

IAOP Proudly Turns 10!



THE 2015  
OUTSOURCING WORLD SUMMIT  
JW Marriott Phoenix Desert Ridge  
Phoenix, Arizona  
February 16-18, 2015

STILL TIME  
TO  
REGISTER!

# THE WORLD'S MOST IMPORTANT GATHERING OF OUTSOURCING PROFESSIONALS

## MASTERMIND MAIN TENT



**Opening Keynote:**  
**Jack Uldrich**  
*Global Futurist and Best-Selling Author*



**A View from the C-Suite:**  
**Scott L. Singer**  
*COP, CIO and Head of Global Business Services,  
Rio Tinto, and 2015 Outsourcing Hall of Fame Inductee*

### PLUS:

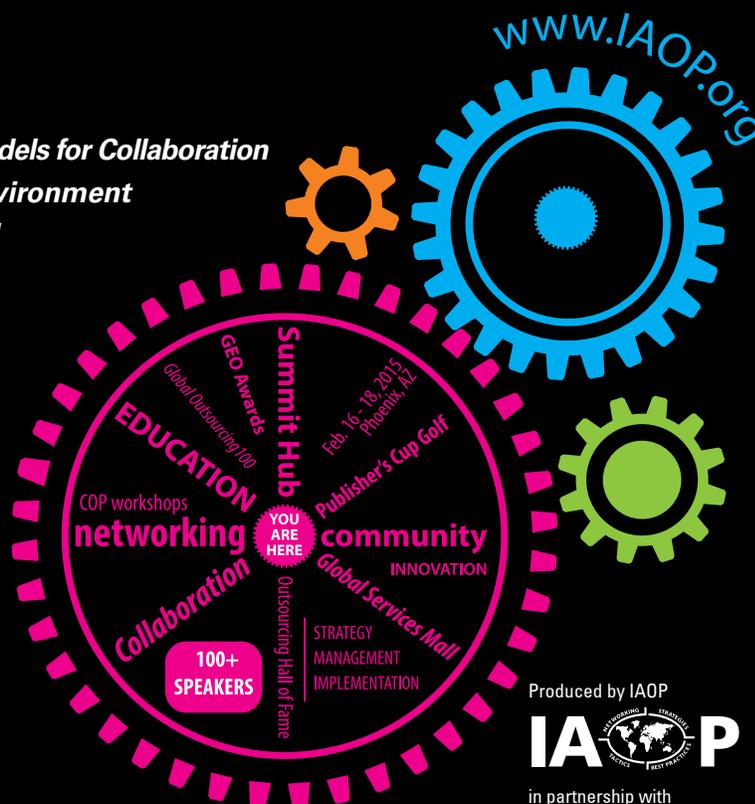
- Geopolitical Risk and Outsourcing
- TENTTalks: 3, ten minute, fast-paced presentations that will get you thinking!
- State of the Industry – IAOP's Annual Member Survey – supported by ISG
- First Annual North American Academic Workshop on Outsourcing: Research Into Practice

## 9 DISTINCT TRACKS!

- ✦ *Cloud, Big Data, Automation and Beyond*
- ✦ *ITO's Next Generation*
- ✦ *Redefining the Outsourcing Relationship: New Models for Collaboration*
- ✦ *Managing in Today's Complex, Multi-Vendor Environment*
- ✦ *Taking Your Sourcing Program to the Next Level*
- ✦ *Voice of the Customer*
- ✦ *Outsourcing In Action*
- ✦ *The People Factor*
- ✦ *Risk Mitigation: Cyberland & Geopolitical Focus*

### Featuring Organizations like...

UBS, Cisco, Walmart, Walgreens, Molson Coors, Bristol-Myers Squibb, Morgan Stanley, Time Warner, Cargill, State Farm, Accenture, ISS, Amazon, AstraZeneca, Deloitte, United Health Care, KPMG, Boeing, HCL, Merck, CBRE, BP, Wells Fargo, USAA, Intel, Microsoft, Sprint, and more!



Register online at [www.IAOP.org/Summit](http://www.IAOP.org/Summit)

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## TOP 5 REASONS TO ATTEND

**Get immediate ROI.** If you are not already a member, from the moment you register you will have associate level access to IAOP and the Mobile App. 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.

**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 and over 10 scheduled hours of networking activities with faculty and peers, including access to the world's top providers.

**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.

**Become your in-house expert.** For nearly two decades, 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.

**Access IAOP's network, know-how and expertise.** With more than 120,000 members and affiliates worldwide, IAOP leads the effort to transform the world of business through outsourcing.

## FROM THE CEO

Dear Friends,

It is with great pleasure that I invite you to attend The 2015 Outsourcing World Summit® at the JW Marriott Phoenix Desert Ridge in Phoenix, Arizona. The event kicks off with the 3rd Annual IAOP/Pulse Publisher's Cup Golf Tournament on Sunday, February 15 and ends with the "Food for Thought" luncheon on Wednesday, February 18.



The 2015 Outsourcing World Summit is IAOP's premier event for networking across the community of buyers, providers and advisors. The annual meeting provides a forum for sharing new ideas and approaches with your colleagues and peers and for translating them into improved outsourcing outcomes. The Summit continues to be the largest and longest-running industry event in the world, attracting more than 800 delegates from over 40 countries.

The program committee has developed an exceptional program, continuing the tradition of presenting the highest quality speakers, cutting-edge information as well as unmatched networking opportunities. Our general session features global futurist and best-selling author Jack Uldrich, as well as a view from the C-suite from Scott Singer, CIO of Rio Tinto and Hall of Fame inductee. More than 100 expert speakers will be on hand to present 50+ sessions over the course of two days. Cocktail receptions offer the opportunity to reconnect with old friends and make new ones.

IAOP continues to offer training and certification as one of our most important missions. If you are interested in learning more, I encourage you to sign up for the COP primer workshop. In addition, we have scheduled special events specifically for our Certified Outsourcing Professionals®.

As IAOP turns ten, I'd like to thank each of you for getting involved and bringing your expertise to not only this gathering, but to our association as a whole. You, as organization leaders and practitioners, have the vision, the knowledge and the experience to help us pave our way into the future. I look forward to seeing you in February!

Sincerely yours,

Debi Hamill

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**Register online at [www.IAOP.org/Summit](http://www.IAOP.org/Summit)**

Questions? Contact the registration desk at +1.845.452.0600 ext 110



## Sunday, February 15, 2015

- 8:00 am – 4:30 pm First Annual North America Academic Outsourcing Workshop
- 11:00 am – 12:00 pm Early Registration for IAOP Publisher's Cup Golf Tournament
- 12:00 pm – 5:30 pm **IAOP Publisher's Cup Golf Tournament**
- 5:00 pm – 6:30 pm **Early Registration Champagne Welcome**

## Monday, February 16, 2015

- 8:00 am – 11:00 am Registration Coffee Bar
- 9:30 am – 12:30 pm Customer– Only Networking Provider/Advisor– Only Networking
- 11:00 am – 6:00 pm **Networking Lounge**
- 11:30 am – 12:30 pm **Summit Kick– Off Luncheon**
- 12:30pm – 2:00 pm **General Session Keynote Presentations**
- 2:35 pm – 3:25 pm **Educational Track Sessions – Round 1**
- 3:30 pm – 4:20 pm **Educational Track Sessions – Round 2**
- 4:20 pm – 4:30 pm Refreshment Break
- 4:30 pm – 5:20 pm **Educational Track Sessions – Round 3**
- 5:30 pm – 7:00 pm **Welcome Reception in the Global Services Mall**
- 7:00 pm – 8:00 pm **COP Cocktail Reception**

## Tuesday, February 17, 2015

- 7:30 am – 8:45 am **Continental Breakfast in the Global Services Mall**
- 8:45 am – 11:00 am **General Session Keynote Presentations**
- 11:15 am – 11:45 am Refreshment Break in the Global Services Mall
- 11:00 am – 6:00 pm **Networking Lounge**
- 11:45 am – 12:35 pm **Educational Track Sessions – Round 4**
- 12:45 pm – 2:10 pm **Awards Luncheon**
- 2:20 pm – 3:10 pm **Educational Track Sessions – Round 5**
- 3:10 pm – 3:40 pm Refreshment Break in the Global Services Mall
- 3:40 pm – 4:30 pm **Educational Track Sessions – Round 6**
- 4:30 pm – 4:40 pm Refreshment Break
- 4:40 pm – 5:30 pm **Educational Track Sessions – Round 7**
- 5:30 pm – 7:00 pm **Cocktail Reception in the Global Services Mall**

## Wednesday, February 18, 2015

- 7:00 am – 9:00 am **Networking Breakfast Grand Sonoran G**
- 7:00 am – 9:00 am Working Groups Sessions
- 9:15 am – 12:45 pm **General Session Keynotes: Research You Can Use Now!**
- 11:00 am – 11:15 am Refreshment Break
- 12:45 pm – 1:00 pm **Final Thoughts & Highlights of The 2015 Outsourcing World Summit**
- 1:00 pm – 2:00 pm **Food for Thought Networking Luncheon**
- 2:00 pm – 5:00 pm COP Intensive Workshop
- 2:00 pm – 3:30 pm The Certified Outsourcing Professional Application: A Tutorial
- 2:00 pm – 3:30 pm Outsourcing Certification Primer – Earning Your Certification & Beyond

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## Monday, February 16

### 12:30 pm – 12:45 pm Welcome and Opening Comments



**Debi Hamill**, CEO, IAOP

Day one host, Debi Hamill, IAOP's CEO, welcomes delegates with a view of what's to come at OWS15.

*Hamill oversees the entire scope of IAOP's global operations, driving the association's mission as the leading, standard-setting organization and industry advocate. Her esteemed leadership and steadfast focus on building innovative programs and member services has helped grow IAOP to 120,000 members and affiliates worldwide. Known for her relationship development acumen, she regularly represents IAOP at industry events and is active in multiple industry organizations.*

### 12:45 pm – 1:30 pm Unlearning for the Future



**Jack Uldrich**, Global Futurist and Best Selling Author

In the reality of exponential change, the fact that before an organization can seize tomorrow's opportunities it must first unlearn old, obsolete knowledge as well as unlearn the old ways of doing business. Uldrich – who has been hailed by Business Week as "America's Chief Unlearning Officer" – will not only explain why unlearning is a critical skill for a company or an organization's employees, he will also demonstrate how unlearning can help successfully navigate a future where the pace of scientific and technological knowledge is doubling every seven years; how to prepare for competition that doesn't yet exist; and how to seize opportunities which are, today, only on the periphery of the imagination. Uldrich is a renowned global futurist, independent scholar, sought-after business speaker, and best-selling author whose award-winning books include, *The Next Big Thing is Really Small: How Nanotechnology Will Change the Future of Your Business* and *Jump the Curve: 50 Essential Strategies to Help Your Company Stay Ahead of Emerging Technologies*. He is noted for his ability to deliver stimulating, new perspectives on competitive advantage, organizational change, and transformational leadership, while helping businesses to adapt.

### 1:30 pm – 2:00 pm IAOP's TENT Talks



**Atul Vashistha**, COP, CEO, Neo Group on the number one trend in the outsourcing industry for 2015

**David J. Brown**, Global Lead, KPMG on global business services

**Peter Ankerstjerne**, Head of Group Marketing, ISS World Services on CSR and employee motivation



These fast-paced 10-minute sessions will cover three cutting-edge and even controversial topics that create thought-provoking conversation to take you through the Summit!

