



21st 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

Table of Contents

Why SSO Week? **pg. 3**

2017 Speaker Line Up **pg. 4**

Who will you meet in 2017? **pg. 7**

Big Ideas Keynotes **pg. 9**

New for 2017! **pg. 10**

GBS Evolutions Forum **pg. 11**

RPA Master Class **pg. 12**

Agenda-at-a-Glance **pg. 13**

pg. 15 Exclusive Workshops and Site Tour Road Trip!

pg. 16 Full Agenda

pg. 34 SSOW Excellence Awards

pg. 37 Our Partners

pg. 41 Sponsorship Opportunities

pg. 43 Venue and Accommodation

pg. 44 Registration



GET YOUR BOGO PASSES!

We released 50 Buy One, Get One passes to SSOW 2017. Email us at enquiry@iqpc.com to reserve your spot!

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



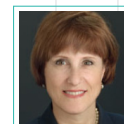
Eric Simonson
Managing Partner, Research
Everest



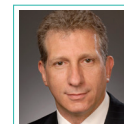
Bob Cecil
Partner
KPMG



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
President of Global Business
Services and CIO
Mars



NEW

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



Marc 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

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

The 2017 Expert Speaker Faculty *continued*



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



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

Steve Bott
Manager Treasury Technology
Services
Ameren



NEW

Cindy Pekrul
SVP and Deputy Controller
Turner



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

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



John Hopkins
Director Finance Shared Services
Abbott



Chris Langley
Head Business Services North America
Syngenta



Mike Koehler
VP, HR
Express Scripts



Philip Woodburn
VP, FiSS
Schneider Electric



Sarah Davie
SVP Operations and Shared Services
Dining Alliance



Daniel Stuart
Chief Business Processes Officer
Breakthru Beverage Group



Shashi Mandapaty
VP Procurement Shared Services
Johnson and Johnson



Graham Russell
BPO Director
WPP



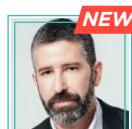
Paul Rodwell
Finance Director - Global Shared Services
Experian



Tony Bender
CIO and VP Global Business Services
Edgewell Personal Care



Alexis Hart
Director of NAFTA HR Shared Services
Daimler



Jamie Marchland
VP HR Operations
Pall Corporation



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



Curt Burghardt
Senior Director HR Shared Services
Wallgreens



Stephanie Ernsting
Director Global Business Services
Bemis



Samir Bagri
Director Global Business Services
Delphi



Stephanie Giron
VP HR and Payroll Operations
Nielsen



Lance Siemen
Global Leader Compliance, Audit and Shared Services
Daimler



Joe Rafter
Former Senior Director Enterprise Change
PG&E



Brian Martin
VP and Site-Lead US SSC
Pfizer



Nick Tomashot
Senior Vice President and General Manager, National Service Center
US Foods



