



THE 2012 OUTSOURCING WORLD SUMMIT®
Disney's Contemporary Resort & Conference Center
Lake Buena Vista, Florida
February 20-22, 2012

15th Anniversary Edition

OUTSOURCING BEYOND THE HORIZON: TURNING TODAY'S OPPORTUNITIES INTO TOMORROW'S SUCCESSES

Register by
DECEMBER 15
and get the *new*
Kindle Fire
FREE!

(See back cover for details)



Insights from the Industry's Most Inspiring Speakers



Peter Sheahan

Best-selling author, world renowned speaker and Founder and CEO of ChangeLabs™ on **innovative business thinking and creating lasting behavior change.**



F. Warren McFarlan

Baker Foundation Professor, Albert H. Gordon Professor of Business Administration, Emeritus, Harvard University on **Outsourcing in Global Transition.**

Plus... CSR Risks And Rewards

A roundtable discussion focusing on maximizing the benefits and minimizing any downsides of Corporate Social Responsibility featuring panelists from The Rockefeller Foundation, World Bank, Digital Data Divide, and the University of Pittsburgh

And... Results of IAOP's Annual Survey

With the support of Accenture, IAOP has taken the pulse of the industry and will discuss where leading companies are headed with a panel of C-level executives.

NEW FOR 2012...

The Summit Hub – See Who is Attending!

The Summit's global online community easily connects you with other Summit delegates, allowing you to begin dialogue, plan meetings, learn about sponsors and exhibitors and discuss topics of interest before your feet ever touch the ground in Orlando.

Wednesday Afternoon Networking Opportunity

Arrange meetings with fellow delegates, chapter chairs, speakers or sponsors. This is your last chance to make the valuable face-to-face connections you need for the next step in your outsourcing journey.

7 EDUCATIONAL TRACKS 30+ "HOW-TO" SESSIONS

- Customer Experiences
- Outsourcing Tools, Technology and Models
- The Management Science of Outsourcing
- Transition and Governance
- The Human Side of Outsourcing
- Globalization - Where do we go from here?
- The Future of Outsourcing



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TOP 5 REASONS TO ATTEND THE 2012 OUTSOURCING WORLD SUMMIT

1 Get immediate ROI. From the moment you register, you will have access to the latest knowledge and insights on outsourcing. Not only can you immediately begin networking with other attendees, but you also can take advantage of in-depth and timely reports, opportunities for increased professionalism through advocacy and certification, and have access to globally recognized outsourcing education.

2 Receive unprecedented value. There is simply no other outsourcing event in the world that provides so much value for the price, not only on-site, but long after the event ends. The Summit itself features nearly 20 hours of education and insights from outsourcing's global leaders, at least 10 hours of networking with faculty and peers, and access to the world's top providers.

3 Take it to the next level. It's been proven beyond a doubt that outsourcing can lead to dramatic cost savings. Now it's time for firms to focus on the fact that outsourcing is a valuable tool to augment existing capabilities. Ultimately, the new capabilities learned at the Summit will give your firm a leading edge.

4 Become your in-house expert. For more than a decade, The Outsourcing World Summit Conference Series has been the globe's premier gathering for outsourcing professionals from all industries and disciplines. This holistic approach to outsourcing education and knowledge sharing has both advanced the topic and made Summit attendees their companies' resident experts on the topic.

5 Access IAOP's know-how and expertise. With more than 110,000 members and affiliates worldwide, IAOP leads the effort to transform the world of business through outsourcing. Eighty-five percent of customer members credit IAOP for improved outsourcing outcomes – making it the one source you need for success.

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The Outsourcing World Summit®: Simply the Best

As the CEO of IAOP, I would like to personally invite you to attend the 15th anniversary edition of The 2012 Outsourcing World Summit in Lake Buena Vista, Florida on February 20-22. This year's conference promises to be our most exciting and rewarding one yet, as 700+ outsourcing buyers, providers, advisors and academics join in discussions and presentations about the major opportunities and challenges affecting our industry.

The Outsourcing World Summit has long been recognized as one of the world's premier outsourcing conferences. Since 1998, nearly 7,000 have attended, more than 700 educational sessions have been presented and more than a thousand leaders have spoken - from industry powerhouses like Gary Wendt, Oren Harari, Ram Charan and John Sculley, to political figures like Robert Reich, Jack Kemp, and even one astronaut, Buzz Aldrin.

Among the highlights are best-selling author and world renowned speaker Peter Sheahan on innovative business thinking and creating lasting behavior change; F. Warren McFarlan, Baker Foundation Professor and Albert H. Gordon Professor of Business Administration, Emeritus, Harvard University on Outsourcing in Global Transition, and a roundtable discussion on Corporate Social Responsibility moderated by Accenture and featuring the The Rockefeller Foundation, World Bank, Digital Data Divide, and the University of Pittsburgh.

Once again we'll share the results of IAOP's Annual Survey as well as unveil the Global Outsourcing 100: The World's Best Outsourcing Providers and Advisors, announce GEO award winners, and induct the 2012 Outsourcing Hall of Fame recipients. Networking opportunities will be unmatched – from evening receptions to more structured sessions.

The 2012 Outsourcing World Summit provides an unequalled opportunity to see old friends, meet new ones, learn about IAOP's recent advances, and tackle the most important issues facing the outsourcing industry. We would like very much to count you among the conference participants, and I encourage you to register online now and make plans to join us in Orlando in February.

I look forward to meeting you there!



Debi Hamill
CEO, IAOP



SUMMIT AT-A-GLANCE

SUN
02.19

12:00 pm - 5:00 pm	Golf Outing at Disney's Osprey Ridge
1:00 pm - 2:00 pm	First Timers' Meet & Greet
1:00 pm - 3:00 pm	The OPCF Families & Certified Outsourcing Professional Prep Class
1:00 pm - 3:00 pm	COP Advanced Intensive
3:00 pm - 5:00 pm	ADR Workshop
5:30 pm - 7:00 pm	Early Registration Champagne Welcome Reception

MON
02.20

8:00 am - 11:00 am	Registration Coffee Bar
9:30 am - 11:30 am	Customer-Only and Provider/Advisor-Only Networking Sessions
11:30 am - 12:30 pm	Summit Kick-Off Luncheon – Hosted by IAOP's Membership Committee
1:00 pm - 3:00 pm	General Session Keynote Presentations
1:00 pm - 1:15 pm	IAOP Chairman & CEO's Welcome
1:15 pm - 2:00 pm	Insights from IAOP's Annual Member Survey
2:00 pm - 3:00 pm	Strategies for Turning Challenge into Opportunity, and Change into Competitive Advantage

3:30 pm - 4:20 pm EDUCATIONAL TRACK SESSIONS - ROUND 1

<i>The Road to Partnership</i>	<i>Cloud Computing in an Outsourced Environment</i>	<i>Outsourcing: A Love Story</i>	<i>Mature IT Sourcing: From Good to Great</i>	<i>Building a Global Sourcing Ecosystem</i>	<i>Government Outsourcing</i>
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4:30 pm - 5:20 pm EDUCATIONAL TRACK SESSIONS - ROUND 2

<i>Moving Beyond Transaction</i>	<i>Security in the Cloud</i>	<i>An Agile Retained Organization</i>	<i>When Band-Aids are not Enough</i>	<i>Humanomics</i>	<i>From Shop to Retailer:P&G</i>
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5:30 pm - 7:00 pm Welcome Reception in the Global Services Mall - Hosted by Accenture

TUE
02.21

7:30 am - 8:45 am	Continental Breakfast in the Global Services Mall
7:30 am - 8:45 am	Value Health Check Survey Customer Experience Session
9:00 am - 10:45 am	General Session Keynote Presentations
9:15 am - 10:00 am	Roundtable Discussion: CSR Risks And Rewards
10:00 am - 10:45 am	Outsourcing In Global Transition

11:20 pm - 12:10 pm EDUCATIONAL TRACK SESSIONS - ROUND 3

<i>The Customer Experience</i>	<i>A New Approach to Health Care</i>	<i>Outsourcing in Clinical Research</i>	<i>Integrating Providers into Governance</i>	<i>The Chinese Outsourcing Industry</i>	<i>Investment Management</i>
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1:50 pm - 2:40 pm EDUCATIONAL TRACK SESSIONS - ROUND 4

<i>Development of Client Centers of Expertise</i>	<i>Achieve Higher ROI from Outsourcing</i>	<i>Evolution of Governance Matures</i>	<i>Xenophobic Buyer to Competitive Supplier</i>	<i>Outsourcing Trends in Latin America</i>
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3:10 pm - 4:00 pm EDUCATIONAL TRACK SESSIONS - ROUND 5