*Atul is Chairman of Neo Group, a firm he founded in 1999, focused on global services and outsourcing advisory, supply risk monitoring and program management services. He is also the author of three books; Outsourcing Wisdom, Globalization Wisdom and The Offshore Nation.*



*Dave is the Global Lead for KPMG's Shared Services and Outsourcing Advisory Practice. In this role Dave provides Shared Service and Outsourcing advice to many of our larger, complex deal structures. Dave has more than two decades of experience in IT and Business Process outsourcing, Shared Services design/build/implement, sourcing management, contract renegotiations and finance budgeting, planning and analysis.*

*Through his more than 20 years with the ISS Group, Peter has been exposed to most aspects of Service Management, Facility Management, Outsourcing, Marketing and Strategy Development. Starting his career in ISS Denmark where he worked with Marketing and Business Development, Peter was responsible for developing the Integrated Facility Services model, which is still a key strategic focal point of the ISS organization and where he chairs the IFS Steering Committee.*

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## Tuesday, February 17

8:45 am – 9:00 am

### Master of Ceremonies



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

*Neil, host of day two, has been called “business-savvy and creative,” adding that he “knows all the ins and outs of a deal and always gets the best possible outcome in negotiations,” according to Chambers & Partners, which selected Neil as one of America’s Leading Lawyers for Business in Outsourcing from 2007-2013 and as one of The World’s Leading Lawyers for Business 2009-2013. Neil has also been recognized by The Legal 500 U.S. each year since 2010. He is the founder and co-chair of IAOP’s Chicago Chapter and sits on IAOP’s Strategic Advisory Board as well as its North America Regional Advisory Board.*

9:00 am – 9:30 am

### State of the Industry –

### IAOP’s Annual Member Survey – supported by ISG



**Jagdish R. Dalal**, COP, Chief Advisor, Thought Leadership, IAOP  
**Todd D. Lavieri**, President, Americas, ISG

Jag is back with the exciting results of IAOP’s State of the Industry survey, produced with the support of ISG. Hear what the data from the largest industry survey says about trends, understand what this means for you now and learn how to not only be prepared for, but get ahead of the next big thing.

*Jag is Chief Advisor, Thought Leadership for IAOP and President of JDalal Associates LLC. Jag was one of the first group of outsourcing professionals who became Certified Outsourcing Professionals. JDalal Associates is a leading outsourcing consulting practice and has associates with deep industry experiences in operational and management roles in all aspects of outsourcing.*

9:30 am – 10:15 am

### A View from the C-Suite



**Scott L. Singer**, COP, Head of Global Business Services and CIO, Rio Tinto and 2015 inductee into IAOP’s Outsourcing Hall of Fame

How do you stay ahead of the curve? Hear from Scott Singer on emerging technology megatrends that require a new paradigm in operation and thinking and dealing with the many challenges faced by large organizations in making that shift.

*Scott Singer is the head of Global Business Services (GBS) for leading international mining group, Rio Tinto, with responsibility for the Information Systems & Technology, Procurement, Finance, People and Group Property service delivery functions. He is supported by a team of over 3000 people based at Rio Tinto sites across the world on five continents. Scott also serves as the Managing Director and country head for Rio Tinto’s Singapore Regional Office.*

10:15 am – 11:15 am

### Geopolitical Risk and Outsourcing: A Panel Discussion



Moderator: **Kevin Parikh**, COP, CEO, Avasant

Panelists: **Jon Browning**, former Director, Microsoft and President, Global BPO Solutions;  
**Charles Aird**, COP, Global Leader, Shared Services and Outsourcing Advisory and Business Services Transformation, PwC  
**Sanjay Tripathy**, Vice President, Global Strategy and Transformation, Genpact;  
**Prasad Sankaran**, Senior Managing Director - Application Services, Accenture  
**Fabrizio Operti**, Chief of Trade and Investment, Inter-American Development Bank (IDB)  
**Jim McDonnell**, General Manager, Cisco



As companies decide to offshore, global risk considerations become as much a part of their analysis as any other factor. In recent times, we have seen volatile situations in different parts of the world, including some of the previously attractive locations. This roundtable of buyers, providers and advisors delve into challenges and best practices from practitioners on what they look at when considering global risk and outsourcing.

*Kevin Parikh is the Global CEO and Senior Partner of Avasant. He also serves as the Chairman of the Avasant Foundation. Mr. Parikh is also an author and speaker on topics of Globalization, the Digital Enterprise and Innovation. 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*

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## Wednesday, February 18

### 9:15 am – 9:30 am Master of Ceremonies



**John Maher**, COP, Executive Managing Director, CBRE

*John C. Maher is Executive Managing Director of Global Corporate Services for CBRE; he is responsible for Business Development and leading the growth of CBRE's outsourcing business with corporate clients headquartered in the Northeast. John is recognized in the real estate industry as an innovative leader who has helped a wide range of corporate clients structure and implement highly successful long term partnerships, including the real estate industry's first global, end-to-end real estate outsourcing contract with American Express.*

### 9:30 am – 10:15 am The IAOP/KellyOCG Outsourcing Talent Survey



**Mike Corbett**, Chairman, IAOP

**Teresa Carroll**, Senior Vice President and General Manager, KellyOCG

As outsourcing becomes more embedded as a strategic lever, organizations will want to consider the importance of outsourcing as a profession. Based on findings from jointly developed research - The Outsourcing Talent Survey, by IAOP and Kelly Outsourcing and Consulting Group (KellyOCG), this session will highlight perspectives from buyers and providers/advisors of outsourcing on the following topics:

- Business drivers for outsourcing
- HR involvement in outsourcing talent management and strategy
- Career progression for outsourcing professionals
- Compensation for outsourcing professionals

Join Mike Corbett (CEO, IAOP) and Teresa Carroll (SVP, General Manager, KellyOCG) for a conversation about the evolution of outsourcing as a profession and what's next.

*Teresa manages the strategic planning, market strategy, sales, operations, and development of client workforce solutions for the fastest-growing division of Kelly Services. She and her team design and deliver innovative talent solutions that help clients manage a higher quality, more flexible, and more cost-effective workforce on a global basis.*

*Corbett is IAOP's Chairman, Founder and Inductee into the Hall of Fame for his lifetime contribution to the Outsourcing Industry.*

### 10:15 am – 11:00 am The Case for Impact Sourcing: The Rockefeller Foundation/Everest Group Study



**Eric Simonson**, Managing Partner, Research, Everest

**Mamadou Biteye**, Managing Director, The Rockefeller Foundation

**Tim Hopper**, Responsible Sourcing Manager, Microsoft

**Lori Silverstein**, Chief Sales Officer, Digital Divide Data

**Mark Pfeiffer**, Executive Vice President, Teleperformance

**Curt Swaggart**, Senior Offshore Vendor Manager, Ancestry.com



The Rockefeller Foundation is aiding the development of the impact sourcing market to help connect high potential but disadvantaged individuals to job opportunities in the services sector. Impact sourcing is a win-win opportunity that not only offers value for business, but also provides an opportunity for individuals to improve their lives, the lives of their families, and communities. As part of this initiative, the Foundation supported Everest Group to conduct a study to substantiate the business case for impact sourcing and profile its current market landscape. The results of that study will be presented here and provide the opportunity to learn more about the business and social benefits of impact sourcing and how you can integrate impact sourcing into your service delivery portfolio.

*Hopper is responsible for the social and environmental activities of Microsoft's indirect spend suppliers. He is a member of IAOP's CSR committee, the Global Business Coalition against Human Trafficking (gBCAT) supply chain subcommittee, Made in a Free World, and the Rockefeller Foundation stakeholder group to promote Global Impact Sourcing.*

**Register online at [www.IAOP.org/Summit](http://www.IAOP.org/Summit)**

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# MAIN TENT

11:15 am – 12:00 pm

## How Capabilities and Governance Mechanisms Influence Outsourcing Performance



**Aihua Yan**, Assistant Professor, Saint Louis University  
**Anubhav Saxena**, President, GLOBale Managed Services, Research & Data, ISG



This session features the selected paper from the North America Academic Outsourcing Workshop. Presented with workshop host, ISG, this research investigated the influence of capabilities and governance mechanisms on outsourcing performance. Research on ITO and BPO has consistently found that firm capabilities and governance mechanisms (contractual and relational) are key determinants of outsourcing performance. This study provides two implications for outsourcing practitioners. Hear what those implications are in this info-packed session.

*Yan is Assistant Professor at Saint Louis University and received a Doctor of Philosophy (Ph.D.), Information Systems in 2014 from University of Missouri-Saint Louis. Saxena is a respected leader in the global sourcing industry with two decades of experience working with major information technology service providers. In his current role, he is responsible for ISG Global Managed Services, one of the company's fastest-growing business units and a major contributor to its revenue and long-term strategic success. Anubhav also manages the Global Research and Data Services business, which continues to provide valuable insights across the sourcing lifecycle to enterprises and service providers around the world.*

12:00 pm – 12:45 pm

## Results of IAOP's 2014 CSR Committee Survey



**Dr. Ron Babin**, COP, Associate Professor, Ted Rogers School of IT Management, Ryerson University  
**Dr. Bill Hefley**, COP, Clinical Associate Professor, University of Pittsburgh and Director, ITSqc



In 2009, IAOP conducted its first Corporate Social Responsibility (CSR) survey which was repeated in 2011 and again last year, gaining a global perspective on CSR in outsourcing. Corporate Social Responsibility in outsourcing is not a fad that is going away. The 2013 bi-annual CSR Survey, which builds on the prior results again reflect this, with nearly 70% continuing to support the view that CSR will be important in future outsourcing contracts. Providers who aren't active in CSR may be eliminated because buyers are increasingly focused on both social conditions and environmental considerations at the global locations where services are provided. Hefley and Babin, supported by the CSR Committee, will present facts and findings to back up the trends towards CSR.

*Ron Babin is a professor in the School of IT Management at Ryerson University, in Toronto Canada. He has several decades of industry experience with global consulting firms Accenture and KPMG. Global Outsourcing, both IT and IT Enabled Services, is Ron's area of interest and expertise. Dr. Bill Hefley, COP, is Chairperson of the Training & Certification Committee and its Courses & Curriculum subcommittee, and is active in the Corporate Social Responsibility (CSR) subcommittee. He is a faculty member at the University of Pittsburgh and a Director of ITSqc, LLC, the spin-off from Carnegie Mellon University for promoting best practice models for the global services industry, founded to extend the impact of the eSourcing Capability Models (eSCM-SP and eSCM-CL).*

# WORKSHOP

## 1st ANNUAL NORTH AMERICAN ACADEMIC WORKSHOP *Hosted by ISG*

Sunday, February 15

IAOP is honored to host the 1st Annual North American Outsourcing Research Workshop bringing together academic researchers and industry practitioners to explore important new issues and challenges in global outsourcing. The workshop theme is "Integrating rigorous research to address relevant and current outsourcing industry issues," or "Where academics and practitioners come eye-to-eye."

This Workshop will allow academic researchers to present serious papers to their peers, as well as gain feedback on how these issues are handled in real world situations by customers and providers of outsourcing services. IAOP's Academic Organizing Committee for the Workshop consists of Ron Babin, DBA, COP, Ryerson University; Leslie Willcocks, COP of the London School of Economics and Joe Rottman, University of Missouri – St. Louis. The committee is reviewing all submissions from an academic call for papers and will determine which of these papers will be presented during the Workshop.

The "winning" submission will be presented with a "Best Research Submission" award and be co-presented at the Summit as well, along with the workshop's host, ISG.

Limited seating for outsourcing industry researchers and others interested in attending.

Email [pam.odell@iaop.org](mailto:pam.odell@iaop.org) to request a seat.

