

# 14th HR Shared Services & Outsourcing Summit™



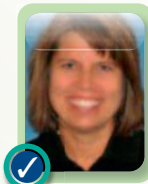
October 15-18, 2013 • Disney's Contemporary Convention Center, Orlando, FL

## HR Service Delivery Excellence: Transforming Processes, Changing Culture and Maximizing Performance to Become the Provider of Choice

### Meet and Exchange Knowledge with Industry Experts:



**Craig Gomez**  
Chief People Officer  
Chobani



**Mary Schnackenberg**  
Director, Human Resources  
Employee Services  
Novo Nordisk Inc.



**Kym Burke**  
Vice President,  
HRConnect  
Iron Mountain



**Tadhg Bourke**  
Head of HR Operations  
Google Inc

### Customizable Learning Based on Your Needs

#### Track (A) Planning & Implementation

Gain the tools and knowledge you need to **transform** your HR service delivery model and become a true partner to the business

#### Track (B) Continuous Improvement & Expansion

Learn how you can modify existing HR Service delivery models to increase efficiency and effectiveness

### New Formats Based on YOUR Feedback!

#### Knowledge Sharing Sessions

Exchange best practices and problem solve with like-minded peers

#### Continuous Learning & Capability Development

Interactive think tanks that explore the industry's most pressing challenges

### Plus! *Coca-Cola* Site Tour:

Tuesday, October 15, 2013  
See inside Coca-Cola's cutting edge Shared Services Center and discover how this world-renowned organization leverages innovative solutions and ground-breaking strategies to support over 70,000 employees.

Sponsored by:



14th

# HR Shared Services & Outsourcing Summit™



WELCOME

AGENDA AT A GLANCE

WORKSHOPS

DAY ONE

DAY TWO

SPONSORS

REGISTRATION

October 15-18, 2013 • Disney's Contemporary Convention Center, Orlando, FL

## Welcome to the most comprehensive and trusted HR shared services event!

Does your HR organization meet the needs and expectations of the business? At the 14th HR Shared Services and Outsourcing Summit, gain the tools and knowledge you need not to only cut costs, but maximize the effectiveness of HR related services and transform your HR organization into a strategic heavyweight.

Whether you're in the early stages of HR transformation or looking to revamp your current delivery model, you'll have the opportunity to exchange lessons learned and solutions with corporate leaders and industry experts this October 16-18 in Orlando, FL. In addition to the candid, real-life case study presentations we're known for, we'll also be incorporating discussion groups and expert panels to dig deeper into the key issues and obstacles associated with the design and continuous improvement of HR shared services delivery model.

### New for October 2013:

- Exchange best practices and benchmark against peers in our Knowledge Sharing Sessions
- Expanded and customizable learning with two breakout tracks: Track A Planning & Implementation, and Track B Continuous Improvement & Expansion
- Gain in-depth insight into HR shared services best practices at our interactive Workshops
- Connect and brainstorm with other shared services professionals at structured networking events and Continuous Learning & Capability Development sessions
- Get a behind-the-scenes look into Coca-Cola Refreshment's pioneering HR shared services operations

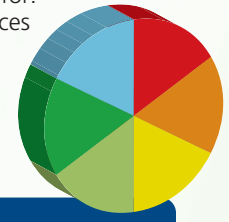
We look forward to seeing you in October!

**Elizabeth Mixson**  
Content Director  
HR Shared Services and Outsourcing IQ  
Elizabeth.Mixson@iqpc.com

## Who Should Attend this Year:

Vice Presidents, Directors, and Managers responsible for:

- Global Shared Services
- HR Service Delivery
- HR Metrics
- HR Transformation
- HR Operations
- HR Technology



## HRCI and Credits



This Program has been approved for recertification credit hours through the Human Resource Certification Institute (HRCI). For more information visit [www.hrci.org](http://www.hrci.org)

## Sponsorship and Exhibition Opportunities

Sponsorships and exhibits are excellent opportunities for your company to showcase its products and services to high level, targeted decision makers attending the HR Shared Services & Outsourcing Summit.

For more information on sponsoring or exhibiting please contact **Simon Copcutt at 1-212-885-2771 or [Simon.Copcutt@iqpc.com](mailto:Simon.Copcutt@iqpc.com)**.

