi-functional SSC is designed with employee wellbeing at the heart of every space. Each neighborhood is devised for activity based working and consists of an open work space, focus and meeting rooms, a communication room and global connect rooms allowing each employee to optimize their performance and access the best space to suit their working needs. In addition, the site also features wellbeing spaces for health, relaxation and social food and drink facilities, to ultimately encourage holistic employee health and retention.

This tour will take you on a journey through one of the most innovative and exciting workspaces available. Helping you to understand how J&J is promoting a culture of health, through culture creation and workspace and ultimately enabling employees to do better in their work and careers.

Hosted by:  
**Ron Walker**  
Tampa Senior Director, Site Lead  
**Johnson and Johnson**



7:30 **Registration Opens for Workshop Participants**

8:15

## WORKSHOP A

### Shared Services 101: How to Design, Build, and Implement Shared Services

How do you ensure that your new shared services operation is successfully established and able to provide value immediately back to the business? Join us for this interactive session where we discuss the journey of setting up a new shared services organization.

This workshop focuses on the essential activities to plan and launch a new shared services operation; including setting the strategy, defining the opportunity, and setting up work streams to ensure all implementation resources are used most efficiently and effectively. During this session you will learn:

- Strategic considerations for designing shared services
- Characteristics of a leading service delivery model
- The most important activities required for successful implementation
- Common implementation mistakes and how to avoid them

**Courtney Jackson**

Partner



**Trish Ferris**

Partner



**Andy Flores**

Partner



## WORKSHOP B

### Change Management: Driving Innovation through a Culture of Continuous Improvement

Change can be difficult, and sustaining change can be an even bigger challenge. So how can you set yourself up for a successful continuous improvement program from the beginning? This workshop discusses:

- Creating ongoing efficiencies and productivity within your Shared Service center
- Building a continuous improvement culture
- The importance of Measuring, Empowering, Publishing, Communicating and Celebrating
- Instilling employee passion and ownership from the beginning to sustain change
- Changing team mindset from “we have always done it this way” to a more impactful and meaningful “I do this because”
- Developing a clear accountability structure
- Setting KPIs that drive continuous improvement
- What tools should you have in your Continuous Improvement toolkit?
- Incorporating Continuous Improvement teams within a shared services function

**Frank Fenello**

Managing Director



**Cynthia Hannafey**  
Managing Director



## WORKSHOP C

### Moving Up the Value Chain –Making Effective Data Analytics Happen Within Your SSC

63% of SSCs claim that they are already using data analytics to improve their processes, whilst 75% of SSOs say business intelligence activities are ramping up either within their captive or through their outsourcing strategy. However, while there are some really innovative examples of analytics, many SSCs are having difficulty in articulating what a systematic approach to data analytics might look like, or indeed, why shared services should be leading the agenda for this activity. This workshop illustrates via case-studies, how you can build a data analytics strategy within your SSC. Points of discussion include:

- Using big data and analytics within different functions
- Big data to business reporting: Remaining close enough to the business to manage the data
- Creating a coherent strategy to develop a deep data culture within your organization
- Linking the business partners, SSC and business units to get one version of the truth

**Anil Bhavnani**

Director BPO - India Site Lead



## WORKSHOP D

### Operationalizing RPA – Top 10 Challenges (and How to Overcome Them!)

Robotic Process Automation (RPA) is transforming the shared services market, taking business process automation to the next level and redefining labor and location strategies through the advent of the virtual workforce. But using RPA platforms to create automations is the easy part – the challenge lies in shepherding the transition to an automation-enabled operating model and to then manage the new environment to ensure responsiveness to constantly changing business requirements.

This workshop will open with an overview presentation and interactive group discussion on the “Top 10 Challenges” to operationalizing RPA, including case studies on how Alsbridge clients have overcome them. The main group will then disperse into breakout sessions for focused dialogue on:

- Collaboration with IT on architecture, infrastructure, security and change management
- Communication planning, stakeholder management and organizational redesign
- Governance, compliance, controls, audit and measuring success
- RPA COE org structure, roles, responsibilities, skillsets, service delivery methodology and interface to business/operations

**Scott Furlong**

Partner



**Mark Davison**

Partner





10:45

## WORKSHOP E

**Advancing Your Shared Services Operations: Taking It to the Next Level**

What's next for maturing shared services operations? How do you add value within a manageable framework? Dive into non-traditional, next-generation concepts with this interactive session. Here, we will share strategies to add value to your organization related to:

- Predictive and prescriptive analytics
- Use of social media
- Robotic process automation
- International expansion and treatment of small countries
- Increasing business customization without losing efficiency

Courtney Jackson  
Partner



Trish Ferris  
Partner



Jerred Crosby  
Partner



## WORKSHOP F

**Driving Awesome Customer Experience in Your SSC****Responding to and Actioning CEM feedback**

- Collecting useful feedback: Creating a customer board and survey
- Turning customer feedback into continuous improvement
- Outside in: Looking at your process from the customer point of view
- Empowering your team to provide fantastic CEM

Tom Peyton  
VP BPO

**Culture, Branding and VOC: Creating CEM excellence in Shared Services**

- Employee engagement; The foundation to creating a positive customer experience
- Creating a strong service excellence brand for your SSC
- Customer journey mapping: Putting the customer at the center of your business

Sheila March  
Customer Experience Manager

**Panel Discussion: Sharing ideas and best practice on SSC and CEM**

Deborah Kops  
Founder

**Sourcing Change**

April Russo  
VP Assistant Controller  
**AOL**

Bob Cecil  
Partner



## WORKSHOP G

**Change Leadership: Building Internal Transformation Capabilities**

Are you keeping up with pace and complexity of your strategic implementation? How are you strengthening your company to keep up? The best companies understand that a flawless execution is more important than a flawless strategy.

- Are you driving the delivery of your strategy?
- What can you do to unleash your people on your strategy?
- How can you accelerate the realization of the value?

In this workshop you will learn which internal capabilities are critical for strategy implementation and transformational success. Additionally, we will explore what and how you can build internal transformational capability so that you can accelerate the realization of strategic value.

Based on 24 years of large-scale global transformational delivery across a dozen industries as a consultant and employee, Joe Rafter will share the most complete, actionable and configurable transformation capability model along with proven case studies.

Randy Geoghagan  
Partner



## WORKSHOP H

**Understand the Role of GPO & How to Implement One Into Your Shared Services**

So you've decided that a global process ownership capability would be the best step forward in your SSO, or you've been anointed GPO. Now what? There are so many "what comes next?" possibilities, it can be daunting to create a path and follow it. This workshop will take you through those crucial first steps in developing a GPO capability, including:

- Ideation: honing the high-level concept and securing the mandate to take it forward
- Investigation: understanding the existing landscape and what you must do to make the global process ownership model work
- Roll out: starting to put the model into action including outlining a governance structure

John E. Hopkins  
Director of Finance Shared Business Services

**Did You Know...**

2015 saw more than **4% increase** in the minimum salary of CFO, compared with only 2%+ increase in 2014

10:45 - 1:00

## Mid-Cap Master Class: Making Shared Services Work No Matter Your Size!

As a mid-size company you may ask “Does size matter when it comes to success with Shared Services? Don't you need to be a large company to achieve economies of scale through ‘centralization’? Doesn't scale enable a better position when purchasing new technology or considering outsourcers?” The truth is that smaller size companies can also capitalize on Shared Services to achieve the benefits of cost savings, higher quality of service and improved control environment by leveraging the approach, principles and tools of Shared Services. And many of these are not “scale dependent”.

This in-depth Master Class offers you case studies, best practices, and proven and tested implementable approaches through a mix of presentations, panel sessions, roundtable discussions and interviews.

### An Essential Guidebook to Successful Shared Services Implementation for a Mid-Cap Company

- This session unveils all critical success factors for implementing Shared Services in a smaller size company and shares lessons learned from some real examples.
- Critical success factors to Shared Services implementation in a “smaller” organization: People, Process, Technology and Customer
- Does the functional vs multifunctional scope decision point influence the opportunity and approach taken?
- The make or buy decision when size is not so significant
- Lessons learned from some real life examples

Phil Searle, Founder and Managing Director, **Chazey Partners**  
 Chas Moore, Managing Director North America, **Chazey Partners**  
 Robert Towle, Managing Director North America, **Chazey Partners**



### Panel Discussion: Successes and Challenges of a Mid-Cap Shared Services Implementation

This session will be an interactive panel discussion with some practitioners from Mid-Cap companies who are either in the implementation process or have already implemented shared services. The topic will be introduced, there will be some initial panelist introductions and background presented, and then we will open up for audience questions.

### Interview with the Expert: Adapting Shared Services Principles to work for a Mid-Cap Organization in practice:

- Selling the solution to the organization
- What needs to be covered in the business case?
- Governance and control considerations
- Scope covered – functional or multifunctional
- Challenges faced and how they were overcome
- Success achieved and next steps
- Q&A

Mike Rescoe, former CFO of **Travelport**

10:45 - 12:45

## How to leverage a Digital Workforce in your Automation Journey

Many of us have now started on our automation journey, navigating a roadmap commencing with RPA and the automation of structured and semi-structured data. Unfortunately for many people the next steps are less clear. This session aims to provide some clarity to shared service center's exploring the move towards cognitive solutions and machine learning in the form of Digital labor. With a new digital workforce you can scale your automation strategy and unlock levels of customer experience, cost reduction and risk reduction, but only if its done right!

During this interactive session you will learn:

- How to get from basic automation and RPA to cognitive solutions and machine learning
- What digital labor is already achieving in enterprise companies
- How digital labor is applying the science of human thought to create a human experience
- What are the component parts of a successful cognitive strategy?

Gene Chao, General Manager, **IPsoft, Inc.**  
 Patrick Marlow, Solutions Architect, **IPsoft, Inc.**  
 Scott Furlong, Partner, **ISG**




## 12:00 Main Conference Registration Opens

Introduce yourself to your fellow line-members and start making connections!

## 1:10 SSON's Opening Remarks

Heather King  
Portfolio Head  



Sally Fletcher  
Event Director, SSOW North America  
Global Head of Content and Events  


## 1:20 Chairman's Opening Remarks

Brad DeMent  
Partner  


## 1:30 What Does the CFO Want From Your SSC in 2017? The Top 3 Strategies to Add Ultimate Value

Whether we want to hear it or not there is nothing more valuable than honest and constructive feedback from our customers, and none better than the ultimate customer of the SSC, the CFO. In this session, S&P DJI's CFO talks candidly about what his shared service center means to him. What is the most vital thing he believes the SSC can do for a company? What has been the metric that has most impressed him to date? How does he see the role of the shared service center evolving? All these questions and more will be answered alongside insight into S&P DJI's own SSC transformation – if you have ever wondered how to get buy-in and contribute to corporate strategy, you won't want to miss this session!

Manny Korakis  
Chief Financial Officer  


2:10

## On-Stage Interview: Achieving Best-in-Class RPA Results: Creating value and transitioning your Shared Service Centre

Join Mihir Shukla, CEO of Automation Anywhere, and one of their top clients for an enlightening discussion of real world business challenges and how Robotic Process Automation is driving transformational business process improvement on an enterprise scale. Learn how this business is leading an industry in improving processes while liberating people to focus on higher-level contributions to the business, in what promises to be an inspiring and informative discussion.

Hosted by 

2:50

## Networking Break

3:30

## Track Sessions – Maturity Curve Groups Begin

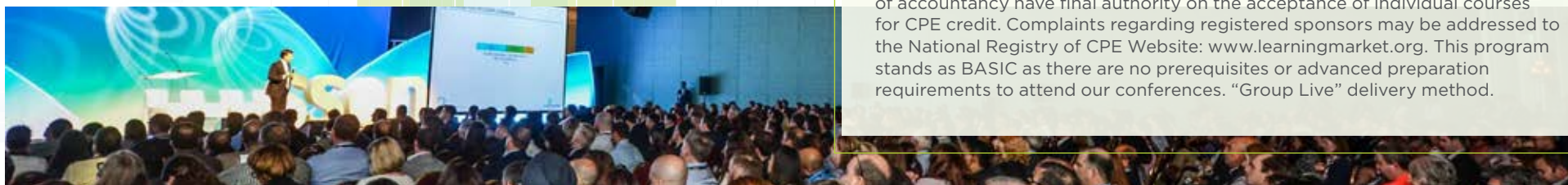
The tracks are designed to provide in-depth practical advice no matter your maturity level. Whether you are planning and launching, pursuing continuous improvement or a more mature center seeking additional value, there is a session for you.

 Please see next page for more details 

### Did You Know...

There are **1514** Shared Service Centers in the USA and **183** in Canada

**EARN UP TO 18 CPE CREDITS!** Penton Learning Systems d.b.a International Quality and Productivity Center is registered with the National Association of State Boards of Accountancy (NASBA), as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be addressed to the National Registry of CPE Website: [www.learningmarket.org](http://www.learningmarket.org). This program stands as BASIC as there are no prerequisites or advanced preparation requirements to attend our conferences. "Group Live" delivery method.