Register online at [www.IAOP.org/Summit](http://www.IAOP.org/Summit)

Questions? Contact the registration desk at +1.845.452.0600 ext 110

# NETWORKING & SOCIAL EVENTS

## Sunday, February 15

- 12:00 pm – 5:30 pm**     **3rd Annual IAOP/Pulse Publisher's Cup Golf Tournament**  
Join anchor sponsor KPMG, your colleagues and delegates at Faldo Championship Course on Sunday, February 15, 12:00pm shotgun start, for this Texas Scramble with a few twists! Included: An 18-hole round of golf, golf cart, use of practice facility, golf gift pack, boxed lunch, beverage coupons and tournament prizes. Buyers play FREE, all others are \$199 per person.
- 5:00 pm – 6:30 pm**     **Early Registration Champagne Welcome Reception**  
The Summit's unofficial kick-off! Avoid the Monday morning crowd by stopping by and picking up your badge, materials and a glass of champagne and help IAOP toast a successful event!

## Monday, February 16

- 9:30 am – 12:30 pm**     **Customer Only Networking Session and Provider/Advisor Only Networking Session – Now Extended!**  
This event will help you meet like minded professionals early in the conference, make stronger connections and ask the questions you want answered. An opportunity for both providers/advisors and customers to separately share their experiences and best practices. Come up with key topics to be discussed at Wednesday's networking!
- 11:30 am – 12:30 pm**     **Summit Kick-Off Luncheon**  
You asked for more time and here it is! No need to stop the conversation...refuel with lunch and keep the networking going. .
- 5:30 pm – 7:00 pm**     **Welcome Reception in the Global Services Mall**  
The Summit's exhibition hall opens with a reception hosted by IAOP Founding Member, Accenture. Enjoy cocktails and hors d'oeuvres and join fellow delegates in a free-flowing exchange of ideas while visiting exhibition booths showcasing the best in outsourcing from around the world.
- 7:00 pm - 8:00 pm**     **COP Cocktail Reception (Invitation Only)**  
IAOP honors all Certified Outsourcing Professionals at this special reception

## Tuesday, February 17

- 7:30pm – 8:45pm**     **Networking Breakfast in the Global Services Mall**  
Grab a bite in the exhibit hall before the sessions start at this continental breakfast!
- 12:45pm – 2:10pm**     **IAOP Awards Luncheon**  
Join IAOP at this special luncheon honoring the 2015 inductees into The Outsourcing Hall of Fame, GEO award and GOSRIA winners and IAOP's Members of the Year.
- 5:40pm – 7:15pm**     **Cocktail Reception in the Global Services Mall**  
This is the final chance to meet the exhibitors and network with fellow delegates in the Summit's Exhibition Hall. Be sure to check your list to ensure you've taken advantage of each opportunity.

## Wednesday, February 18

- 8:00 am – 9:00 am**     **Table Talk Networking Breakfast**  
Come together with the entire outsourcing community and join in facilitated table talks geared toward the topics developed in Monday's Networking Groups.
- 1:00pm – 2:00pm**     **Food for Thought Networking Luncheon**  
Keep the conversation going and enjoy one last educational and networking opportunity before you head home!

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## Track #1 Cloud, Big Data, Automation and Beyond

Monday Feb 16 2:35 pm – 3:25 pm



**The Challenge of the Digital Enterprise:  
It is not about the CMO, it is about the CIO and the Approach**  
Greg Palesano, Executive VP, Global Head of Application Services, HCL

Please join HCL and two of its key CIO clients and learn about their journey to the Digital Enterprise using the Digital Systems Integration Roadmap. They will share the roadblocks, challenges, common mistakes and the better paths forward to digitization. Regardless of what analysts and industry critics say, it is still the job of the CIO and his team to quickly move his or her enterprise to the Digital era. Come join us and we will share the framework for every legacy enterprise/business running to catch up and pass competitors who were already born “Digital”.

*As a part of the executive management team for the applications services unit of HCL Technologies, Greg is responsible for leading the applications business across all industry segments globally. His teams are responsible for setting and executing market strategies, including development of industry-specific offerings. As part of the management board, Greg is heavily involved in setting strategic direction, shaping organizational structure, and collaborating with other HCL line of business leadership to ensure efficient business operations.*

Monday Feb 16 3:30 pm – 4:20 pm



**Orchestrate a Multi-sourced Landscape: The Next Generation of Collaborative Support**  
Jim McDonnell, General Manager, ServiceGrid Business Unit, Cisco

Today, organizations face a more complex IT environment than ever with a hybrid of devices, services and vendors. To overcome this complexity organizations must establish a holistic approach for managing and governing vendor, partner, and service provider relationships. In Jim McDonnell’s session he will discuss how to:

- Manage service providers in a consistent and efficient way
- Coordinate service delivery across multiple providers
- Enable end-to-end governance and transparency across an outsourced landscape

*As an entrepreneur and Cisco executive, Jim McDonnell is a recognized industry expert in cloud software and services. He launched his career with four start-ups, and went on to lead the creation of new Cloud business units at Cisco and Avaya. Jim consolidated all software teams within Cisco Services to form the new Smart Services Technology Group. Today, Jim serves as General Manager of the ServiceGrid Business Unit at Cisco.*

Monday Feb 16 4:30 pm – 5:20 pm



**Creating Effective Cloud Services RFPs to Enable New Capabilities**  
Michael Snyder, Partner Development Manager, Amazon Web Services

Request for Proposals (RFPs) are an effective procurement tool in acquiring enterprise-level cloud services. However, organizations need to learn how to write RFPs to allow for the unique requirements that the cloud can provide over traditional IT services.

Governments, non-profits and enterprises are looking to take advantage of these differentiated requirements as they shift to the cloud and yet need guidance on ensuring RFPs are effective. I will discuss case studies and advice on effectively communicating cloud requirements and new opportunities in developing effective cloud RFPs.

*Michael develops and maintains relationships with top-tier consulting firms and private equity firms. His role consists of educating partners and helping them develop go-to-market offerings integrating their services and AWS.*

Tues Feb 17 11:45 am – 12:35 pm



**How to Address the Privacy, Security, Regulatory, Big Data, “That’s Just Creepy” and “Whatever You Call it, Don’t Call it Outsourcing” Issues in Outsourcing – A Panel Discussion**

Moderator: **Aaron Tantleff**, Partner, Foley & Lardner

Panelists: **David Strauss**, Vice President & Associate General Counsel, Experian  
**Ravikiran Taire**, Senior Client Partner, Healthcare, Infosys



Organizations are at a cross roads in terms of trying to squeak out cost savings without creating additional risk, regulatory non-compliance, or legal issues. With an ever increasing amount of data and the harm that is possible from improper use or disclosure of Big Data, the big question that everyone is asking is, “what can be done to ensure that my organization’s data remains secure, confidential, and available in the outsourcing relationship?” Learn what is the future of outsourcing and Big Data, and how customers and vendors can work together to ensure the confidentiality, integrity, and availability of an organization’s Big Data so that no one loses sleep over-night, and the interplay of Big Data in the outsourcing relationship.

*Tantleff is a partner in Foley & Lardner LLP’s Technology Transactions and Outsourcing and the Privacy, Security, and Information Management practice groups, and the Health Care, Life Sciences, and Energy Industry Teams. Aaron has represented companies in technology and outsourcing transactions, both as in-house and outside counsel.*

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## Track #1 Continued

Tues, Feb 17 2:20 pm 3:10 pm



### Global Cloud Computing Survey Results: Market Practice As A Service

**Michael Mensik**, COP, Partner, Baker & McKenzie

**Gregg Goldman**, Executive Director and Global Outsourcing Legal Lead, UBS AG

**Tracy Kocourek**, Director of Legal Services and Global Legal Lead- Accenture Cloud Platform, Accenture



Baker & McKenzie presents the results of its global survey of Buyer and Provider responses to the questions of what cloud computing is; how cloud computing solutions are evaluated; whose contracts are being used to memorialize cloud transactions; what contract terms are being negotiated, which are not; what are the "market standard" terms; how long does the contracting process take; what are the key variables to getting a contract done; what are the key drivers to successful implementation of cloud solutions; what are the key stumbling blocks; how do the parties manage the integration of various stake holder concerns and how can contracting processes be improved to deliver more value for all parties involved.

*Mensik is the global co-coordinator of Baker & McKenzie's Global Information Technology/Communications Law practice. Ranked as a leading Technology and Outsourcing attorney by Chambers Global 2007, Mr. Mensik is described by that publication as "erudite and popular." According to clients "he is an expert in a variety of topics and knows the best person in every office around the world for your situation." Goldman is the global head of outsourcing legal across all business divisions at UBS, and is additionally the Americas regional lead for Data Management, Privacy, and manages all IP litigation. Kocourek serves as the Director of Legal Services and Global Legal Lead for Accenture Cloud Platform, a cloud brokering and orchestration service which supports multi-cloud technology from a broad range of leading global providers such as Amazon Web Services, Microsoft Azure, NTT Communications, Orange Business Services and Verizon Cloud.*



Tues, Feb 17 3:40 pm – 4:30 pm

### Big Data is Here: What can you Actually do with it?

**Boris Kontsevoi**, COP, President, Intetics Co.

Big data is now everywhere, but what are companies actually doing to use it? Whether you want it to or not, the tech world is transitioning into a data-driven age. With these changes new technologies are taking hold, and companies are finding new and exciting ways to implement ideas and bring innovation to their businesses. The objective of this session is to bring forth the most transformative and pressing ideas and explore how technology is helping transform business and how data is helping drive the change. The focus will be on real-life examples of how companies are implementing location-based services, Internet of Things, and omni-channel systems technologies and what benefits they are seeing.

*Kontsevoi is a Founder and President of Intetics Co. Under his leadership a group of software engineers developed into a truly global technology company with multiple professional certifications and industry awards, including Top 100 Outsourcing and Top 100 Global Services company. For the impressive growth Intetics had demonstrated over the years, Boris received an Entrepreneurial Excellence Award from The Business Ledger in 2009.*



Tues, Feb 17 4:40 pm – 5:30 pm

### Reimagining Outsourcing with Robotic Process Automation: Its Impact on Delivery, Transformation and Competitiveness

**James P. Swinford**, Director of Services, Virtual Operations

**Balamurugan Arumugam**, Business Process Services, Cognizant Technology Solutions



Robotic Process Automation (RPA) is a leading example of machine intelligence already impacting the world of outsourcing, back-offices, and shared-services centers. Early adaptors of RPA are already experiencing its many core benefits such as significant labor cost-reduction, operational efficiency, and greatly reduced cycle times and near zero error rates. Those organizations that wait too long or do nothing with RPA risk quickly losing ground to their peers and perhaps fading into irrelevancy. As an early adaptor of RPA, Cognizant Technology Solutions has established themselves as a leader in the deployment of these new technologies and realized significant and meaningful results. Along with Virtual Operations, the two organizations have automated and transitioned several of Cognizant's client processes and been able to create external and internal benefits as a result. Together, Cognizant and Virtual Operations will share highlights of this journey and illustrate lessons learned and best practices.

*James Swinford is the Director of Services for Virtual Operations. James has over 7 years of experience in the financial services industry with a skillset developed over a broad range of roles and responsibilities. For the last four years James has been at the forefront of Robotic Process Automation development and integration.*



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## Track #2 ITO's Next Generation

Mon, Feb 16 2:35 pm – 3:25 pm



### Outsourcing IT Metrics – Productivity & Efficiency

**Sailesh Thakur**, COP, Director, CME Group

There are many metrics that are collected today with respect to IT outsourcing. Most of the metrics are related to SLA, satisfaction, etc--. Very few companies try to evaluate the productivity and efficiency of the outsourcing program/project. This session will walk through the methodologies for quantitative way of designing and measuring Productivity and Efficiency.

