

Shared Services in Finance & Accounting



15th Annual

Shared Services for Finance & Accounting

Conference and Technology Expo

Celebrating 15 Years of Excellence

2015 Industry Perspectives



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We know the pressures you are under as financial shared services professionals. Resources are as tight as ever, so you need to master the (almost) impossible task of doing more with less. This is why we're bringing together a panel of expert speakers who will help you to:

- Maintain a strong control environment
- Deal with vast labor issues
- Cope with the intense level of M&A activity
- Continue to validate your strategic impact

Don't take our word for it. Contained in these pages are a handful of our expert speakers who will join us at the upcoming [15th Annual Shared Services for Finance & Accounting Conference and Technology Expo](#). They told us what their shared services model looks like today, where they see shared services going in five years and their top priorities for 2015.

We hope these insights will give you the push you'll need to join us so that together we can achieve strategic goals for 2015 and beyond by perfecting the fundamentals and addressing opportunities for growth.

Kind regards,



Hannah Hager
Online Content Director
IQPC



James Copeland

Vice President of Financial Shared Services
BMC Software Inc.

James Copeland is the Vice President of Financial Shared Services for BMC Software Inc. For the past seven years he has been leading the transformation from regional shared service centers to a centralized shared service center in Pune, India for back office applications. Prior roles at BMC included leadership of the Revenue Recognition and Revenue Accounting functions, as well as Assistant Controller for Regional Accounting. Prior to BMC, James spent 25 years in Telecom manufacturing in a wide range of accounting, finance and information technology roles. James is a graduate of the University of Texas at Arlington.

June 23 at 1:30 p.m.

[Case Study: How BMC Software Benefitted by Moving to an Offshore Captive](#)

Kelly Litster is the Senior Vice President of the MGM Resorts International Finance Shared Services Center (FSSC). The FSSC is a full-service accounting and auditing operation responsible for Payroll, Accounts Payable and Receivable, Gaming and Non-Gaming Audit, and Financial Accounting Company-wide functions.

Kelly has been with MGM Resorts for over 14 years in a variety of accounting, audit and process improvement roles. Kelly joined the FSSC team from MGM Resorts International Corporate Solutions where she held a Director position. Prior to that, Kelly held several management positions within MGM Resorts International, including Controller of Corporate Services, Hotel Controller at MGM Grand, and Assistant Financial Controller at TI. Kelly has a Bachelor of Science degree in Accounting from the University of Nevada, Las Vegas and is a Certified Public Accountant in Nevada.

June 23 at 9:15 a.m.

[Case Study: How to Move up the Value Chain by Creating a Culture of Quality](#)



Kelly Lister

SVP, Finance Shared Services Center
MGM Resorts International



Todd Dooley

VP, Productivity & Expenses
H&R Block

Todd Dooley is VP of Finance for H&R Block, a leading tax preparation company. Todd is leading the establishment of a company-wide productivity culture, improving the company's productivity efforts and analytics as well as the company's sourcing and field logistics teams.

Todd has 20+ years in a variety of finance and accounting roles at Ceridian, IBM and 3M ranging from auditing, controllership, pricing, financial analysis, financial consolidations, shared services, customer and product profitability, and FP&A systems. Todd was the Director of Global Finance Transformation at Stanley Black and Decker in 2013 and 2014 and SVP of Finance at Ceridian from 2006-2012.

He was also a Captain in the Air Force and was a decorated ICBM commander. He holds a bachelor's degree in accounting from The University of Notre Dame and a master's in business from the University of North Carolina at Chapel Hill. He was the leader and co-inventor of the Ceridian-UCLA Pulse of Commerce Index, an important measure of the pulse of the U.S. economy.

June 23 at 2:15 p.m.

[Create a Culture of Productivity Within And Beyond Your SSO](#)

Melissa Gulick

Director, Accounting Shared Services
Service Experts LLC

Melissa Gulick is the Director of Accounting Shared Services for Service Experts LLC, a North American HVAC Residential and Commercial Service and Replacement Contractor.

Over the past ten years, she has lead the evolvement of at one time 3 district accounting centers into now one centralized Shared Services Organization covering two locations in Atlanta, GA and Plano, TX at times supporting 100 - 150 service centers with a range of \$400 - \$650 Million in revenue. The Shared Service Organization activities support Accounts Payable, Payroll, Fixed Assets, General Accounting, Cash Applications and Tax. Melissa is a graduate of Middle Tennessee State University in Murfreesboro, TN.



June 24 at 2:15 p.m.

[Build Your FSSO as a True Business Partner](#)

Bryce Tawney

*Sr. Director, Finance Lead for Integration
Halliburton*



June 23 at 10 a.m.

[Best Practices for M&A Finance Integration: Staying Focused on "Day One" While Building the Roadmap for the Future](#)

Bryce's recent role as Senior Director of Accounting Services in Halliburton's corporate accounting group included the oversight of four global Business Support Centers with over 370 employees located in Duncan, OK, Houston, TX, Dubai, UAE, Panama City, Panama and Kuala Lumpur, Malaysia. Center activities include SAP Global Master Data, Accounts Payable, Cash Applications, Fixed Assets, General Accounting, Payroll and Financial Analysis.

His 35-year career at Halliburton working in Dallas, Duncan and Houston, included various roles in Internal Audit, Operations Accounting, Financial Reporting and International Accounting. Bryce's career also includes assignments based in Europe managing the accounting and financial functions for Europe and Africa.

In January, Bryce was named as the Finance Lead for Integration for Halliburton's recently announced acquisition of Baker Hughes.