Brendan Lynch
VP Global HR Services
Johnson and Johnson



Vanessa Bui
VP Finance Shared Services
MGM



Christina Critzer
SVP Enterprise Shared Services
SunTrust Bank



Andrew Jackson
Head of Global Shared Services
Anglo American

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

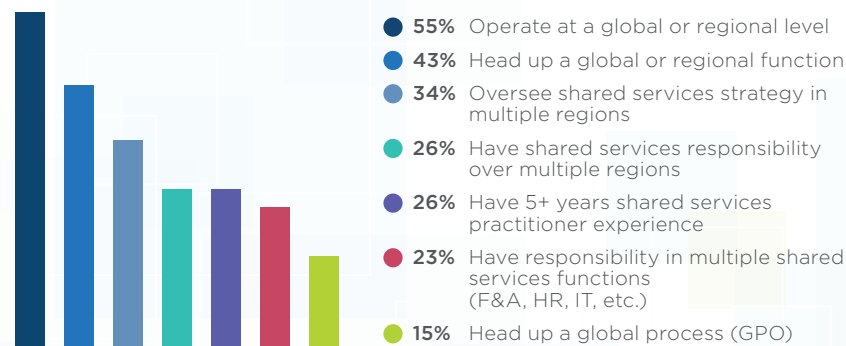
850+ Attendees

100+ Speakers

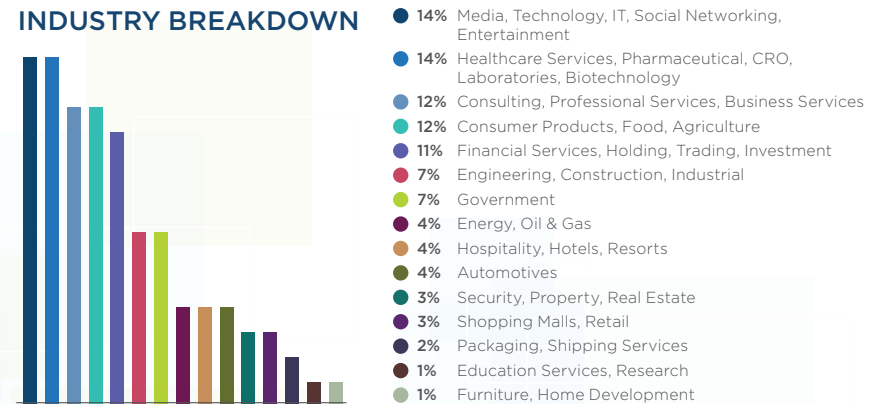
75 Sponsors

70% SSO Practitioners

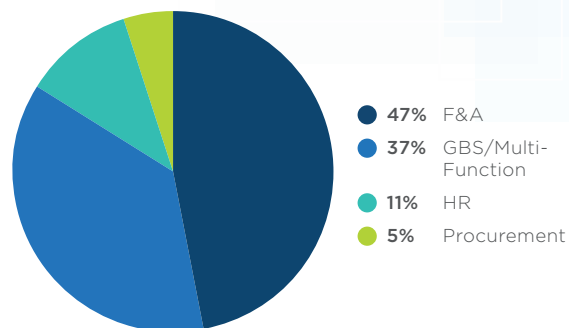
ATTENDEE RESPONSIBILITY & OPERATION



INDUSTRY BREAKDOWN

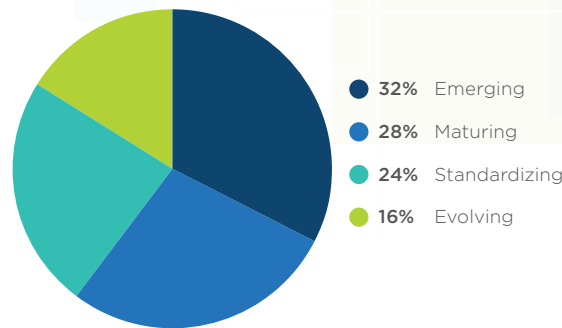


ATTENDEE JOB FUNCTION

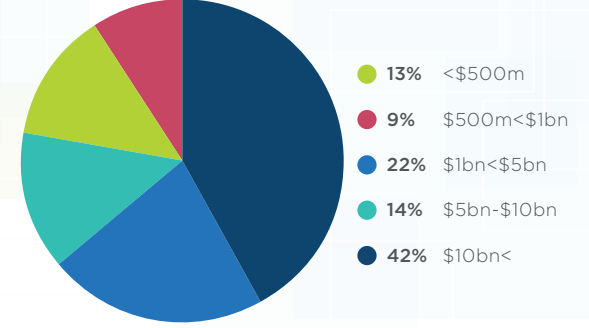


F&A, Multifunction and Procurement functions all saw attendee increases at SSOW between 2015 and 2016.

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
 Nielson
 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 Advisors **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  **Automation Anywhere**
Go to great.



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  **Alsbriidge**
Challenge the Future™

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  **pwc**

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



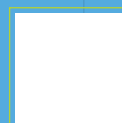
Satish Bengari
Global IT Lead
Cargill



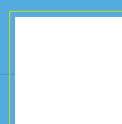
Derek Toone
Managing Director,
RPA Advisory Services
Alsbriidge



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**

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**

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

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

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

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

5:15 **Live Benchmarking Session!**

5:25 **Plenary Session with Vodafone**

6:10 **“Yes, We’re Legal!” 21st Annual SSOW Poolside Reception**

MAIN CONFERENCE DAY TWO • WEDNESDAY, MARCH 8, 2017

8:40 **Opening Remarks**

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

9:30 **Plenary Sessions**

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

11:30 **Interactive Discussion Groups**

1:00 **Networking Lunch**

2:00 **Functional Fast Tracks Begin plus RPA Masterclass**

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

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

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

7:00 **SSOW Exhibit Hall Reception**

MAIN CONFERENCE DAY THREE • THURSDAY, MARCH 9, 2017

9:00 **Opening Remarks**

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

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

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

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

11:40 **Track Sessions Begin**

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

1:50 **Close of Main Conference**

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. This program stands as BASIC as there are no prerequisites or advanced preparation requirements to attend our conferences. “Group Live” delivery method.