*As the leader of the Global offshoring/outsourcing team at CME Group Sailesh is responsible for designing, implementing and managing an enterprise-wide offshoring/outsourcing strategy. This is aligned with the overall strategy and is positioned for the long-term support of CME Group's business objectives and growth. In addition, Sailesh is responsible for the management of all offshore service providers across the organization.*

Mon, Feb 16 4:30 pm – 5:20 pm



### Use Your IT Strategy to Build Long-Term Sourcing Partner Roadmaps

**Ricki J. Koinig**, Global IT Strategic Sourcing, OMV AG

OMV AG is an Austrian-based, global oil and gas company. Recently, they have established a new IT Strategy, accomplished a large scale vendor management consolidation project, and named their first group wide IT long term strategic sourcing partners. To manage these developments effectively, OMV used Business expectations reflected in the IT Strategy for every step of their long term sourcing partner roadmap. The strong tie between the strategy and sourcing partner roadmap allows full transparency of topics for all players involved, realistic bite sized tactical steps, clearer metrics and steering, an increasingly broader reach throughout diverse locations of global Group IT, and a smoother ride through vendor management transitions and organizational cultural changes starting right from Day One.

*Koinig is currently leading Group IT Strategic Sourcing and Vendor Management at OMV AG, headquartered in Vienna, Austria. Originally from Wisconsin, Ricki has led business analysis, strategy, IT optimization, merger/divest and sourcing topics in the US, Europe, India and Scandinavia. She has various academic and professional accolades and publications, and holds a Master's degree from Marquette University in Milwaukee and a Doctorate degree from the University of Technology in Vienna.*

Tues, Feb 17 2:20 pm – 3:10 pm



### Staging a Global IT Transformation for Success

**Lou DiLorenzo**, Platform CIO, Cargill

**John Tweardy**, Principal, Deloitte Consulting

**Justin Kershaw**, VP Global IT Services, Cargill



The IT leadership team at the largest private corporation in North America undertook the enormous challenge for transforming how their organization provided infrastructure services to their global business which spanned 57 countries, multiple lines of business, and hundreds of product portfolios. With the help of a third party advisor the leadership team constructed a roadmap detailing the target end state vision of both the infrastructure organization as well as the manner in which infrastructure services would be delivered. This session will detail both the journey of the sourcing program as well as the lessons learned along the way. Additionally it will highlight the more cohesive IT Roadmap and how sourcing played a key role in driving transformational change, but is not the only lever to pull when thinking about transformation. Key themes around the approach, target operating model, organization design, change management, transition planning, and vendor evaluation will also be discussed.

*DiLorenzo serves as the Platform CIO for Cargill's Food Ingredients & Systems (FIS) business as well as the Global Data & Business Intelligence Lead within Cargill's Global IT function. In these roles, Lou is responsible for all aspects of IT for Cargill's \$35B/year FIS business as well as leading the Data & Business Intelligence team worldwide. Tweardy is an accomplished client executive and advisor in the IT Management and Infrastructure space. With over 18 years of experience, he has managed more than \$10 Billion in strategic outsourcing transactions and is the IT Outsourcing (ITO) National Practice and Offering Leader within Deloitte's Global Business Services (GBS) function. Kershaw is responsible for all applications, infrastructure and Cargill's SAP Program (Tartan). Prior to joining Cargill, Justin worked at Eaton since 2006 as VP/CIO for the Fluid Power Group and most recently as the SVP CIO of Eaton's Industrial Sector since 2009.*

Tues, Feb 17 4:40 pm – 5:30 pm



### Re-imagining the IT Role in a World of Multiple Business Process Outsourcings

**Serge Librot**, COP, Partner, LivIT



Years ago, customers decided to develop their Business by initiating multiple BPO projects to support their growth. Over time those projects became business critical without anyone ever looking at the underlying connectivity and the IT support model. As a consequence, flaws appeared where they were not expected: systems unavailability, performance problem, KPI's not met and it led to frustration and misunderstanding for everyone. This presentation will tell you how, in a journey that lasted three years, the work of an advisor can help to build trust and collaboration between the provider and the customer. It will take you through a real life customer experience and you will navigate through the different waters of Hybrid Sourcing like outsourcing, offshoring and local sourcing, to find the perfect formula.

*With 20 years experience in IT and Sourcing, Serge Librot has gathered different perspectives while working on the customer, the provider and the advisor sides. He supported outsourcing-enabled client transformations including process redesign and ITO. COP certified, Serge is recognized as an ITIL expert, an experienced project/program manager and as a forward thinking Enterprise Architect.*

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## Track #3 Redefining the Outsourcing Relationship: New Models for Collaboration

Mon, Feb 16 3:30 pm – 4:20 pm



### Five Stories You Will Never Forget

**William P. Metz**, COP, Senior Director, IT Sourcing & Vendor Management, Walmart

For nearly 30 years Mr. Metz has been delivering business solutions for some of the world's largest companies including General Electric, Procter & Gamble, and Walmart. He has been recognized globally as a thought leader on the topics of shared services, globalization, and outsourcing. A key theme of his career has been helping organizations analyze and reshape how work gets done. In this session Mr. Metz will draw from his experiences and share five lessons learned in a memorable story telling format, and then entertain questions.

*Mr. Metz joined Walmart in 2012 and currently leads the Global IT Sourcing and Vendor Management organization. Prior to joining Walmart Mr. Metz spent more than 21 years at Procter & Gamble where he led the Strategic Alliances program for P&G Global Business Services His specialty areas include shared services, sourcing, alliance management, business transformation, and service commercialization. He has been recognized globally as a thought leader on the topics of shared services, globalization, and outsourcing, and holds the Certified Outsourcing Professional certification.*

Tues, Feb 17 11:45 am – 12:35 pm



### Kick-Starting Your Organization's Innovation Potential Through Collaboration

**Patrick Stamm**, Senior Vice President, United Healthcare

Explore how to encourage collaboration and kick-start your organization's innovation potential by tapping into the creativity and diversity of your sourcing partners. Use this specific approach to create better alignment through clear communication of what are important outcomes for your business and entice your vendors to invest in solving your most critical business problems. In this session, you will learn the five steps you need to take to build this enduring innovation engine and how to get started immediately.

*Patrick Stamm is responsible for Global Operations, Payment Integrity and Advanced Analytics for UHC, Benefit Operations. He works with operations areas to ensure they have the global capabilities needed to support delivery of high quality service for UHC customers and provides a capable team of advanced operations researchers and engineers to improve organizational effectiveness and efficiency. Additionally, working closely with Optum Insight, Patrick and the Payment Integrity team ensure UHC claims are paid correctly and have advanced capabilities to identify instances of fraud, waste or abuse.*

Tues, Feb 17 3:40 pm – 4:30 pm



### Molson Coors and HP's Hybrid Service Delivery Model – Objectives, Lessons Learned and Future Plans

**Gary Walker**, Senior Director of Global Shared Services, Molson Coors

**Amine Tarhini**, Account Delivery Executive, HP

As Molson Coors builds a bigger and stronger brand portfolio, they continue to seek ways to improve their operations by reducing costs, implementing common global processes, and focusing on cash and capital allocation strategies. The "Business One Way" project is seeking to further standardize processes and technologies for Molson Coors' businesses around the globe. Prior to 2008 Molson Coors had three different business units with different systems and back offices. They soon realized they could better leverage the value from the internal team by also partnering with an external provider. Partnering with HP for Finance & Accounting services since 2008, Molson Coors has benefitted from HP's expertise, along with a scalable, secure solution, for the business process services needed to stay competitive. In the hyper-competitive beverage market, Molson Coors is seeking to make their business operations even more nimble and flexible, so they can focus on brewing great beer brands for consumers. Through HP's experience with running their own internal Global Business Services organization, Molson Coors' is looking to HP for assistance to continue to generate value for their firm, while still retaining portions of the internal service delivery group using a hybrid service delivery model.

*Gary Walker is an experienced financial executive with progressive multi-disciplined experience in public sector accounting. His expertise lies in accounting and finance functions, financial research and analysis, global process review & design, evaluation of internal controls, financial systems implementation as well as GAAP and SEC regulation compliance & reporting.*

*Tarhini is an Account Delivery Executive in HP's BPS Finance & Accounting (F&A) business. In this role, Amine works with the account team to structure a robust global delivery process for clients that provides quality services with calculated value. Since joining HP in May 2002, Amine led the integration and standardization of HP's Master Data into one ERP supporting reference and transactional Finance and Accounting, Supply Chain, Order Management, and Customer Service operations. A significant accomplishment in this role was leading the implementation of an off shore SSC for Master Data operations.*

## Track #4 Managing in Today's Complex, Multi-Vendor Environment

Mon, Feb 16 2:35 pm – 3:25 pm



### Implementing and Operating in a Complex Multi-Sourced Environment – A Panel Discussion

**Gregg Kirchoefer**, COP, Partner, Kirkland & Ellis LLP

**Matt Lovell**, Partner, Kirkland & Ellis LLP

**Dan Lewis**, Attorney, Kirkland & Ellis LLP

**Eric Thompson**, Attorney, State Farm

State Farm and Kirkland & Ellis LLP will hold a panel discussion focused on the issues and challenges involved in negotiating, implementing, and managing a series of application development and maintenance outsourcing agreements in a complex multi-sourced IT environment. The panel will discuss State Farm's highly transformative initiative to develop the systems and technologies necessary to assist in providing its customers with a remarkable customer experience.

*Kirchoefer's practice is focused on transactional matters primarily involving technology and IP; these include: outsourcing agreements; Internet, e-commerce, SaaS, and EDI agreements; strategic alliances; life sciences agreements; licensing agreements; and distribution arrangements, all across a broad spectrum of businesses, technologies, and intellectual property rights. Lovell's practice is focused on intellectual property and technology-related transactions and counseling, Lewis's practice is focused on technology and IP-related transactions, including outsourcing, telecommunications, software development and implementation, joint ventures and strategic alliances, and various IP and technology licenses.*

Mon, Feb 16 3:30 pm – 4:20 pm



### Service Integration: A Blueprint for Regaining Control of a Complex IT Vendor Landscape

**Mark Stein**, Vice President, Infrastructure Services, Capgemini

Many organizations are paying excessive amounts to multiple outsourcers who are providing services with different types of agreements. These complex portfolios of outsourcing services make it difficult to manage service delivery and control cost. Learn how Service Integration can help you to manage your enterprise portfolio of outsourced services to gain greater performance at a lower cost.

*Currently, Mark leads the Service Integration program which develops and supports Capgemini's global Service Integration offering. Most recently, Mark has led Capgemini's delivery of Multi-sourcing Service Integration Services for the State of Texas. Mark joined Capgemini in 2004 to provide information technology and business process outsourcing services to the US electric, gas and water utility industries.*

Mon, Feb 16 4:30 pm – 5:20 pm



### Improving Outcomes Through a Focus on Collaboration in a Multi-Sourced Environment

**Laura D'Ambrosio**, Director, Bristol-Myers Squibb

**Marie Surrette**, Managing Director, Accenture

You've signed contracts with multiple service providers and everything is good, until it isn't. What do you do when the end-to-end services are not being delivered effectively while service levels are green? This session will highlight T.E.A.M.work, the collaborative program that Bristol-Myers Squibb has implemented with its service providers. T.E.A.M.work, Together Everyone Achieves More, has enabled Bristol-Myers Squibb to facilitate the development of a culture where teamwork is expected, supported, and recognized. This is possible when we all use a common language and where we hold each other accountable to behave in ways that build alignment, transparency, trust and respect. T.E.A.M.work has enabled a more rewarding and engaging work environment by building skills necessary to address and resolve problems and through a focus on business outcomes recognizing individual and mutual interests.