<i>Supplier Management as a Core Competency</i>	<i>The Importance of Transparency</i>	<i>Genpact: A Client Case Study</i>	<i>Maximizing Global Supply through Local Strengths</i>	<i>Outsourcing and Engineering</i>
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4:10 pm - 5:00 pm EDUCATIONAL TRACK SESSIONS - ROUND 6

<i>Global Delivery Model Strategy (Lift & Shift)</i>	<i>The BPO Landscape: The Next Generation</i>	<i>IAOP Research</i>	<i>Outsourcing & Culture</i>	<i>The Value Proposition for Indirect Procurement</i>
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5:00 pm - 6:30 pm Cocktail Reception in the Global Services Mall

WED
02.22

7:00 am - 8:30 am	Provider/Advisor/Customer Joint Networking Breakfast
8:45 am - 12:00 pm	IAOP's Real-Time Strategy Sessions and Concurrent Hands on Practicums
11:45 am - 12:00 pm	Final Thoughts on The 2012 Outsourcing World Summit
12:00 pm - 1:30 pm	Food for Thought Networking Luncheon

KEYNOTES

Learn How the World's Top Companies Redefine and Reposition Themselves For Success through Outsourcing

MON 02.20

DAY ONE CHAIRED BY Michael F. Corbett, Chairman, IAOP

1:00 - 1:15 pm

Welcome to The 15th Anniversary Edition of The Outsourcing World Summit

Debi Hamill, CEO, IAOP

IAOP's CEO welcomes delegates and provides an overview of what's to come!

1:15 - 2:00 pm

Insights from IAOP's Annual Member Survey

Jagdish R. Dalal, COP, Managing Director Thought Leadership, IAOP

IAOP takes the pulse of the industry through the Annual Member Survey. Based on the latest experiences and insights from IAOP's members and affiliates worldwide, key trends and developments will be identified, including how companies' outsourcing programs have changed in size, make-up, and impact in this highly robust and diverse global industry. How are the continuing challenges in the global economy affecting outsourcing plans and what are the critical issues that customers and providers are facing? Jag Dalal will be joined by a panel of executives who will share their insights on this first look at the state of the industry and where it's headed in 2012.

Jag is one of the best-known and most highly respected thought-leaders in the field. In addition to his role at IAOP, He has worked as an outsourcing customer at corporations including Xerox and Carrier Corporation, as one of the founding partners of the business process outsourcing practice at PwC, and most recently his own firm, JDalal Associates.

2:00 - 3:00 pm

FLIP: Creative Strategies for Turning Challenge into Opportunity, and Change into Competitive Advantage

Peter Sheahan, Founder and CEO of ChangeLabs

Innovation doesn't just mean a hot new product or advertising campaign. True innovation is more often a realignment of the way that leaders think about business structure and organizational design. Peter Sheahan reveals that in order to find new opportunity and increase competitive advantage, organizations must look at their business and industry in a new way. Whether the answer is a change in supply chain, a transition in commission structure, or an internal campaign for positive behavioral change, Sheahan examines the ways organizations must change with the demands of the new marketplace. Using industry-specific examples, and an energetic stage presence, Sheahan challenges his audience to think differently to create mind-blowing success.

*Peter Sheahan has spent a decade teaching leaders how to flip their thinking and find opportunity where others cannot. When competitive advantage is in jeopardy, he helps organizations think differently about their business model, their customer, and their organizational design. He is the author of six books, including *Flip: How to Turn Everything You Know on Its Head and Succeed Beyond Your Wildest Imaginings* and *Making It Happen: Turning Your Good Ideas into Great Results*.*



TUE 02.21

DAY TWO HOSTED BY Neil S. Hirshman, COP, Partner, Kirkland & Ellis, LLP

9:00 am - 9:15 am

Welcome and Opening Comments

Neil S. Hirshman, COP, Partner, Kirkland & Ellis, LLP

Neil Hirshman represents customers and service providers in BPO and ITO deals and is a COP, founder and chairman of the Chicago Chapter of IAOP and a frequent lecturer on many aspects of outsourcing.



TUE

02.21

9:15 am – 10:00 am
Roundtable Discussion: CSR Risks and Rewards

Moderator: LaMae Allen deJongh, U.S. Human Capital & Diversity Managing Director, Accenture

Panelists: Essein Lore Eme, Associate Director, The Rockefeller Foundation; Pumela Salela, Advisor to The World Bank; Jeremy Hockenstein, CEO, Digital Divide Data; and Bill Hefley, Ph.D. CDP, COP, Clinical Associate Professor, University of Pittsburgh and Director, ITSqc



Corporate Social Responsibility is a new term, but an old concept. This panel of experts will educate the audience on managing the economic, social and environmental impacts of their operations to maximize the benefits and minimize any downsides. Topics such as evaluating risk; developing a CSR strategy and budget; how will you handle public perceptions and coverage; selecting the best CSR standards for your organization; ensuring compliance and transparency; recognizing new and evolving ethical/moral norms; and impact sourcing will be addressed.

LaMae Allen deJongh is currently focused on attracting, retaining and developing Accenture's best talent. Essein Lore Eme serves as the regional champion for the Foundation's Harnessing the Power of Impact Investing initiative. Pumela Salela is a Board member of the Global Sourcing Council and the African Ambassador for Sustainable and Socially Responsible Outsourcing. Jeremy Hockenstein is co-founder and CEO of Digital Divide Data an award-winning social enterprise. Bill Hefley, COP is Associate Clinical Professor at the University of Pittsburgh and a Director of ITSqc.

10:00 am – 10:45 am
Outsourcing In Global Transition
F. Warren McFarlan, Baker Foundation Professor
Albert H. Gordon Professor of Business Administration, Emeritus, Harvard University

Driven by one set of factors in the late 1980s, outsourcing serves very different needs in 2012. Cost reductions and asset light structure justifications have been replaced by focuses on tighter controls, improved innovation capabilities, and access to global networks among others. Deep changes have occurred in both the product and its form of delivery as well as the underlying justifications for it.

Warren McFarlan earned his AB from Harvard University in 1959, and his MBA and DBA from the Harvard Business School in 1961 and 1965 respectively. He has had a significant role in introducing materials on Management Information Systems to all major programs at the Harvard Business School since the first course on the subject was offered in 1962. He has been a long-time teacher in the Advanced Management Program: International Senior Managers Program, Delivering Information Services Program, and several of the Social Sector programs. He is currently teaching in the General Manager Program and several short Executive Education programs.



WED

02.22

DAY 3 of The Outsourcing World Summit is a Conference within a Conference!

Building on the success of the last two years, delegates will select from IAOP's Real-Time Strategy Session or one of two Hands-On Practicum, which run concurrently, designed to help customers, providers, and advisors get more value, right now, out of their current outsourcing efforts.

8:45 – 11:45 am
REAL-TIME STRATEGY SESSION
Chaired by Dylan Taylor, Chief Executive Officer USA – Colliers International

This line-up of experts share their strategies and experiences on today's hottest topics and their thoughts on where the industry is headed and why. The setting is a theater-in-the-round, with no Powerpoint slides and no canned speeches. Each session is on point, on target and designed to get you thinking and interacting throughout.

Welcome and Opening Comments
Dylan Taylor, Chief Executive Officer USA – Colliers International

As CEO of the USA business of Colliers International, Dylan's role is to integrate operations across all services lines, enhance client engagement strategies and cross-selling, and develop systems for supporting the growth of US operations.



WED 02.22



It's all about the People! Rethinking Privacy and Security in this People-Driven Industry

Arijit Sengupta, CEO, BeyondCore

A recent PwC survey quoted in the Times of India stated "Nearly 90% of all security breaches at 13 small, mid-sized and large IT/ITeS companies in 2009-10 was an insider job." When the vast majority of security breaches are insider jobs, traditional methods don't work. Many of these privacy breaches actually happen due to human error rather than deliberate theft. However, the industry's standard response, more training, doesn't work when thousands of people have to consistently do the right thing while an attacker just has to trick one employee once. This session will discuss new approaches to solving this problem. It will also cover how BPO/ITO firms can appropriately engage with their prospects to make security and privacy a key part of the discussion even before the clients have decided to outsource a given process.

Arijit Sengupta is the CEO of BeyondCore, the Chair of the IAOP Cloud Computing Chapter, the Co-Chair of the IAOP Outsourcing Tools and Technology Innovation Chapter and the IAOP Ambassador for India. Arijit has guest lectured at Stanford and other universities on globalization and outsourcing; spoken at conferences in a dozen countries; and was written about in "The World Is Flat Release 3.0", the New York Times, San Jose Mercury News, and other leading publications.