## TRACK SESSIONS – MATURITY CURVE GROUPS BEGIN

**MID-CAP COMPANIES**

Designed for smaller organizations who want to access SSC benefits

**STAGE 1 – EMERGING**

For those in early years of shared services, looking to perfect the fundamentals

**STAGE 2 – EVOLVING**

For those who are fully implemented and looking to drive continuous improvement

TRACK CHAIR: Joesph Peri,  
Former Chief Operating  
Officer Shared Services,  
Ascension Health

**STAGE 3 – MATURING****STAGE 4 – ADDING VALUE**

For more mature shared services who want to access that next level of value

**GBS EVOLUTIONS FORUM**

Hosted by: KPMG

(See page 11 for admission criteria)

3:30

### Silicon Valley Bank Case Study: Rapid Growth, Cutting-Edge Technology and Value-Add: Creating an Outsourcing Strategy to Achieve All This and More

When Steven joined, SVB was in high-growth mode and had adopted a messy multi-provider “strategy.” Their outsourcing use expanded rapidly but despite their growth they were nowhere near the scale of the big MNCs and thus forged their own strategy to deliver value, cost-savings and back-office support.

In this session Steven discusses how SVB leveraged its BPO to access the cutting-edge technology and agile operations of a much bigger company, and the change management that was vital to its success.

Steven Jo  
Head of Procurement



### Transforming Disparate Functions into One Team: Continuous Improvement and Lean at its Best

Combining multiple departments under a single leader does not necessarily result in an effective multi-function shared services center; you’ve got to be prepared with a much more strategic plan. In this session, you will see how developing a common vision and a compulsive reason to act can result in your shared services organization having key metrics with clear goals, a transformation plan to get you there and every employee’s actions aligned. Learn how visual management, standard work, and individual contributor involvement can reduce exception work, reduce costs, and increase employee engagement.

Antonio Lozano  
Director Shared Service Center



Steven Bott  
Manager Treasury  
Technology Services



### Panel Discussion: Getting the Buy-In for Value-Added Services

- Proving the case for value-added services
- Demonstrating value back to all stakeholders
- Dissecting the SSC: which processes are SSCs bringing in and which have the fastest ROI
- Transitioning to a strategic business partner and enabling business decision making

Lori Bondar  
Vice President,  
Controller & Chief  
Accounting Officer



Brian Martin  
VP and Site-Lead US  
SSC



Paul Bartley  
Director Global Shared  
Services



### Disruptive Technologies and the Acceleration of Business Transformation

An expert panel comprised of IBM thought leaders and enterprise buyer clients will discuss a wide range of topics including RPA, Intelligent Automation, Cognitive and Blockchain. Insights on the impact of disruptive technologies and the talent and skills needed to stay relevant and thrive in our changing business environment will also be shared.

Jay Desai  
Senior Director,  
Enterprise Outsourcing  
Strategies, **abbvie**

Ramesh Gudalur  
Cognitive Process  
Transformation Leader



### Leadership In a Whole New Landscape: Ensuring You’re Ready to Lead an SSC 3.0

Along with the SSC, the role of the SSC leader has changed drastically over the last 5 years and shows no sign of slowing down. Rather than cutting costs and leading a transactional back-office, the new leader needs to be tech savvy and industry aware. This session examines how SSC leaders can evolve and embrace change, maximizing their unique position as a birds-eye across the business and ultimately leading their SSC to cost-savings, standardization, and process-efficiency victory.

Pamela Gabel  
Executive Director,  
Shared Service Center



### Roundtable Discussion: Has Your GBS Delivered Everything it Promised? Challenging the GBS Model

Everyone in this room has either committed to a GBS model or has committed to exploring the path to GBS. But has the model’s value been proven for these organizations? Challenging existing thought is always a worthwhile endeavor and this group will discuss these key points:

- Has your GBS achieved everything it set out to?
- What is the measure of success for a GBS?
- As an independent unit are you too far removed from the organization?
- What is the optimum hybrid balance for a GBS

Roundtable Host:

Mike Webb  
VP Head of Region





## TRACK SESSIONS – MATURITY CURVE GROUPS CONTINUE

4:00

## MID-CAP COMPANIES

**Battling Big Brands to Ensure You Get (and Keep) the Talent Needed**

It's a dog eat dog world out there, especially in the battle for the best talent. The F1000s have a big name to tout, which often will attract new faces by the sheer force of the brand. To compete, smaller companies have had to rely on more than just their names and this session discussion some of those strategies including:

- Building a brand that can compete
- Creating a culture that will help retain talent within your center
- Including flexible and virtual working to encourage work-life balance
- Competing on quality not cost

Sarah Davie  
SVP Operations and Shared Services  
**Dining Alliance**  
— PURCHASE WITH POWER —

## STAGE 1 – EMERGING

**All Aboard? What's the Best Way to Get Stakeholder Buy-in**

What's the quickest way to stop a project in its tracks? Not having the buy-in from the right people. Shared Services - which necessitates movement of work and ownership - screams risk for many business heads causing them to be defensive and uncollaborative. This session demonstrates how best to gain and keep the buy-in from all major stakeholders, ensuring that your SSC gets off to a flying start.

Steven Larrabee  
Former President of Global Business Services and CIO

**MARS**

## STAGE 2 – EVOLVING

**Developing a Global Service Delivery Network: GPOs, Standardization and a Unified Approach**

As SSCs grow and become more global, there are enormous gains that can be made from a properly global service delivery network, but the journey is not always easy. This session looks at:

- Establishing a robust governance strategy
- Building strong engagement with the business unit to understand needs and requirements
- The importance of establishing proper global process ownership of all new activities
- Creating a unified approach to business support: Overcoming resistance and coordination

Richard Rowan  
VP Global Shared Services Organization



## STAGE 3 – MATURING

**Panel Discussion: How to (and How not to) Implement RPA**

- Lessons learned from early adopters
- Getting staff to embrace the robots
- Security! Embedding robust governance and data security
- Collaborating with IT on architecture, infrastructure and everything else

Christina Critzer  
SVP Enterprise Shared Services  
**SunTrust Bank**

Satish Bengeri  
Global IT Lead



Joe Allen  
General Manager  
North America Global Operations



## STAGE 4 – ADDING VALUE

**Manulife Financial Services Case Study: Improving quality and empowering a customer-centric culture leveraging RPA**

- RPA Adoption Challenges
- Vision for customer value add
- Enhance efficiency
- Improve quality

Sheldon Foster, Process Automation, Customer Experience, **Manulife Canada**

hosted by:

softomotive 

## GBS EVOLUTIONS FORUM

The rest of the session is reserved for moderated discussion, which is not limited to but covers:

- Robotics and AI
- Zero-Based Budgeting
- Using SMAC inside your GBS
- Talent management
- The full and future scope of GBS

**Did You Know...**

**31%** of LATAM SSCs are owned by US companies

## TRACK SESSIONS - MATURITY CURVE GROUPS CONTINUE

4:30

## MID-CAP COMPANIES

**Panel Discussion:  
Moving to Value-Add Within a Mid-Cap Company**

For many larger SSCs the route to value-add comes via million dollar technology investments and large scale recruitment. However this doesn't need to be the case. There are many different methods to provide value. This panel looks at tools, techniques and activities that can be used to drive value over and above cost-saving if you aren't working for a massive SSC.

Richard E. Arbuthnot  
SVP, Director  
Shared Service Center



Steven Jo  
Head of Procurement



Silicon Valley Bank

## STAGE 1 - EMERGING

**Getting it Right the First Time: Taking the Strategic to the Tactical**

How can you ensure you get it right first time when moving to a SSC. What key decisions need to be made to ensure a successful migration? How can you identify and mitigate risks before they occur? This presentation covers the importance of:

- Starting with "why" to understand and develop your strategic vision: why are you moving to a SSC, what does the end result look like, and what do you want to receive?
- Building a plan from strategic vision to tactical execution
- Focusing on change management
- Standardizing and centralizing areas that support your strategic vision
- Embedding standardization through multi-functional shared services
- Leading tools to support your standardization
- Mitigating risk: Common pitfalls and knowing what to look for

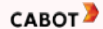
Tammy Coley  
Executive Director, Enterprise Accounting, Financial Systems & Compliance



Jamie Babb  
Vice President, Process Improvement



Ted Guthrie  
Finance Director, North America



Client-led presentation:  
Hosted by:



## STAGE 2 - EVOLVING

**Experian: Creating a Global Finance Shared Services**

For an SSC on a smaller scale, Experian has achieved big things. Going from several disparate local financial systems, inconsistent processes and highly manual regional reporting to a Global Centre of Excellence and in-depth analytics in a short time. In this session SVP of Finance Shared Services, Paul Rodwell, uncovers how they achieved this with particular focus on:

- Facilitating common and consistent internal controls and policies
- Supporting centralizing and offshoring
- Enabling Global process ownership
- Utilizing the SSC data to provide better C-Suite insight and eliminate errors

Paul Rodwell  
SVP/Group Finance Shared Services Director



## STAGE 3 - MATURING

**Overcoming Perceptions: Back Office Servants to Crucial Business Partners - Swiss Re's Revolutionary Journey**

How do you change perceptions within your organization as you move from the back office to value adding business partner? It's not easy and can create disruption internally. In 5 years Swiss Re's GBS team has grown to be the 3rd largest in the Group, representing 16% of the company's workforce.

In 2015 they created 120 million of value (e.g., working capital) and reduced the run rate of the company by 80 million, in addition to meeting service agreements. The captives have generated an average of 8% productivity per annum and attrition in India remains low at 10%. How did they achieve these results? Swiss Re chose relationship building, organizational transformation and coalition building as their foundation when creating their COE.

In this session Ms. Bovair discusses how Swiss Re's GBS organization has now taken a strategic role in the business and is driving change through their data analytics hub, robotics automation center and global captive service locations, and how they never let a good crisis go to waste.

Vesta Bovair  
Managing Director, Head of Global Business Solutions



Swiss Re

## STAGE 4 - ADDING VALUE

**The Price is Right... Or Is It? Outcome, Value-Based, Gain-Sharing or FTE - Which is Right for You?**

As SSC and outsourcing models evolve, traditional FTE pricing may no longer be relevant. How often do you re-examine your pricing model and how easy is it to change? This session dives into:

- The pros and cons of FTE vs. outcome based pricing
- Analyzing your pricing and identifying areas for improvement
- Gain-sharing, incentive-based contracts and shared risk-reward - can these work for you?
- Pricing RPA

Jay Desai  
Senior Director,  
Enterprise Outsourcing Strategies

**Did You Know...**

**39% of SSCs in the US are Finance and Accounting, closely followed by HR (31%)**

## GBS EVOLUTIONS FORUM

The rest of the session is reserved for moderated discussion, which is not limited to but covers:

- Robotics and AI
- Zero-Based Budgeting
- Using SMAC inside your GBS
- Talent management
- The full and future scope of GBS

5:30 **Transition to General Session Room**

5:35 **LIVE BENCHMARKING SESSION – PART ONE**



Wondering in which direction to take your SSC strategy? You're not alone. Many SSC leaders are struggling to decide on the next step but lack the data to back their decision up. Using data obtained from SSON's 100k+ members, 20 years of conferences, plus our state of the industry survey, SSON has obtained first-hand benchmarking data to assist you in deciding on the most profitable option for your SSC. This first session focuses on examining global and regional benchmarks for finance and automation; including cost-per-invoice, invoice cycle-time and RPA adoption.

5:45 **Inspiring a Global Team, Leveraging Talent and Enabling Technology – The Colgate - Palmolive Journey**

Colgate-Palmolive is a truly global company, with people, customers and global brands sold in more than 200 countries. The Company has three core values: Caring, Teamwork and Continuous Improvement. Aligning global teams against critical priorities is a must for winning in this global marketplace. In this session Tom talks about how, through staying highly connected with business functions they were able to create an innovative culture, and how integrating bespoke activities such as data-analytics, contract management and supply-chain logistics they were able to provide diverse career paths for their staff as well as increasing value to the company. He also touches upon the enabling technology that was crucial in their journey to global standardization and value-add.

Tom Greene  
CIO and Business Services Officer



6:25 **End of Main Conference Day One**





7:45 **Coffee & Registration**

8:30 **SSON's Day Two Opening Remarks**

Heather King  
Portfolio Head



8:35 **Chairman's Day Two Opening Remarks**

Brad DeMent  
Partner



8:45 **BIG IDEA KEYNOTE PRESENTATION**

## The Rise of the Robots: Robot Revolution, Artificial Intelligence and the Threat of a Jobless Future

Martin Ford explores the ways in which “robots” and other technological advances are outpacing humans in all kinds of sectors, offering a realistic view of what the future of work—and your place in it—will look like. But beyond pragmatic concerns, Ford addresses a bigger question: can accelerating technology disrupt our entire economic system to the point where a fundamental restructuring is required? In the past, even as jobs were eliminated, jobs were created to replace them. Increasingly, though, new machines will be able to take care of themselves. The effects of this transition could be shattering. But there will be opportunities as well. Do we continue to listen to those who argue that nothing fundamental has changed, and take a bad bet on a miserable future? Or do we begin to discuss what we must do to ensure all of us, and not just the few, benefit from the awesome power of artificial intelligence, machine learning, and other breakthroughs? The time to choose is now. This talk is both an exploration of this new technology and a call to arms to address its implications.

### Martin Ford

Futurist, New York Times  
Bestselling Author,  
Speaker and Silicon Valley  
Entrepreneur



9:25

## Panel Discussion: Global Standardization, Agility and Increased Visibility: How Can a GBS Model Add Value to Your Organization?