*Laura D'Ambrosio joined Bristol-Myers Squibb in 1998. In her role as director for Service Provider Governance she is responsible for developing and managing the performance management strategy for Bristol-Myers Squibb Enterprise Services multi-sourced environment. Marie Surrette is a Managing Director within Accenture Operations specializing in BPO Services. In her capacity as the Accenture Operations Account Lead at Bristol-Myers Squibb she leads the delivery of BPO services and collaborates with Bristol-Myers Squibb leaders to identify and deliver value for their organization.*

Tues, Feb 17 11:45 am – 12:35 pm



### Transparency Between Partners Equals Trust

**Charemon Tovar**, Director, SIIM, CBRE

Companies and their vendor partners must continually seek improvement in their business relationships. A strong relationship can only be achieved through transparency in service delivery and mutual trust between partners. See some of the tools and methods that enable a successful partnership including a robust governance model and tools that enable visibility and scale. This session will share methodologies for communications, collaborative operations that identify specific opportunities and risks, evaluate potential short and long term solutions, and drive joint strategic decision making.

*Charemon Tovar has over 19 years of experience in the real estate industry including Strategic Planning, Portfolio Optimization, Performance Management, and most recently, Technology Strategies. At CBRE, she is the Director of Innovation and Information Management for the Sprint account. Her goal is to implement innovative portfolio and performance management practices, through the use of technology, in order to enable optimization of resources, asset utilization and real estate service delivery.*

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## Track #4 Continued

Tues, Feb 17 2:20 pm – 3:10 pm



### Managing Sourcing Complexity within a Hybrid Ecosystem: A Panel Discussion

Moderator: **Adrian Quayle**, Managing Partner, Avasant

Panelists: **Yogendra Goyal**, Corporate Senior Vice President and Head of Sales, North America, WNS

**Frank Lewis**, AVP, Head of Sales, Manufacturing & Logistics, Cognizant

**Mike O'Brien**, Head of Vendor Management, BP

**Kurt Pearson**, Senior Vice President, Wells Fargo



Sourcing has seen dramatic changes over the years. Buyers, especially the second or third generation outsourcers, are demanding more value for money with greater flexibility, higher productivity, and continuous improvement. Outsourcing objectives are moving towards achieving business outcomes as opposed to traditional play on efficiencies and cost savings. For this, sellers are reinventing themselves, leading with domain capabilities and vertical oriented solutions, leveraging technology to gain competitive advantage, and changing delivery models to address challenges like the US visa legislation. Innovation is the key word for both the buyers and the sellers. There is movement away from single-sourced deals to the best-of-breed multi-sourcing deals, thereby increasing the significance of Service Integration and Change Management. Buyers are also gearing up for these changes either by developing service management and governance capabilities internally or going to the market for specialist skills and managed governance services.

*Adrian is the Managing Partner of Avasant Europe. He is an experienced Sourcing and IT business Management Consultant working with a wide range of clients and service providers globally across all areas of the Sourcing Lifecycle.*

Tues, Feb 17 3:40 pm – 4:30 pm



### Hunting the Mice While the Elephants Run Wild: A Common Approach to Supplier Management Automation

**Ajay Agrawal**, CEO, SirionLabs

**Claude Marais**, President, SirionLabs



One of the most common traps we have seen large enterprises fall into is the myth that they first need to instill basic procurement hygiene before addressing the management of strategic suppliers. This typically plays out in the form of focusing on core procurement processes, people, data quality and pre-signature technology. By its very nature, this classic strategy involves treating the strategic suppliers equally just like any other supplier. In reality, however, this small subset of the supply base which concentrates a very large percentage of the dollar spend, is where the majority of the value leakage occurs and seldom gets the necessary attention. In this session we will foreground the importance of managing the strategic supply base alongside the broader supply base and talk specifically about the global best practices that have emerged in this space over the past decade at the level of processes, tools and practices within the world's best managed enterprises.

*Ajay has been a securities lawyer and a product visionary in the strategic legal technology space for more than 20 years. He founded UnitedLex Corporation in 2006 – a global leader in the legal process outsourcing and strategic legal technology space – and led the company through a period of explosive, profitable growth creating more than \$100m in enterprise value in 4 years. Claude has been a leader in the global sourcing domain for over two decades. Prior to SirionLabs, Claude pioneered I SG-TPI's supplier governance solution, which extended the best practices developed during his previous tenures at General Motors and The Coca-Cola Company.*

Tues, Feb 17 4:40 pm – 5:30 pm



### Financial Services Regulatory Compliance and Supplier Performance and Risk Management: USAA's Journey to Transform Enterprise-Wide Supplier Management

**Glenn Ellis**, Director, Enterprise Supplier Governance, USAA

**Nipun Sehgal**, CEO, Enlighta



This session will detail both the journey of the sourcing program as well as the lessons learned along the way. Additionally it will highlight the more cohesive IT Roadmap and how sourcing played a key role in driving transformational change but is not the only lever to pull when thinking about transformation. Key themes around the approach, target operating model, organization design, change management, transition planning, and vendor evaluation will also be discussed.

*Glenn leads an enterprise team of USAA Enterprise Supplier Management professionals responsible for establishing and delivering enterprise standards, tools, processes and training for USAA's Supplier Governance framework. This framework enables the optimization of third party provider value and risk while addressing regulatory compliance considerations. Nipun is the Founder & CEO of Enlighta; Enlighta's solutions have been deployed by global 2000 enterprises to simplify and streamline performance management, risk management, contracts compliance, relationship and financials management across strategic supplier relationships*

*"I found OWS14 to be extremely beneficial and I learned a lot in an atmosphere of collegiality and exchange. To be at one venue where thought leaders and business leaders from all over the world can share ideas and discover ways to work together so we can each attain our goals is truly extraordinary!" - Mary D. Lewis, Sprint*

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# EDUCATIONAL TRACK SESSIONS

## Track #5 Taking Your Sourcing Program to the Next Level

Mon, Feb 16 2:35 pm – 3:25 pm



### Navigating Site Selection and Economic Incentives for your Next Service Delivery Center: A Panel Discussion

Moderator: **Christopher Chung**, CEO, Economic Development Partnership of North Carolina  
**King R. White**, President, Site Selection Group, LLC  
**John Lenio**, Economist and Managing Director, Economic Incentives Group, CBRE  
**Monty Hamilton**, CEO, Rural Sourcing

This session provides valuable advice and information on how companies - specifically service providers looking to locate new delivery centers or corporate customers looking to locate new captive centers - can work effectively with state and local economic development organizations, as well as third-party site-selection advisers, on setting up new operations. Learn about the various services available through state and local economic development organizations, understand how incentives are awarded to companies looking to establish new operations in a particular geography and learn how site selection is performed by other companies looking to set up similar facilities.

*Christopher Chung joined the Missouri Partnership in 2007 as the public-private, non-profit corporation's first Chief Executive Officer. In addition to having led the organization through its initial start-up phase, Chris directs the Partnership's efforts to market Missouri for new business investment and recruit new corporate operations to the state.*

Mon, Feb 16 3:30 pm – 4:20 pm



### The Third Industrial Revolution, Smart Machines, and the Resource Revolution: Second Industrial Revolution: Impact on the Global Sourcing Industry

**Mike Fabrizi**, Principal, The MITRE Corp.

This presentation will address how advanced technology, much more efficient usage of resources, and developments such as additive and Atomically Precise Manufacturing (APM) will change the outcomes sought in making global sourcing decisions. Included will be how the value add web is changed in the face of automation and advanced machine learning; these developments will likely impart an even greater advantage to ideation and open innovation. The presentation will conclude by noting that, as access to commodities and labor arbitrage opportunities becomes less important, there will be even greater emphasis on finding, developing, productizing, and marketing the best ideas from around the world.

*Fabrizi's responsibilities include both customer-facing leadership as well as internal stewardship for a vital part of MITRE's Applied R&D Efforts. Fabrizi helps public sector clients meet their technology needs through creative sourcing arrangements. Leadership roles have included or presently include helping a major client outsource its systems engineering processes, helping clients evaluate the roles to be played by various service providers, as well as leading a major portion of a cloud sourcing arrangement.*

Mon, Feb 16 4:30 pm – 5:20 pm



### Elevating Strategic Sourcing Capabilities at Boeing

**Lawrence Kane**, COP-GOV, Senior Leader, IT Infrastructure Strategy, Sourcing, & Asset Mgmt Execution, Boeing

During this session, a senior IT leader from Boeing will share insights and perspectives on the key challenges large global enterprises face today in designing, building, implementing and sustaining a high performing team of global sourcing professionals to deliver contemporary Global Business Services. Despite decades of successful sourcing history, robust tools and processes are not enough to assure that vital knowledge is sustained as employees retire, change positions, or enter the organization. Boeing will share their approach to determining organizational requirements as well as development of business case justification for an on-going Global Sourcing Talent Management Program and share experiences to-date in the roll-out of the program.

*Lawrence Kane established the Boeing sourcing office, hired and developed a high-performance team and saved more than \$2.1B by architecting the IT infrastructure sourcing strategy, designing the proposal evaluation process, executing RFPs, negotiating with providers and benchmarking the effectiveness of resultant deals. He is also the author of eleven books.*

Tues, Feb 17 11:45 am – 12:35 pm



### Why & How Do Outsourcers Outsource: A Case Study of What's Good for the Goose is Good for the Gander

**Scott Tracey**, Vice President, IT Operations & Security, Convey Health Solutions  
**Miguel Garcia**, President & CEO, DTSI Group

Whether you're a customer/buyer of outsourcing services or a BPO/ITO solutions provider serving global clients, you likely face the challenge of optimizing your "return on assets" and "return on investment" in today's complex and increasingly risky business environment. You BOTH must focus on your "core competencies" and bring "innovative new ideas" to the table in order to solve today's pressing problems. In this session, you'll learn from a real-life case study why "what's good for the goose (customers) is good for the ganders (providers)" in today's contact/call center outsourcing marketplace.

*Tracey runs all IT at Convey, including call center technology and facilities. Convey Health Solutions are experts in highly-compliant member enrollment, service and administration support (Medicare, Medicaid and Commercial / EGWP).*

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## Track #5 Continued

Tues, Feb 17 2:20 pm – 3:10 pm



### **Applying Machine Intelligence to Outsourcing Projects** **Albert Ma**, CIO, Hengtian Services LLC

For many years, outsourcing service providers have been under tremendous pressure in competition with forever-rising labor cost and relatively flat profit margin. While moving up to a higher value chain is a no brainer, being able to streamline and automate the software development process could still sustain the business with a lower operating expenditure. BlueMorpho is an innovative R&D project between Zhejiang University and InSigma Hengtian. This session provides the business and technical detail about how machine intelligence can save project costs by mimicking programmers.

*Mr. Albert Ma is the Chief Innovation Officer of InSigma Hengtian Software, Ltd. He has over 25 years of IT management and software development experience. Before joining Hengtian, Mr. Ma was the Chief Information Officer of the State Street Technology Center for several years in Hangzhou, China.*

Tues, Feb 17 4:40 pm – 5:30 pm



### **Tech Mahindra and M&M - A Digital Case Study: The Provider, The Customer and the Eco-system Partner Share Their Experience of Enabling the Business of Mahindra & Mahindra go Digital.**

**Naresh Nagarajan**, Global Head, Digital Enterprise Services, Tech Mahindra  
**Bishwanath Ghosh**, CIO-Corporate, Mahindra & Mahindra Ltd.