## Connect with Your Community



## ABOUT THE ORGANIZER



**Human Resources IQ** is one of the world's largest and fastest growing communities of Human Resources Professionals. We provide industry professionals and senior business decision makers with exclusive information, news and trends through Articles, Podcasts, Webinars, Online and Live Conferences. We are a subsidiary of IQPC, one of the world's largest, fastest growing conference/trade show organizers. [www.humanresourcesiq.com](http://www.humanresourcesiq.com)

# Agenda at a Glance



October  
15-18, 2013

WELCOME

AGENDA AT A GLANCE

WORKSHOPS

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## COCA COLA REFRESHMENTS SITE TOUR

Tuesday, October 15, 2013 • 12:30-5:30 PM

## PRE-CONFERENCE WORKSHOP DAY

Wednesday October 16, 2013

- 7:30 Registration for all Workshops & Breakfast
- 8:00 **Workshop A:** Designing, Promoting and Leveraging Employee Self-Service Web Portals
- 10:15 **Workshop B:** Process Selection and Standardization for HR Shared Services Centers
- 12:30 **Workshop C:** Change Management, and the Stages of Grief
- 2:45 **Workshop D:** Building a Road Map and Establishing a Vision for Your HR Transformation

## MAIN CONFERENCE DAY ONE

Thursday October 17, 2013

- 7:00 Registration & Coffee
- 7:45 Chairman's Welcome
- 8:00 **KEYNOTE:** Johnson & Johnson's Global Transformation in Shared Services
- 8:45 **HR Operations - The Google Model**
- 9:30 **Looking Ahead: Foresee and Address Future Needs through Forward Looking Analytics**
- 10:15 **Morning Networking Break**

Breakout sessions begin. You're welcome to move between tracks.

### TRACK A: Planning & Implementation

### TRACK B: Continuous Improvement and Globalization

- |   |  |
|---|--|
| 11:00 <b>The Future of HR is Now: Leveraging the Shared Services Model to Drive HR's Strategic Value</b>                              | <b>You Have Survived Launch, Now What?</b>   |
| 11:45 <b>KNOWLEDGE SHARING SESSION: Leading Change so it Sticks</b>   | <b>KNOWLEDGE SHARING SESSION: Developing a Structured and Ongoing Continuous Improvement Initiative</b>    |
| 12:15 <b>Networking Luncheon</b>  |  |
| 1:30 <b>Navigating the Perfect Storm</b>  | <b>Translating Lean Concepts into HR Strategies</b>  |
| 2:00 <b>CONTINUOUS LEARNING &amp; CAPABILITY DEVELOPMENT: How to Choose the Right Metrics the Drive Performance and Effectiveness</b> | <b>CONTINUOUS LEARNING &amp; CAPABILITY DEVELOPMENT: Engaging HRSS Employees and Building Career Paths</b> |
| 3:00 <b>Afternoon Networking Break</b>  |  |
| 3:45 <b>HR Shared Services: Enabling Business Transformation</b>  |  |
| 4:30 <b>HR Business Partners and Shared Services: Ensuring Alignment and Partnership to Support the Business</b>                      |  |
| 5:15 <b>End of Conference Day One</b>   |  |

## MAIN CONFERENCE DAY TWO

Friday October 18, 2013

- 7:00 Registration & Coffee
- 7:45 Chairman's Recap
- 8:00 **Leveraging Content and Knowledge Management Systems to Achieve Service Excellence**
- 8:45 **'Cloudsourcing' as Driver of HR Innovation and Transformation**
- 9:30 **Panel: What CEOs Want to Hear from HRSSO**
- 10:15 **Morning Networking Break**

Breakout sessions begin. You're welcome to move between tracks.

### TRACK A: Planning & Implementation

### TRACK B: Continuous Improvement and Globalization

- |   |   |
|---|---|
| 11:00 <b>Redefining Employee Self-Service: The story of Ivy, Intel's Virtual HR Agent</b> | <b>Developing a Coordinated Strategy for Global Expansion</b> |
| 11:45 <b>Looking Back: Lessons Learned from Past Implementation</b>                       | <b>Surviving the HR Content Avalanche</b>                     |
| 12:30 <b>Networking Luncheon</b>  |   |
| 1:30 <b>KNOWLEDGE SHARING SESSION: Partnering with IT to Deploy Effective Solutions</b>   |   |
| 2:45 <b>Is it Time for Autopilot?</b>   |   |



## 12:30-5:30 PM Coca Cola Refreshments Site Tour

In 2009, Coca-Cola Enterprises expanded its Shared Services Center in Brandon, Florida to include an HR Service Center. Over the past four years, the SSC has achieved operating objectives and exceeded targeted economic benefits as well as added scope and services, now operating under The Coca-Cola Company. The HR Service Center currently has over 200 employees and expects to continue evolving services over the next several years. In this interactive site tour see how coca-cola

has continued to integrate within the company and improve processes. Hear about their recent acquisition, restructuring and divestiture activity as well as the improvements to the operational cycle time resolution of the service center over the past year.

Site Tour Leader: **Karla Younger**, VP, HR Services & HRIS, **Coca-Cola Refreshments**

# Pre-Conference Workshops



## 7:30 Registration for all Workshops & Breakfast

### A 8:00 AM Designing, Promoting and Leverage Employee Self-Service Portals

The goal of the next-generation HR Shared Services model is to improve the quality of HR service delivery and achieve efficiencies while reducing the overall cost. Core to achieving this goal is the application of new technologies – some of which were not available even as recently as five years ago, including chat, mobile and other social tools.

But for true high yield shared services, you must focus on personalized employee and manager self-service. HR shared services is about efficiency – how quickly and easily can employees answer their own questions so HR professionals who have more strategic assignments do not have to. A high percentage of employee and manager questions and actions solved through self-service means a powerful return on investment and greater employee satisfaction.