"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.

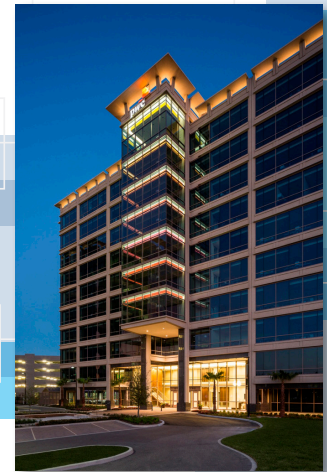
The Tampa office is a high-tech facility that has been designed to foster maximum collaboration across various business services teams on site and in remote locations. During this site tour, PwC will share with you their journey from strategy through execution, from shared services and beyond to RPA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



7:30 Registration Opens for Workshop Participants

8:15

WORKSHOP A	WORKSHOP B	WORKSHOP C	WORKSHOP D
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 follow a company through its 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 Scott Manning Partner  scottmadden MANAGEMENT CONSULTANTS Trey Robinson Partner  scottmadden MANAGEMENT CONSULTANTS Tina Krebs Partner  scottmadden MANAGEMENT CONSULTANTS	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 Principal 	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	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 Derek Toone Managing Director, RPA Advisory Services  ALSBRIDGE Challenge the Future™

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

Are You Utilizing Your Trust-Bank? Driving Awesome Customer Experience in Your SSC

Automation and cost-savings are important but if you aren't pleasing your customer then the whole process will go defunct. Customer satisfaction has become an important KPI for shared services & outsourcing organizations as customers increasingly expect to get more than just consistent services from their SS&O organization. They want "innovation" and "continuous improvement" in the services they receive.

Gerald Yerardi, the winner of an **SSON Excellence Award** on customer services, and his deputy, will share how they achieved amazing CEM through the concept of a trust-bank. They will discuss:

- Driving continuous improvement and developing the capability to please customers again and again
- Developing the customer centric culture throughout the shared services organization
- Making it easy for clients to engage in the solution design, mapping the components of the services catalogue to their specific business requirements
- Designing a winning on-boarding agenda to reduce transition risk

Gerald Yerardi
Associate CIO, Campus Shared Services



Michelle Bautista
Deputy Director Campus
Shared Services IT



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.

Joe Rafter
Former Senior Director
Enterprise Change



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!

SSON understands that while stories from Fortune 500 firms may be exciting, not every shared service center has the budget or resources to compete on this scale. Nevertheless the shared service model can still be an enormously powerful tool within a mid-cap company, enabling agility, cost-savings and a platform for growth and international expansion. We have restricted this specially developed master-class purely to case-studies that can be easily implementable in a company of mid-cap size, helping you to walk away with some quick wins and practical insight.

This in-depth Master Class will be a hybrid of presentations and roundtable discussions so that you get the best of both worlds.

Using Your SSC as a Platform for Company Expansion

- Remaining agile to respond quickly as your company grows
- Workforce planning: Working with business units to establish future plans and supporting them
- Global standardization and governance

Gaining Buy-in on Your Shared Services Initiative

- Establishing quick wins to prove the value of SSC within your business
- Tailoring the model to suit your size
- Bringing together smaller and remote teams

Roundtable discussions:

- Governance and Control
- Working with remote teams and employees
- Pre-requisites and scale for automation: How big do you really need to be?
- Competing with the big brands for talent
- Accessing SSC benefits on a smaller scale

Paul Rodwell

Finance Director - Global Shared Services



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'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
S&P DOW JONES
INDICES

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  AUTOMATION
ANYWHERE
GO BIG OR GO HOME

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

TRACK SESSIONS – MATURITY CURVE GROUPS BEGIN

3:30

MID-CAP COMPANIES

Designed for smaller organizations who want to access SSC benefits

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



Silicon Valley Bank

STAGE 1 – EMERGING

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

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



STAGE 2 – EVOLVING

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

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



Anthony Ippolito
Senior Director Shared Services



STAGE 3 – ADDING VALUE

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

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



GBS EVOLUTIONS FORUM

Hosted by: KPMG

(See page 11 for admission criteria)

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

TRACK SESSIONS – MATURITY CURVE GROUPS CONTINUE

4:10

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
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 – ADDING VALUE

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.