Researchers the world over have compiled several views on the shifting paradigm of technology and how it is disrupting the market as we know it. It is the constant endeavor of the business to understand the market at large and consumer in specific. With the aid of digital solutions not only are the specifics being decoded but are being utilized to cross sell, upsell and delight.

This session will feature the global head of Digital Enterprise Services and the CIO of its client business sharing their experience of enabling the business of M&M go digital.

*Naresh is an industry veteran with demonstrated ability in the area of articulating thought leadership on disruptive technologies, new markets and creation of non-linear revenue streams. He brings to the table a plethora of diversified capabilities with unique combination of building and leading large technology businesses (CTSH), private equity led roles, entrepreneurship (startup) and intrapreneurships. Ghosh is a person who has donned several hats during his tenure over the last six years at Mahindra & Mahindra. A recipient of the Best IT Driven Innovation in Automotive Business' award by NASSCOM in Feb 2013, Bishwanath is a B.Tech in Mechanical Engineering from IIT, Kharagpur.*



*"This was my first time attending the Outsourcing World Summit. The event was well organized and well executed. Both the sessions and caliber of attendees were of the highest quality. There wasn't a moment in each day that I wasn't getting value out of a session or conversing with a speaker or peer." - Michael Nacarato, Union Bank*

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## Track #6 Voice of the Customer

Monday Feb 16 2:35 pm – 3:25 pm

### A Buyers Guide to Vendor Engagement - The New Life Cycle of the Deal: A Panel Discussion



Moderator: **Donald Mones**, COP, Vice President Risk Management, Morgan Stanley

Panelists: **Michael Serghiou**, COP, Director Externalization, Merck

**Gary Sheneman**, Sr. Director, Business Engagement, Microsoft

**Paul Quaglia**, COP, CIO, Scientific Games

**Megan Carlyle**, Director, Fannie Mae

Join this panel for a discussion on turning best practices into proven methodologies into vendor evaluation, country evaluation and the developed of a balanced portfolio - what attributes are buyers looking for with emerging, established. why are large companies looking toward smaller companies to deliver products and services.

*Donald recently joined Morgan Stanley as the VP of Outsourcing Risk Management and Oversight. Key to his current role is to interpret the impact of outsourcing regulatory changes on Outsourcing policies and procedures and to incorporate changes to ensure regulatory compliance.*

Mon, Feb 16 3:30 pm – 4:20 pm



### Project Managing a Change: Building a Plan

**Brandon Richie**, Change Management within a Project, Boston Scientific

Often Project Plans in outsourcing and offshoring are built with strict planning and rigor for all of the transition elements, but little emphasis on managing the people and culture impact to the business. Learn the key elements of tactical change management activities as they fit into an all-encompassing project plan: what are the key activities to perform, when is it appropriate to perform them against the timing of the transition activities, how to resource your team to assure these change management activities are executed.

*Brandon Richie is a Process Improvement Principal in the Global Business Services department of Boston Scientific. He holds an MPM from the American Academy of Project Management and is a Certified Change Management facilitator, Coaching Others Through Change. He has been managing various functions at Boston Scientific through the offshoring journey over the past 4 years, has helped develop an internal Change Management CoE, and is part of the Outsourcing CoE at Boston Scientific.*

Mon, Feb 16 4:30 pm – 5:20 pm



### Choosing the Right Offshore BPO Locations: A Buyer's Perspective

**Jon Browning**, formerly Director, Microsoft

Finding the right balance for offshore locations depends on many factors and Jon will provide detailed insight for how buyers should evaluate specific offshore markets. Jon will address how buyers should consider many factors including labor supply, market saturation, inflation, and business continuity risk. Alternative English-language markets will be reviewed including Central America, Africa and Tier Two Philippines locations.

*Jon Browning is a former director at Microsoft responsible for developing and managing the global outsourcing strategy for Microsoft Customer Support Services. He co-founded the Contact Center Buyers Forum, a network established for companies who outsource large-scale businesses to share best practices and is a stakeholder for the Rockefeller Foundation project to promote Global Impact Sourcing in Africa and rural India. He is the president and founder of Global BPO Solutions, a company that helps buyers with BPO procurement and site strategy.*

Tues, Feb 17 11:45 am – 12:35 pm



### How to Live With Outsourcing

**Michelle Ferguson**, Senior Vice President, McGraw Hill Financial

In this session, you will get a practical and unvarnished view of the highs, lows, successes and setbacks of BPO outsourcing efforts from the leader of the F&A and HR outsourcing transformations at McGraw Hill. The discussion will focus on the outsourcing journey post contract award through transition and transformation, with attendees obtaining insights that will help them navigate their own outsourcing efforts with eyes wide open.

*Michelle R. Ferguson is Senior Vice President, Global Business Services for McGraw Hill Financial. She developed a shared services strategy as part of the corporation's Growth and Value Plan and now leads that organization which includes financial and human resources, shared services and real estate. She was instrumental in the planning for the sale of McGraw-Hill Education and has led change and outsourcing efforts in all areas of her organization. Her responsibilities also include leading a multi-phase Oracle implementation.*

## Track #6 Continued

Tues, Feb 17 2:20 pm – 3:10 pm



### **A Practical Guide to Drafting Contracts and Statements of Work for Consulting Services** Mary Lewis, Sourcing Manager II, Sprint

Regardless of a company's size or line of business, we've all had the need at some point to seek outside expertise. Contracting for services presents many challenges. And when those services involve consulting, the ability to craft an effective contract or SOW may make the difference between a successful project and an expensive failure, or worse unforeseen legal claims. In this fast-paced, interactive presentation focused on the IAOP customer segment, we will highlight best practices and ideas as well as discuss some of the pain points we've experienced with the consulting services category. Attendees will connect with their IAOP peers and we'll find out from each other what's worked, what hasn't, and how we can all plan for success.

*Mary D. Lewis is a supply chain leader at Sprint Corporation with extensive experience in sourcing, negotiating, and managing complex contracts. She speaks nationally on supply chain and sustainability topics. Lewis also is an adjunct professor at Rockhurst University's Helzberg School of Management and contributes to various online and print publications.*

Tues, Feb 17 3:40 pm – 4:30 pm



### **Implementing World-Class Managed Services** Judith Chuisano, Director, Business & Supplier Management, Merck

Merck has implemented Managed Services for key aspects of their IT life cycle spanning Infrastructure, Applications, Network and Security. This presentation will walk you through the critical components required for you to be successful implementing Managed Services in your company. Learn the critical items for developing a solid Managed Services Contract with your selected suppliers, how to transition work from your current staff/supplier to your selected outsource provider, and more.

*Ms. Chuisano is a Senior IT Manager with extensive IT management experience with directing complex and diverse global projects within Infrastructure across several industries. Throughout her career, she has transformed the knowledge she gained from previous engagements into the rapid deployment of IT strategies exceeding business expectations.*

Tues, Feb 17 4:40 pm – 5:30 pm



### **Mantra for Innovative Sourcing - A Strategic Supplier Consolidation for Engineering Outsourcing**

Gowrishankar Chandrasekaran, Global Sourcing Manager, Intel  
Mukul Kekar, Procurement Techbiologist, Intel



The PES (Product Engineering Services) commodity within Corporate Strategic Procurement is a very key enabler to strong R&D and rapid product development and deployment. The PES commodity managers work with Contingent Workforce (CW) suppliers to bring onboard to Intel those skillsets that are either in high demand, project critical or niche and enabling. A supplier working base has been established over the years, but it has been fragmented and unstructured. As the requirements for CW has grown over the years, the total spend has risen to the order of half a billion USD. The team responded by launching a grand scale RFP to evaluate and consolidate the PES suppliers. Multiple scoring criteria such as technology, quality, cost, strategic alignment, skillsets and availability were used in this selection. Processes such as face2face interviews, online negotiations and write-ups were used for this process. This session will provide details of the process that was followed, the detailed engagements and the results as well as touch on some fundamental shifts in the attitude to outsource away from a headcount driven selection (unhealthy in a sense of efficiency and spends) towards a demand driven skill evaluation.

*Gowrishankar (Gowri) has 15 years of industry experience with global scope in the field of supply chain and procurement covering both Direct and Indirect procurement domains. Kekar is a technology and management leader in Semiconductor Chip design, and entrepreneurship in government management consulting.*

## Track #7 Outsourcing in Action

Mon, Feb 16 2:35 pm – 3:25 pm

### How the Cloud Is Reinventing Business Operations



**John S. Sepple**, Sr. Managing Director, Accenture

Now that every business is (or is fast becoming) a digital business, a new cycle of enterprise transformation is emerging, driven by digital technologies such as analytics, mobility, social media and cloud. But although technologies like analytics and automation are being embraced, take-up of cloud is lagging in transforming business services. While more and more companies have been leveraging cloud technologies in their bids to become agile, digital businesses, the technology is still shy of its long-term promise—and it now lags behind what the trailblazers know they need. The next iteration of cloud—the “intelligent business cloud”—will soon give enterprises everything required to span multiple clouds and multiple vendors and to set a confident course for a truly digital future. This session will focus on how a cloud-based intelligent infrastructure can revolutionize enterprise services and operations, what the typical barriers are and how they can be overcome.

*John (Jack) Sepple is the Senior Managing Director for both Infrastructure Services and Accenture Cloud. In his Infrastructure Services role, Mr. Sepple manages teams across consulting and outsourcing to help clients transform their infrastructures end-to-end—from data center and workplace to network, security and operations—and take advantage of high growth technology trends. The teams work across the infrastructure lifecycle of innovate, solution, transform and operate to create a more agile, scalable, secure and flexible infrastructure.*

Mon, Feb 16 3:30 pm – 4:20 pm



### Principles of Collaborative Problem-Solving

**Mary Lacity**, COP, University of Missouri

**Leslie Willcocks**, COP, London School of Economics

**John Hindle**, Founding Principal, Knowledge Capital Partners



We propose to present our newest research. We sought to find the key practices that distinguish world-class BPO performance. We wanted to understand how some BPO relationships achieve more than just minor cost savings and meeting service level agreements (SLAs). We wanted to know how some BPO clients extract additional sources of value from their BPO relationships. World-class performers deliver much greater business value to clients. Providers in our study helped clients implement shared services on a global scale, enabled rapid growth, delivered products faster, and increased the clients bottom lines by, for example, capturing more discounts and by reducing errors. Based on the results of five surveys and on interviews with client and provider executives leading 32 BPO relationships, we identified nine key practices that contribute to world-class BPO performance. We organized the nine practices along a journey to world-class performance. The practices are demonstrated through named case studies such as a EMC, BP, Microsoft, and TalkTalk as well as masked case studies.

*Mary Lacity is Curator's Professor at the University of Missouri-St. Louis and Co-chair for the Midwest chapter of IAOP. Leslie Willcocks is Professor of Work, Technology and Globalization at the London School of Economics and Director of the Outsourcing Unit. Dr. John Hindle is Founding Partner, Knowledge Capital Partners.*

Mon, Feb 16 4:30 pm – 5:20 pm



### Right Sourcing IT: A Bank of America Case Study with Key Lessons Learned

**Aristide Toundzi Dzouankeu**, Senior Manager, Financial Services Advisory, EY

**Marlin Ness**, Executive Director, Financial Services Strategic Technology Advisory, EY

**David Taylor**, Senior Technology Manager-System Engineering Architecture, Bank of America



This case study describes an approach and methodology for transitioning from a single managed services vendor to multiple best-of-breed vendors while insourcing key functions for vendor oversight and coordination. As part of a strategic program to modernize IT services and reduce cost, a top financial services firm launched a program to redefine its 10-year contract with a major Managed Service Provider for the delivery of voice, data, and security services. EY assisted the client in reducing costs, improving services, and managing risk by insourcing key IT functions and improving best-of-breed outsourced arrangements. The transformation helped achieve over \$300M savings annually.