Risks and Opportunities in the Third Party Supplier Base in the Outsourcing Environment

Denver Clark, Global Strategic Sourcing, CBRE

In many outsourcing programs, the outsource provider also engages third party companies for goods and services to support their client. Because these third parties are required to execute the overall outsourced services, they can have a significant impact on the quality, reliability, and value overall. Additionally, third parties can introduce legal and performance risk, that the outsourced provider must manage. The most successful models of third party management result when the outsourcing provider brings industry expertise and best practices of vendor management into the client's environment, and builds off the client's own programs in the same area. The group would explore these dynamics and identify keys for success, as well as potential problems that can arise when not managed effectively.

Denver Clark has twenty four years of experience in Strategic Sourcing, Supply Chain Management, Procurement, and Contracts Management. Mr. Clark has led global sourcing and supply chain organizations in the aerospace, electronics, medical, and environmental services industries.



What's on the Horizon

Jagdish R. Dalal, COP, Managing Director Thought Leadership, IAOP

What's on the horizon for companies setting strategy for the next year? Join Jag Dalal, as he takes us through IAOP's thought-leadership research agenda for 2012 and beyond - where we are going and why, and how we will get there.

Jag is one of the best-known and most highly respected thought-leaders in the field. In addition to his role at IAOP, He has worked as an outsourcing customer at corporations including Xerox and Carrier Corporation, as one of the founding partners of the business process outsourcing practice at PwC, and most recently his own firm, JDalal Associates.



Outsourcing Blunders

Wendell Jones, Chief Executive, Society for Information Management

Wendell Jones examines the challenges, opportunities and trends in outsourcing across cultures based on two trips to China, Jordan, and other countries, interviews and conversations with global executives and government officials, research programs of outsourcing researchers, information from advisors and practitioners, thirty years of experience in IT management, and more than a decade managing relationships across organizational boundaries and national cultures.

Wendell Jones is the Chief Executive of the Society for Information Management, a professional association for CIOs, and an outsourcing consultant, speaker and advisor. His former management positions include Senior Vice President, NASD/NASDAQ; Vice President, Compaq; GM, McDonnell Douglas Information Services Company; and Chair of Computer Science Faculty at West Point.



WED 02.22

Hands-On Practicum #1: For Outsourcing Buyers

Want to know how to get more value today out of your organization's outsourcing program? This hands-on practicum delivers exactly that. Top outsourcing practitioners take participants through a step-by-step guide to elevating your company's outsourcing program right now.

8:45 – 9:00 am Intro: Practicum Chair: Bill Metz, COP, Director, Vendor Management, P&G



9:00 am – 9:45 am

Successfully Measuring Customer Satisfaction in Outsourcing Projects and Programs

Donald Mones, COP, former VP Global Planning & Strategy, The McGraw-Hill Companies

After years of defining requirements, SLA, contract teams, improvement plans, etc. It's time to figure out how to accurately and consistently measure customer satisfaction with outsourcing from the line managers. Donald has spent years developing and implementing an effective process to measure customer outsourcing satisfaction for IT outsourcing programs. Learn more than how to measure and report the findings. Donald will provide real life examples of how outsourcing projects were measured and improvement opportunity plans (IOP) developed and implemented. He will discuss his experience in developing satisfaction surveys with such global providers as Wipro, TCS, and Cognizant.

Currently Managing Director of his own outsourcing consulting firm, GlobeSource Partners LLC. Donald was previously with The McGraw-Hill Companies as Vice President of outsourcing planning and strategy. Donald has been involved in all aspects of outsourcing and service delivery with a strategic focus on buyer/supplier relationship management.



9:45 am – 10:30 am

The e-Sourcing Capability Model for Client Organizations (eSCM-CL)

Bill Hefley, Ph.D. CDP, COP, Clinical Associate Professor, University of Pittsburgh and Director, ITSqc

The eSCM-CL has been used by the panel members to improve their capability as effective customers and coupled with the eSCM-SP to objectively evaluate the capabilities of their key providers. The presenters will provide actual cases where their organizations were transformed and improved processes for supplier management and overall sourcing management have been measurably improved using eSCM-CL. Senior managers from two major international organizations will describe their approach to addressing overall quality standards and best practices for sourcing in their respective organizations. This will include their organization's adoption of the eSCM-CL and as well as information about the benefits they are realizing from applying eSCM-CL to their businesses.

Bill's research interests include CSR, human capital management, process and capability modeling, organizational capability assessment, People CMM, eSourcing Capability Models (eSCM), outsourcing/offshoring, software process improvement, human capital in software projects, service innovation, and global software engineering.



10:45 am – 11:45 am

A Practical Approach for Measuring and Managing Performance

Bill Metz, COP, Director, Vendor Management, P&G

P&G's Global Business Services (GBS) is widely recognized as one of the largest and most successful shared services organizations in the world. GBS and its network of alliance partners deliver more than 180 business and employee services to a large global organization. One key element of P&G's success is the strong network of strategic partnerships it has put in place and its unique approach to managing those relationships. In this session Mr. Metz will discuss how P&G measures and manages the performance of those relationships.

Bill Metz - Director P&G, Vendor Management. Bill has worked in outsourcing, vendor management, and shared services the last 20 years.



WED 02.22

Hands-On Practicum #2: For Providers and Advisors

In a tough economy, providers and advisors alike are scrambling for business and aggressively looking for ways to increase the value they bring to customers. Spend the morning with our team of experts and come away with new approaches for doing both.

8:45 am – 9:00 am Intro: Practicum Chairs: Bill Hall and Kyle Andrews, Partners, Pretium Partners

9:00 am – 9:45 am

State of the Global Provider Industry: Findings from the 2011 ORN Global Service Provider Survey

Arie Y. Lewin, Professor of Strategy and International Business at Duke University, Fuqua School of Business

This presentation shares latest analyses and findings from ORN buy side and service providers' surveys. Why is it that so few organizations 'get it' when it comes to managing global sourcing of services? Is the global service providers industry poised to resume its growth in 2012? What are companies expecting from providers beyond the body shop model? Is the midcap client market ready to take off? With increasing availability of near shore delivery centers why are US companies continuing to favor nine time zones away locations? Emerging economies are aggressively competing share of global services market as a new lever of economic development. What are implications for global demand and supply of business services sourcing?

Arie Y. Lewin is also Director of the Center for International Business Education and Research (CIBER). He is elected Fellow of the Academy of International Business and was awarded the first Joanne Martin Trailblazer Award by The Organization Management and Theory division of the Academy of Management. Professor Lewin is Visiting Research Professor at IESE (2005- 2008) and RSM Erasmus University (1998-) where he is also ERIM Senior Fellow.

9:45 am – 10:30 am

eSCM-SP Sourcing Best Practices: Benefits for Service Providers and Their Clients

Jane Siegel, COP, Director, Ph. D. ITSqc, Co-Director, CSMIC, Senior Scientist, Carnegie Mellon

Victor Muñoz, Global Business Director, Carvajal Servicios y Tecnología

Jorge Osinski, PMP Manager, New Business Acquisition and Quality Programs, IBM Global Delivery Center, Argentina

The eSourcing Capability Model for Service Providers (eSCM-SP) helps sourcing organizations manage and improve their capabilities across the entire sourcing lifecycle. Service providers use the eSCM-SP to evaluate and enhance their capabilities and to become eSCM-SP certified. Senior managers from two major Latin American provider organizations will describe their eSCM-SP adoption efforts and the significant benefits they are realizing from applying eSCM-SP to their businesses.

Jane Siegel is a founder and director of ITSqc, LLC the spin-off created by Carnegie Mellon University to foster adoption of the eSourcing Capability Models. Victor Munoz occupied various positions that have given him an extensive knowledge about government, healthcare, and telecommunications. Jorge Osinski's responsibilities include the development of new customers, the creation of education programs in universities in Argentina with IBM's sponsorship and the implementation of quality practices in accordance to certifiable standards.