Shashi Mandapaty
VP Procurement Shared
Services

Johnson & Johnson

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

4:50

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



Steve Sharlow
Director Finance and
Accounting and Supply-
Chain Operations



STAGE 1 – EMERGING

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

How can you ensure your 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

Client-led presentation:
Hosted by:



STAGE 2 – EVOLVING

**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 Global
Service Operations



STAGE 3 – 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



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...

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

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 **People, Performance, Management, Systems: Why is Vodafone Urging SSCs to Go Back to Basics?**

Bobby Abraham is on a mission. After 15 years in SSO he's noticed an all too familiar trend - the industry tendency to chase innovation but ignore the fundamentals that made the model a success. Leading one of the world's most impressive and fastest growing SSCs, Bobby noticed that as captives evolved and condensed through automation and productivity gains, the down-side being brushed under the carpet was a huge loss of knowledge, and dilution of purpose. If 20% head-count is lost to productivity and automation and a further 20% to attrition, no one is left to keep the basics in check. As market controls and regulations are only getting stricter, what exactly is the risk? This session explains why as other leaders chase novelty, Vodafone is going back to basics.

Bobby Abraham

Executive Vice President
Global Head of Finance Shared Services



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

Please Join Us to Celebrate our 21st Birthday with a Poolside Reception!



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

Paul Nicolaisen
EVP Global Business Services



Richard Schmidt
VP Finance, Global Shared Service, Procurement, Business Process



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**

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 Controller



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?

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

Viral Chhaya
Director Global Business Services



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 AUTOMATION ANYWHERE
Go for great

Overcoming Challenges Within 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

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

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



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

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 Up 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



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



The Ultimate Guide to Change Management!

- Transparency and communication
- What are the factors needed for a seamless change management project?
- Expect the unexpected: Red-flags and contingency plans
- How can you create quick-wins?

Lance Siemen
Global Leader, Compliance, Audit and Shared Services
DAIMLER

Alexis Hart
Director NAFTA HR Shared Services
DAIMLER

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

Hosted by:



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: Winning strategies to retain your most important asset

- Setting expectations: How much attrition should you plan for?
- Creating links with educational establishments to create a talent pipeline
- Improving retention by recruiting the right people and developing paths to keep them

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

Hosted by: Chazey Partners

RPA a Game Changer - and a Quick Fix

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:



12:55

Networking Lunch: Digital Transformation Lunch and Learn

Hosted by:

Filippo Passerini

Former Group President Global Business Services and CIO



ONLY 30 SPOTS AVAILABLE ON FIRST COME, FIRST-SERVED BASIS

FUNCTIONAL FAST TRACKS

2:00

F&A TRANSFORMATION	HR TRANSFORMATION Hosted by: KPMG	MULTI-FUNCTION TRANSFORMATION	SOURCING AND SUPPLIER RELATIONSHIP MANAGEMENT	P2P MASTERCLASS	RPA MASTERCLASS Hosted by: Automation Anywhere	GBS EVOLUTIONS ROOM Track Owner: Robert Cecil, Partner, KPMG
Dissecting the Finance Process: What to Automate and Where to Add Value 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. Client-led session: Hosted by 	Help Yourself: Designing a Self-Service System That Works for Your Business 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: • Change management within self-service: How can you make the employee experience better • Best-in-breed tech: Which are the right apps, systems to use? • Communicating change to your business in the right way: Engaging all stakeholders Stephanie Giron VP HR and Payroll Operations 	What Can Shared Services Do for Your Career? Leveraging the New Generation of Shared Services to Expand Your Possibilities 20 years ago SSO was a relatively unheard of phenomenon; today it's a business critical hub, providing insight and integrating cutting edge activities. What this means is that SSC professionals are quietly gathering skills their predecessors will not have had. In addition, the unique position of the GBS leader in the business enables them to look over the whole organization from a birds-eye vantage point, and exposes them to a variety of departments and industry knowledge. This session investigates how SSC professionals can leverage these crucial changes to establish the career they want, whether it's a board-level seat, product specialist or something else entirely.	The BPO is Dead... Long Live the BPO 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.	Starbucks Case Study: Achieving 96% invoice automation to create P2P and CEM excellence • Creating alignment across 5.6M invoices per year • Disseminating Starbucks vision from front-end through to P2P operations • Ensuring a seamless transition to paperless to ensure customers remain happy • Taking advantage of working capital gains Cynthia Haug Director of Accounts Payable 	RPA Case-Study 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! 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	Your GBS Journey Unique – Where do you plan to go in your GBS journey? 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

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.