Some say it's little different to a SSC model, others say that it has brought them significant, tangible benefits. But would a GBS model work for your organization? And if you've already taken that leap, do you have a clear plan on how to progress further? This session draws input from some of the most experienced and innovative GBS models around, and tries to understand what makes them great. Hear lessons on:

- Transitioning from a SSC to GBS
- Creating in-depth business insights
- GPOs: Creating cross-functional management and new accountability lines
- Ensuring and maintaining executive sponsorship for your GBS project

### Panel Moderator:

Kapil Jain

Senior Vice President and  
Global Head of Sales and  
Enterprise Capability



Richard Schmidt

VP Finance, Global Shared  
Service, Procurement, Business  
Process



Tracy Schaefer

VP - GBS and Finance COE



Rodney Bergman

SVP, Global Business Services



Viral Chhaya

Director Global Business Services



10:05 **Client Presentation**

Hosted by:

10:45 **Morning Coffee and Networking Break**

## Private Breakfast - Transcending Disruption

Digital technologies have altered how people and businesses interact. Digital forces have created unprecedented levels of industry and enterprise disruption and are fundamentally changing business economics. To succeed in this disruptive environment, organizations need to offer compelling new experiences, establish new focus, build new expertise and devise new ways of working. Business leaders face a stark choice: either digitally reinvent their enterprises or watch as their businesses decompose around them. IBM's Ramesh Gudalur will share how enterprises are fundamentally reimagining how their organizations operate. A lively interactive discussion will also touch on analytics, cognitive technologies and design thinking and how digitization is accelerating business transformation and enabling new solutions to support better user and business outcomes.

Hosted by



11:25

## INTERACTIVE DISCUSSION GROUPS – SELECT THREE

During this part of the summit, delegates will be sorted into groups of 15 to take part in Interactive Discussions around the topics below. They will get the opportunity to select three topics and will rotate between their choices every 30 minutes. Discussion groups are kept small to ensure all delegates get the opportunity to ask their most pressing questions, ensuring a perfectly tailored experience

### Unlocking Your Cash Potential Through Dynamic Discounting and Supply Chain Finance

- Creating new profit sources whilst maintaining cash flow control
- Negotiating better payment terms
- How to use dynamic discounting to turn your P2P function from a cost to a profit center

Cindy Gallagher  
SVP GBS Contoller



### Extracting Value from Big Data

- Getting and calculating ROI from Big Data
- Working with the business to understand what insight is needed
- Best practice examples of Big Data creating serious value!
- What should you consider when working with big data?

Danny Thompson  
SVP Market and Product Strategy  
**apexanalytix.**

### Are you ready to Evolve: SSC to GBS

- Creating a path from shared services to Global Business Services
- Assessing whether you are ready to transition
- Governance, scope and process organization
- Best practice GBS Leadership

Maria Mora Vinuesa  
GBS Hire to Retire Director



### The Truth (And Myth) behind Robotics Process Automation

- What are the pre-requisites for RPA: Scale and Standardisation
- How will Robotics challenge the BPO provider?
- How do you build a business case for RPA investment?

Hosted by



### Overcoming Challenges in Standardization and Centralization

- Establishing best practice when it comes to standardizing your processes: How do you achieve increased productivity and accuracy?
- What's the best way to prepare your business for process migration?
- Getting your processes ready for automation

Jack Brassell  
Director, Financial Shared Services



### Digital Transformation: Why You'd be a Fool to Ignore it

- How can shared services support the business' digital transformation?
- How will Digital Transformation change the way your SSC operates?
- Identifying what role Big Data plays within DT

Hosted by



### You've got Millennial Employees all Wrong: 5 Things You Need to Know Now

- Individuality against the reductionist mentality: Removing the broad-brush approach
- Empowering millennials: Engagement through sharing responsibility
- Supporting work-life balance
- Giving feedback...in the right way

Tomasz Brzostowski  
Senior Director, Global Finance Shared Services



### P2P Success: Creating Impact through Global Process Ownership

- How has the GPO model impacted P2P?
- What are the KPI's needed to transform P2P?
- How do we create true end-to-end process ownership and what's the value?

John Hopkins  
Director Finance Shared Services



Hosted by **TRADESHIFT**

### Achieving Finance Process Excellence through Enabling Technologies

- Creating a roadmap from vision to delivery
- Automation through multiple best of breeds vs. end to end single solutions
- How do I prioritize what to automate?
- Success in implementation and roll-out

Renata Sheyner  
Senior Product Manager



### Customer Experience Management: NPS, KPIs and SLAs

- Implementing NPS: Best practice and results
- Actioning the results of your customer surveys: How can they change the way your GBS is working?
- Internal and Reverse SLA's: Helping your customer help you

Gerald Yerardi  
Associate CIO, Campus Shared Services



### Beyond Standardization: Moving the Value Chain

- Balancing value-adding services with productivity gains
- Integrating more complex services into your SSC: How does this impact talent, processes and technology?
- Engaging and partnering with the business to establish what value means to them

Chris Langley  
Head Business Services North America



### Shared Services and The Challenges of Global Collaboration

- What processes/checkpoints are in place to ensure global collaboration in day to day operations?
- How do you manage successfully communicating in diverse cultural environment? (tools, processes, etc.)
- How does HR interact with other functions to ensure global collaboration?
- What is one technique that has enabled you to meet the challenge of global collaboration?

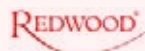
Kim Bryant  
Senior HR Operations Manager



### Removing Manual Activities from your Period-End Close via Enterprise Robotics

- Replacing your manual effort through robots with built-in IP process
- Revolutionizing shared services delivery capability through next-generation knowledge robots
- Robotics application across complex organizations

Greg Fritsky  
Director of Finance Transformation



### Leadership in Change Management: How Good is Your EQ?

- Leading the way through a complex transformation
- Getting the buy-in of your staff and keeping it
- Communicating changes to your staff
- Aligning all departments with your vision
- Harmonizing policies, processes and culture

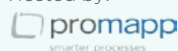
Paul Runyan  
SVP Head of HR Shared Services and Total Rewards



### Optimizing your process management: Ownership, change management and information flow

- Taking control of process variations
- Ensuring process ownership discipline
- Creating and sustaining engagement with your process teams and owners

Hosted by:



### The Evolution of Automation to Artificial Intelligence(AI), and the Positive Impacts to your Business

- Testing proofs-of-concepts with "Systems that Do" to preparing for sophisticated smart machines and "Systems that Think-and-Learn"
- Flick Your Automation-On Switch: Finding your process-automation targets, drive automation at scale and protect for a future of AI
- Learn how Automation can affect what's driving your business
- Understand the relevant building blocks of AI for shared services organizations.

Hosted by Cognizant

### Geopolitical Changes and their Impact on Global Business Services

Brexit. 2016 US Election. Indian Legislated Merit Increases. Travel Bans. Over the last 18 months there have been some unprecedented changes in the geopolitical landscape. What are the impacts for our "industry?" Have any of the changes caused a shift in your strategy with respect to shared services and outsourcing? We have witnessed election hangovers before which caused temporary caution in decision making but is this cycle different? Let's discuss.

Scott Furlong  
Partner



### Leverage Big Data to Create Actionable Business Insight and Optimize Spend

- What to consider when working with Big Data
- Steps to identify key stakeholders and their KPIs
- How to uncover sources of real-time and historical data
- New ways to organize and consolidate data from disparate sources
- How to identify quick wins, understand where shared services can build efficiency, reduce costs and gain end-to-end visibility into organizational spend

Winston Saldana  
Director, Deployment Consulting

Hosted by: CONCUR

### Operationalizing RPA – the 5 steps to implementation

- Collaborating with IT on architecture, security and change management
- Communication planning and stakeholder management
- Organizational re-design
- Skill-sets needed

Hosted by: Deloitte.

### Creating a Business Case for Global Payroll

- How do you create a business case for global payroll? What are the benefits of a global payroll system? What are some watchouts when investigating and executing a global payroll system?
- Globalization of policies: Is it possible to have one global payroll policy?
- Using single or multiple outsourcing providers: Can one work end-to-end?
- Best practice payroll tech: What solutions work?

Stephanie Ernsting  
Director Global Business Services



### Recruitment, Retention and Turnover: Solve These Five Team Challenges and Optimize Your Most Important Asset

- Contentious Teams
- High Change Teams
- New Team or New Leader
- Identify and Grow High Potentials
- Optimizing High Functioning Teams

Chris White  
Chief Science Officer  
 Flippen Group

### Location Exploration: Evolving Trends in LATAM

- Which location has the right level of language proficiency to support your SSC
- What are the primary challenges in moving your center to LATAM?
- Cultural nuances you need to be aware of
- Tax, legal and regulatory perspectives

Esteban Carril  
Managing Director  
 LATAM

Hosted by: Chazey Partners

### RPA a Game Changer - and a Quick Fix

**SOLD OUT**

The idea of Robotics as a game-changing transformational technology is well-discussed, however this can create the perception that RPA is a massive undertaking, requiring extensive planning and years of implementation to achieve the benefits. In fact, RPA is ideally suited for rapid deployment and immediate quantifiable savings - this roundtable discusses how you can achieve just that.

Adam Devine  
VP, WorkFusion



### The journey of centralizing finance and tax

Centralizing finance, tax and accounting functions such as indirect tax compliance, statutory reporting and transfer pricing documentation in a shared service centre can deliver significant benefits for your company. Leveraging technology for these functions automates routine data management and reporting processes resulting in consistency and standardization. Hear from tax and accounting executives as they discuss their journey and answer your questions on why, how and where.

Hosted by:



### Planning and Launching Perfection: Talent, Culture and Governance

- Ensuring you have the right talent profile for your SSC ambitions?
- Culture clash! Engaging and recruiting diverse cultures and leaders
- Location update: What are the long-term opportunities and how can you factor them in?
- Is your governance robust?

Sherry Ambrose  
VP  
 ENTERPRISE FLORIDA.



## FUNCTIONAL FAST TRACKS

	F&A TRANSFORMATION	HR TRANSFORMATION Track Owner: Robin Rasmussen, Partner, KPMG	MULTI-FUNCTION TRANSFORMATION	SOURCING AND SUPPLIER RELATIONSHIP MANAGEMENT Track Moderator: AJ Wijesinghe, Chief Shared Services Center Officer, JLL	P2P MASTERCLASS	RPA MASTERCLASS Hosted by: Automation Anywhere	GBS EVOLUTIONS ROOM Track Owner: Robert Cecil, Partner, KPMG
2:00	<p><b>Dissecting the Finance Process: What to Automate and Where to Add Value</b></p> <p>Sometimes it's important to break things down before you build them back up and indeed this is very much true of the finance process. This session carefully dissects the finance function looking at which processes provide the obvious and most advantageous candidates for automation and where more value can be added; allowing you to create a blueprint for your next transformation.</p> <p>Client-led session:</p> <p>Hosted by</p> 	<p><b>Help Yourself: Designing a Self-Service System That Works for Your Business</b></p> <p>Despite game changing developments in technology and the increase of tech-savvy workers, the resistance to even the smartest self-service system is a pain felt acutely by many shared services. This session looks at:</p> <ul style="list-style-type: none"> <li>• Change management within self-service: How can you make the employee experience better</li> <li>• Best-in-breed tech: Which are the right apps, systems to use?</li> <li>• Communicating change to your business in the right way: Engaging all stakeholders</li> </ul> <p>Stephanie Giron VP HR and Payroll Operations</p> 	<p><b>Governance Managed Services: Your Ticket to World-Class Customer Experience, Governance and Business Insight</b></p> <p>Mondelez found that as they built their SSC, different centers, multiple solution providers and disparate business partners had become misaligned, creating their own SLAs and becoming entities unto themselves. Exactly what shared services was trying to avoid! Enter GMS.</p> <p>Mondelez turned the model on its head creating an enterprise which engendered better customer experience, greater governance and transparency, protection against value-leakage and last but not least, clear, strategic insight for the business. This session, details how they did it.</p> <p>Sandeep Arora Global Operations &amp; Capabilities Lead</p> 	<p><b>The BPO is Dead... Long Live the BPO</b></p> <p>Outsourcing large swathes of transactional work offshore, being charged per FTE and locked in a 10 year contract is an increasingly irrelevant state-of-play and is synonymous with the BPOs of yester-year. What's emerged instead is a brand new type of BPO, designed at adding value, implementing RPA and assisting to reduce your operational labor costs. This panel examines where the BPO market is now and where it's headed, and how it can be ultimately useful to you and your business.</p>	<p><b>Starbucks Case Study: Achieving 96% invoice automation to create P2P and CEM excellence</b></p> <ul style="list-style-type: none"> <li>• Creating alignment across 5.6M invoices per year</li> <li>• Disseminating Starbucks vision from front-end through to P2P operations</li> <li>• Ensuring a seamless transition to paperless to ensure customers remain happy</li> <li>• Taking advantage of working capital gains</li> </ul> <p>Cynthia Haug Director of Accounts Payable</p> 	<p><b>RPA Case-Study</b></p> <p>This RPA master-class will feature several brand-new RPA case-studies, detailing exactly the methods used to implement Robotics and the wider impact on the business. Both challenges and successes!</p> <p>Following that the session will examine how RPA can work outside purely AP – and in other functions and processes; these include HR, O2C, Reconciliation and procurement</p>	<p><b>Your GBS Journey Unique – Where do you plan to go in your GBS journey?</b></p> <p>GBS is a unique journey for every company. Whether you're a GBS veteran or a GBS tenderfoot, you have to know where you are today and where you want to be in your next time horizon. We will provide you with a framework for your GBS journey and provide you with a leading practice approach that will help you be successful in that journey. In this session, you will find out how to successfully</p>

## Did You Know...

The top 3 states for Shared Service Center concentration are  
**Texas, California and Florida**



## FUNCTIONAL FAST TRACKS CONTINUE

2:40

**Integrating Working Capital Management and O2C to Create a Truly Advanced GBS Organization**

Hanesbrands' operate under a complex network of world-wide offices and lengthy supply-chains, making their global finance transformation and its enterprise-wide, integrated working capital management approach even more admirable. The evolution of the company's order-to-cash (O2C) processes and their development of working capital capabilities have taken their GBS to new heights and created a growth strategy which the wider business is really responding to. Now they are looking at working even more closely with the treasury team to see just how far their GBS can go! In this session Russell explains in detail how they made the change, the challenges overcome and the impact on both the GBS and wider-business.