Bryce is a member of the advisory board for the Oklahoma State University Spears College of Business and serves on the School of Accounting Advisory Boards at Oklahoma State and at University of North Texas. He is a member of the American Institute of Certified Public Accountants, the Texas Society of Certified Public Accountants, and FEI. In his spare time, Bryce's hobbies include fishing and collecting antique fishing tackle.

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“What does your shared services organization look like today?”

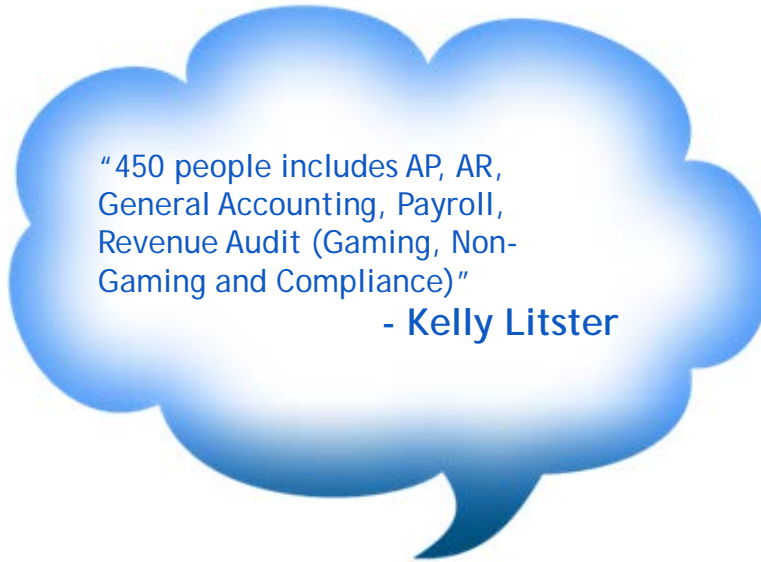
“Our company operates with multiple business units. Our Shared Services include IT, Order Management, Global Procurement, Procure to Pay and Finance/Accounting.”

- James Copeland



“450 people includes AP, AR, General Accounting, Payroll, Revenue Audit (Gaming, Non-Gaming and Compliance)”

- Kelly Litster



“Finance moving to centralize more activities in regional centers; human resources doing the same; procurement also making inroads.”


- Bryce Tawney



“Staff of 55 that covers Payroll, Accounts Payable and General Accounting. Our Shared Services team supports 100 service centers across the US and Canada with Revenue of \$409M annually.”

- Melissa Gulick





“What do you think will happen in shared services over the next five years?”


“Leverage changing technologies to drive economies of scale and automation; greater use of mobile apps for approval workflows.”

- Bryce Tawney



“Move to robotics, change in outsourcing strategies, focus on globalization and overall stability.”

- Kelly Litster



“I think that companies will continue to take advantage of consolidation opportunities where they make sense within their risk profile. I also think that the continued growth of the “Cloud” may offer additional opportunities for companies who may be looking for non- traditional ERP services in addition to the point solutions available today.”

- James Copeland

“What are your top priorities for 2015?”

“We are celebrating our 15th year. What has changed in shared services?”

“New ERP implementation, continued process improvements and supporting the business initiatives of the organization.”

“Greatly impacted by streamlining of processes which has resulted in significant cost reductions. More involvement with the company’s organizational goals and partnering with operations team to support them in the design and process of their key initiatives.”

- Melissa Gulick

“Shift from ‘fast’ to ‘good’ - quality is important for us - reduction in errors and rework.”

“Way of doing business vs. everyone thinks we’re the enemy. Getting far more progress with cooperation and real partnership with our upstream partners (HR, Procurement, Sales, etc.)”

- Kelly Lister

“Continue to improve our service levels and innovate. We find that innovation within our Shared Services team can deliver great productivity as well as provide very positive reinforcement to the team members and serves as a catalyst for more innovation.”

“We started as a greenfield Financial Shared Service Center 8 years ago. We continue to grow our scope and take on increasingly complex tasks and provide meaningful information for our business units.”

- James Copeland

“Stabilization and optimization of recently introduced processes and technology.”

“Technology being the key enabler.”

- Bryce Tawney

“Instill a culture of productivity, execute our strategic process improvement pipeline, and identify human middleware processes we can digitize.”

- Todd Dooley

Want to learn more?

Join Us >>>

15th Annual Shared Services for Finance & Accounting Conference and Technology Expo

Celebrating 15 years of excellence! June 22-24, 2015 Dallas, TX

Helping you achieve your strategic goals for 2015 and beyond by providing the latest news and attending opportunities for growth

Meet our esteemed speaker faculty:

- Erica Edwards**, VP Director, Shared Services, Oracle
- Kevin Lister**, Senior VP Finance & Finance Shared Services, Oracle
- James Copeland**, Vice President, Finance Shared Services, Oracle
- Michael Burcher**, Global Leader - Business Process Management, Oracle
- Dawn G. Copeland**, VP, Shared Services, Oracle
- Carolyn Foster**, Head of Shared Services, Applied Materials
- Scott Crisley**, VP, Shared Services, Oracle
- Kyle Finner**, VP Shared Services, Oracle

Why attend THIS event?

1. Save 15% on your registration fee.
2. Meet with industry leaders and share best practices.
3. Hear from the industry's top experts on the latest trends in shared services.
4. Network with peers and build relationships.
5. Gain valuable insights into the latest trends in shared services.
6. Attend exclusive sessions and workshops.

M&A Finance Integration • Outsourced Provider Governance • Creating a Culture of Quality Project Management that Works • Global Process Ownership • Expanded FSBO Expense Metrics for Insights • True Business Partnerships

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