Russell D'Souza
VP Global Financial Services

HANES Brands Inc

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

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

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

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.

Janine Albano
Director Shared Services,
NA Fire & Security



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?

Daniel Stuart
Chief Business Processes Officer



Jean-Claude de Vera
VP GBS

**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



Tony Filippone
SVP, Vendor Management Office

**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 Client Testimonial

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 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



6:30

End of Main Conference Day Two**SSOW EXHIBIT HALL RECEPTION**

8:30 **Coffee & Registration**

9:00 **SSON Day Three Opening Remarks**

Heather King
Portfolio Head



9:05 **Chairman's Day Three Opening Remarks**

Brad DeMent
Partner



9:10 **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

Vijay Rao
Global HR Operations Leader



Philip Woodburn
VP, FiSS



Tony Bender
CIO and VP Global Business Services



9:50 **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



10:20

LIVE BENCHMARKING PART THREE!

Comparing Your Journey against the North American Shared Services & Outsourcing Landscape

Integrating proprietary data from SSON's 100K+ global membership and publically sourced data, SSON's Global Analytics Centre Dart Institute has produced a visual analytics workbook of North American Shared Services & Outsourcing data. This session will interrogate the data live as you navigate the landscape of shared services & outsourcing in the US, with detailed findings on location, function, maturity, industry sector and city-level insights into graduate talent pools and average starting salaries across emerging and more saturated hotspots.

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

Jean-Claude de Vera
VP, GBS


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**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!

Mike Koehler
VP, HR


OPERATIONAL BEST
PRACTICE**Policies, Metrics and
Accountability: Good
Governance and Global
Process Ownership**

- Establishing new reporting lines and accountability for performance delivery
- Using performance metrics to promote change and get stakeholder buy-in
- Measuring cost/benefit in the GPO implementation
- Tracking metrics: Using performance scorecards and communicating results to stakeholders
- Re-drawing reporting lines

Jessica Hill-Johnson
Senior Director Global Shared
Accounting Operations


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

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

	FINANCE PROCESS EXCELLENCE	DATA ANALYTICS AND DIGITIZATION	CULTURE CREATION AND CUSTOMER EXPERIENCE	TALENT MANAGEMENT AND HR SERVICES	OPERATIONAL BEST PRACTICE
12:10	Panel Discussion: Applying Design Thinking to your end-to-end process The design thinking process is an approach to dealing with difficult, multidimensional problems by considering all ideas and constraints as well as individuals and groups affected by the problem. In the past, design activities mostly occurred fairly downstream in the product development process, but now it is being used in all kinds of human-centric and business processes, to achieve astounding results Michael Morack SVP Global Finance and IT Operations 	Can You See the Tree for the Woods? Essential, Interactive Data Visualization There is no point having the data if you can't present it in the right way to the stakeholders that need it most. So, how should data be presented? Strategies to be discussed: • Using data visualization to ensure your leadership team gets the big picture • Integrating tools to assist in data visualization • Establishing how your stakeholders would prefer to view their data • Identifying areas for improvement or attention • Creating a 'war-room' using interactive data analytics and plotting your plan of attack	Digitization and CEM: Best of friends or Mortal Enemies? In the race for continued productivity and automation, customer experience risks becoming the casualty. How do we ensure that customer engagement remains a priority as we implement self-service, automation and bring in value-added services? • Involving your customers in the change management project • Communication, communication, communication: Demonstrating the value of your digitization project • Making digitization work for you: Apps, mobile devices and social media that can help with CEM	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 	The Race for Good Governance! The relentless chase for productivity and rapid automation puts strain on the governance structure. In this session we ask, what is good governance and which KPIs, processes and reporting lines do you need to achieve it and thereby realize the SSCs greatest value? Reserved for: Mauro Echeverri Head of Finance and Operations 
12:45	Shared Services Excellence Awards Winners Panel Discussion - What Can You Learn from the Best of the Best?				
1:30	"The Winner Takes it All" Prize Giveaway				
1:45	Close of Conference				
1:55	Closing Lunch				