A VERY SPECIAL THANK YOU TO THE 2012 OUTSOURCING WORLD SUMMIT PROGRAM COMMITTEE FOR THEIR CONTRIBUTIONS AND VISION:

Debi Hamill
Chief Executive Officer, IAOP, Chair

Jag Dalal, COP
Managing Director Thought Leadership, IAOP

Neil Hirshman, COP
Partner, Kirkland & Ellis LLP

Kurt Kohorst, COP
Vice President, Liberty Mutual

David Prevost
Director, Global Financial Shared Services, GM

Matthew Shocklee, COP
CEO, GSOS, and IAOP Ambassador

Rich Etzkorn, COP
Senior Vice President, Cassidy Turley

Scott Philips
Senior Manager, Accenture

Jeff Russell
Director of Research Operations, Duke University, Fuqua School of Business

Rene Herlaar, COP
Head of Network Technology, Vodafone The Netherlands

Mary Lacity
Professor of IS, University of Missouri-St. Louis

Bobby Varanasi, COP
CEO, Matryzel Consulting, and IAOP Ambassador

Simon Masterton
Vendor Manager, Zurich Financial Services

Rob Sharp
Head of Global Airport Infrastructure & Services, Qantas Airways Ltd

Arijit Sengupta, COP
CEO BeyondCore, and IAOP Ambassador

Alistair Maughan
Partner, Morrison & Foerster

Santiago Pinzon
Executive Director, BPO Chamber of ANDI and past Chair, Latin American Regional Advisory Board

WED 02.22

10:45 am – 11:45 am
Creating the High Performance Salesforce: Why the Science Matters
Bill Hall, Partner, Pretium Partners
Kyle Andrews, Partner, Pretium Partners

Sales executives from companies of all sizes admit that their hiring accuracy for sales is well below 50%. Hiring isn't the only issue; it's poor internal selection as well. 60% of salespeople who fail do so because they are in the wrong sales role for their skill set; it's not because they can't sell. Internal selection is especially problematic during realignment and deciding who moves into what roles. The single greatest impact on revenue improvement is accurate selection and placement; more than training, coaching or technology. This practicum will build upon last year's practicum session. It will examine how to apply actuarial science to identify high potential sales professionals, place them in the correct roles and explore development opportunities, all while improving selection accuracy to greater than 80%.

Bill is a founding partner of Pretium Partners. Pretium Partners services include sales and marketing training and predictive assessments for sales talent selection, alignment and development. Bill chairs the Member Services Committee of IAOP, Co-Chairs IAOP's Sales & Marketing Chapter and was recognized as IAOP's Member of the Year in 2009. Kyle is co-founder and Vice President of Pretium Partners. He has spent the last 18 years in sales and sales training, is a contributing author of the "Sales Encyclopedia", has written many articles on value selling and spoken on numerous occasions on the subject of selling outsourcing.


11:45 am – 12:00 pm
Final Thoughts on The 2012 Outsourcing World Summit
Michael F. Corbett, Chairman, IAOP

Delegates reconvene one last time to share their three day assessment, key issues, current challenges and action plans for 2012 and beyond.


IAOP Membership: Connecting You to the Resources You Need

Membership in IAOP provides access to an extensive array of services and distinguishes organizations and professionals as leaders in the field of outsourcing.

CUSTOMER CORPORATE MEMBERSHIP

This membership is a fit for organizations that are currently outsourcing or are considering one or more outsourcing initiatives. It provides organization-wide access to the association's research, training, certification, and networking programs — all designed to help companies achieve better business results through outsourcing.

PROVIDER/ADVISOR CORPORATE MEMBERSHIP

This membership provides the same organization-wide access to IAOP's research, training, certification and networking programs as Customer Corporate Membership, but also includes member-only sponsorship opportunities that serve the marketing and business development needs of providers and advisors.

PROFESSIONAL MEMBERSHIP

Available to individuals either as part of their company's Corporate Membership or on an individual basis, this membership serves the needs of practitioners working in the field of outsourcing as customers, providers or advisors. In addition, it provides these professionals with direct, personal access to association services.

MEMBER SERVICES

- IAOP's Global Chapter Network
- Globalization Today, the Official Magazine of IAOP
- IAOP's Knowledge Center
- The Outsourcing World Summit®, IAOP Member Forums and regional events
- Training & Certification, such as the COP Program and COP Master Class
- Award Programs including The Global Outsourcing 100® and GEO
- Value Health Check Survey (VHCS)
- BestOutsourcingJobs.com

For more information on IAOP membership, visit www.IAOP.org

THREE DAYS OF POWERFUL EDUCATIONAL SESSIONS...

Each Packed with Information you can use Immediately!

TRACK01: Customer Experiences – Challenges, Opportunities and Best Practices

Customers share best practices in implementing all the forms of outsourcing, including vendor selection, vendor management, change management, centers of excellence and more.



Track Chair: Chris Long, COP, Chair, IAOP's Voice of the Customer Chapter

Chris was COO of StayWell Health Management where he led Operations, IT and Analytics and was responsible for the integration of StayWell's acquisition of LifeMasters, where he was General Manager prior to its acquisition. Prior to that, Chris developed and led a Business Process Outsourcing Center of Excellence at Blue Shield of California. Chris has been an IAOPCOP since 2008. He founded and currently chairs the IAOP Voice of the Customer Chapter and also serves on the IAOP Membership Committee.



MONDAY FEBRUARY 20 | 3:30 pm - 4:20 pm

The Road to Partnership

Rene Herlaar, COP, Head of Network, Vodafone

Rob Wolters, Key Account Manager, Ericsson

Vodafone Netherlands and Ericsson have worked together in a first network outsourcing contract. Vodafone outsourced its network planning, deployment and operations to Ericsson. Now we are in the 5th year of a 6 year contract. This session will look back over these five years, and both Vodafone and Ericsson will share their learnings and discoveries.



Rene Herlaar has 15 years' experience in Telecoms and leading outsourcing contracts. Rene is a member of IAOP's Global Human Capital chapter, Northern Europe regional advisory board and the BeNeLux chapter. Rob Wolters is Key Account Manager for Vodafone Netherlands (VFNL) account at Ericsson. He is responsible for all business with the telecom infrastructure to managed services and is a member of the Global Customer Unit, Vodafone's Leadership Team within Ericsson.



MONDAY FEBRUARY 20 | 4:30 pm - 5:20 pm

Moving Beyond Transaction into Knowledge-Based Activities

Scott Singer, Head of Global Business Services, Rio Tinto

Join Rio Tinto for a deep dive into procurement as an outsourcing function. Explore the business circumstances within Rio Tinto that created 2 waves of BPO opportunities. This session will focus on the transition from "transaction" to "knowledge-based activities" and challenges that were encountered after moving into the knowledge-based arena.

Scott Singer is responsible for the Information Systems & Technology, Procurement and Shared Services functions. Scott is supported by a team of over 2500 people based at Rio Tinto sites across the world and regional office hubs on five continents.



TUESDAY FEBRUARY 21 | 11:20 am - 12:10 pm

Focus on the Customer Experience, Not the Contract!

Paul Quaglia, COP, Director, Hospira

Your company is probably no different than most... you want to provide the best overall service for your customers at the most reasonable cost possible. Given that premise, you have probably outsourced some of your services to third party providers. You spent a significant amount of time crafting an airtight contract for outsourcing services utilizing a top notch sourcing advisory firm and various lawyers. The goal being to produce a contract that is as favorable to your organization as possible. While this looks good on paper, if the contract does not represent a win/win for both parties, the results can be sub-optimal. Find out how a team approach provides excellent service to the customers, from a customer's viewpoint.

Paul has over 20 years of IT Leadership experience working for various sized organizations. He holds the position of Head of IT Operations & Strategic alliances, where he directs the activities of the company's global infrastructure and application maintenance portfolio. Paul is also a member of the IAOP COP Training and Certification committee.



TUESDAY FEBRUARY 21 | 1:50 pm – 2:40 pm
Development of Client Centers of Expertise: Kraft Case Study
Anna Barej, Director of Contract Management for BPO CoE, Kraft Foods

This presentation will discuss the evolution of Kraft Foods' BPO CoE Organization.

Anna Barej is the Director of Contract Management for BPO CoE at Kraft Foods. She is a Procurement professional with 20 years of strategic sourcing experience. Her career includes assignments in indirect and direct spend categories with major CPG Companies.



TUESDAY FEBRUARY 21 | 3:10 pm – 4:00 pm
When Supplier Management Becomes a Core Competency
Charles Peterson, Director, Sprint – Nextel

Moving from a “do it yourself” operation to a “managed service” operation is exactly the transition Sprint had to make when it transitioned much of its network engineering and operational functions to a managed service outsource provider. Sprint recognized early in its transition planning that Supplier Management would be a new core competency in its new environment and was as important as the traditional technology management functions it had retained. This case study will offer customers and advisors of outsourcing engagements a structured method to examine organizational structures and capabilities when transitioning to an operational model that relies heavily on outsourcing.

In his current position, Chas has been instrumental in closing and implementing two large managed services partnerships, including its landmark network managed service outsourcing with Ericson -- the largest network outsourcing engagement world-wide -- and North America's first network sharing arrangement with LightSquared.



TUESDAY FEBRUARY 21 | 4:10 pm – 5:00 pm
Global Delivery Model Strategy (Lift & Shift)
Vishal Ahluwalia, Executive Director, UBS

Vishal will share his experience and help buyers gain a perspective on the next generation of offshoring. This session will also give buyers a unique perspective on overcoming internal challenges creating a portfolio for better alignment to the business needs. Vendors will walk away with an idea of how the buyer may perceive their knowledge and will also gain a perspective of how large clients look at domain knowledge. This session will give an innovative approach to a 360° paradigm of sourcing covering all aspects and a viewpoint of challenges and how a large organization can manipulate its workforce population to achieve productivity gains.