In this workshop, learn from practitioner Karen Francks, Manager, HR Services, Pepco Holdings, and Kelvin Lovely, Business Process Consultant, Infor how to leverage these four keys to self-service portal success:

1. Organization: for efficient content management structure
2. Contextualization: to connect related information and transactions
3. Personalization: filtered content for the users specific needs.
4. Collaboration: easy access to assistance from shared services

**Karen Francks**, Manager, HR Services, **Pepco Holdings**

**Kelvin Lovely**, Business Process Consultant, **Infor**



### B 10:15 AM Process Selection and Standardization for HR Shared Services Centers

Replace Session with: Two objectives of most HR SSC implementations are to lower costs and improve efficiency, which any consultant will tell you, requires standardizing and automating processes.

But how do you approach selecting which processes you would like to use and begin standardizing them? In this session, you can learn from the experience of a seasoned industry veteran how to select, standardize and automate HR service delivery processes that enable you to accomplish your objectives, while keeping employee satisfaction high.

#### What You Will Learn:

- How to define process families and sub-families and build a selection process
- The three phases of process standardization

- Process mapping, simplifying and systematizing
- How to use technology to automate processes and measure their success

#### Benefits of Attending:

- Learning how to approach each phase of process standardization and accomplish the related tasks in a workshop environment.
- Identifying the tools, data and team leaders needed to select, standardize, and automate HR processes.
- Establishing the timeline, goals and budget considerations to successfully complete your process selection and standardization initiative.

**Dwane Lay**, Head of HR Process Design, **Dovetail Software**



### C 12:30 PM Expanding Tier Zero: Taking your Employee Portal to the Next Level through Smart Forms, and Automated Transactions

The Self Service Portal is a major part of most HR Shared Service Technology Initiatives. When most practitioners think of Self Service, they think of access personalized answers from a knowledgebase. And they may also think of the ability to ask questions to HR directly through the portal. Both of these can be big advantages for both the employees and the HR Service Center, but for forward-thinking organizations, that's just the tip of the iceberg.

This workshop will explore how one organization has expanded the capabilities of their Self Service portal, and thereby expanded the advantages of Tier Zero.

**Joe**



### D 2:45 PM Building a Road Map and Establishing a Vision for Your HR Transformation

A recent Conference Board CEO survey determined that human capital is the number one challenge on the minds of CEOs (more than 10% higher than "operational excellence"). This leadership trend is changing the direction of HR in numerous organizations. The term "HR transformation" is sweeping through countless magazines, blogs, internet sites, and other HR venues, but what does it really mean? ScottMadden will explore what is driving HR transformation across the globe and then discuss the various models seen in HR transformations. We will then switch gears and outline how to build a road map, define the project infrastructure, and develop an implementation plan for achieving your HR transformation.

- A successful methodology for designing, building, and launching a transformed HR organization
- Details on individual work streams that are critical to a successful transformation
- Ideal team structures
- The importance of change management and internal customer engagement
- The do's and don'ts of an effective design, build, and launch of a transformed HR organization
- Metrics and leading practices that will help you design and build your new operating model

#### What You Will Learn:

- Elements driving an HR transformation
- Various HR transformation options

**Scott Manning**, Partner and Corporate & Shared Services Practice Lead, **ScottMadden, Inc.**

**Tina Krebs**, Partner, **ScottMadden, Inc.**





7:00 **Registration & Coffee**

7:45 **Chairman's Welcome**

8:00 **KEYNOTE: Johnson & Johnson's Global Transformation in Shared Services**

In 2010, Johnson & Johnson launched the largest shared services transformation initiative in the US within the last 5 years by overhauling their delivery model to create an innovative and comprehensive shared services capability. Supported by effective Change Management, Johnson & Johnson successfully launched multiple shared service centers in April 2013, realizing tangible benefits that include greater control of transactional process, improved functional partnership and elevation of talent, streamlined and improved service, reduced cycle times, and better compliance. Johnson & Johnson engaged KPMG to design, build, and implement a shared services delivery model

covering global markets across North America, Europe/Middle East/Africa, Latin America, and Asia Pacific. This session will highlight critical success factors in strategic visioning and operating model development; detailed process documentation and enabling technology; and organization design, staffing, and governance.

**Robin Rasmussen**  
Partner, HR Shared Services & Outsourcing  
**KPMG**

**Felicia Rinehimer**  
Director, Human Resource Operations  
**Johnson & Johnson**

**Danny Marsh**  
Regional Director, HR Services - North America  
**Johnson & Johnson**

8:45 **HR Operations - The Google Model**

This session approaches HR logistics as a supply chain. Over the past 6 years, Google has experienced double digit headcount growth taking it from a small start up to a global organization operating in over 75 countries. This session will cover the science behind how Google has

managed to scale it's workforce and build out its HR operations infrastructure that is both globally consistent and locally relevant.