Hosted by

**apexanalytix.****Panel Discussion: Eradicate inefficiencies and find HR golden nuggets: Making HR Tech work for you**

- Using technology and data to uncover process inefficiencies
- In a multitude of offerings, which tech is truly transforming HR?
- Getting buy-in for your technology transformation
- HR Portals, Case Management, Electronic Document Management and RPA, how can these technologies possibly work together?
- Using technology to identify golden nuggets of insight
- Enhancing user experience to drive employee tech adoption

Moderator:  
**Robin Rasmussen,**  
Partner



**Jimmy Zhang**  
Head of People  
Operations



**Tom Nesteruk**  
Executive Director  
and Resource Center  
Site Leader



**Brendan Lynch**  
VP Global HR  
Services

**ESSA: Assessing Where Automation Can Add Value to Your Business**

The benefits of ESSA (Eliminate, Simplify, Standardize, Automate) are well known, but how often do we re-visit this advice when assessing new activities within our GBS. Automation is the buzz word du jour but ensuring we are automating the right activities, and have done rigorous due diligence prior to automation is essential. This session discusses how to select and prepare your processes to make sure automation can achieve everything you want it to

**Paul McLean**  
VP Head of US  
Centralized  
Business Services



Client Led Session:

Hosted by  
**blueprism**

**Panel Discussion: One Happy Family or Ready for Divorce? Making Your Outsourcing Provider a Part of Your Team**

- Promoting partnership and cultural awareness
- Sustaining interest and engagement with your new outsourced team
- Preparing your internal SSC team for the change
- Driving joint accountability in an outsourcing relationship long-term
- Getting the right level of oversight...without micro managing

Moderator:  
**Graham Russell**  
BPO Director  
**WPP**

**Christie Shepard**  
Head of Finance and  
Accounting, Global  
Shared Services



**Robert J. Yeldell**  
VP of Global Payroll  
Services



**AJ Wijesinghe**  
Chief Shared Services  
Center Officer

**Successful Change Management within P2P: How to Guarantee Your ROI and Quick Wins**

Why do change management initiatives fail? How do you overcome the "big three" hurdles? What are the elements of a successful plan?

Join us for an interactive discussion on change management best practices. You will walk away with concrete answers to these common problems so you can ensure your business gets the highest return on your investment

Session Hosted by:

**Intelligent Automation (RPA) Security Governance (How to Ensure Your BOT Doesn't Go Terminator)**

- Understand how IA increases traceability of all processes steps (including multiple system logins and cut-n-pasting data between systems)
- Should a BOT have an independent login id or operate as a role assigned to a human team member?
- What controls and preventative actions should you put in place to monitor the BOT and satisfy SOX IT audit controls?

**Map Your Course - What is Your Primary Path in Your GBS Journey and How Do You Make it Happen?**

Every company takes a different path to achieve GBS success. We will introduce several paths to success and focus the interactive break-out sessions on your identified priorities. The session will address disruptors and dimensions of GBS like global process ownership, talent management, commercial perspective for GBS and several other key topics of your choosing. We will discuss existing barriers and challenges introduced by GBS and the possible solutions offered through GBS.

**Did You Know...**

At the time we went to print (Sep 2016) NYC was the hottest city for SSC job-ads, with **31 SSCs openings**



## FUNCTIONAL FAST TRACKS CONTINUE

3:20

**Visibility, Compliance and Control: Creating Measurable Value through Reconciliation**

Reconciliations are an essential part of the financial close process. Improperly done they can create havoc however managed correctly they can result in unexpected value that stretches well beyond the SSC. In this session we discuss how one company's need for global standardization drove them to re-examine their reconciliation process. This led to complete compliance with central policies, reduction in the risk of error from manual rote tasks and consistent reporting. Join this session to understand how to access visibility, improved compliance and auditability across the business and the close period.

David Swanberg  
Executive Director,  
Shared Services



Hosted by

**HR and Robotics: Threat or Opportunity?**

When RPA first burst onto the scene, it was thought of as mainly being of use to the finance function. As more companies have gotten into this space, it has become clear that RPA is applicable to far more areas within shared services, and HR is one of the most exciting. In this session, hear about:

- How can RPA be applied to HR?
- Recruiting, Payroll, scheduling, talent management: Examining existing work that can be automated
- Linking Robotics to your self-service system
- What if the Robot breaks down: Do you need bot' runners?
- Case Study of HR RPA in practice

Curt Burghardt  
Senior Director  
HR Shared Services

**M&A or Buyout: Managing Your SSC in a Merger**

- Overcoming the us vs. them mentality
- Bridging the knowledge gap and showcasing opportunities
- Engaging all stakeholders
- Convincing the business to relinquish control and demonstrating the value of harmonization
- Aligning systems, policies and processes
- Can outsourcing help?

Michael Smith  
Head of Global  
Shared Services



Anil Bhavnani  
Director BPO



Daniel Cruceana  
Head US Shared  
Services

**Panel Discussion: Driving Value and Innovation With Your BPO Provider**

- Communicating business plans with your BPO to ensure alignment and define vision
- How can you work better with your existing BPO to mitigate the problems of attrition?
- Working with your supplier to establish areas for improvement and innovation
- Establishing crystal clear steps to value: How can you make sure value promised = value delivered?

Tom Peyton  
VP Service Excellence,  
NA Accounting Center



Brian Martin  
VP and Site-Lead US  
SSC



Ed Hansen  
Partner

Morgan Lewis

**Digitizing the P2P Process to Create Process Intelligence and Better Customer Experience**

It is well understood that digitizing your P2P process is a sure fire way to drive efficiency across financial operations. But how exactly do you achieve digital transformation with minimum disruption to your suppliers and customers?

- Creating quicker turn-around times and just-in-time inventory management
- Using digitization to enable agility towards the needs of the organization
- Transitioning employees to a digital P2P system
- Accessing process intelligence to uncover what's actually happening within your P2P process

Caesar Parlade  
Chief Operating  
Officer

**A Strange New World: AI in Shared Services - It's Not as Far Away as You Think!**

The role of RPA in delivering services has evolved at a faster rate than anyone would have naturally perceived, and despite pockets of latent skepticism its adoption from here onwards should be exponential. Cognitive disruption and its usage in global business services is an extension of that story but its not completely clear yet how exactly it can be applied to shared services.

This session explores the place of AI in the SSO industry giving practical examples of AI-enabled automation of knowledge work and the impact on human capital costs.

**Conquer the Technology Terrain - How to Leverage and Improve your Technology Enablement?**

Technology is a critical component to GBS, but how does it really fit? Does GBS drive technology or does technology drive GBS? The interactive break-out sessions will include discussions on cloud and integration for GBS, robotics and advanced automation, the impacts of social and mobile on GBS and other technology topics based on your priorities. We will discuss technology landscapes and the challenges introduced by GBS along with possible solutions.

**Did You Know...**

**59%** of SSCs  
in the US are  
now doing data  
analytics

#### 4:00 **Networking Break and Demo Drive**

SSOW has the largest exhibit hall of any shared services event in the world! Don't you want to see all that there is on offer? Our excellent service providers are here to help! Grab a demo drive card, visit the booths and be entered to win one of several excellent prizes!

#### 4:45 **How does Digitization change a Supply Chain model? Talent, Cost and Value-Adding Work**

Think you have nailed Digitization, you ain't seen nothing yet! As an early adopter of Smart Automation, Citi's Enterprise Supply Chain (ESC) not only transformed basic transactional processes but are now pursuing a strategy of enterprise-wide intelligent automation. Citi ESC Systems Head, Dona Linthicum, will share how Citi's ESC smart approach to digital transformation is driving transformative business impact, with the lessons learned along the way.

Hosted by:  **WorkFusion**

Dona Linthicum  
Managing Director, Head - Enterprise Supply Chain Systems



#### 5:15 **SSON Excellence Awards Part One**

Announcing the winners for:

- Excellence in Culture
- Excellence in Process Improvement
- Excellence in Innovation



5:35

#### **LIVE BENCHMARKING SESSION - PART TWO**

This session represents the second part of our exclusive visual benchmarking analytics. Focusing on one of your biggest challenges – this session hones in on talent – looking at average and optimum attrition, cost to serve, availability of graduates and language skills.

5:50

#### **Creating tremendous results at speed: Accelerating your GBS Journey using innovative tools and methodologies**

Speed. Agility. Excellence. Three words describing the ambitious journey of Mondelez International Business Service (MBS). Since its inception in 2014, MBS has been powering profitable growth by delivering outperforming services. In just two-years' time, the MBS organization is already serving 8 distinct service lines—across procurement, finance, CS&L, HR, marketing, and more— with a team of more than 3,000 employees and partners worldwide.

Now, the organization is setting off to further grow the company in big and bold ways through its newly created 3-year strategy. This session details Mondelez's journey, as well as the 8 tools and methodologies that enabled its speed and excellence. Join us to hear a sneak preview of the 3-year strategy that's driving this GBS organization forward

Caroline Basyn  
SVP & Global Business Services Officer



6:30

#### **End of Main Conference Day Two**

### **SSOW EXHIBIT HALL RECEPTION**



## 8:15 Coffee & Registration

## 8:45 SSON Day Three Opening Remarks

Heather King  
Portfolio Head



## 8:45 Chairman's Day Three Opening Remarks

Brad DeMent  
Partner



## 8:55 THE BIG TALENT CONVERSATION!

### Automation, Digitization and the Four Generation Workplace: How Can Shared Services Adapt to the Future Workforce

The shared service market is transforming right before our eyes - ignore it at your peril! Automation, Robotics, Digitization; these changes often suggest fewer FTEs, more judgment based activities and thus a whole different profile of (expensive) talent. Coupled with this, as baby-boomers continue to work longer and millennials progress their career, SSC leaders for the first time are finding themselves managing staff across multiple-generational divides. A perfect storm or an opportunity for true innovation? In this session we discuss:

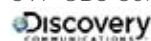
- How will automation impact the GBS workforce?
- Gut or gigabytes: Should we really be making talent decisions based on data?
- How can we exploit digital and mobile tools to result in a more global workforce?
- How can we create a culture across multiple generations whilst still treating people as individuals?

Moderator:  
Deborah Kops  
Founder  
**Sourcing Change**

Philip Woodburn  
VP, FiSS



Cindy Gallagher  
SVP GBS Controller



Vesta Bovair  
Managing Director, Head of  
Global Business Solutions



## 9:30 BIG IDEA KEYNOTE PRESENTATION

### Transforming the Way Business is Done: Learning From the Largest, Most Progressive Shared Service Organization in the World

In a world ever more complex and fast-paced, anticipating and leading business change is becoming increasingly important. Also, the ability to stay ahead-of-the-curve is more than ever a critical attribute of successful companies and leaders. To accomplish that, the business model requires agility, responsiveness, innovation, ever increasing employee productivity, and flawless operations.

Shared Services organizations are uniquely positioned to enable the business to reach new heights, and in fact help transform the way business is done. This is a win-win all around: greater impact on the business through cost improvements and service quality, as well as stronger motivation and contributions by Shared Services people. By contrast, the risk is to become a "commodity"... This is what we must prevent at all costs, through constant focus on value creation and innovation.

Globally recognized as a shared services pioneer and thought-leader, Filippo is renowned for creating new progressive business models and championing innovation. This session is a unique look into the strategies that allowed Procter & Gamble to form the world's most progressive GBS.



Filippo Passerini  
Former Group President Global  
Business Services and CIO



10:05

## LIVE BENCHMARKING

### Top 20 Most-Admired SSCs Benchmarking Exclusive

**Want to know what good really looks like? And understand the data behind world-class SSCs?**

For the first time ever SSON Analytics have analyzed digital and event data to establish which are the top 20 most-admired SSCs and worked with them to understand the metrics driving their success. These include:

- Global Attrition Rate
- Cost per Invoice
- Days to Close
- Cost of Finance

In this session, 4 of the project's participants talk through their aggregated data and the methods and tools used to achieve these results. Helping you set your strategy for the next year and understand the hard and fast numbers you should be aiming for.