Vishal Ahluwalia is currently Executive Director at UBS.

TRACK02: Outsourcing Tools, Technology and Models: From the Cloud and Beyond



Discover the tools, technologies and innovative ways of thinking about outsourcing that will improve your outsourcing outcomes, from fostering innovation to mitigating risk and global data security.

Track Chair: Matthew Shocklee, COP, CEO, GSOS and Ambassador, IAOP

Matt Shocklee is the U.S. Ambassador for the IAOP and a Certified Outsourcing Professional (COP) He is also the President and CEO of Global Sourcing Optimization Services (GSOS), LLC.



MONDAY FEBRUARY 21 | 3:30 pm - 4:20 pm
Cloud Computing in an Outsourcing Environment

Rick Towner, Senior Associate, Booz & Co
Fuad Abdelhadi, Senior Associate, Booz & Co.

What we thought of before as competitive advantages is now becoming a commodity with the cloud, SaaS, BPaaS, etc. Much like today's air travel, more people will be able to afford more complex computing as a result of the cloud.

Rick Towner is a Senior member of Booz & Company Global IT practice with 35+ years of industry and consulting experience with IT outsourcing. He Led multiple full lifecycle outsourcing engagements across multiple industries including healthcare, retail/pharmaceutical, manufacturing and insurance. Fuad Abdelhadi is a Senior Member of Booz & Company Organization efficiency practice who co-led the design of Global Shared Services Center for an Industrial conglomerate.





MONDAY FEBRUARY 20 | 4:30 pm - 5:20 pm
Security in the Cloud: How to Choose a Secure Cloud Vendor
 Matthew Lane, CTO, Janus Associates

As the need for greater workplace efficiency and lower costs continues to increase, IT spending on cloud services will grow almost threefold to \$42 billion by 2012 according to recent predictions by IDC. The actions perpetrated by Lulzsec and Anonymous clearly demonstrate that there is a need for careful thought regarding IT security practices when both procuring and providing Cloud services. Today's hostile computing environment coupled with too vague security definitions often found in Cloud Service Level Agreements can prove to be disastrous even for the best thought-out Cloud deployments. The session will foster a better understanding of best security practices for cloud deployment.

Matthew Lane is the CTO of JANUS Associates. Specializing in the security aspects of e commerce and development of secure application code, he has identified vulnerabilities in many applications and web-sites and has implemented customized solutions to properly secure those systems.



TUESDAY FEBRUARY 21 | 11:20 am - 12:10 pm
A New Approach to Health Care Management
 Beth Ginzinger, President & CEO, Radiant
 Ginger Dusek, NA Health & Public Service BPO, Accenture
 Kim Mentzer, Health Management Offering Lead, Accenture

Skyrocketing costs and resulting healthcare reform mandates, coupled with an aging population and increases in chronic conditions, demand transformation from the healthcare community. Responding to this unprecedented change and achieving high performance means using knowledge in new ways—from the back office to the doctor's office. Health care organizations are responding by implementing new operation and service models to increase operational excellence and improve the customer service experience. Through Care Management BPO, Health Care payers are able to realize benefits for their organization, and also for the companies and organizations they serve.

Beth Ginzinger, RN, is the President and CEO of Radiant, Inc. Ginger Dusek is a Senior Executive with Accenture in the Health & Public Service practice based out of the Chicago office. Kim Mentzer is a Senior Executive in Accenture's Health & Public Service (H&PS) practice and leads Accenture's Health Management Foundation Offering.



TUESDAY FEBRUARY 21 | 3:10 pm - 4:00 pm
The Importance of Transparency: Customer-Provider Relationship Success
 Colin Bottomley, Global Service Executive, Zurich Account - CSC

The overall effort to conquer IT Visibility Challenges is many-fold. So, what are the key components for obtaining true two-way transparency? By establishing and maintaining data quality that both the customer and provider can rely on, gaps and issues can immediately be addressed, hidden opportunities for optimizing IT operations uncovered, and reliable outcomes produced. Come join us for this informative session, as Colin Bottomley of CSC, Global Service Executive for Zurich Account, leads us through a full formula perspective on what it takes to successfully strengthen the customer-provider working relationship.

Colin joined CSC in March 2001 as the EMEA Asset Manager on the Nortel Networks Account. Within a short timeframe, he became the Global Asset Manager and then the Global Asset, Lease and Client Order Fulfillment Manager.

TRACK03: The Management Science of Outsourcing: Turning Challenges into Opportunities

Focusing on outsourcing as a management science, this track explores remote workforces, KPO and LPO, SMEs and analytics



Track Chair: Ramaprasad (Bobby) Varanasi, COP, CEO, Matryzel Consulting
Bobby served in various positions within Strategy Consulting, Country Market Development, Program & Risk Management, Service Delivery and Customer Relationship Management. He advises federal governments across four continents on ICT sector development with particular emphasis on policy development, industry-government partnerships aimed at creating GDP growth and enabling positive economic impacts.



MONDAY FEBRUARY 20 | 3:30 pm - 4:20 pm

Outsourcing: A Love Story

Margo Beckwith-Byrne, Senior Vice President, Hotel Operations Center, Wyndham Hotel Group

Outsourcing is a relationship that cannot be taken lightly. Both outsourcer and outsourcing partner must approach it as a long-term relationship. In fact, it has many parallels with marriage – courting, getting to know each other, complementing each other's strengths and weaknesses, keeping each other honest, and above all trust. This session describes how outsourcing is like a marriage, and provides an example of Wyndham's leap into uncharted waters.

Margo is responsible for managing Voice and Email services for Reservations; Customer Care; Wyndham Rewards Membership Services; Distribution Services; and Global Sales with locations in Saint John New Brunswick Canada, Aberdeen South Dakota, as well as outsource locations in Singapore, Frankfurt and Manila Philippines. Margo has been with Wyndham for 17 years



MONDAY FEBRUARY 20 | 4:30 pm - 5:20 pm

Creating an Agile Retained Organization

Amanda Sweeney, Director, IT Global Service Delivery, PETCO

PETCO outsourced all IT functions to a multi-vendor environment simultaneous to transforming the merchandising and marketing organizations with new technologies. The IT organization has moved from being the solution to managing solutions for the enterprise. This was accomplished by improving its interface with the business, architecting its technologies and providing skilled support for major organizational projects led by the business. However, it all starts with their people. PETCO will discuss changes to organizational structure, compensation planning, training and development frameworks which have made them successful in delivering a more agile response to fast changing customer demands and business requirements.

Amanda Sweeney has a robust background in retail with diverse experience within supply chain management disciplines and international business across numerous industries. She manages a team of specialists focused on delivering return on investment for both capital and operating expense information technology initiatives in a highly matrix environment. Sweeney works directly with the CIO on initiatives to enhance contract management oversight, use of modern procurement practices, workforce re-deployment and augmentation.



TUESDAY FEBRUARY 21 | 11:20 am - 12:10 pm

The Outsourcing Discipline in Clinical Research: A Panel Discussion

Julia Santos, COP, Head of Global Business Optimization for the Johnson & Johnson Group of Consumer Companies, Johnson & Johnson

Maria Agcaoili, COP, CEO/Founder, Ascent Pharma Solutions Inc

Deirdre Hall, COP, Director, Pfizer



The challenges faced by the drug development industry today are of an unprecedented magnitude, and of all the phases in drug development, clinical research is the most expensive and time-consuming. Over the years, outsourcing has become an indispensable component in ensuring that this process of bringing innovative and life-saving cures can continue. Why is it, then, that in spite of its importance, the evolution of the outsourcing discipline in clinical research seems to lag behind its financial, IT, and manufacturing counterparts? This panel discussion aims to explore outsourcing in clinical research, trace its beginnings, and impart information about its current state. The panelists will also stimulate discussion about the unique challenges in clinical research and the factors that influence the outsourcing discipline's development in this sector.



Julia is a COP with 20+ years of global delivery experience. She is an industry Leader and Advisor to Governments on Global Outsourcing Industry, Foreign Direct investment, Innovation and R&D Attraction. Over the past 12 years, Maria held various roles in the pharma industry, first as a regional Clinical Research Associate for Quintiles and Merck, then as Clinical Study Manager for Pfizer's NY headquarters, responsible for all operational aspects of a clinical trial. Deirdre Hall is a Director, Clinical Quality Manager, in Pfizer's Worldwide Research & Development organization. Prior to this role, Deirdre was Director, Global Team Lead, Business Operations in Pfizer's Global Contracts & Outsourcing organization.