**Tadhg Bourke**  
Head of HR Operations  
**Google Inc**

9:30 **Be the Change You Want to See: Real Successes and Lessons to Drive Adoption**

Your service delivery model is built on leveraging work to managers and employees, yet your expectations have not met your reality in your second or third year of operations. Or, you're just moving to shared services and are worried about how to get leaders, managers and employees (don't forget HR!) to adhere to the new model. Better yet, you think that change "just takes time."

services continue to evolve and expand with a focus on continued improvement in value, process, capability and simplicity in the eyes of their customers – the workforce. Hear their successes and lessons learned about how to convert enemies to allies, leverage existing priorities and prepare a culture to embrace and advocate change. Be sure to come with questions – and a few stories of your own to share!

Iron Mountain moved from paper-based, decentralized (localized) HR with almost no employee or manager self-service to cloud-based, integrated, direct access North American delivery in just over one year. Now registering 100% manager and 85% employee access, their

**Kym Burke**  
Vice President, HRConnect  
**Iron Mountain**

10:15 **Morning Networking Break**

Breakout sessions begin. You're welcome to move between tracks.

**TRACK A:  
Planning & Implementation**

*Designed specifically to cater towards the challenges, benchmarks and solutions for shared services executives in the planning or launch phases of HR transformation*

**TRACK B: Continuous Improvement and Globalization**

*This track has been designed specifically to cater towards the challenges, benchmarks and solutions for mature and established HR shared services operations*

11:00 **Best Practices with Shared Services Technology**

Hear from three very different companies about the lessons they learned, and the Best Practices they've established while implementing and using HR Shared Services technology solutions in their Service centers.

This open roundtable discussion will address a number of questions including:

- What were your organization's primary business goals for implementing HR Shared Services technology?
- What did you learn in the process, and how are you applying those lessons as the implementation grows and evolves?
- What are some of your present and planned initiatives for building upon, and expanding the use of the HR Shared Services technology, to drive greater results through your service centers, and for your employees?

The objective of this session is to reveal thoughts, ideas and Best Practices that will be of value to any organization that has, or plans to implement an HR Shared Services technology solution.

**Jim Watson**  
Product Consultant  
**Neocase Software**

**Sue Swayhoover**  
Director, HR Shared Services  
**Sanofi**

**Kimberly Rose**  
Senior Global Project Manager  
**EMD - Affiliates of Merck KGaA**

**Amy Clark**  
Director, Employee Relations  
**Sallie Mae**

**Dan Walsh**  
Director of US Operations  
**Neocase Software**

**Scott Spence**  
**Sallie Mae**

**You Have Survived Launch, Now What? Driving a Continuous Improvement Culture within Your Employee Service Center for Sustained Success**

Designing, launching, and implementing an employee service center is a monumental undertaking for even the most experienced human resources leader. But surviving the launch is just the first step in a successful transformation. Establishing and fostering a continuous improvement process and culture within the employee service center drives the improvement and innovation that will ensure continued success inside and outside of human resources. Metrics, data analysis, quality control, customer engagement, handling of issues, and promoting successes are critical elements of this continuous improvement process. However, there is also an improvement mentality that must be developed and nurtured among the employee service center staff. Thermo Fisher Scientific and ScottMadden will discuss the foundations of a successful continuous improvement process and how to leverage the outcomes for the future success of your employee service center.

What you will learn:

- The importance of continuous improvement in driving the success of your employee service center after initial launch
- Critical elements of an effective continuous improvement process
- Typical metrics, measures, and data analysis
- Roles and responsibilities for continuous improvement within the employee service center
- Typical challenges from internal and external customers and how continuous improvement can help mitigate

**Mark White**  
Vice President Human Resources Operations  
**Thermo Fisher Scientific**

**Molly Donofrio**  
Director  
**ScottMadden, Inc.**

11:45 **KNOWLEDGE SHARING SESSION: Leading Change So it Sticks: Building a Change Management Approach for HR Shared Services Implementation**

Building a technical business case for HR Shared Services is an important first step, but managing the hearts and minds of stakeholders will determine the project's sustainable success. In this session, we will discuss a change framework and set of tools that can be readily applied to large-scale change efforts and help improve adoption, productivity, and engagement. This session is ideal for those at the beginning phase or for those who are facing challenges as they implement a shared services model. Exchange best practices related to change management with peers and take home:

- A practical change framework to use during complex change
- Essential and straightforward change management tools to increase stakeholder engagement
- A deeper understanding of each phase of managing change

**Daniel Stewart**  
Director, Organizational Change Management  
**Aurora Health Care**

**KNOWLEDGE SHARING SESSION: Developing a Structured and Ongoing Continuous Improvement Initiative**

Continuous Improvement ideology allows business leaders to identify performance gaps and implement solutions in a timely and effective manner. In this extended session, attendees will have the opportunity to discuss and exchange strategies for developing an effective and robust continuous improvement strategy. Exchange best practices with like-minded peers related to:

- Creating a culture of continuous improvement
- Assessing the effectiveness of your existing metrics and reporting tools
- Designing a process optimization strategy that meets your organization's unique business needs.