Lee Coulter  
SVP, CEO, Shared Services



Paul Bartley  
Director Global Shared Services



10:35

## SSON Excellence Awards Part Two

**Announcing the winners for:**

- Excellence in Value Creation
- Excellence in Automation
- Practitioner of the Year



10:55

## Morning Coffee and Networking Break

## 11:40 TRACK SESSIONS BEGIN: WHAT'S YOUR CHALLENGE?

11:40

FINANCE PROCESS  
EXCELLENCE**Against All Odds:  
FLSmidth 3 Pillar  
Approach to  
Continuous Accounting**

FLSmidth Finance team, turned around their function by putting the right people in the right roles, employed Continuous Accounting concepts and strengthened the relationship with their Shared Services group in less than a year. In the end, on-shore headcount had been reduced by 30% and customer satisfaction had significantly increased. These accomplishments were specifically driven by three pillars of improvement from the following areas:

- Continuous Accounting – Moving tasks from monthly to weekly activities
- Technology – Creating innovative Excel tools to streamline upload to the reporting software
- Shortening the distance between on-shore and off-shore teams by promoting the SSC within the organization

Jean Clemson  
US Accounting Operations  
Director

DATA ANALYTICS AND  
DIGITIZATION**Delivering Decision  
Support through Data  
Analytics and Master  
Data Management**

Business strategy support, financial analysis, budgeting forecasting and management reporting; there is no end to the benefits you can provide your business if you get the data strategy right. This session discusses how you can create some amazing results by:

- Enabling data accuracy: Ensuring you have reliable data
- Integrating technology to enable faster results
- Aligning with business lines to ensure your data strategy supports company vision

Joe Peri  
Former Chief Operations  
Officer

CULTURE CREATION  
AND CUSTOMER  
EXPERIENCE**Creating a Culture of  
Customer Experience  
Excellence**

As SSCs take on more front-end, business critical roles, the SSC will necessarily get closer to both the external and internal customer. This presents a perfect opportunity to re-examine your CEM strategy:

- Tracking and improving CEM: KPIs, NPS and metrics
- Empowering your staff to give better customer experience
- Beyond cost savings: Rewarding and incentivizing staff to work better with customers
- Customer journey mapping

Tracey Ruff  
VP GBS

TALENT MANAGEMENT  
AND HR SERVICES

Track Owner:  
**Robin Rasmussen, Partner,  
KPMG**

**Leveraging Shared  
Services to Change  
Your Company's View  
of HR**

On top of the usual cost-saving and productivity gains, Express Scripts used the implementation of their HRSSC as an opportunity to revolutionize the way HR was viewed within the company. In this session Mike Koehler, VP HR, explains how he revolutionized the HR function into a fresh and dynamic operation that gave real value to the business, and ensured his internal customers and executive sponsors recognized it!

Leigh Mangum  
VP, Shared Operations  
**HCA HR Operations Center**

OPERATIONAL BEST  
PRACTICE**From Paperless to  
Touchless: Chasing  
Excellence whilst  
processing 3.5 million  
invoices**

As one of Portugal's largest retailers, Sonae recieve approximately 3 million invoices from external suppliers and process approximately 500,000 internal invoices per year. This equates to processing almost 10,000 invoices daily! In this session their Head of Accounts Payable talks through their move to a paperless and touchless process without compromising on control. And the three strategic actions that allowed them to engender efficiency, visibility and accuracy

Nuno Guerreiro  
Head of Business  
Administrative Processes

**Did You Know...**

Large companies saw a **5.2% increase** in the minimum salary of AR/AP Manager from 2015 to 2016. This is a major increase from 1.9% in 2014



## 12:10 TRACK SESSIONS CONTINUE: WHAT'S YOUR CHALLENGE?

12:10

FINANCE PROCESS  
EXCELLENCE**Making the Most of What You Have: Enabling Low-Cost Automation and Process Excellence**

Adding value doesn't necessarily equate to large scale technology investment. Like Turner, there are serious gains to be made by re-examining your existing resources to identify missed opportunities. In this session Cindy explains their step-by-step process to doing just that:

- Engaging process excellence and process automation by leveraging existing ERPs and technology
- Developing your business case and gaining executive support
- Stronger controls, productivity gains and better decision support: Understanding Turner's drivers and how they got there

Cindy Pekrul  
SVP and Deputy Controller

DATA ANALYTICS AND  
DIGITIZATION**Beyond Reporting: Harnessing Predictive Analytics to Create Immediate Cash-Flow**

Many SSCs continue to struggle with information over-load and fail to derive actionable insights from the data they possess. However, fast but significant improvements can be gleaned if you can gain visibility on your payments process and working capital. This session provides tips on how you can optimize your cash-flow through analytics utilizing methods such as prioritizing the right customers and optimizing your collections process.

Seshagiri (Sesh) Tripurana  
Senior Director, J&J Global Services- Procurement

Jess Buckley  
Director, J&J Global Services  
- Procurement Data Services

CULTURE CREATION  
AND CUSTOMER  
EXPERIENCE**Innovation Session: What's in your value-added service catalogue?**

Real-Estate, Sales, Marketing, Treasury, Risk; there are a wealth of innovative activities being integrated into their shared service centre. This session examines a few of the most-innovative service catalogues around and looks at:

- What are the most exciting activities being added into the SSC
- Service-depth: What is actually being provided?
- What's Next?: What new activities can benefit from a SSC environment

Earl Pinto  
Director of Acquisition  
Management Services for the  
Program Support Center

TALENT MANAGEMENT  
AND HR SERVICES**Hiring for the Future: Recruiting for Value-Added Shared Services**

A new type of adaptable and intelligent talent is now required as SSC's and GBS expand their value-added services. This session discusses how to create a talent roadmap to respond to how your SSC is changing and evaluates the skills you should consider when formulating your recruitment strategy

Vanessa Bui  
VP

OPERATIONAL BEST  
PRACTICE**Removing 1 Million Man-Hours through Process Simplification and Digitization**

Establishing a route to simplifying your processes – and executing it!

- Digitizing processes to improve customer experience and drive productivity
- Creating a culture of productivity: Methodologies, tools and change management

Todd Dooley  
VP Operations and  
Productivity



12:45

**Change with Loose Change: Low Cost Journey to Automation and Analytics!**

Tim Westendorf, SVP, Group Head Financial Systems and Shared Services Strategy, [MasterCard](#)

1:30

**"The Winner Takes it All" Prize Giveaway**

1:45

**Close of Conference**

1:55

**Closing Lunch**



## EXCELLENCE AWARDS

The Shared Services & Outsourcing Excellence Awards, held at Shared Services Week, is your chance to celebrate yours and your team's achievements.

### Award Categories:

- Excellence in Culture Creation
- Excellence in Process Improvement
- Excellence in Innovation
- Excellence in Value Creation
- Excellence in Automation
- Practitioner of the Year

In order to reflect the rapid shift within the industry, this year we are delighted to announce the introduction of a brand new award - **Excellence in Automation!**

Presented by:



### LAST YEAR'S WINNERS INCLUDED:

#### EXCELLENCE IN CULTURE:

Winner: Citi  
Runner Up: AT&T

#### EXCELLENCE IN PROCESS IMPROVEMENT:

Winner: EMC  
Runner Up: Ontario Power Generation

#### EXCELLENCE IN INNOVATION:

Winner: EMC  
Runner Up: UCSD

#### EXCELLENCE IN VALUE CREATION:

Winner: Unisys  
Runner Up: MasterCard

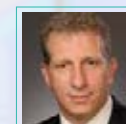
#### PRACTITIONER OF THE YEAR:

Craig McKenny, Managing Director, Head of Global Purchase to Pay Operations, Enterprise Supply Chain, Citi

Hosted by:



### Judges:



Ed Hansen  
Partner  
**Morgan Lewis**



Michael Garvey  
Industry Expert



Craig McKenny  
Managing Director  
- Head of Global Supply Chain  
**Citi**  
SSON 2016  
*Practitioner of the Year*



Mark Simon  
Senior Director  
Global Business Services  
**Dell**



Paul Bartley  
Director of Global Shared Services,  
**Becton Dickinson**



For more information about the awards, visit [www.shareservicesweek.com/awards](http://www.shareservicesweek.com/awards)

# SSOW is where you...

## Network with Peers and Make Connections

From our pre-conference speaker dinner to our killer pool party, SSO Week provides you with endless opportunities to network with fellow attendees and get exposed to new ideas.

### Receptions and Dinners:

Pool side reception, Expo Hall reception and private dinners, **SSON's 21<sup>st</sup> Birthday Party**



### Structured Networking:

Tech-Demo Drive, Interactive Discussion Groups, lunch and learns



### Online:

Mobile App: connect with colleagues and build custom schedules







The world's first global practitioner-only  
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### And the best part...? You get all this for free as an additional benefit of your SSON event attendance!

All SSON event attendee practitioners receive a free 12 month membership to Shared Intelligence. You will receive your login credentials closer to the event. Login to continue networking and sharing with your global peers all year around.



## Digestible Data for Shared Services & Outsourcing

SSON's global data analytics center, offering visual data insights that are simple, accurate, and digestible to the global shared services and outsourcing community.

Use Dart's data to understand the shared services landscape in your region, or globally, through a variety of tools and reports:

- ▶ **The City Cube** compares shared services locations around the world across a variety of metrics, including number of existing SSCs, with industry, function and company size breakdowns; talent availability, including ACCA, CPA, CA and MBA accreditations; average salaries; job market metrics; and cost of living.
- ▶ **The Shared Services Atlas** locates shared services hotspots around the world by displaying the numbers, functions and industries of SSCs at country, state and city level, from Dart's global database of 5500+ centers.
- ▶ **Visual Analytics Workbooks** focus on specific countries or regions to give you a 50,000ft view of the shared services landscape. They include identification of SSC hotspots and breakdowns of the functions, regions and languages serviced, as well as overviews of talent availability, average salaries, growth trends, and risk factors.
- ▶ **Sign up for free** to access the first level of data.

[www.sson-analytics.com](http://www.sson-analytics.com)

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At Automation Anywhere, we believe that people who have time to create, think, and discover build great companies. That's why we've dedicated the last decade to driving the adoption of robotic process automation technology in leading Banking, Financial Services, Insurance, BPO, Technology, and Healthcare companies—to name a few—across more than 90 countries. Our intelligent process robots transform the way businesses operate, delivering complex business and IT work across a range of processes including procure-to-pay, quote-to-cash, HR administration, claims processing, and thousands of other front and back office processes.



### Information Services Group

Website: [www.isg-one.com](http://www.isg-one.com)

Information Services Group (ISG) (NASDAQ: III) is a leading technology insights, market intelligence and advisory services company, serving more than 500 clients around the world to help them achieve operational excellence. ISG supports private and public sector organizations to transform and optimize their operational environments through research, benchmarking, consulting and managed services, with a focus on information technology, business process transformation, program management services and enterprise resource planning. Clients look to ISG for unique insights and innovative solutions for leveraging technology, the deepest data source in the industry, and more than five decades of experience and global leadership in information and advisory services. Based in Stamford, Conn., the company has more than 900 employees and operates in 21 countries.



### ScottMadden

[www.scottmadden.com](http://www.scottmadden.com)

ScottMadden has been a pioneer in corporate and shared services since the practice began decades ago. Our Corporate & Shared Services practice has completed more than 1,300 projects since the early 90s, including hundreds of large, multi-year implementations. Our clients span a variety of industries from entertainment to energy to high tech. Examples of our projects include business case development, shared services design, and shared services build support and implementation.



### Workfusion

[www.workfusion.com](http://www.workfusion.com)

WorkFusion helps enterprise operations improve customer service, increase agility, and reduce costs by automating repetitive manual work. Customers use WorkFusion to digitize high-volume business processes by leveraging the platform's unique combination of workforce orchestration, robotics, and machine-learning powered cognitive automation. WorkFusion won SIIA's CODiE Award for Best Big Data Solution, Data Management Review's award for Best Data Management Solution and has been recognized by the leading analysts as a breakthrough solution for customers. The company is headquartered in New York City with offices in London and Eastern Europe.



### KPMG LLP

[www.kpmg.com](http://www.kpmg.com)

KPMG works with leading organizations to create and protect the sustainable value of their business. Working from 156 countries, our global network of member firms helps clients make better decisions, reduce costs, increase cash flow, build more effective organizations and develop appropriate technology strategies for the long term. Combining wide-ranging management consulting capabilities across industries and functions with deep knowledge and experience in audit, risk, regulatory issues, tax and mergers/acquisitions, we help clients seize competitive advantage while creating and protecting the sustainable value of their business.



### Infosys

[www.infosys.com](http://www.infosys.com)

Infosys is a global leader in consulting, technology, outsourcing and next-generation services. We enable clients, in more than 50 countries, to stay a step ahead of emerging business trends and outperform the competition. We help them transform and thrive in a changing world by co-creating breakthrough solutions that combine strategic insights and execution excellence. Infosys BPO ([www.infosysbpo.com](http://www.infosysbpo.com)), the business process outsourcing subsidiary of Infosys focuses on integrated end-to-end outsourcing and delivers transformational benefits to its clients through reduced costs, ongoing productivity improvements, and process reengineering.



**IBM**  
www.ibm.com

Digital disruption is accelerating business reinvention by design. Technologies are impacting virtually every industry, and the business process outsourcing and shared services market is no exception. IBM's experienced consultants recognize that as business models are changing to keep pace and stay ahead of competition, pressure is increasing for back-office functions to become more agile to support new methods of operating. IBM leverages the latest in automation, robotics and cognitive capabilities to help organizations reassess how their target operating models need to change. Let us help you trailblaze the journey to becoming a cognitive business. Learn more at [ibm.com/services/bpo](http://ibm.com/services/bpo).



**Cognizant**  
[www.cognizant.com/business-process-services](http://www.cognizant.com/business-process-services)

Cognizant is one of the largest providers of consulting, information technology and business process services. Our passion is helping clients worldwide build stronger businesses and maximize their competitive performance through innovative technologies and processes.

Cognizant BPS (Business Process Services) is a leader in industry aligned processes that help companies run better through operational efficiencies, automation, and streamlined processes, and also helps companies run different through enhanced customer experience, analytics, business digitization and operational transformation.