TUESDAY FEBRUARY 21 | 1:50 pm – 2:40 pm
Achieve Higher ROI from Outsourcing by Transforming Your Organization

Craig Nelson, Managing Director, Alsbridge
 Dianne Fennell, VP, Sears

Transforming your internal organization to effectively operate with your outsourcing partner(s) is key to achieving a higher return on investment for your outsourcing initiatives. Choosing the right scope of work to outsource, selecting the right partner(s) and negotiating a mutually beneficial contract(s) are just the starting points. It's what you do after the contract is signed and once the relationship is in place that will determine whether you receive the full value of an outsourcing partnership. Whether you're contemplating a future outsourcing project, have just signed a contract, or are a veteran consumer of outsourced services, there are key changes you can make to your organization that will enhance ROI.



TUESDAY FEBRUARY 21 | 3:10 pm – 4:00 pm
A Genpact Client Case Study

Join Genpact and one of their top clients as they discuss the successes of their partnership.



TUESDAY FEBRUARY 21 | 4:10 pm – 5:00 pm
The BPO Landscape: The Next Generation

Mary Lacity, Professor of IS, University of St. Louis – Missouri

Dr. Leslie Willcocks, Professor of Work, Technology and Globalization, London School of Economics

Many buyers still use BPO to manage discrete business processes governed largely with input-based contracts, a practice that is certainly safe and proven. However--some mature buyers are getting much more from their relationships with BPO providers by bundling end-to-end services, contracting for innovation, and collaboratively governing internal retained and supplier capabilities. Based on recent BPO case studies, a global buyer's survey, and a review of 615 academic findings, we discuss the present and future BPO landscape.



Dr. Leslie Willcocks is Professor of Work, Technology and Globalization at the London School of Economics. Dr. Mary Lacity is a Professor of Information Systems and an International Business Fellow at the University of Missouri-St. Louis.

TRACK04: Transition and Governance: Making the Right Moves Now that the Contracts are Signed

Tackling two of the most critical parts of outsourcing, this track delivers new ideas for vendor selection and management including multi-vendor and bundled, contract flexibility, measuring performance and dispute resolution.



Track Chair: Danny Ertel, COP, Partner, Vantage Partners

Danny Ertel is a founding partner of Vantage Partners and a leading authority on negotiation and relationship management. He leads Vantage's Outsourcing practice and focuses on helping buyers and providers launch, manage (and when necessary, remediate) outsourcing relationships.



WEDNESDAY FEBRUARY 22 | 3:30 pm - 4:20 pm
Taking Your Mature IT Sourcing Deal from Good to Great
Kenny Markford, IS Services Category Sourcing Manager, AstraZeneca

Are you in a mature and relatively healthy IT sourcing relationship? Learn how to take that deal from Good to Great. We'll examine some concrete tactics you can use to take your deal to the next level.

Kenny Markford is Strategic Global Sourcing Manager for UK based AstraZeneca Pharmaceuticals. He currently manages over \$100M annual spend providing a blended Offshore/Onshore service to operations in 69 countries worldwide.

**“ The Outsourcing World Summit was an invigorating experience.
 It was charged with enthusiasm and knowledgeable people.”**

- Jorge Muxica, COP

Director, Global IT Managed Services and Global Sourcing, Applied Materials


MONDAY FEBRUARY 20 | 4:30 pm - 5:20 pm
When Band-Aids are not Enough
Danny Ertel, COP, Partner, Vantage Partners

In this interactive discussion, Danny Ertel will present 3 different case studies of mid-term outsourcing arrangements where buyer and provider were experiencing a number of challenges such as a lack of innovation, disagreements over scope, inefficient issue resolution, and misaligned expectations about service delivery. For each real-life case scenario, he will share the actual symptoms and challenges the parties experienced, and lead a group discussion about possible hypotheses for the root causes of those problems and how best to test the hypotheses (a benchmark? a survey?). The pros and cons of various methods for gathering data about outsourcing challenges will be discussed as well. Finally, for each case, Danny will share the actual diagnoses and outcomes. This fun, interactive session will go beyond a basic presentation format to engage participants in a lively discussion about real issues.

Danny Ertel is a leading authority on negotiation and relationship management. He leads Vantage's Outsourcing practice and focuses on helping buyers and providers launch, manage (and when necessary, remediate) outsourcing relationships.


TUESDAY FEBRUARY 21 | 11:20 am - 12:10 pm
Effectively Integrating Multiple Service Providers into Your Governance Ecosystem
Cynthia Batty, Director, Governances Services, TPI
Dianne Smock, Partner and Managing Director, TPI

Sourcing projects that involve multiple service providers create special challenges for client organizations. As service providers consolidate and expand their offerings across service towers, it is no longer sufficient for clients to manage their sourcing initiatives in functional silos. Organizations that are sourcing services across multiple towers (ITO and BPO) and multiple providers are discovering that they can effectively gain traction on their enterprise sourcing initiatives, as well as leverage with providers, by changing the way they organize their sourcing teams. During this session we will explore challenges of multi-sourcing at the enterprise level, how a Sourcing Center of Excellence functions in organizations, and what are the key efficiencies and challenges of implementing a Sourcing Center of Excellence.

Cynthia Batty leads governance-related intellectual property development in addition to advising clients. Batty developed the TPI Service Management & Governance Maturity Assessment, which helps clients evaluate their maturity and capability against a standard, focus on areas for improvement and evaluate their growth over time. Dianne Smock, helps clients organize for success in sourcing governance. She advises clients on developing effective sourcing governance approaches.


TUESDAY FEBRUARY 21 | 1:50 pm – 2:40 pm
How Governance Models are Evolving as Outsourcing Matures
Bill Metz, COP, Director, Vendor Management, P&G
Mark Voytek, Director, Managed Governance Services, KPMG

Outsourcing continues to evolve and mature and governance models need to do so as well. This discussion will include an overview of shared services and outsourcing Governance and Transition support, and will address several key areas of Governance service delivery. We will review what large and small companies are doing, how they are delivering governance services within their organizations and the qualitative and quantitative benefits. Specifically, we will review examples of companies that have had success implementing a tier one governance infrastructure, and several companies that have had issues. Of course, we will further dialogue about what they did to overcome the issue.

Bill has worked in outsourcing, vendor management, and shared services the last 20 years. He is a frequent industry speaker on the topics referenced above. Mark Voytek's background includes Managing Director at EquaTerra, including Partner and Industry Leader ; a Partner at TPI, developing their Sourcing Strategy Practice and an Industry Lead for Healthcare and Life Sciences; and roles at several service providers including IBM, EDS and Xerox.



"I am impressed by the openness in which the attendees share their lessons learned, whether provider, customer or advisor. It is a great learning opportunity and a real fast forward in maturing the industry!"

- 2011 Summit Delegate



TUESDAY FEBRUARY 21 | 4:10 pm – 5:00 pm
IAOP RESEARCH

Jagdish Dalal, COP, Managing Director Thought Leadership, IAOP

Please join Jag as he takes us through the committee's most recent research project - legal process outsourcing (LPO).

Jag is one of the best-known and most highly respected thought-leaders in the field. In addition to his role at IAOP, He has worked as an outsourcing customer at corporations including Xerox and Carrier Corporation, as one of the founding partners of the business process outsourcing practice at PwC, and most recently his own firm, JDalal Associates.

TRACK05: Outsourcing Horizon: CSR, SRS and the Human Side of Outsourcing



This track puts the spotlight on issues trending in the industry today, such as CSR, SRO, rural sourcing, impact sourcing and human capital.

Track Chair: Scott Phillips, Senior Manager, Accenture

Scott Phillips is a Senior Manager in Accenture's Communications, Media, and Technology practice. He serves as a Special Advisor to IAOP's CSR sub-committee.



MONDAY FEBRUARY 20 | 4:30 pm – 5:20 pm
Humanomics: Creating Socio-Economic Impacts through Commercial Pursuits
Ramaprasad Varanasi, COP, CEO, Matryzel Consulting

Emphasis rests on leveraging global sourcing models to create socio-economic impacts on deprived populations worldwide. Trade, not aid is the norm that will and has impacted people positively. Low entry barriers need to be leveraged with a two-sided conversation.

Bobby Varanasi is CEO of Matryzel Consulting Inc, an advisory firm focused on advising corporations and governments worldwide to adopt concerted strategies aimed at enhancing competitiveness while focusing on their core competencies.



TUESDAY FEBRUARY 21 | 1:50 pm – 2:40 pm
Moving the USA from Xenophobic Buyer to Competitive Supplier: A Panel Discussion
Monty Hamilton, CRO, Rural Sourcing

As the rural sourcing industry is gaining steam, many companies are curious about the model but are hesitant to take action outside of simply listening to a news segment or webinar. Their hesitations lie within the uncertainty of something so new. This session will be a panel discussion on how buyers can benefit from embracing the rural sourcing model. We also hope to educate buyers how the future looks for rural sourcing and answer any questions to clear up misconceptions or hesitations.