*Toundzi is the co-creator of Service Management Integration, a new EY service offering designed to provide clients with Operating Models and Governance Frameworks for the efficient and effective management of multi-vendor environments. He also leads the Financial Services IT Operations practice with a focus on helping clients transform their IT organizations to rationalize IT costs, manage risk, and realize higher value from their IT investments. Ness is an Executive Director in Ernst & Young's Financial Services Strategic Technology Advisory Services practice. Over the last 25 years he has been responsible for the successful implementation of over 50 major command centers, data centers and IT service management improvement projects. Taylor has 16 years of leadership and 20 years in Information Technology experience within the financial industry. Well versed in leading and building international teams, providing technology guidance to project teams, facilitating support for technology decisions, and offering capital and strategic planning that provides a solid foundation for strategic planning and resource allocation.*

## Track #7 Continued

Tues, Feb 17 11:45 am – 12:35 pm



### Serving The Millennial Generation

**Keith Tice**, VP and Chief Procurement Officer, GoDaddy, Inc.

**Jeff Stevens**, Division President, ISS Facility Services, Inc.

Join this session to understand the strategy behind the partnership between GoDaddy and ISS. Gain insight into how to design an outsourcing program of non-core competencies that supports and enables the work culture of a millennial generation and enhances its ability to attract, retain and motivate the productivity of this generation's future leaders. When outsourcing non-core services of a technology company there has to be a strategy in place to secure a relational and extremely flexible service delivery to a new generation of young employees.

Tues, Feb 17 2:20 pm – 3:10 pm



### The Nimble, Agile VMO – Combining Service and Technology to Drive Scalability and Effectiveness: A Case Study with Three Market Leaders

**Kevin McDonald**, Vice President BPO Governance, The E. W. Scripps Company

**Andrew Bishop**, Manager - Procurement and Support Services at Health Care Service Corporation

**Eugene Kublanov**, Advisory Managing Director, KPMG LLP



The complexity of managing vendor portfolios is increasing by the day. Right sizing the governance organization, finding and retaining the right talent and staying focused on strategy and high value activities are ongoing challenges for most companies. Enter the Nimble, Agile Vendor Management Office (VMO). In this session you will hear from three major corporations about their journey in leveraging services and technology to establish scalable VMO's that not only support the enterprise but advance it.

*Kevin McDonald has over 14 years of experience working within both large and mid-market companies in virtually every aspect of HR operations, technology strategy and implementation. Andrew combines 4 years of healthcare experience at Healthcare Service Corporation in the areas of Business Process Outsourcing (BPO), Strategic Sourcing, and Governance and Vendor Management. Prior to his current role, he spent 3 years working in Management Consulting supporting clients with a focus on IT Outsourcing and Governance. Andrew's educational background is in Finance and he is a graduate of Michigan State University. Eugene is a recognized thought leader, practitioner and trusted advisor in the shared services and outsourcing industry. He has spent the majority of his career advising leading organizations on developing and executing initiatives to effectively globalize their services portfolios. With deep experience in ITO, BPO and KPO, Eugene has worked with clients across numerous industries including financial services, retail, pharmaceuticals, hi-tech, private equity, healthcare, aerospace & defense and media & entertainment.*

Tues, Feb 17 3:40 pm – 4:30 pm



### How to Transform your Enterprise Function and Gain Business Agility, Flexibility, and Scalability

**Dennis McCann**, Managing Director, UBS

**Raghu Kidambi**, Senior Vice President, Business Services, HCL Technologies Ltd



Significant amount of costs in large companies are locked up in operations and back-office functions. These costs not only reduce Return on capital but also impact ability of your company to invest in more client centric/revenue generating activities – which are essential to maintain competitive position of your organization. Enterprise functions such as FINANCE, procurement, marketing, legal and HR form a major component of the back-office costs. Managing these costs is a key agenda item for Boards, CEOs and CFO's today. HCL has developed a breakthrough proposition to strategically manage these costs and improve your company's profitability.

*Dennis is Managing Director, Head of Strategic Partnership Management and Co-Head of Taking Finance Forward, the transformation initiative of UBS Group Finance. He is responsible for driving the change agenda to strengthen effectiveness and efficiency through the delivery of a Finance target state operational model and for the offshoring, near-shoring and outsourcing efforts for the function. Raghu has 20 years of experience in process transformation across multiple industry verticals, 6 years in business process outsourcing and 10+ years in deploying shared services in core operations and horizontal processes. Raghu has implemented large-scale ERP implementations across the globe. Prior to HCL Raghu as worked with AMEX, Oracle, PWC and Deloitte. Raghu has a BS in Accounting and MBA in Finance from American University.*

Tues, Feb 17 4:40 pm – 5:30 pm



### Data Driven Real Estate: An Outsourcing Imperative

**Bryan Jacobs**, Principal Corporate Solutions, JLL

Why is big data so important to outsourcing, notwithstanding the technology that delivers data solutions? It's certainly more than creating the latest application that's fed by a comprehensive data warehouse. Within the real estate outsourcing industry, the opportunity to deliver a compelling data solution centers around what it enables real estate professionals and their client partners to become - productive, innovative, and empowered. The right solutions create total enterprise mobility and flexibility for executives to make strategic decisions at the speed of business, but in a risk-mitigated fashion. Within this session, JLL will discuss its big data path to delivering outsourcing productivity enabled by comprehensive data-driven real estate advice.

*As a Principal member of the Solutions Development team, Bryan creates and implements real estate and integrated facility management solutions for our major global clients. He specializes in leading large assignments that call for multiple services in several geographies with a particular emphasis on large operational outsourcing.*

Register online at [www.IAOP.org/Summit](http://www.IAOP.org/Summit)

Questions? Contact the registration desk at +1.845.452.0600 ext.110

## Track #8 The People Factor

Mon, Feb 16 2:35 pm – 3:25 pm



### Human Capital & Outsourcing: Enhancing Business Performance with Innovative Approaches and Operational Effectiveness

**A Panel Discussion with Members of IAOP's Global Human Capital Chapter**

Moderator: **Tom Kaminsky**, Vice President, RPO Practice Lead, KellyOCG

Panel:

**Dr. Bill Hefley**, COP, Clinical Associate professor, University of Pittsburg, and Founding Director at ITSqc

**Gary L. Dobbins**, COP, Sr. Director, Global Engineering Services, Covidien

**Allan Racey**, Global HR BPO Capability Lead, Accenture

**Debora Card**, Partner, ISG



How can HR leaders today keep pace with and tackle the dynamic business challenges that threaten the competitiveness of their organizations? Join the Global Human Capital chapter leaders & experts from Accenture, Brookfield Global Relocation Services, Covidien, Deloitte, Intel, ISG, ITSqc, LLC and Kelly Outsourcing & Consulting Group for an engaging and interactive discussion around strategies HR teams can employ to address some of the most pressing workforce issues of this decade including: talent & HR analytics; the psychographics of talent; performance measurement & management; talent acquisition & access plus global mobility management.

*Kaminsky is Vice President and Recruitment Process Outsourcing (RPO) Practice Lead – Americas for KellyOCG, the Outsourcing and Consulting Group of Kelly Services, Inc., a leader in providing workforce solutions. In this position, he is responsible for expanding current client relationships and developing new business opportunities.*

Mon, Feb 16 4:30 pm – 5:20 pm



### How to Successfully Incorporate Veterans into your Hiring Process

**Marianne Strobel**, VP, AloriCares

Active duty and retired military service members are used to seeing their fair share of struggles. Veterans return from overseas expecting better circumstances and a new chance at life; however, they often find that the road to opportunity isn't always paved. The jobless rate for veterans who served during the Gulf War II-era has dropped since 2012, yet remains shockingly high at 9 percent. An estimated 246,000 post-9/11 veterans are unemployed. The overall unemployment rate for all veterans is 6.6 percent – or 722,000 military service members. Despite the discrepancies in age, gender and location, the underlying theme in the U.S. is that military unemployment rates are still high. Solutions are diverse and broad in scope, and while corporations say they champion the idea of hiring former service members, not everyone puts a plan into action. With this in mind, Alorica built AloriCares, which focuses on hiring veterans, service disabled veterans and active duty spouses. In this session, Marianne Strobel, VP of AloriCares, will discuss how to successfully incorporate military hiring into your corporate hiring initiatives.

*Marianne has over 25 years of experience in the telecommunications industry leading organizations focused on diversity. She guides the AloriCares initiative focusing on veteran hiring at Alorica. Marianne is a recognized leader in business and supplier diversity and was named to San Francisco's 2013 Most Influential Women in Business list.*

Tues, Feb 17 2:20 pm – 3:10 pm



### Internal Culture & Outsourcing

**Ioannis Karalis**, Outsourcing Services Manager, Delhaize Group

Our organization, one of the nation's largest grocery retailing companies, outsourced IT Services for the first time in 2013. As a leadership team the appropriate steps were taken from a due diligence perspective before we outsourced our data center operations to start with, our network operations right after, and our help desk and desktop support after that. It has been a year and a half of continuous change in our organization and great learnings have come out of this experience. The learnings are very relevant to the retail industry as the culture has specific characteristics, as well as all organizations that are outsourcing and are moving from being the doers to be the supervisors/Project managers for managed services.

*Yanni is the Outsourcing Services Manager of Delhaize America, a subsidiary of Delhaize Group, a global Food Retailer. He holds a BA in Political Science & International Relations from the University of New Hampshire, and an MSc in International Management from King's College London.*

## Track #8 Continued



Tues, Feb 17 4:40 pm – 5:30 pm

### **Why Using Successful Sales People as Models for Hiring is a Mistake! The Science of Identifying High Potential Sales Professionals**

**Kyle Andrews**, Partner, Pretium Partners

Sales Executives from companies of all sizes admit that their hiring accuracy for sales is well below 50%. That's a frightening fact considering that sales people are responsible for the lifeblood of your company: revenue. It isn't just hiring; it's poor internal selection as well. The single greatest impact on revenue improvement is accurate selection -- more than training, coaching or technology. Making effective decisions about selecting sales professionals is nearly impossible when relying on methods that are subjective, inconsistent, not tailored to specific job skills, or because the results are not meaningful enough to support objective and accurate decision making. Science and "big data" can now be used as a truly predictive decision making tool to identify high potential sales professionals. This session will outline 9 common hiring mistakes and offer practical advice on how to avoid them. For examples, using successful sales people as models leaves you vulnerable to false predictors. Having too many hiring criteria creates inconsistency because it's nearly impossible to focus on all of them sufficiently so hiring managers chose their favorites. Being persuaded by out-going, effective communicators leads you to overlook the important, job specific competencies that really make difference.