**softomotive**

**Softomotive**  
[www.softomotive.com](http://www.softomotive.com)

Softomotive offers sharp business solutions, premium support and professional services that organisations need to get the most out of their enterprise automation. Trusted by more than 6,000 companies worldwide, Softomotive is one of the leading Robotic Process Automation providers. The company has been operating for more than 10 years in the software automation market, and offers the most reliable and scalable automation solutions, bridging the gap between best-of-breed technology and continuous innovation to deliver true business transformation.



**UHY Advisors**  
[www.uhy-us.com](http://www.uhy-us.com)

With 7,600 professionals in 92 countries, UHY Advisors is a leading global financial, tax and business consulting firm. We help companies ranging from mid-sized to the Fortune 500 transform financial and operational functions with a full suite of services through our Management & Technology Consulting practice. Our Shared Services solutions create a change that is fundamental to your operations, lasting and sustainable, and delivered through tested and proven project management methodologies. UHY works with client teams to improve visibility and metrics for back-office operations, improve internal control efficiency and effectiveness, and optimize workforce through process improvement.



**THOMSON REUTERS®**

**Thomson Reuters**  
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Thomson Reuters ONESOURCE is an advanced global tax and accounting technology suite that empowers multinationals to manage tax and reporting compliance in Shared Service Centres. Integrated with ERP systems including SAP and Oracle, ONESOURCE enables compliance across multiple jurisdictions by automating the processes of calculating, reporting, and submitting tax and statutory financial reports.



**IPsoft**  
[www.ipsoft.com](http://www.ipsoft.com)

IPsoft makes it possible to transform business performance through the employment of digital labor. Every day we apply ourselves to transforming our clients' IT and business operations for competitive advantage. Through our technology platforms and our services, IPsoft guarantees predictable business outcomes that maximize the benefits of intelligent automation.

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Visit us at: [www.ipsoft.com](http://www.ipsoft.com)



**APEX Analytix**  
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APEX Analytix serves global shared services with recovery audit services and technology solutions that prevent, detect, and rapidly recovery overpayments; support compliance, mitigate risk, and provide insight into accounts payable, purchasing and the procure to pay process. The company has over 40 software installations - more than any provider of A/P recovery audit services and prevention software. The software has prevented more than \$1 billion in overpayments. APEX Analytix serves more than 30 of the Fortune 100 and has 110 active software and service clients.



**WNS (Holdings) Limited**  
[www.wns.com](http://www.wns.com)

WNS is a leading global business process management company. WNS offers business value to 200+ global clients by combining operational excellence with deep domain expertise in key industry verticals, including Utilities, Banking & Financial Services, Insurance, Travel & Leisure, Manufacturing, Retail & Consumer Packaged Goods, Telecommunications, Media & Entertainment, Shipping & Logistics and Healthcare.

WNS delivers an entire spectrum of business process management services such as finance & accounting, customer care, technology solutions, research & analytics, procurement & sourcing, professional services and human resource outsourcing solutions.

WNS operates through 41 delivery centers spread across 10 countries.



**Concur**  
[www.concur.com](http://www.concur.com)

Concur imagines the way the world should work, offering cloud-based services that make it simple to manage travel and expenses. By connecting data, applications and people, Concur delivers an effortless experience and total transparency into spending wherever and whenever it happens, so businesses can focus on what matters most.





**Trintech**  
www.trintech.com

Trintech is the leading provider of financial software solutions for the Record-to-Report process. Over 900 clients in 100 countries – including half of the Fortune 50 and the FTSE® 100 – rely on our solutions to optimize resources, reduce costs, manage risk and monitor activities across the entire finance organization worldwide. Trintech's Cloud-based Cadency® software manages all aspects of the financial close – from automating and managing balance sheet reconciliation, journal entries, to governance, risk and compliance, and financial reporting. ReconNET™ streamlines daily operational reconciliations such as bank and credit card transactions. Trintech's offices and partners are located around the globe.



**Kofax**  
www.kofax.com

Kofax's Financial Process Automation solutions leverage industry-leading intelligent capture technology and best-of-class business processes aligned with your organization's ERP to automate the entire P2P cycle and deliver actionable financial insight. With our solutions, you'll leverage analytics for effective cash management, compliance, and process improvement. We understand that one size does not fit all – that's why our solutions for indirect procurement have a multi-channel approach and our supplier portal is a complimentary solution.



**Fiserv**  
www.financialcontrol.fiserv.com

For more than 30 years, Fiserv, Inc. (NASDAQ: FISV) has been a leader in financial services technology, and today is among FORTUNE® magazine's World's Most Admired Companies and Forbes magazine's America's Best Employers. At the IQPC SSON event we will be showcasing our Frontier™ Reconciliation solution for financial shared services. The solution provides complete balance sheet reconciliation automation that can enable operational efficiency gains of up to 80% and cut the risk of errors resulting in financial loss in half.



**CEB**  
www.cebglobal.com

CEB is a best practice insight and technology company. We have a unique view into what matters—and what works—when driving corporate performance. With more than 30 years of experience working with top companies to share, analyze, and apply proven practices, we deliver innovative solutions that help you unlock your full potential. Every year we equip over 20,000 senior leaders from more than 10,000 organizations across 110 countries with the intelligence they need to respond quickly to evolving business conditions. In doing so we help them more effectively manage their talent, customers and operations to exceed business objectives. CEB stock trades on the New York Stock Exchange (NYSE: CEB).



**Blue Prism**  
www.blueprism.com

Blue Prism is the pioneer of Robotic Process Automation Software for the Enterprise - enabling business operations to be agile and cost effective through rapid automation of manual, rules based administrative processes, executing transactions autonomously within a highly secure, scalable and centrally managed "Virtual Workforce" of Software Robots. The technology and methodologies have been developed over many years with numerous large scale and complex deployments in highly regulated industries including major Banks, Telco's, Utilities, Healthcare and Service Providers With offices in Manchester, London, Miami and Chicago, Blue Prism was formed by a group of process automation experts in 2001.



**CSC**  
www.csc.com  
In 2016, CSC joined forces with Xchanging, a London-based insurance

software and business process outsourcing leader. CSC's combined business has more than 66,000 employees, including 18,000 insurance-dedicated staff globally. With the combined strength of Xchanging, CSC is at the heart of the industry's digital transformation wave, bringing to life innovations in RPA, SaaS, Cloud and IoT. Leveraging our partners, industry IP and global domain expertise, CSC's strategy is to lead our clients on their digital journey with a new generation of offerings.



**Deloitte**  
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Deloitte helps organizations grow their businesses and enhance value by identifying actionable insights. More than 23,000 professionals provide a broad range of capabilities across human capital, strategy and operations, innovation, and technology that are aligned to the particular needs of specific sectors, businesses, and organizations. Deloitte provides clients with leading business insights that can help generate a tangible and measurable impact.



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More than 3,000 customers worldwide already trust

Redwood's next generation smart robots to automate their IT and business processes and eliminate unnecessary stress and manual effort. Our robots understand your processes and remove the costs, risks and wasted time of manual tasks and deliver greater reliability, consistency and accuracy across diverse processes, such financial close, order-to-cash, supply chain, meter-to-cash and business intelligence (BI). Redwood is the only strategic process automation partner for SAP®.

Roboclose TM by Redwood solves the month-end close problems, end-to-end and perfectly integrated in the system of report of your ERP. Unlike most solutions that assist with the manual effort, our robots eliminate the effort and stress across the financial close and the wider RtR altogether, eliminating in excess of 90% of your clerical manual tasks. With Roboclose TM customers reduce costs and increase visibility, control and governance.



**SC Power team**  
www.scpowerteam.com

South Carolina Power Team is the economic development organization of the state-owned, electric utility, Santee Cooper, and the state's 20 electric cooperatives. Together, they provide power to more than 2 million South Carolinians.



**Promapp**  
www.promapp.com

Promapp's cloud-based business process management (BPM) software makes it easy to create, navigate, share, and change business processes, enabling quality assurance, risk management, and business continuity. Providing an intuitive online process mapping tool, a cloud-based process repository, and a comprehensive process improvement toolset, Promapp's proprietary software supports the development of smarter and safer ways to work, while encouraging sharing of information by operational teams rather than limiting it to process analysts and technical specialists.



**PwC**  
www.pwc.com

Imagine the power of 180,000 people with a common purpose — building relationships that create value for you and your business. This is PwC. Every day, our people work with you to build the value you are looking for.



**BlackLine Systems**  
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Ninety percent of Fortune 1,000 companies still close their books manually using Excel. The BlackLine Financial Close Software Suite automates the entire financial close process to help improve controls for accounting and compliance staff in mid-size to large companies. Delivered via a SaaS/OnDemand platform, BlackLine complements GRC and ERP systems, eliminating Excel from what has been a laborious, error-prone, manual process.



**Chazey Partners Inc.**  
www.ChazeyPartnersInc.com

Chazey Partners Inc. is a practitioners-led global management advisory business. We bring together a unique wealth of experience, empowering our clients to strive for world class excellence through Business Transformation, Shared Services & Outsourcing, Technology Enablement, Process Enhancement and Corporate Strategy Optimization. We pride ourselves in having built, operated and turned around some of

the world's most highly commended and ground breaking Shared Services Organizations, and for implementing many highly successful multi-sourced delivery solutions.



**The Flippen Group**  
www.flippengroup.com

Sustainable growth requires more than random acts of improvement; it requires a process that is strategic, systemic, and measurable. The Flippen Group works with organizations to teach, foster, and support specific skills, behaviors, and relationships that clear the way to long-term success.

No organization can rise above the constraints of its leadership.™

Flippen's leadership and organizational development processes equip companies with the strategies and tools required to grow and align an organization's talent to achieve desired outcomes.

The Flippen Group works with executives, senior leadership, and staff to identify behavioral constraints that limit productivity and organizational performance. Flippen's personalized coaching, customized processes, and online tools provide measurable results that directly impact the bottom line.



**Tradeshift**  
www.tradeshift.com

Tradeshift is a flexible business commerce platform where companies can buy, sell, and tailor B2B solutions to meet their needs. We enable customers to digitize multiple supply chain processes, information and collaboration. Our solutions include procure-to-pay, supplier engagement and financial solutions. Our extensible cloud platform allows you to tailor solutions to meet your company's needs. Tradeshift connects 800,000 companies across 190 countries and is headquartered in San Francisco, with offices in Copenhagen, New York, London, Paris, Suzhou, Tokyo and Munich.



**Sutherland**  
www.sutherlandglobal.com

As a process transformation company, Sutherland rethinks and rebuilds processes for the digital age by combining the speed and insight of design

thinking with the scale and accuracy of data analytics. We have been helping customers, across industries from financial services to health care, achieve greater agility through transformed and automated customer experiences for over 30 years.

Headquartered in Rochester, N.Y., Sutherland employs over 38,000 professionals spanning 19 countries around the world. For more information on how we can help you transform your processes, visit us at [www.sutherlandglobal.com](http://www.sutherlandglobal.com), email us at [sales@sutherlandglobal.com](mailto:sales@sutherlandglobal.com) or call 1-800-388-4557 ext. 6123.



**JPD Financial**  
www.jpdfinancial.com

For over 25 years JPD Financial has been working on behalf of our customers to research and uncover money that would otherwise be lost in today's automated systems and written off due to accounting error. We provide both Supplier Credit Recovery and computer based AP auditing which maximises the potential recoveries for our customers. In addition to this we also give detailed analysis and ongoing process improvement recommendations to help you reduce future errors.

Our unique Supplier Credit Recovery service means that we increase the money we find for you by working with your suppliers to research credits, overpayments and misapplied or duplicate payments that appear on their receivable records; but may not appear in your payables system or on the standard statements your company receives. Hence we find money that would not be picked up by traditional AP audit companies, resulting in a greater amount of money going to the bottom-line.

With offices in the US and Europe we are able to accommodate the needs of multi-national companies and organisations; particularly those that have shared service centre operations. JPD work on a contingency basis, there are no upfront fees and minimal requirement for involvement from our customers as all day-to-day activities are carried out by us at our premises.



**Direct Commerce**  
www.directcommerce.com

Direct Commerce (DCI) offers Procure-to-Pay product solutions that include electronic invoicing, remittance and payment, imaging, discount management, dispute resolution, workflow and more over a secured webhosted Supplier Portal that is customizable and delivers bottom-line cost reduction results.

Focused on delivering the perfect solution for your needs, Direct Commerce is renowned for its efficient implementation and premier customer service. The Company's superior product functionality, rapid Go Live process, and friendly post-sales support make Direct Commerce the first choice for Fortune 1000 clients worldwide.

Founded in 2000 and a leader in the accounts payable automation and procure-to-pay solutions, Direct Commerce supports thousands of suppliers submitting hundreds of thousands of electronic invoices adding up to billions of dollars per year in transaction volume.

Direct Commerce's mission is to transform the delivery and management of inter-business financial transactions from a predominantly paper-based process to a fully electronic interchange.



**ADAM HCM**  
www.adamhcm.com

ADAM Human Capital Management, a leading payroll services provider with over 30 years of experience, offers a single software platform for 30 countries in Latin America and the Caribbean. ADAM is a competitive and powerful solution for medium-sized and enterprise-level multinational companies seeking an innovative HR management tool as well as Business Process Outsourcing services.