Monty Hamilton began his IT career in 1988 with Accenture. In 1995 he joined four other colleagues to build their own consulting firm, Clarkston Consulting. He was instrumental in growing Clarkston into a global strategic and systems integration firm with offices across the US and Europe. After Clarkston's acquisition, he became the CEO of Rural Sourcing in 2009 and has since led the company to 300% growth each year.



TUESDAY FEBRUARY 21 | 4:10 pm – 5:00 pm
Outsourcing & Culture: A World of Opportunities

Jan Allen, Managing Partner, J.Allen Associates

Lucy Herlaar, Director, Herlaar Coaching



Various factors mean it is becoming more and more of critical business operating imperative for companies to create environments where they can attract and retain their share of the top female talent. This is going to be especially critical in the outsourcing industry which traditionally has low numbers of women but has seen tremendous growth over the past several years and usually requires working in multi-cultural environments. The challenges for women working in the outsourcing industry will range from more obvious ones like needing to become comfortable and successful in dealing with men to navigating the unwritten rules of working in male dominated corporate cultures. We will review how companies can successfully overcome these challenges as well as attract and retain their share of female talent to ensure their competitive advantage in the workplace.

Jan Allen is an Organizational Effectiveness consultant passionate about helping individuals and organizations excel. Lucy Herlaar specializes in transformational coaching and personal development, with strong focus on Cultural Awareness and Appreciation, the Human Side to Outsourcing and Female Leadership Development.

TRACK06: Track Six: Globalization: Where Do We Go From Here?

This track focuses on the hottest current and emerging outsourcing destinations and how to both harness and manage the power of globalization.

Track Chair: Kevin Parikh, COP, CEO, Avasant

Prior to joining Avasant, Mr. Parikh led the Global Sourcing practice for Gartner Consulting. Mr. Parikh specializes in IT and business process (BP) outsourcing contract and service level negotiations, strategic management, business risk evaluation and software licensing. His practice engages in both nearshore and offshore sourcing solutions.



MONDAY FEBRUARY 20 | 3:30 pm - 4:20 pm

Building a Strong Global Sourcing Ecosystem: A Panel Discussion

Anupam Govil, President, Avasant

Mike Garber, Global Head Sales & Marketing, WNS

Jay Desai, COP, Senior Vice President – Global Sourcing, Northern Trust Company

Lando Kravetz, Director of Global Client Solution, Capgemini



Outsourcing as a whole continues to grow and achieve more strategic relevance. While India, China and Philippines remain favorite destinations, other countries have been maturing and there are more options today than ever before. But there are several challenges that could erode the value of global sourcing initiatives. While rising wages, attrition and workforce saturation lead to quality issues and escalating costs – political and economic turmoil in other countries create delivery risk. How can buyers develop a strategy that will endure the constant changes in the sourcing environment? How can providers offer consistent quality and optimal value to their clients who are increasingly seeking a global delivery model? How can emerging destinations embed themselves in the global sourcing ecosystem and yet maintain their differentiation and advantages? This session will address the decision vectors and associated strategies to effectively build a strong global sourcing ecosystem.

Govil is a Partner with Avasant, a Sourcing Advisory firm and President of Avasense. Mike is an accomplished executive with 33 years of ITeS, marketing, consulting and general management experience. Desai is responsible for designing, implementing and governing a global sourcing initiative that is aligned with the overall corporate strategy. Kravetz is VP and Head of Sales for Capgemini Infrastructure Services in North America.



TUESDAY FEBRUARY 21 | 11:20 am - 12:10 pm

A Walking Dragon: Historical Trends, Contemporary Landscape and What the Future Holds for the Chinese Outsourcing Industry

Eric Rongley, CEO, Bleum

There is no doubt that the proverbial sleeping dragon is beginning to stir. As China continues to vie with India for dominance of the global outsourcing market, what historical evidence can we use to create trends for the future? How did Chinese outsourcing get to the point it is at currently? What has accounted for its rapid growth? What will the Chinese outsourcing landscape look like in 2030?

Eric Rongley currently serves as the Chair of IAOP's Shanghai Chapter and is the former Chair of the Ethics and IT Committee of the American Chamber of Commerce in Shanghai. He is founder and CEO of Bleum, Inc.



TUESDAY FEBRUARY 21 | 3:10 pm – 4:00 pm

Maximizing Global Supply through Local Strengths

Shirley Sofer, Global Outsourcing Manager, Intel

Ms. Sofer shares insights from Intel's Global Outsourcing Team. The team operates as internal advisors working across the company's organization to supply outsourcing solutions meeting the technical demands of their 'internal' customers.

The Global Outsourcing Team's responsibilities include: identification, design, implementation and governance of outsourcing solutions for both project and operational needs. The team operates with local representation in India, China, Malaysia, US, and Israel and from these locations delivers outsourcing solutions across the company and around the world.

This presentation focuses on the journey of Intel's Global Outsourcing Team including how its operations have evolved over time and how it maximizes outsourcing solutions through global benchmarking, fine-tuned decision making criteria and leveraging its global strengths.

TRACK07: The Future of Outsourcing: Global Trends and Special Topics to Take you There

This track addresses key topics that IAOP membership and the outsourcing community have let IAOP know will soon be at the forefront of the industry including what's new in contract manufacturing, R&D, pharma and drug discovery, vested outsourcing and government outsourcing.

Track Chair: Rich Etzkorn, Executive Managing Director, Cassidy Turley

Rich Etzkorn is responsible for the overall management of Cassidy Turley Corporate Services operations. Rich oversees the account teams comprising more than 350 associates. These teams are responsible for managing more than 25,000 locations for Cassidy Turley clients in the United States and across the globe.



**MONDAY FEBRUARY 20 | 3:30 pm - 4:20 pm
Government Outsourcing in the US and the World**

Alistair Maughan, Partner, Morrison & Foerster UK

Christopher D. Ford, Partner, Morrison & Foerster

The public sector is a significant, but often undervalued, driver of outsourcing activity in many regions of the world. Outsourcing by governments is subject to factors not present in the private sector, including political motivation and governance; regulated procurement processes; anti-outsourcing legislative initiatives; and greater public transparency and media scrutiny. This presentation will focus on the government outsourcing experience at federal, state and local levels in the United States; the government outsourcing market across Europe; and also the prospects for government outsourcing in developing markets, especially China. It will also examine the appetite among governments for adopting Cloud-based components of outsourcing solutions, and the current state of anti-outsourcing and "Buy Local" laws in the U.S. and elsewhere.

Maughan focuses on outsourcing and technology-based projects for major companies and public sector organizations. His practice focuses on advising customers on the full life cycle of their complex information technology and business process outsourcing transactions. Chris Ford focuses on advising customers on the full life cycle of their complex information technology and business process outsourcing transactions. Mr. Ford also advises large clients on joint ventures, telecommunications, technology procurement and sophisticated licensing transactions, as well as Enterprise Resource Planning and other systems integration projects.



**MONDAY FEBRUARY 20 | 4:30 pm – 5:20 pm
From Shop to Retailer: P&G Transforming The Art of Shaving**

Michael W. Pugh, MCR, Vice President Real Estate and Development, Procter & Gamble

Procter & Gamble purchased The Art of Shaving in April 2009, thus beginning P&G's first endeavor in company owned retail. Shortly after acquisition P&G realized The Art of Shaving did not have a retail platform including retail processes, capabilities and network of external partners/vendors capable of delivering a national store rollout. Through strong relationships and intense work P&G and the many strategic partners have successfully taken this small retail organization with limited to no scalable retail capabilities and transformed it into a world class retailer.

Mike Pugh is responsible for overall management of The Art of Shaving Retail Real Estate Portfolio. In his current capacity, Mike oversees the entire real estate portfolio including new store design, development, lease administration and portfolio management of the existing stores. He is also responsible for international expansion and provides input into the overall retail expansion strategy.



**TUESDAY FEBRUARY 21 | 11:20 am - 12:10 pm
Applying Principles of Outsourcing to the Investment Management Function**

Gregg Kirchoefer, COP, Principal, Kirkland & Ellis LLP

Gregg will be joined in this presentation by his client and the session will focus on the application of the learnings, principles, and best practices from state of the art outsourcing to a business function that has long been undertaken by third parties but had been done on a highly discretionary, loosely documented basis.

Gregg Kirchoefer will be joined by a principal from a global insurance carrier responsible for the outsourcing of the investment management function. Gregg has extensive experience in outsourcing spanning almost 30 years and is the founding partner of the Outsourcing Practice Group at the IAOP Global 100 law firm of Kirkland & Ellis.