Shared Services and Outsourcing Excellence Awards

The North American Shared Services & Outsourcing Week plays host to the Shared Services and Outsourcing Excellence Awards, 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:

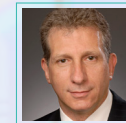
Winner: Unisys
Runner Up: MasterCard

PRACTITIONER OF THE YEAR:

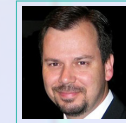
Craig McKenny, Managing Director, Head of Global Purchase to Pay Operations, Enterprise Supply Chain, Citi



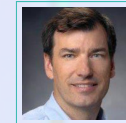
Judges:



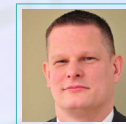
Ed Hansen
Partner
Morgan Lewis



Michael Garvey
Industry Expert



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



Marc Simon
Senior Director
Global Business
Services
Dell



For more information and information on how to apply, visit awards.shareservicesweek.com

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 21st 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
online Shared Services community

www.sharedintelligence.com



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

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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.



ScottMadden
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.



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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), 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. EdgeVerve Systems (www.edgeverve.com), a wholly-owned subsidiary of Infosys, develops innovative software products and offers them on premise or as cloud-hosted business platforms.



Workfusion
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
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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.



UHY Advisors
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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
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thomsonreuters.com

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.



WNS (Holdings) Limited
www.wns.com

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

WNS delivers an entire spectrum of BPM services such as finance & accounting, customer care, technology solutions, research & analytics, procurement & sourcing, professional services, human resource outsourcing solutions and industry-specific back-office and front-office processes.

WNS is a pioneer in adopting an industry-specific approach to business process management solutions. WNS's solutions are rooted in a comprehensive understanding of the business issues in each of the key industry verticals as they relate to revenue growth, operational efficiency, product / market strategy, customer experience and a range of risk management challenges.

With a strong track record of delivering business value to over 200 clients and across 600 processes, WNS is a trusted partner for clients across industries. We drive profitability and growth into our clients' businesses with an efficient interplay of Technology, Analytics and Process Solutions.

WNS operates through 33 delivery centers spread across 10 countries.



Alsbridge
www.alsbridge.com

Alsbridge provides world-class benchmarking, shared services and outsourcing consulting for the CIO, CFO and CPO. Alsbridge clients utilize the most cost-effective and value-add sources globally for IT infrastructure services, hardware and maintenance, network services, software, application support and development, business processes and cloud services. Our commitment to delivering value to clients has made Alsbridge a distinguished member of the Inc. 500 fastest growing privately held companies in America.



Concur
Website: 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.



Lexmark
www.lexmark.com

Kofax, Perceptive Software and ReadSoft have come together under one Lexmark brand to offer a level of financial process automation no other organization can match. It's a powerful combination of capture, content, process and search technology that connects your core systems with all the documents, processes and supporting information that you couldn't track before. You gain near real-time visibility into the status of your organization's finance and accounting operations as you automate accounts payable, procure to pay, order to cash and every process in between.



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.



Redwood
www.Redwood.com/RoboClose

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.



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
www.blackline.com

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.



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.



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.

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SCAN·ONE

Scan-One
www.scan-one.com

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Our very unique Business Process Engine (BPE) was designed to make workflow work - our workflow, your workflow, or even their workflow. No hardware, no software, no IT, no capital investment - immediate savings.



OnBase by Hyland
www.onbase.com

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Basware
Website: 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

HTC Global Services Inc. a leading ITO & 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.

HTC BPO offers wide range of shared services such as Finance & Accounting, Statutory & Internal Reporting,

Trade Regulation Compliance, Helpdesk Services and Mailbox management services.

These services are delivered from within US or from the delivery centers located in India, Malaysia & Singapore.