ADAM provides BPO services and offers its solution as a SaaS platform (Software-as-a-Service), helping its Clients reduce CapEx costs and maximize ROI, since Clients only pay for actual employee usage. Our solution works as a standalone tool or integrated into any ERP.

With over 350 clients, processing approximately 10 million annual payrolls, ADAM has a history of satisfied clients in sectors such as: Agriculture, Automotive, Consumer Goods, Transportation, Finance, Mining, Pharmaceutical, Technology, and others.

ADAM Human Capital Management – the best choice for managing Payroll and Human Talent, and meeting the complex needs of companies in Latin America and the Caribbean.



**Malaysia Digital Economy Corporation (MDEC)**  
www.mdec.my

Malaysia Digital Economy Corporation (MDEC), previously known as Multimedia Development Corporation (MDeC), was incorporated in 1996 to strategically advise the Malaysian government on

legislation, policies and standards for ICT and multimedia operations as well as to oversee the development of the Malaysian Multimedia Super Corridor (now MSC Malaysia), the platform to nurture the growth of Malaysian Small and Medium Enterprises (SMEs) in the IT industry whilst attracting participation from global ICT companies to invest in and develop cutting edge digital and creative solutions in Malaysia.

In 2011, MDEC's mandate was broadened by the Prime Minister to include driving Malaysia's transition towards a developed digital economy by 2020 through Digital Malaysia. In 2012, Digital Malaysia was officially unveiled as the nation's transformational programme to achieve this aim. Digital Malaysia is the national agenda towards a sustainable digital economy built upon a vibrant domestic ICT industry, transformative use of digital solutions by government, businesses and citizens, as well as a robust enabling ecosystem.

Today, both MSC Malaysia and Digital Malaysia run concurrently to spur Malaysia's ICT industry development and digital transformation, under the purview of MDEC.

For more information, please visit [www.mdec.my](http://www.mdec.my)



The Minnesota Department of Employment and Economic Development (DEED) is the state's principal economic development agency. DEED programs promote business recruitment, expansion, and retention; international trade; workforce development; and community development.

Those objectives, and the plans to reach them, are:

- \* Attract, retain and expand businesses and create jobs\*
- Cultivate entrepreneurs\*
- Connect workers to jobs, prepare workers for jobs in demand and assist people to live independently\*
- Stabilize and stimulate the economy through benefit payments\*
- Help communities thrive

Our plans provide a roadmap for action and help assess progress in meeting our goals. DEED's strategic planning results from an examination of the current environment, awareness of the pending challenges and opportunities, and regular check-ins so strategic plans become ongoing time-management tools that tell leaders and staff where to focus energy and resources. For additional information: [mn.gov/deed](http://mn.gov/deed)



**Conduent**  
www.conduent.com

Conduent is the world's largest provider of diversified business process services with leading capabilities in transaction processing, automation, analytics and constituent experience. We work with both government and commercial customers in assisting them to deliver quality services to the people they serve.

We are the customer interface for large segments of the technology industry and the operational and processing partner of choice for public transportation systems around the world. Whether it's digital payments, claims processing, benefit administration, automated tolling, customer care or distributed learning – Conduent manages and modernizes these interactions to create value for both our clients and their constituents.



**The Trinidad & Tobago International Financial Centre (IFC)**  
www.ttifc.co.tt

The Trinidad & Tobago International Financial Centre (IFC) is focused on facilitation of foreign investment in the banking, financial services and insurance sector. Trinidad & Tobago IFC continues to develop T&T as a preferred nearshore financial services destination through its end-to-end investment facilitation and support services. T&T offers a one-stop-shop for investors with services that include fast-tracking setting-up operations, direct access to incentives and tailored solutions to suit each company's requirements. With a Standard and Poor's rating of A-, Trinidad & Tobago (T&T) is a vibrant and stable economy with world-class infrastructure, high availability of trained banking and Finance & Accounting personnel, sector specific incentives and proactive government support that has turned T&T into a financial services hub that is home for large financial services outsourcing operations.



**Stefanini**  
www.stefanini.com

Created in 1987, Stefanini is a \$1B global IT provider of business solutions with locations in 39 countries across the Americas, Europe, Australia and Asia. With more than 21,000 employees, Stefanini provides onshore, offshore & nearshore IT services to increase the efficiency of operation in mid-size, large and global enterprises. Our services include application development, IT infrastructure outsourcing (help desk support and desktop services), systems integration, consulting and strategic staffing.





**OnBase by Hyland**  
www.onbase.com

OnBase by Hyland is a single enterprise information management platform for managing content, processes and cases. By combining market-leading enterprise content management (ECM) functionalities with case management, business process management (BPM), and capture technologies on the same platform, OnBase helps organizations improve service levels and reduce operating costs while minimizing IT application sprawl. Whether starting in a single department or deploying enterprise-wide, OnBase can scale to support an unlimited number of solutions – from industry-specific applications to shared services solutions common across all industries.



**PROINVEP Panama**  
www.proinvex.gob.pa

As part of the Ministry of Commerce and Industry (MICI), Proinvex Panama is Panama's Governmental Investment Promotion Agency dedicated to attracting and promoting Foreign Direct Investment (FDI) into the Republic of Panama.

The agency manages an Integrated Information System allowing investors to easily identify all the instruments that the National Government has available for Foreign Direct Investment.

Proinvex Panama is focused on promoting investment and exports in the government strategic sectors, such as: logistics and transportation, energy, tourism, business services and mining. Proinvex Panama is also responsible for coordinating the commercialization and promotion of national product exports.

Another important function is to establish formal communication channels between the public and private sector to identify barriers that could limit foreign direct investment and to coordinate the necessary measures to connect them.

The agency offers a concierge service free of charge to investors involved in the investment process in the Republic of Panama. For more information, visit [www.proinvex.gob.pa](http://www.proinvex.gob.pa) and follow us on Twitter @Proinvexpma.



**Enterprise Florida**  
www.enterpriseflorida.com

Enterprise Florida, Inc. (EFI) is a public-private partnership between Florida's businesses and government leaders and is the principal economic development organization for Florida. EFI facilitates job growth for Florida through business recruitment and retention, international trade and export assistance, and more. Enterprise Florida staff can provide confidential assistance to companies making location, relocation, or expansion decisions.



**SCAN ONE**  
**Scan-One**  
www.scan-one.com

Practical. Complete. Automate All Things AP.

Our customers say it all: Scan One processes over 175,000 invoices daily for Fortune 100/500 companies, and we've been doing it for almost 30 years. These large and well-known customers achieve true automation for their AP Departments, realizing 85% straight-through processing.

Scan One's service is unique in the industry – we deliver AP departmental automation as a service via the cloud. What is unique is that we manage the automation process for you; you manage the business. A partner in automation, Managed Automation is a practical and complete service that addresses all things AP.



**MarketSphere**

[www.unclaimedpropertiespecialists.com](http://www.unclaimedpropertiespecialists.com)

MarketSphere helps organizations handle escheatment liabilities and manage unclaimed property. Our solutions are designed to help companies of all sizes and in all industries address every aspect of unclaimed property. Whether you need to complement an in-house unclaimed property team or outsource all of your unclaimed property responsibilities, we apply the right level of services. We can assess your risk, negotiate Voluntary Disclosure Agreements (VDAs) on your behalf, educate leaders, manage and expedite audits from beginning to end and improve audit results. Our expertise combined with our unique, proprietary technology will 'right-size' your payments – and improve your internal processes long-term.



**OpenConnect**  
www.openconnect.com

OpenConnect is the leader in process intelligence, mainframe modernization, and desktop analytics solutions that objectively identify and illuminate workforce activity, resulting in associated productivity gains. With OpenConnect's process automation software, the costliest processes performed by a workforce can be automated. Combining unparalleled experience and problem-solving capabilities, OpenConnect enables its clients to more quickly address and adapt to today's operational and competitive challenges so they can accomplish more with fewer resources. Learn more about OpenConnect and its products at [www.openconnect.com](http://www.openconnect.com).



**InvestChile**  
[www.investchile.gob.cl/](http://www.investchile.gob.cl/)

InvestChile is the Chilean government agency responsible for promoting Chile as a destination for foreign direct investment. Our mission is to link the interests of overseas investors with the business opportunities the country offers, by providing world-class services that are in line with Chile's economic development policies.

Chile is one of the best positioned countries for the exportation of global services in Latin America. More than US\$3,000 million are exported annually from Chile under this concept.



**PanamaPacifico**  
[www.panamapacifico.com](http://www.panamapacifico.com)

Panama Pacifico is a Special Economic Area (SEA) situated on the western bank of the Panama Canal. Panama Pacifico is one of the largest mixed-use developments in the world with 1,400 hectares. Located just 15 minutes from downtown Panama City, Panama Pacifico provides an exceptional environment for all types of SSC Operations. Over the years, Panama Pacifico has become the leading business hub for multinational corporations seeking a competitive position in the Americas and is already home to numerous international companies including Dell, Caterpillar, 3M, Grainger, VF Corp, Lacoste, Ingersoll-Rand, Trane, and more.

**EnableSoft**

[www.enablesoft.com/foxtrot-robotic-process-automation-software/](http://www.enablesoft.com/foxtrot-robotic-process-automation-software/)

EnableSoft is the early innovator and leading provider of Robotic Process Automation software and serves over 500 corporate clients worldwide with its RPA solution, FoxTrot. FoxTrot acts like an Automated Employee and has helped more than a dozen of the Fortune 500 companies and 1/3 of the largest financial institutions increase operational efficiencies by liberating key staff from burdensome and time consuming manual and unstructured data processes.

**Clearsulting**

[www.clearsulting.com](http://www.clearsulting.com)

Clearsulting is not your typical consulting firm. We take pride in the straightforward, "roll up our sleeves" manner in which we partner with our clients to immerse ourselves in their business challenges and deliver clear transformation solutions in the following areas: Process Improvement, Organization Design, Technology Enablement, and Controls Optimization. Our people have worked for some of the most prestigious consulting firms in the world and bring deep technical knowledge, a fresh perspective, and the ability to effectively collaborate in order to customize each project based on the unique goals and personality of our clients.

**ActiveOps**

[www.activeops.com](http://www.activeops.com)

ActiveOps software delivers the world's most successful production management system for back offices and shared service centres globally, managing over 100 million hours of output last year.

ActiveOps enables Operations Leaders to realise the full potential of their human and digital workforce, ERP systems and robotic automation tools to create agile and effective operations delivering competitive advantage for the enterprise.

Our software solves the challenge of quantifying

work and capacity across diverse functions to create consistent metrics and production management practices independent of the underlying process or technologies. Using ActiveOps empowered teams optimize performance across the whole operation to meet or exceed customer requirements at radically reduced costs.

Our solutions are trusted by a diverse range of blue chip organisations to control some of the most demanding administrative environments. Customers in 30 countries including ANZ, Xchanging, TD Bank, Capita, NAB, NZ Inland Revenue, BAT and ADCB all use ActiveOps software to manage delivery across internal and outsourced operations.

ActiveOps, the most successful production management system for back offices and shared service centres, globally.

**NIIT Technologies**

[www.niit-tech.com](http://www.niit-tech.com)

NIIT Technologies is a leading global IT-BPS-MS solutions provider servicing clients across many industries – Travel & Transportation, Banking and Financial Services, Insurance, Manufacturing and Media. Leading with its service vision "New Ideas, More Value", NIIT Technologies is committed to delivering new concepts combined with operational excellence to provide exceptional significance to its clients.

As a full spectrum integrated Business Process Services (BPS) provider, NIIT Technologies adds value to organizations through a deep domain know-how, an experienced talent pool, and innovative services like – Robotic Process Automation (RPA) while developing proprietary tools like – FinGénie, MonaLisa, ProcessGymSM, TermsMonitorTM and K-Portal (a Knowledge Support System).

NIIT Technologies end-to-end RPA engagement framework addresses all aspects of Transformation, Enablement, Standardization and Scale for organizations aiming for Best-in-Class automation outcomes.

**Basware**

[www.basware.com](http://www.basware.com)

Basware is the global leader in providing purchase-to-pay and e-invoicing solutions in the world of commerce. We empower companies to unlock value across their financial operations by simplifying and streamlining key financial processes. Our Basware Commerce Network, the largest open business network in the world, connects 1 million companies across 100 countries and enables easy collaboration between buyers and suppliers of all sizes. Through this network, leading companies around the world achieve new levels of spend control, efficiency and closer relations with their suppliers. With Basware, businesses can introduce completely new ways of buying and selling to achieve significant cost savings and boost their cash flow.

**HTC Global Services Inc.**

[www.htcglobalservices.com](http://www.htcglobalservices.com)

HTC Global Services Inc. a leading IT & BPO service provider, headquartered at Troy, MI. HTC works with a number of Large, Medium and Small enterprises to help them streamline their business processes and achieve operational efficiency.

**Auxis**

[www.auxis.com](http://www.auxis.com)

Auxis is a leading Shared Services Consulting and Nearshore Outsourcing firm that was an early pioneer in the Americas Shared Services industry and a firm believer in the strategic advantages of Nearshoring. Auxis' founders led the establishment of the first international SSC for PepsiCo in the early 90s, and have since advised hundreds of Fortune 1000 organizations from Shared Services Strategy and Design, to Implementation and Optimization. Auxis' unique perspective of Advisor, Outsourcer and Former Industry Operators allow its clients to receive real-world, practical solutions with a focus on flexibility, customization and faster speed to benefit.

