

IAOP OWS17

JW Marriott Hill Country
San Antonio, Texas
February 19-22, 2017



DON'T MISS:

Networking

- Play golf on a championship course
- Meet and make new friends over cocktails in the Exhibit Hall
 - Wednesday's Interactive Game Show
- Research and Professional Development Workshops
 - And more

KEYNOTES:



Kaihan Krippendorff, *Business Strategist, Consultant and Best-Selling Author*



Jared Weiner, *Executive Vice President & Chief Strategy Officer, The Future Hunters*



Peter Ankerstjerne, *aCOP, Chief Marketing Officer, ISS World Services*



Dave Brown, *Global Lead, Shared Services and Global Advisory, KPMG*

20TH ANNIVERSARY EDITION OF THE SUMMIT

FEATURING ORGANIZATIONS:

Intel, RJ Reynolds, Boeing,
Bristol-Myers Squibb,
Humana, ISS, Accenture,
KPMG, ISG, Genpact,
Shell, GoDaddy, Merck,
Microsoft and more

*Pre-Con
Activities
2/19/17*

SESSION TOPICS:

- **Robotics, AI & Technology:** Revolutionizing Work and Changing the Face of Outsourcing
- **Creating Value:** Business Models, ROI and Best Practices
- **Ins and Outs of Innovation**
- **The Art of Negotiations, Contracts & Relationships**
- **Winning at Outsourcing Governance & Management**



Register online at www.IAOP.org/Summit
Questions? Contact the registration desk at +1.845.452.0600 ext.110

www.IAOP.org

Welcome!



Top 5 Reasons to Attend

1 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.

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

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

4 Become your in-house expert. For 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.

5 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.

CEO's message

Dear Friends,

OWS17 is just around

the corner... Please join us

for the 20th edition of the largest

and longest-running industry event in the world, with

hundreds of delegates from over 40 countries in attendance,

and the first time being held in Texas at the JW Marriott Hill Country, San Antonio. It's not all about business...

it's about connections, and new partnerships. As you know,

IAOP continues to bring together all members of the

outsourcing community – buyers, advisors, providers and

academics – to collaborate and learn from each other. It's

also about fun...and where else could you have so much of it!

So saddle up, everyone – get out there and network!

And learn while you're at it. We've got 40 plus sessions

on today's key topics from some of the best in the industry.

And then top it off with a reception or two. Meet your

new partners. Learn from your colleagues.

See you in San Antonio!

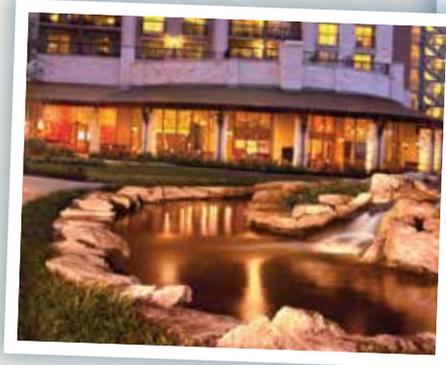


Venue



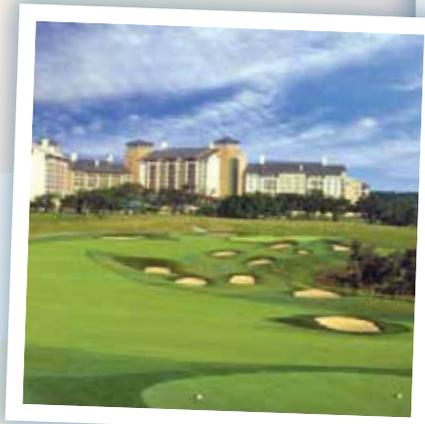
JW Marriot

IAOP is excited to hold the 20th-anniversary edition of OWS at the JW Marriott San Antonio Hill Country, which has firmly established itself as a premier destination for comfort in the Texas Hill Country. Featuring the 36-hole TPC San Antonio golf course, an adult-only infinity pool, Lantana Spa, 6-acre water park with a lazy river, seven restaurants with impeccable cuisine and the largest convention and meeting space in the area, the JW is an easy choice. High-speed wireless internet is available throughout the resort.