TUESDAY FEBRUARY 21 | 1:50 pm – 2:40 pm
Outsourcing Trends in Latin America: A Panel Discussion
 Moderated by Atul Vashistha, COP, Chairman, Neo Group

Please join Sergio Pessoa, Director, BRASSCOM; Santiago Pinzon, Executive Director, BPO Chamber, ANDI; and members of IAOP's Latin America Regional Advisory Board for an in-depth discussion on the emerging trends, gaps being identified and challenges faced in the outsourcing industry throughout Latin America.

Atul Vashistha is a leading proponent and practitioner of globalization and futurizing enterprises. He is recognized as one of the leading advisors on globalization and outsourcing. He founded Neo Group (formerly neoIT) in 1999 with the mission of helping enterprises grow their business and improve operations by leveraging outsourcing and globalization.



TUESDAY FEBRUARY 21 | 3:10 pm – 4:00 pm
Outsourcing and Engineering: A Panel Discussion
 Mahesh Patel, Manager, Global Engineering Sourcing, Pratt & Whitney

Outsourcing in the Engineering Function in enterprises today is a fast growing area of outsourcing. What are the contemporary opportunities and challenges in driving business value in engineering outsourcing? A broad panel of customers, providers and advisors involved in product engineering outsourcing, including Infotech, Covidien and Intetics, will share their global outsourcing experiences and best practices. Industries represented will include medical devices, heavy industry, aerospace and pharmaceuticals to name just a few.

Patel is Manager Engineering Sourcing, Pratt & Whitney a United Technologies Company and chair, IAOP's Engineering Chapter.



TUESDAY FEBRUARY 21 | 4:10 pm – 5:00 pm
The Outsourcer's Value Proposition for Indirect Procurement
 Mark Power, Senior Vice President, Sourcing Solutions, Xchanging

This joint presentation by Xchanging and BAE Systems will focus on the challenges internal procurement organizations face in delivering savings across indirect spend categories and how outsourcer's can deliver world class people, processes and technologies to identify and accelerate savings across the indirect enterprise.

Mark Power has over 20 years of experience in the global marketplace establishing and managing strategic sourcing alliance, ITO, ADM and BPO initiatives.



SUN
02.19

1:00pm-3:00pm
OPCF/COP Workshop (Open to all Summit registrants)
Pam O'Dell, Director, Corporate & Professional Development, IAOP

This workshop is the first step for anyone looking for more information regarding the different certifications IAOP has to offer along with the elements needed to earn these designations. Participants will leave this workshop not only with a solid understanding of which designation is best for them and where they stand within the certification process, but how this program can be beneficial to bring in-house within their company.

Topics of discussion will include:

- A step-by-step guide to successfully completing the application process for the COP designation
- An in-depth review of the evaluation criteria and procedures for all designations
- An introduction to the Certified Outsourcing Professional® (COP) Master Class
- A self-evaluation checklist for building your personal roadmap to certification

SUN
02.19

1:00pm-3:00pm
COP Advanced Intensive (COPs only)
Jag Dalal, COP, Managing Director Thought Leadership, IAOP

The Certified Outsourcing Professional® (COP) program is continuously growing and is in the process of developing elite certifications. This workshop is a great way to understand these advanced options as well as gaining the opportunity to network once again with the industry's most elite professionals.

This annual update will not only focus on current, challenging and critical issues, but also on how the outsourcing industry's only professional certification is leading to greater opportunities and outcomes for outsourcing professionals and firms. Attending this workshop will earn COPs 5 recertification points.

SUN
02.19

3:00pm – 5:00pm
Alternative Dispute Resolution Workshop
Julian Millstein, Senior Counselor, Morrison & Foerster

This new workshop, led by Julian Millstein along with other members of IAOP's membership, will explore the practical uses of Alternative Dispute Resolution techniques, such as mediation, arbitration and early neutral evaluation, to (i) improve governance of outsourcing relationships, and (ii) provide realistic alternatives to litigation of domestic and international disputes.

The outsourcing industry has been slow to recognize the advantages of ADR techniques, even though they have been used in the construction industry for decades to resolve thorny disputes which threaten to interrupt projects. Join IAOP's leading law firms, business consultants, customers and providers to discuss IAOP's initiative to encourage use of ADR as a tool in governance of outsourcing relationships and resolution of disputes. This workshop will include representatives of some of the leading ADR organizations in the world, including the American Arbitration Association, and its international arm, the International Center for Dispute Resolution.

Learn (i) what a third party mediator or neutral expert can provide that the parties cannot, (ii) what a dispute resolution board is and why some long-term agreements use them to great advantage, (iii) why arbitration has many advantages over litigation for international disputes, and (iv) dispute resolution issues that need to be addressed in the outsourcing contract.

TUE
02.21

BONUS SESSION!
7:30 – 8:45 am
Value Health Check Survey Customer Experience Session

A bonus session for early risers! Please join us for this hands-on working session with current VHCS users sharing their experience in a panel discussion format.

**SUN
02.19**

12:00 pm – 5:00 pm SUMMIT GOLF OUTING

Join fellow delegates for an enjoyable afternoon round on Osprey Ridge Golf Course. For more information and to sign up, go to www.IAOP.org/Summit/Golf. (Additional fees apply)

5:30 pm – 7:00 pm EARLY REGISTRATION CHAMPAGNE WELCOME

Stop by the registration desk to pick up your Summit Guide and help us toast to another successful Summit!

**MON
02.20**

9:30 am – 11:30 am CUSTOMER-ONLY NETWORKING SESSION

Network and share your experiences with fellow customers. This event will help you meet others early in the week so you can make stronger connections with colleagues working in the outsourcing space.

9:30 am – 11:30 am PROVIDER/ADVISOR-ONLY NETWORKING SESSION

An opportunity for providers and advisors to share their experiences, best practices and ideas on how to be the best partners.

**MON
02.20**

11:30 am – 12:30 am Summit Kick-Off Luncheon

5:30 pm – 7:00 pm Welcome Reception in the Global Services Mall
– hosted by



**TUE
02.21**

7:30 am – 8:45 am NETWORKING BREAKFAST

Continue the previous evenings' meetings with breakfast in the Global Services Mall.

12:15 pm – 1:45 pm AWARDS LUNCHEON, GEO

Join IAOP in honoring the 2012 Inductees into The Outsourcing Hall of Fame, GEO winners and IAOP's Members of the year.

5:00 pm – 6:30 pm COCKTAIL RECEPTION

Network with fellow delegates in the Global Services Mall

8:30 am – 10:00 pm DESSERT PARTY AND FIREWORKS

**WED
02.22**

7:00 am - 8:30 am CUSTOMER/PROVIDER/ADVISOR JOINT NETWORKING BREAKFAST

Join the entire outsourcing community and get answers to your questions raised during the conference.

12:00 pm - 1:30 pm FOOD FOR THOUGHT NETWORKING LUNCHEON

Keep the conversation going and enjoy one last educational and networking opportunity before you head home!

1:30 pm - 5:00 pm NEW NETWORKING OPPORTUNITY!

An afternoon of networking, watch for details.

IAOP's Global Chapter Network

IAOP chapters provide a forum for members to collectively focus on professional development, networking, and the advancement of outsourcing within specific areas of common interest. Each chapter is led by a team of Corporate Member chairs and co-chairs with deep knowledge in the area covered.

At the Summit, chapters will have a continual presence! You'll have the opportunity to speak to chapter chairs and learn more about specific chapters of interest to you.

Interested in chairing a chapter?
Contact Julie Huson at julie.huson@iaop.org

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Accenture is a global management consulting, technology services and outsourcing company. Combining unparalleled experience, comprehensive capabilities across all industries and business functions, and extensive research on the world's most successful companies, Accenture collaborates with clients to help them become high-performance businesses and governments.



As a leader in customer care and acquisition for over three decades, Aegis has a track record of introducing process and technology innovations. Today, several Fortune 500 clients trust Aegis to manage their customer interaction, back office and other routine business processes.



Ranked the #1 outsourcing advisor in the world by IAOP, Alsbriidge, Inc., provides world class sourcing advisory and benchmarking services for IT, finance and sourcing executives. Alsbriidge clients utilize the most cost effective and value added sources globally for IT infrastructure services, hardware and maintenance, network services, software and maintenance, application support and development, business processes and cloud services. Their commitment to delivering value to their clients has made Alsbriidge a distinguished member of the 2010 Inc. 500 fastest growing privately held companies in America.



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Outsourcing has fast become a strategic tool and preferred business model that has a powerful impact on a company's growth and financial stability. Kirkland lawyers have experience in IT outsourcing matters that predates the use of the term "outsourcing" (i.e., facilities management), handling some of the largest, most comprehensive outsourcing transactions in history. Kirkland's experience covers not only IT outsourcing but also business process outsourcing. Kirkland lawyers have represented both service providers and customers in manufacturing, service, financial and other businesses that seek to outsource critical functions.



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