**Kym Burke**  
Vice President, HRConnect  
**Iron Mountain**

**Kathleen Reagan**  
Director, HRConnect  
**Iron Mountain**

12:15 **Networking Luncheon**

1:30 **Navigating the Perfect Storm: Changes, Impacts and Outcomes of a Large Organizational Merger & Rapid System Consolidation**

Exelon Corporation is the nation's leading competitive energy provider, with approximately 26,000 employees and a family of companies that participate in every stage of the energy business, from generation to competitive energy sales to transmission to delivery. In this session, you'll learn how the company's HR service center supported the organizational transition between Exelon and Constellation Energy while working through its own stages of maturity in the process. Topics to be discussed include:

- Supporting our HR client process and change management priorities
- Maintaining an eye on daily operations during the peak demand and while experiencing attrition and staff expansion
- Addressing learning curves, expectation gaps and a culture of rapid issue escalation

**Jackie O'Connor**  
Director HR Technology and Support Services  
**Exelon**

**Translating Lean Concepts into HR Strategies**

cLEAN is a global mindset at Novo Nordisk. It's the common language that we speak to break down barriers and to drive simple improvements that make a big impact. In an area of the business where we are constantly trying to "do more with less", it made sense to apply the LEAN principles to the Employee Services function. This presentation will provide an overview of how we built a culture of LEAN within our department, the projects we implemented, and the success we achieved.

- The "c" in cLEAN at Novo Nordisk means "current", not "complex". LEAN principles can be applied with a common sense approach that everyone can understand.
- You can demonstrate success if you know where you are and where you want to go. Use metrics to determine your pain points, and then to tell your story.
- Develop a plan to sustain success. What gets measured gets done. At Novo Nordisk, we do this through weekly cLEAN Board meetings and a culture that rewards process improvement.

**Mary Schnackenberg**  
Director, Human Resources Employee Services  
**Novo Nordisk Inc.**

**Laura Brock**  
Senior Business Support Coordinator  
**Novo Nordisk**

3:00 **Afternoon Networking Break**

3:45 **HR Shared Services: Enabling Business Transformation**

Joe Ales from Thales will be describing how the shared services infrastructure enabled Thales to launch and deliver a change program to align the terms and conditions of employment in the UK.

**Joe Ales**  
Director, HR Operations  
**Thales**

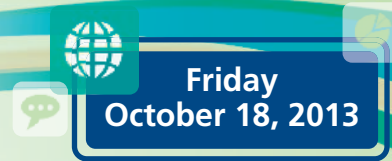
4:30 **HR Business Partners and Shared Services: Ensuring Alignment and Partnership to Support the Business**

As companies continue to transform their HR support models, partnership across HR functions becomes even more critical to success. In this session, you will learn how Adobe transformed its shared services model with a focus on the following:

- Aligning HR support as the business scales
- Partnership across shared services, HR business partners and Centers of Excellence
- Measurement/metrics that provide insight back to the business

5:15 **End of Conference Day One**

# Main Conference Day Two



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## 7:00 Registration & Coffee

## 7:45 Chairman's Recap

## 8:00 Leveraging HR Case Management for Next Generation HR Service Delivery

HR Case Management solutions today are mainly used to capture employees' interactions and transport them through the Shared Services Tier structures, report on a 'how many, how much' basis for cost management and resource planning, and provide historical data and benchmarking. However, as case management solutions become more intuitive and less data dependent, iterative reporting is becoming a critical element in achieving HR service delivery excellence and accomplishing your Shared Services Center's business objectives.

This session covers how to leverage your HR Case Management

solution to go beyond capturing and storing information and providing 'look back' reports. Through case studies and real-world examples, you will learn how to use the information your solution provides for future projections, which offer significant business advantages, such as litigation avoidance, employee retention, legislation compliance and improved employee satisfaction. This is the future of HR service delivery.

### Donna Nelson

Shared Services Strategy and Deployment Consultant  
Formerly of Ann Taylor

## 8:45 'Cloudsourcing' as Driver of HR Innovation and Transformation: The Answer to 6 Technological and Economic Challenges

Innovation and transformation in Human Resources (HR) have been considerably accelerated by the availability of new, innovative solutions such as HR outsourcing and cloud-based HR technologies. 'Cloudsourcing' – the combination of HR outsourcing and cloud technology – will even more accelerate this evolution of HR towards a more strategic role. The evolution of technology in HR is still underway and the end is not there yet. Cloudsourcing combines the above two trends - providing HR outsourcing services using cloud technology – and herewith provides an answer to the current technological and economic developments and challenges. This

session will distinguish several technological and economic challenges tackled by cloudsourcing:

- The democratization of technology
- The 'consumerization' of HR
- The rise of 'Big Data'
- A Shrinking workforce
- Globalization & Increased Economic Pressures

### Keith Strodman

President, North America  
NorthgateArinso (NGA)



## 9:30 Human Resources Shared Services Benchmarking Study – How Do you Compare?

Organizations today face challenges for their HR Shared Services to be as efficient and effective as possible, while delivering the "expected" level of service to customers. In this session, ScottMadden will present highlights from its second annual HR Shared Services Benchmarking Study. Designed by ScottMadden and facilitated by AQPC, this study provides reliable, comparative benchmarking data that you can use to validate your operation's performance to senior leadership and improve the efficiency and effectiveness of your HR Shared Services. See how your organization compares and where the industry is headed in this data-rich presentation.