In addition to consulting, Auxis' outsourcing services include a full range of Business Processes (BPO) and Technology Processes (ITO) from its State-of-the-Art Delivery Centers in Latin America, supporting multiple industries including Retail & Consumer Goods, Manufacturing, Media & Entertainment, Financial Services, Hospitality, among many others.



**Kryon Systems**  
www.kryonsystems.com

Kryon Systems is committed to assisting organizations realize their business objectives by providing Leo Performance Improvement Solutions which support both the end-user and business process automation efforts alike. Leo Robotic Process Automation (RPA) implements Kryon's unique patented technology to deliver a robust solution that is efficient, reliable and scalable. Leo RPA lets you automate any business process that is definable, repeatable, and rulesbased by assigning a Leo (software) robot to manage the execution of that process, just as if a person was completing the task themselves. Once deployed, Leo Robots work 24/7 with amazing accuracy at a fraction of your current costs. Many enterprise and BPO customers, including leading telecommunications and global information technology companies, are already benefitting from Leo's quick deployment and low TCO. Visit us to learn why!



**Cinde**  
www.cinde.org/

Cinde is a private, non-profit, non-political organization, responsible for the attraction of Foreign Direct Investment (FDI) into Costa Rica. Founded in 1982, and declared of public interest in 1984, due to its role in the development of Costa Rica, CINDE has attracted 250 high-tech multinational companies that have found Costa Rica to be a true ally in doing business. CINDE not only attracts investment companies, but it supports them during their establishment, and works with various government institutions in order to create jobs and opportunities for Costa Ricans. It provides services in four key areas: assistance in site selection, meeting the investor's needs, networking and specialized support.



**DATAMARK**  
www.datamark.net

DATAMARK is a U.S.-based global provider of business process outsourcing (BPO) solutions and outsourced contact center services.

We apply our business engineering expertise to help large enterprises and other organizations improve efficiency and process quality across a wide array of shared services and back-office functions, including high-volume digital mailroom management, document processing, research and analytics, and multichannel customer care.

Our clients include Fortune 500 companies representing a range of industry verticals, including banking and financial services, insurance, transportation, telecommunications, manufacturing, utilities, retail and government.

DATAMARK has more than a quarter century of experience providing shared services, BPO and business process re-design and improvement solutions to our client partners across the globe. Headquartered in El Paso, Texas, we have an international reach through our service delivery centers located in the U.S., Mexico and India.



#### Opportunities NB

Opportunities NB is the economic development agency for the province of New Brunswick, Canada, and North America's Nearshore Solution for Business Services.

Named the lowest business cost location in the U.S. and Canada in KPMG's 2016 Competitive Alternatives study, New Brunswick's natural strategic location is the most central point between the Americas and Europe.

New Brunswick has long been known as the logical choice for industry leaders. World-class companies like RBC, IBM, Salesforce, Exxon Mobil, and UPS have leveraged New Brunswick's strong value proposition including quality workforce, superior infrastructure, advantageous time-zone, low business costs, and track record of customer support success.

Combining these advantages with attractive financial incentives makes New Brunswick the ideal location for your shared service and mid/back office operations.

For more information contact Michael.Rublack@ONBCanada.ca or Shaun.Parker@ONBCanada.ca for a meeting onsite.



**PAYBOX**  
www.gopaybox.com

PAYBOX Cloud offers robust and secure Accounts Payable and Receivable platforms which seamlessly integrate with your company's ERP system. Eliminating paper, manual processes, and customer/client invoice inaccuracies and the associated resolution costs, all while increasing working capital and customer satisfaction.

PAYBOX permits vendor/ customer self-registration, secure access, is configurable with robust analytics and reporting multiple enterprise customers currently experience the benefits of the PAYBOX Cloud with no up-front implementation/integration costs, and priced by the transaction so you only pay for what you use.



**finHealth**  
www.finhealth.com

finHealth's primary mission is to "Simplify & Control Healthcare Costs" for large self-insured plans and their employees. Through our web-based platform finHealth Navigator, we deliver in real-time powerful data analytics to reduce healthcare costs and promote healthy outcomes for your associates. Savings of 2-8% of annual healthcare spend are achievable through a combination of industry best practices, benchmarking, cost transparency, and proprietary algorithms that flag billing errors such as eligibility, duplicates, incorrect coding and medically unlikely procedures not currently being captured by your third-party administrator. To guarantee results, we quantify the savings in advance by offering a no-cost "proof of concept" utilizing your companies' healthcare data (not including protected health information).



**Personiv**  
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Efficiency: With a 30-year History. Delivering more than just outsourcing, our focus is on bringing efficiency through cost-effective solutions. From customer engagement to back office and recruiting to design, our team of skilled talent stands ready to complete projects with quality and confidence, allowing you to focus on goal-reaching strategic priorities. Visit [www.personiv.com](http://www.personiv.com) for more information.





**ABiz Corporation**  
www.abizcon.com

ABiz Corporation is a premier contract, commercial management services and consulting company, with offices in the U.S. and India. We take pride in providing cost effective, high-quality, innovative and secure solutions for our clients. Our team members have a deep knowledge of all aspects of the contract lifecycle and of contracting best practices allowing your internal resources to be utilized for more strategic responsibilities while we partner with you in any contract and commercial transformation program. Our team is comprised of industry leaders known for providing solutions to improve organizational efficiencies and reduce operating costs. Our expertise is based on actual experience instead of theory, providing our clients solutions that fit their environment and help them achieve operational efficiencies and meet their financial goals.



**IOFM**  
www.iofm.com

The Institute of Finance and Management (IOFM) is the leading organization providing training, education and certification programs for professionals in financial operations. IOFM has certified over 20,000 F&A professionals

worldwide. IOFM's membership networks feature industry research and best practices, metrics and benchmarking data, case studies, tools, templates, and critical compliance and corporate governance resources. The Institute also hosts industry-leading conferences designed to facilitate continuing education and peer networking. With a universe of over 100,000 professionals and a keen understanding of the issues and needs critical to the profession, IOFM is the trusted source of information in a rapidly evolving field.



**Arystl Technologies**  
www.artsyltech.com

For over a decade, Artsyl Technologies has delivered solutions that address the most painful and inefficient steps in most business processes—manual data entry, approval workflow and document handling. By leveraging data and documents to intelligently handle document sorting and classification, matching, coding, exception handling and routing, Artsyl streamlines business processes for improved visibility, compliance, control, efficiency and cash management.

Artsyl's docAlpha smart process platform intelligently captures data from documents and other unstructured digital files to eliminate data entry, increase data accuracy, accelerate workflows and ensure standards compliance. Supported by robust reporting that increases process transparency, docAlpha empowers organizations to monitor KPIs, eliminate approval bottlenecks and reduce process cycle times while providing instant auditability.

Leveraging the power of docAlpha, Artsyl smart process applications, like InvoiceAction for accounts payable, help companies quickly and cost-effectively automate and streamline people-intensive, highly variable, loosely-structured business processes that are subject to frequent change.



**Global Payroll Management Institute**  
www.globalpayrolleducation.com

Global Payroll Management Institute is the world's leading community of payroll leaders, practitioners, researchers, and technology experts. GPMI provides world-class resources to ensure the competency, compliance, and confidence of payroll professionals operating globally.

Subscribers connect through networking discussions, collaborative opportunities, and access to educational programs and publications dedicated to global payroll strategies, knowledge, research, employment, and training. GPMI publishes several global payroll texts, Global Payroll e-magazine, and white papers addressing global payroll concepts, processes, laws, and regulations, many with a country-by-country focus. GPMI's vision is to help global payroll professionals to become successful leaders and strategic partners within their organizations. (www.globalpayrolleducation.com)

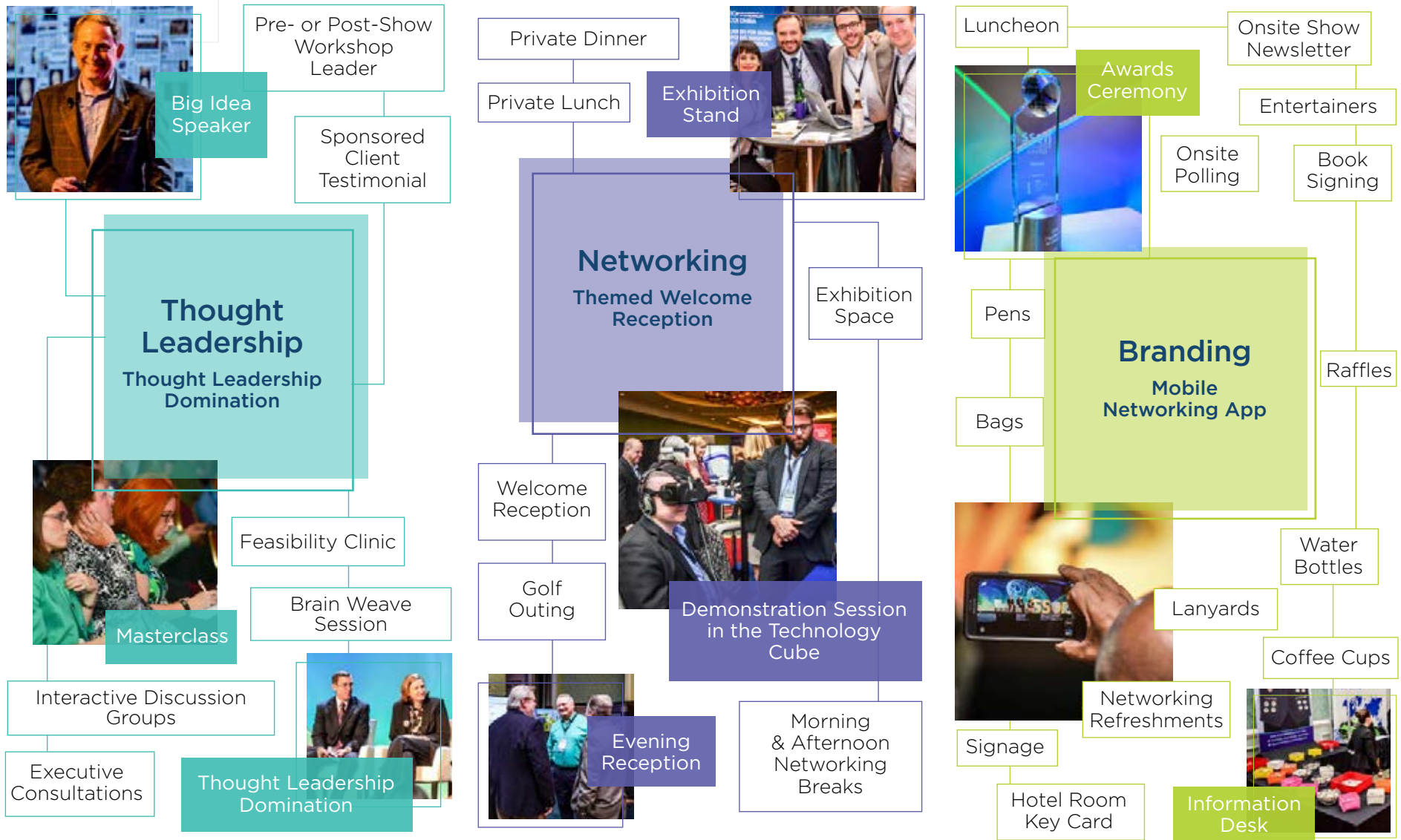
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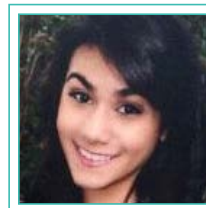
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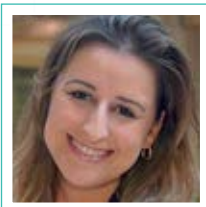
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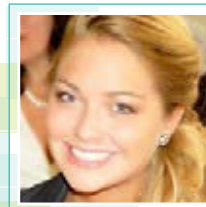
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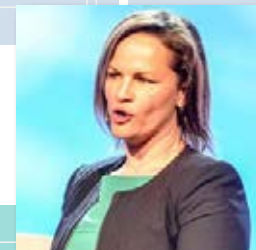
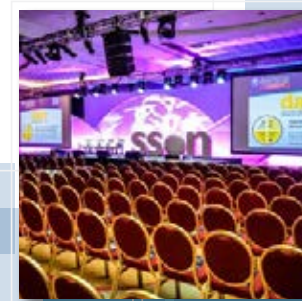
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# VENUE, ACCOMMODATIONS & TRAVEL

## Loews Royal Pacific

6300 Hollywood Way, Orlando, FL 32819

Website: [www.loewshotels.com/royal-pacific-resort](http://www.loewshotels.com/royal-pacific-resort)

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Group Rate: \$249\* plus 12.5% tax per night (for a single room)

**Please make your reservation before February 14, 2017 in order to ensure you are eligible for the group rate.**

Please identify you are part of the Shared Services & Outsourcing Week to ensure the special rate. Note that you are eligible for this rate three day prior and three days post the event based on availability. Please make your reservation before February 14, 2017 in order to ensure you are eligible for the group rate.

We think every island paradise should have three things: sun, sand—and tons of palm trees. Good news: at Loews Royal Pacific Resort at Universal Orlando® you'll find all three, plus so much more. This is your chance to enjoy a South Seas vacation without sailing halfway around the globe. Feel the excitement of a time when adventurous travelers first island-hopped the South Pacific. A lagoon and sandy-white beach set the stage for your adventure. But the magic doesn't stop there.

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**3 Easy Ways to Register**



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