IAOP has reserved a block of rooms for conference delegates at the **JW Marriott San Antonio Hill Country** at a preferred rate of **\$279 per night**.

To book a room, please **click here**. If you prefer to reserve by phone, please call **+1.877.622.3140**.



social media

Twitter.com/IAOP
 Facebook.com/IAOP1
 Instagram – IAOPinpics

LinkedIn – search “IAOP” for our more than 50 LinkedIn groups

#IAOP
#OWS17
#GO100



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Main
Tent

Welcome to the 20th

Monday, February 20, 2017

12:30pm – 12:45pm

Welcome to the 20th-Anniversary Edition of OWS!

Debi Hamill, CEO – IAOP

Hear from the woman at the helm of the world's largest outsourcing association as she highlights 20 years of achievements and successes as well as the big picture issues and challenges impacting our industry today.

Debi oversees the entire scope of IAOP's global operations, driving the organization's mission as the association for improving outsourcing outcomes by bringing together customers, providers and advisors in a collaborative, knowledge-based environment that promotes professional and organizational development, recognition, certification and excellence.



Day 1 Host

Megan Carlyle, Office of the CIO, SSD – Fannie Mae, Chair, IAOP's Strategic Advisory Board

Megan Carlyle is the Governance Lead at Fannie Mae and is responsible for establishing and managing the governance to manage outsourced and strategic services for Operations & Technology. She sets the strategic vision for the governance program and oversees all functions, including contract and financial management, as well as performance and relationship management.



12:45pm – 1:30pm

Outthink the Competition

Kaihan Krippendorff, Business Strategist, Consultant and Best-Selling Author

Based on his most recent book, *Outthink the Competition*, Kaihan focuses on teaching proven business strategy tools to develop innovative ideas that grow revenue and increase profits – tools he has used with more than 300 clients, including GE and Microsoft.

Kaihan shares his first-hand accounts of his time with business and social innovators such as Elon Musk and Noble Peace Prize winner Mohammad Yunus and delivers an inspiring call-to-action for leaders and employees facing an increasingly disruptive marketplace.

Dr. Kaihan Krippendorff is a top business strategy speaker and the best-selling author of multiple business books, most recently Outthink the Competition. A former consultant with McKinsey & Company, he is the founder of Outthinker, a popular blogger who authors one of the most read columns on FastCompany.com, and a sought-after strategic advisor to a growing roster of leading businesses and corporations including Microsoft, Johnson & Johnson, L'Oreal, and Citibank.



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-Anniversary Edition of OWS!

1:30pm – 2:00pm

State of the Industry – IAOP's Annual Member Survey

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

Todd Lavieri, Partner and President – ISG Americas

Jag and Todd are back with first-hand results of this year's survey, including findings from the European 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.

In addition to his role at IAOP, Dalal is President of JDalal Associates LLC. Jag was one of the first Certified Outsourcing Professionals. His firm is a leading outsourcing consulting practice and has associates with deep industry experiences in operational and management roles in all aspects of outsourcing. Todd has a unique mix of experiences starting with Big 4 Consulting leadership roles at Deloitte where he was the Global Leader for Consumer Packaged Goods, and then overall Global Leader for the Manufacturing Industry. That was followed by entrepreneurial startup success with Archstone Consulting where Todd was the Founder, President & CEO.



Tuesday, February 21, 2017

8:45am – 9:00am

Day 2 Host

John Maher, COP, Executive Managing Director – CBRE

John C. Maher is Executive Vice President of Global Workplace Solutions Brokerage for CBRE; he is responsible for the growth of CBRE's brokerage business with corporate clients headquartered in the East. John is recognized in the outsourcing and real estate industries as a collaborative leader who has helped a wide range of corporate clients structure and implement highly successful business partnerships that turn innovative solutions into executable change.



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schedule

9:00am – 10:00am

The Evolution of Outsourcing: Or What is it Going to Look Like Tomorrow?

Join the conversation around the changing landscape of service delivery models, sourcing, automation and talent management. Weigh in on what the future workforce is going to look like and what companies should be planning to embrace the enabling technologies that will change them.