In this session, you will learn about:

- Performance metrics
- Scope and sourcing of services
- Staffing models and tiered approaches
- Service center costs
- Technologies and channels of contact employed

### Scott Manning

Partner  
ScottMadden, Inc.

### Tina Krebs

Partner  
ScottMadden, Inc.

## 10:15 Morning Networking Break

Breakout sessions begin. You're welcome to move between tracks.

### TRACK A: Planning & Implementation

## 11:00 Redefining Employee Self-Service: The story of Ivy, Intel's Virtual HR Agent

In this case study from Intel, the world's largest semiconductor chip maker, attendees will learn about a trailblazing technology for employee support and its evolution to become a highly effective and efficient channel.

- Why a virtual agent for employee support
- Leveraging user experience and feedback to drive innovation and ROI
- Successes, challenges and considerations in implementing

### Tobi Crabtree

Ivy Product Manager  
Intel

### Cindi Lawrence

Global Workforce Mobility Service Line Manager  
Intel Corporation

### TRACK B: Continuous Improvement and Globalization

## Developing a Coordinated Strategy for Global Expansion

Explore common obstacles in implementing and managing shared service operations on a global scale such as varying labor laws, technical challenges, and cultural differences. Discuss best practices regarding developing the most consistent and streamlined processes possible to cater to a global organization's business needs.

- Discuss overcoming regulatory obstacles
- Explore insourcing vs. outsourcing options in a global market
- Tools for communicating vital information globally

**TRACK A: Planning & Implementation**

**TRACK B: Continuous Improvement and Globalization**

**11:45 Looking Back: Lessons Learned from Past Implementation**  
 This candid case study presentation outlines common challenges companies face when undergoing an HR transformation and what you can do to overcome them. Avoid the mistakes of others and learn best practices in HRSS project planning.

- Overcoming resource and technological constraints
- Building a workable plan
- Effective change management and communication tools

**Gayle Mateer**  
 Sr. Director - HR Delivery Solutions  
**eBay Inc**

**Surviving the HR Content Avalanche**  
 Ensuring quality and accessible HR related content is one of the key deliverables of any HR department. In this session, learn best practices in creating, collecting and organizing HR related content to maximize business impact and increase customer satisfaction.

- Assessing the effectiveness of HR related content
- Discover new content and knowledge management solutions
- Exploring the relationship between content and compliance

**12:30 Networking Luncheon**

**1:30 KNOWLEDGE SHARING SESSION: Engaging HRSS Employees and Building Career Paths**  
 Retaining and engaging talent is one of the most pervasive and persistent challenges corporate leaders face. In this session learn best practices in developing and retaining HR shared services talent. This session includes a case study presentation and discussion surrounding:

- Career and succession planning for HR shared services talent
- Developing rewards and recognition programs that drive employee engagement
- Assessing and maximizing employee performance and productivity

**Tanya Lulloff**  
 Director – HR Shared Services  
**Kohler**

**Stacki Yu**  
 Associate Manager – HR Shared Services, Asia Pacific & India  
**Kohler Co.**

**Lini Prasad, SPHR**  
 Manager-Kohler Connect  
**Kohler Co.**

**2:45 Is it Time for Autopilot?**  
 Your HRSS has been up and running for well over a year. The pace is still fast, but a rhythm has developed and initial goals have been met. What comes next when the transactional processes are already transitioned to the HRSS?

- Up scaling HRSS responsibilities
- Transitioning work out of the HRSS and utilization of

- global resources
- Helping COE's see the value of the HRSS for thought-work

**Jill Myhre**  
 Human Resources Business Partner  
**Unisys**

**3:30 End of Conference Day Two**

# Coca Cola Refreshments Site Tour

Wednesday  
 October 16, 2013

**12:30-5:30 PM (travel time included)**



In 2009, Coca-Cola Enterprises expanded its' Shared Services Center in Brandon, Florida to include an HR Service Center. Over the past four years, the SSC has

achieved operating objectives and exceeded targeted economic benefits as well as added scope and services, now operating under The Coca-Cola Company. In this interactive site you'll walk through Coca-Cola's widely benchmarked shared services center see how shared services leaders at Coca-Cola are leveraging state-of-the art technology and cutting edge service delivery models to support growth and drive high performance. You'll get an in-depth look into their ongoing process optimization initiatives, plans for future expansion and lessons learned so far. Areas of focus include:

- Customer Service – view the call center and related metrics; see

- the set-up of the CSR area and live calls being answered
- HR Operations – learn how calls are monitored for quality and adherence as well as how service levels are reviewed
- Payroll – learn about the various functions within the in-house payroll operation on SAP
- Benefits/Pension/Absence Management – see another part of the call center in action, how we support annual enrollment and leaves of absence
- HR Administration – learn what is handled within HR Master Data, Organizational Management, and the Severance Fulfillment team
- Talent Acquisition Services – see how we support the recruiters in the field and enable the new hire start
- Employee Relations – learn about how we've centralized the ER function and support managers and employees remotely
- HRIS – learn about our HRIS team including Production Support, Data Management, Interfaces, and Reporting
- Process Excellence – see how a specialized team supports the entire HR function on continuous improvement

\*Light snacks included





# About Our Sponsors

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## Infor Enwise HCM

Website: [www.enwise.com](http://www.enwise.com)

Infor is the recognized industry leader in providing SaaS-based solutions that help employers actually improve the delivery of HR Services - yet with fewer resources and lower hard-dollar costs. Infor's AnswerSource™ HR Shared Services is the only HR-specific service delivery suite that combines an HR Portal Interface, Personalized Knowledgebase, Case Management application and Onboarding solution for a true, multi-tier approach to delivering HR services across the workforce. AnswerSource HR Shared Services helps employers:

- Provide strong "Tier 0" employee self-sufficiency
- Promote first-call resolution in service centers
- Handle higher inquiry volumes with fewer CSRs
- Speed time-to-productivity for service reps
- Maximize accuracy and consistency
- Manages tickets easily
- Lower hard-dollar annual cost-per-employee for HR services by an average of 30-50%

The low cost of ownership of the SaaS-based solution makes it easily affordable to deploy and maintain. AnswerSource is used by employers from all industries and of every size from 1,000 - 100,000+ employees



## KPMG

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

KPMG LLP helps leading client organizations use technology to drive greater bottom line impact, increase agility, navigate business change, and transform IT from supporting today's business to helping advance the business to where it needs to be. We not only help the IT organization run a more efficient business unit, we help the business derive greater value from IT. And, we do this by providing IT organizations the insights and capabilities they need to balance the introduction of new, innovative solutions while continuing to maintain ongoing operations in line with cost and quality expectations. From strategy to execution, we bring an objective, pragmatic approach, deep industry experience, and a broad range of skills to help our clients maximize the performance of IT to align with business goals and objectives. Our teams are flexible and agile, and bring the right balance of seasoned experts across multiple disciplines.



## NorthgateArinso

Website: [www.ngahr.com](http://www.ngahr.com)

NorthgateArinso is a leading global Human Resources services provider offering innovative solutions in the areas of Technology, Outsourcing, and Consulting. We help HR executives optimize their global HR service delivery through smarter processes and cloud-based technology for compensation management, workforce administration, multi-country payroll, learning, self-service, and talent management.

For more information on sponsoring or exhibiting please contact Simon Copcutt at 1-212-885-2771 or [sponsorship@iqpc.com](mailto:sponsorship@iqpc.com).



## Dovetail Software

Website: [www.dovetailsoftware.com](http://www.dovetailsoftware.com)

Dovetail Software delivers a SaaS-based HR case management and help desk solution that supports HR Shared Services Centers (HR SSC). It has an easy-to-use interface, configurable workflows, integrated knowledge management, employee self service and a powerful web-based reporting module. Dovetail enables the HR SSC to measure and continuously improve its performance while providing faster, consistent, and more accurate information to employees. Dovetail's solution is highly configurable, designed for rapid deployment, and can easily integrate with your existing Human Resource Management System.



## CDP

Website: [www.cdpgroupltd.com](http://www.cdpgroupltd.com)

CDP, known as the first pioneer in Greater China HRO's market is now fully recognized as the leading HR outsourcing service provider in Asia and Greater China. This "Leading" position is not only interpreted as an innovative HR outsourcing solution, but also a leader on the market trend with full commitment and investment on research and development of service products.

We provide one-stop HR outsourcing, HR on-demand and shared services to our customers powered by high-end technology and a State-of-the-art HR platform. Our solution empowers companies or industries of different sizes to manage and optimize their HR management and services through uniquely adaptive and award-winning one-stop HRO, HR on-demand and SSC solutions.



## ScottMadden

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

ScottMadden, Inc. is a leading management consulting firm specializing in shared services, outsourcing advisory services, and the energy industry. ScottMadden began to develop its shared services practice in 1994. Since that time, we have helped many clients with the design, implementation, and operation of shared services within their organizations. Our experience spans the spectrum of potential shared services functions, and we have deep functional expertise in HR, IT, supply chain, finance and accounting, and real estate and facilities. We have performed significant shared services work in a wide variety of industries, from entertainment to energy to high tech. Our approach to the creation of shared services is to help our clients build a "business within the business." We believe that the shared services business should operate just like any other business within the corporation - with a business plan, a scorecard for performance, incentives for performance, and consequences for non-performance.