Softomotive
www.softomotive.com

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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.



finHealth
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Website: www.abizcon.com

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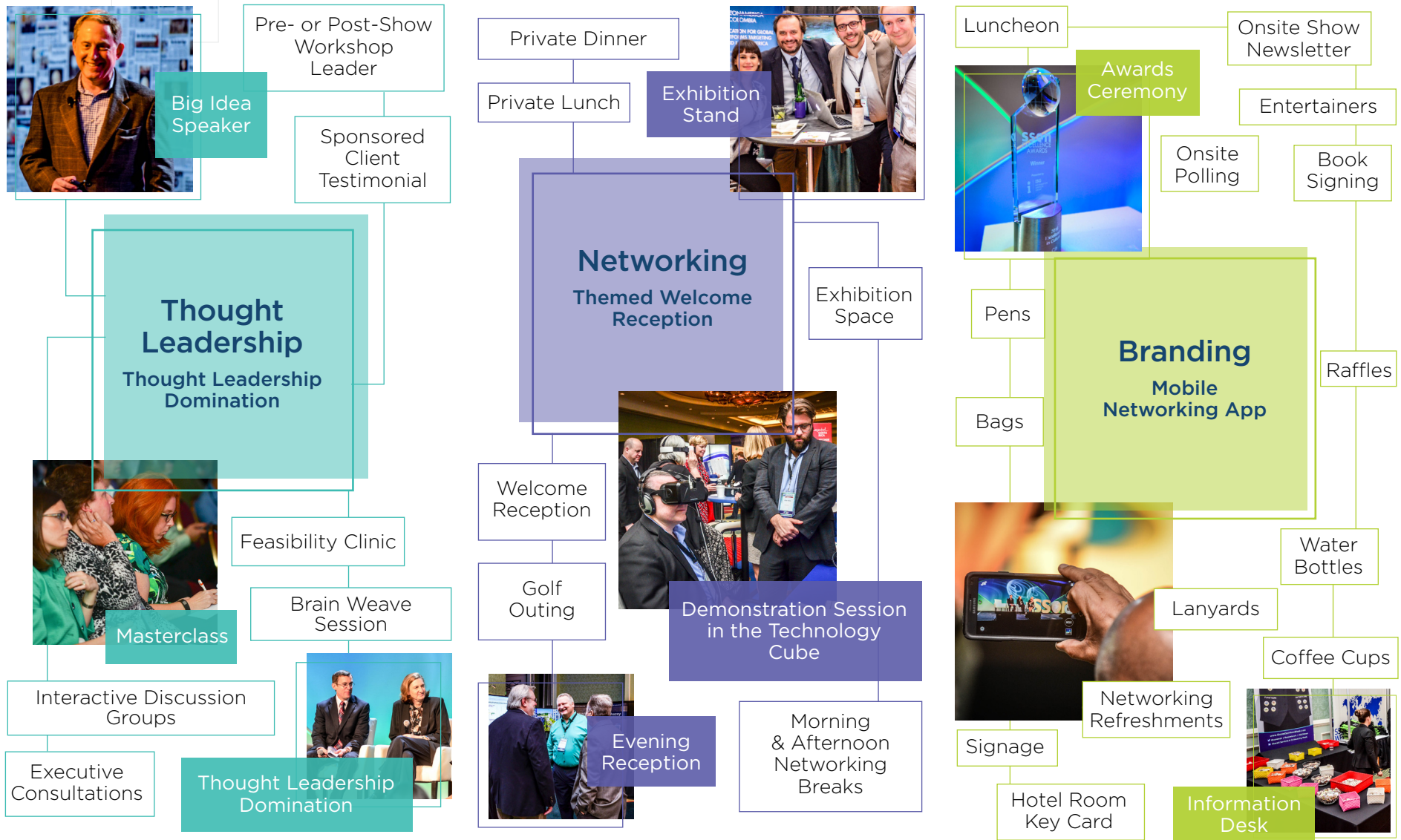


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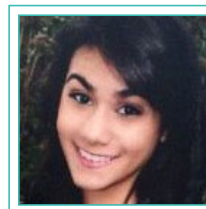
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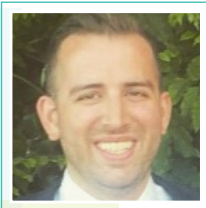
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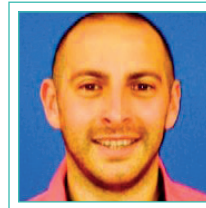
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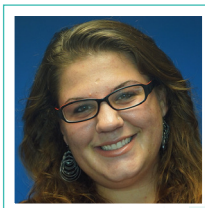
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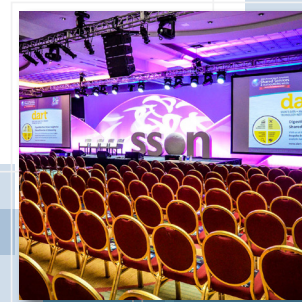
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