*Kyle's sales expertise was forged in technology and services sales, and helping companies develop and institute business recovery plans. At Pretium, he is responsible for business development, managing client relationships and workshop development and has taught thousands of sales professionals around the world how to sell the business outcomes their solutions create for their clients. Kyle is the co-chair of the Sales and Marketing Chapter of IAOP.*



**Register online at [www.IAOP.org/Summit](http://www.IAOP.org/Summit)**

Questions? Contact the registration desk at +1.845.452.0600 ext.110

## Track #9 Risk Mitigation: Cyberland and Geopolitical Focus

Mon, Feb 16 3:30 pm – 4:20 pm



### Managing Organizational Cybersecurity Related Risks in an Outsourced Environment – How a Skilled Workforce will Drive Success

**Robert Stroud**, VP Strategy & Information, CA Technologies

Cyber threats are coming at us from every direction targeting governments, enterprises and even individuals. What is the evolution and nature of these attacks and why is it so difficult to deal with them? ISACA, the developers of COBIT, is a global association of more than 110,000 cybersecurity, governance and assurance professionals. They recently conducted a global survey of more than 1000 industry professionals globally on Cyber threats and their impact to their organization, their responses to the threat and how they will combat them. The session will share key aspects of the research and discuss innovative methods for industry professionals to circumvent these ever-growing cyber threats leveraging industry good practices to assist you in your role as an industry professional.

*Robert Stroud is vice president of innovation and strategy for the IT Business Management Division at CA Technologies. Rob is dedicated to the development of industry trends, strategy and communication of industry best practices and also serves as the ISACA International President.*

Tues, Feb 17 11:45 am – 12:35 pm



### Pre-Defining Globalization Through an Effective Risk Management Program

Moderator: **Bill Sellers**, SVP and Partner, Neo Group

Panelists: **Shuchita Singh**, Director, Governance Shared Services, AbbVie Inc

**Pam Chiechi**, COP, IT Global Sourcing Office Sourcing Relationship, Risk and Contract Management, Walgreens

Outsourcing and Globalization have always been associated with incremental, often poorly defined, risks. Increasingly, organizations and their Boards are being tasked to better identify, quantify, and plan for such risks in a manner that not only pre-empts the disruption of services, but also withstands the scrutiny of regulators, such as those in the Financial Services industry, which have carried out associated enforcement actions in excess of \$1BN in recent years. This presentation will look at the challenge and opportunity presented by “pre-defining” the risk appetite of the organization. With case studies, it will look at the journey and benefits of assessing and defining risk in advance, as well as creating and maintaining an innovative Risk Appetite Charter.



*William Sellers leads Neo Group's Supply Wisdom product growth and sales direction. In this role, he is responsible for corporate sales, revenue growth and client management for all of the risk monitoring solutions. William brings over 20 years of sales leadership experience, go-to-market planning and customer satisfaction in the research and advisory space. Pam is a senior IT Global Sourcing Professional supporting global outsourcing engagements. Expertise includes strategic planning, translating business strategy into tactical action, developing enterprise sourcing strategies, vendor/partner management, shared services and outsourcing, large-scale global project management.*

Tues, Feb 17 3:40 pm – 4:30 pm



### Emerging Threats in Cyberland: Is the “Internet of Everything” Everything It’s Cracked Up to Be?

**Matthew J. Lane**, VP. & CIO, JANUS Associates

A look at the “Internet of Everything” including the bad things coming to your organization and home soon. This presentation will take a serious look at the future and risks of living in a continuously connected environment. Emerging Threats in Cyberland will take a look at some of the devices, the data they collect, who sees the data, and how it might be used and misused. How can you protect your organization and yourself from “the Internet of Everything?”

*Matthew J. Lane, IAM, QSA, CFCP is the V.P. & CIO of JANUS Associates, the nation's oldest IT Security and Privacy consultancy. A sought after public speaker and a recognized subject matter expert in IT Security, Privacy, and Cloud Computing, Mr. Lane frequently presents to public and industry groups in addition to both domestic and international government entities. Mr. Lane is a graduate of Columbia University with a degree in Computer Science.*

# WORKSHOPS

**Wednesday, February 18, 2015**



## **COP Intensive Workshop – COP’s Only**

**Jagdish R. Dalal**  
**COP, Chief Advisor, Thought Leadership, IAOP**

*This complimentary in-depth annual update is exclusively for individuals attending The 2015 Outsourcing World Summit who have already earned their COP designation. Recertification Points Earned: 5*

**Wednesday, February 18, 2015**



## **Outsourcing Certification Primer – Earning Your Certification & Beyond**

**Pam O'Dell**  
**Director, Corporate and Professional Development, IAOP**

*An introduction to IAOP's training and certification programs, which address the needs of individuals who work across the global outsourcing industry from entry level positions focused on the delivery of outsourced services through to senior executives leading global outsourcing programs at customer, provider, and advisor organizations.*

**Wednesday, February 18, 2015**



## **The Certified Outsourcing Professional Application: A Tutorial**

**Courtney Giardina**  
**Manager, Professional Development, IAOP and Dana Corbett, COP Liaison, IAOP**

*This workshop is for individuals who have already decided to become a COP but need help jump-starting or completing their application. You will be taken step by step through a sample application to make sure you fully understand what is expected of you during the process. COPs will also be on hand for the second half of the workshop to help you understand how to properly document your outsourcing experience as well as give you insights into the COP application process from the applicants end, bringing you one step closer to becoming a COP!*



**Workshops are complimentary but you must reserve your seat. Instructions will be emailed to registered delegates.**



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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.



CB Richard Ellis is the global leader in real estate services. Each year, it completes thousands of successful assignments — with clients from the gamut of industries. This volume creates market knowledge that allows CBRE to seize opportunities, speed the business process and create the most thorough, precisely accurate picture of global commercial real estate conditions and trends. Every day, in markets around the globe, CB Richard Ellis applies its insight, experience, intelligence and resources to help clients make informed real estate decisions.



Colliers International is a global leader in real estate services with more than 15,000 professionals operating out of 480 offices in 61 countries. Colliers provides a full range of services to real estate users, owners and investors worldwide including corporate solutions, sales and lease brokerage, property and asset management, project management, investment sales and consulting, property valuation and appraisal, mortgage banking and market research.



Genpact Limited is a global leader in business process management and technology services, leverages the power of smarter processes, smarter analytics and smarter technology to help its clients drive intelligence across their enterprise. Driven by a passion for process innovation and operational excellence built on its Lean and Six Sigma DNA and the legacy of serving GE for more than 15 years, the company's 60,500+ professionals around the globe deliver services to its more than 600 clients from a network of 74 delivery centers across 20 countries supporting more than 30 languages.



The ISS Group was founded in Copenhagen in 1901 and has grown to become one of the world's leading Facility Services companies. ISS offers a wide range of services such as: Cleaning, Catering, Security, Property and Support Services as well as Facility Management. Global revenue amounted to DKK 78.5 billion in 2013 and ISS has more than 530,000 employees and local operations in more than 50 countries across Europe, Asia, North America, Latin America and Pacific, serving thousands of both public and private sector customers.



KellyOCG®, the Outsourcing and Consulting Group of workforce solutions provider, Kelly Services, Inc., is a global leader in integrated workforce solution delivery for clients worldwide, utilizing proven talent supply chain strategies. In addition to integrated solutions, KellyOCG specializes in Recruitment Process Outsourcing (RPO), Business Process Outsourcing (BPO), Contingent Workforce Outsourcing (CWO), Human Resources Consulting, Career Transition and Executive Coaching & Development, and Executive Search. KellyOCG was named to the International Association of Outsourcing Professionals® 2014 Global Outsourcing 100® list, an annual ranking of the world's best outsourcing service providers and advisors. Further information about KellyOCG may be found at [kellyocg.com](http://kellyocg.com).



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.



KPMG is a global network of professional firms providing audit, tax and advisory services that operates in 144 countries and has 140,000 people working in member firms around the world. KPMG's purpose is to turn knowledge into value for the benefit of its clients, its people, and the capital markets.



Neo Group ([www.neogroup.com](http://www.neogroup.com)) is a leading global firm since 1999, exclusively focused on the Global Services & Outsourcing industry, helping Buyers, Suppliers, Governments and Trade Bodies better leverage global services and mitigate risks through Supply Risk Monitoring – real time global services risk monitoring at a Country, City and Supplier level; Global Services & Outsourcing Advisory solutions; and Outsourced Governance Services - High quality provider of outsourced governance services.



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Avasant is a next-generation global management consulting firm. We work with both public and private sector organizations around the world to help them solve business, operations, technology, policy and economic development challenges. Avasant provides services in the areas of Strategic Sourcing, Technology Optimization and Globalization Consulting, helping clients achieve superior business outcomes. Our methods and practices have been refined over decades of experience, and we have a talented team serving clients worldwide.

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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.



Cisco ServiceGrid™ is an integration platform in the cloud seamlessly connecting enterprise IT and service providers to enable automated multiparty service collaboration through support ecosystems. Cisco is the worldwide leader in IT that helps companies seize the opportunities of tomorrow by proving that amazing things can happen when you connect the previously unconnected. We solve our customers' most important business challenges by delivering intelligent networks and technology architectures built on integrated products, services and software platforms.



Improving business performance while managing risk is an increasingly complex business challenge. Whether your focus is on broad business transformation or, more specifically, on achieving growth or optimizing or protecting your business, having the right advisors on your side can make all the difference. Our 30,000 advisory professionals form one of the broadest global advisory networks of any professional organization, offering seasoned, multidisciplinary teams that work with our clients to deliver powerful and exceptional client service. We use proven, integrated methodologies to help you resolve your most challenging business problems, deliver a strong performance in complex market conditions and build sustainable stakeholder confidence for the longer term. We understand that you need services that are adapted to your industry issues, so we bring our broad sector experience and deep subject matter knowledge to bear in a proactive and objective way. Above all, we are committed to measuring the gains and identifying where your strategy and change initiatives are delivering the value your business needs.



HCL is a business enterprise with presence in the fields of Technology and Healthcare. Founded in 1976 as one of India's original IT garage start-ups, the HCL enterprise currently comprises three companies in India - HCL Technologies, HCL Infosystems and HCL Healthcare with annual revenues of US\$ 6.5 billion and over 95,000 professionals from diverse nationalities operating across 31 countries including over 500 points of presence in India. In the technology space, HCL's offerings span a wide range of software and hardware services and solutions including R&D, Technology Services, Enterprise and Applications Consulting, Remote Infrastructure Management, IT Hardware, Systems Integration, Distribution of Technology and Telecom Products. A new entrant in Healthcare, HCL aims to provide innovative medical services, products and training to meet the growing demand for quality Healthcare in India. For further information, visit [www.hcl.com](http://www.hcl.com)



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# VENUE



## JW Marriott Phoenix Desert Ridge

Phoenix, Arizona



*The fires are lit. The water is flowing. The earth is flowering. The sky is limitless. JW Marriott Desert Ridge Resort & Spa is where the elements meet. This desert mountain luxury hotel near Phoenix is set on 316 acres in the Sonoran Desert. It has world-class conference facilities, a pampering spa, outstanding restaurants and championship golf. Upon arrival you are greeted with an expansive grand lobby, splashing fountains, stunning floor-to-ceiling windows, sparkling waterways and majestic palm-lined pathways. Resort suites and hotel rooms include views, signature bedding and balcony or patio. Experience Arizona resort grandeur nestled near the mountains of Phoenix.*

## Accommodations

The event group rate at the JW Marriott Desert Ridge is **\$249** per night.

Hotel reservations can be made online at [www.IAOP.org/Summit/Venue](http://www.IAOP.org/Summit/Venue) or by phone at **+1.877.622.3140** or **+1.506.474.2009**.

**Please mention The 2015 Outsourcing World Summit to get the group rate.**



## Dining Reservations

With ten eateries to choose from, you will find a restaurant to please any taste. From casual poolside fare at Just a Splash to elegant Italian cuisine in Ristorante Tuscany, rated AAA Four-Diamond, the dining options are vast and varied. The resort also features 24-hour in-room dining service, with a menu that changes seasonally.

**For reservations at one of the restaurants, please call the concierge at +1.480.293.3988.**



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