## Neocase

Website: [www.neocasesoftware.com](http://www.neocasesoftware.com)

Neocase Software is a leading provider of customer service solutions for shared service contact centers and customer support operations. Neocase empowers large global corporations to manage and optimize their shared service and support operations performance and processes through its uniquely adaptive and award-winning customer service technology platform. Neocase Software solutions include Neocase HR for Human Capital Resource Management, Neocase CS for Customer Service, Neocase CRM for Customer Relationship Management, and Neocase FR for Financial Resolution.



For more information on sponsoring or exhibiting please contact  
Simon Copcutt at 1-212-885-2771 or [simon.copcutt@iqpc.com](mailto:simon.copcutt@iqpc.com).

# Registration Information

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## Venue Information

### Disney's Contemporary Convention Center

4600 World Drive, Lake Buena Vista, Florida 32830, United States  
<https://disneyworld.disney.go.com/resorts/contemporary-resort/>

Please identify you are part of the IQPC – HR Shared Services group to ensure the special rate. Note that you are eligible for this rate three day prior and three days post the event based on availability. Please make your reservation before Monday, September 23, 2013 in order to ensure you are eligible for the group rate.

## 5 Easy Ways to Register:

- 1 **Web:** [www.HRSSoutsourcing.com](http://www.HRSSoutsourcing.com)
- 2 **Call:** 1-800-882-8684
- 3 **Email:** [info@iqpc.com](mailto:info@iqpc.com)
- 4 **Fax:** 1-646-378-6025
- 5 **Mail:** IQPC - 535 5th Avenue  
8th Floor, New York, NY, 10017

Register Online to receive  
**\$300 OFF!**

Please note multiple discounts cannot be combined.

A \$99 processing charge will be assessed to all registrations not accompanied by credit card payment at the time of registration.

**MAKE CHECKS PAYABLE IN U.S. DOLLARS TO: IQPC**

\* CT residents or people employed in the state of CT must add 6.35% sales tax.

**Team Discounts:** For information on team discounts, please contact IQPC Customer Service at 1-800-882-8684. Only one discount may be applied per registrant.

**Special Discounts Available:** A limited number of discounts are available for the non-profit sector, government organizations and academia. For more information, please contact customer service at 1-800-882-8684.

**Payment Policy:** Payment is due in full at the time of registration and includes lunches and refreshment. Your registration will not be confirmed until payment is received and may be subject to cancellation.

**Details for making payment via EFT or wire transfer:**  
 JPMorgan Chase - Penton Learning Systems LLC dba IQPC:  
 937332641

ABA/Routing #: 021000021  
 Reference: Please include the name of the attendee(s) and the event number: 18172.009

For IQPC's Cancellation, Postponement and Substitution Policy, please visit [www.iqpc.com/cancellation](http://www.iqpc.com/cancellation)

**Special Dietary Needs:** If you have a dietary restriction, please contact Customer Service at 1-800-882-8684 to discuss your specific needs.

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## End User Pricing\*

	Register & Pay by July 26, 2013	Register & Pay by Aug. 23, 2013	Register & Pay by Sept. 20, 2013	Standard & Onsite Pricing
Conference Only	Save \$1,000 \$999	Save \$700 \$1,299	Save \$400 \$1,599	\$1,999
All Access	Save \$1,200 \$1,999	Save \$800 \$2,399	Save \$400 \$2,799	\$3,199
Workshop	\$549 each	\$549 each	\$549 each	\$549 each
Site tour	\$599 each	\$599 each	\$599 each	\$599 each

\*An end user is someone who is looking for solutions and will directly benefit by the content of the program

## Vendor Pricing\*\*

	Register & Pay by July 26, 2013	Register & Pay by Aug. 23, 2013	Register & Pay by Sept. 20, 2013	Standard & Onsite Pricing
Conference Only	Save \$1,000 \$1,999	Save \$700 \$2,299	Save \$400 \$2,599	\$2,999
All Access	Save \$1,000 \$2,999	Save \$700 \$3,299	Save \$400 \$3,599	\$3,999
Workshop	\$549 each	\$549 each	\$549 each	\$549 each
Site tour	\$599 each	\$599 each	\$599 each	\$599 each

\*\*A vendor is a solution provider who can offer products and service to enhance the end user's operations at their perspective organizations

Conference Only     Conference + All Workshops     Workshop(s)     A     B     C

Name \_\_\_\_\_ Job Title \_\_\_\_\_

Organization \_\_\_\_\_ Approving Manager \_\_\_\_\_

Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Phone \_\_\_\_\_ E-mail \_\_\_\_\_

Please keep me informed via email about this and other related events.

Check enclosed for \$ \_\_\_\_\_ (Payable to IQPC)    Charge my  AmEx  Visa  MasterCard  Discover

Card # \_\_\_\_\_ Exp. Date \_\_\_\_/\_\_\_\_ CVM Code \_\_\_\_\_

I cannot attend, but please keep me informed of all future events.