David J. Brown, Global Lead, Shared Services and Global Advisory, KPMG, and **Peter Ankerstjerne**, aCOP and Chief Marketing Officer of ISS World Services, joined by **Calvin Crowder**, Sr. Director of Global Real Estate, GoDaddy, along with other members of the outsourcing community, will lead this interactive discussion and engage the audience on the impact that automation is having on the workforce, how to structure companies for success, how you manage organizations in a technology rich environment and what will be the need for outsourcing in this new world.

Audience participation is not only welcome but requested!

David is the global leader for KPMG's Shared Services and Outsourcing Advisory Practice and heads their Global Business Services (GBS) Center of Excellence. In this role, David provides shared services, outsourcing, and GBS advice for many of KPMG's larger, complex client deals. At ISS, Peter has been responsible for developing the Integrated Facility Services model from idea to implementation - this is still a key strategic focal point for the organization and now represents 40% of group revenue. Peter is the author of ten industry White Papers and co-author/editor of five White Books. He is a former trustee of the IFMA Foundation and board member of IFMA.



10:00am – 11:00am

Women Empowerment and Opportunity in Outsourcing:

Chitra Rajeshwari, aCOP, Executive Director – Avasant Foundation

Janet Gosche, Director – Avasant

Bobby Varanasi, COP-GOV, CEO – Matryzel Consulting Inc

Astrid Uka, Enterprise 360 Strategy Director – Microsoft

Mary Lewis, Manager, Sourcing – Sprint

Sara Enright, Manager of Advisory Services – BSR

Karen Bobear, Managing Director – Accenture

Joe Hogan, COP, Vice President – HCL



This session will explore preliminary findings from IAOP and Avasant's collaborated survey "Women Empowerment and Opportunity in Outsourcing". In addition, this session will be lead as an open forum panel encouraging delegates to engage in the conversation surrounding women empowerment, encouraging the exploration of initiatives being created or successfully executed, challenges we face going forward, etc. The conversation will be encouraged to continue from this session to the chapter headquarters at the following reception where first steps will be taken to create an IAOP chapter focusing on these matters, as well as engaging all delegates in this important conversation.

Chitra Rajeshwari is Executive Director at Avasant Foundation and has over 20 years of sales management success and has spent the last 3 years focusing on Sustainability and Innovation its impact on society as a whole.

Janet is a leader in Avasant's IT, Business Process, and Digital Strategic Sourcing practice.

Sara Enright is a Manager at BSR, where she manages the secretariat for The Global Impact Sourcing Coalition (GISC), a new Rockefeller Foundation and BSR collaborative initiative that aims to promote a more inclusive and sustainable BPO industry through the power of Impact Sourcing. She advises companies on corporate social responsibility, human rights, and the development of inclusive business models.

Joe is a highly experienced independent management consultant with proven success in helping enterprises achieve solid results for their companies and their clients.



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Wednesday, February 22, 2017

9:15am – 9:30am

Day 3 Host

Atul Vashistha, COP, Chairman, NeoGroup; Chief EntrePEERneur, SourcingBoard.org



9:30am – 11:00am

IAOP'S Got Talent

Master of Ceremonies – Atul Vashistha, COP, Chairman, NeoGroup, Sourcing Board

Engage in a high-energy session with IAOP's key talented members – the COPs – hosted by emcee Atul Vashistha. Participate and watch as the audience competes against the teams on stage on charged topics like automation, analytics, digital, governance and impact from recent elections. Listen and weigh in on what your peers are doing and attempting on those relevant sourcing topics.

Atul Vashistha is the Founder, Chairman and CEO of Neo Group, a company recognized globally as a leading supply and outsourcing analytics, monitoring and advisory firm. Atul is one of the "Top 25 Most Influential Consultants" and "Top 6 IT Powerbrokers." Globalization Today recognized him as an "Industry Most Influential Powerhouse 25," and Nearshore Americas recognized him as one of the "Power 50." HRO and FAO Today named him a "Superstar."



11:30am – 12:15pm

The Future Game

Jared Weiner, Executive Vice President & Chief Strategy Officer, The Future Hunters

This will be a rapid-fire overview on where the future is headed. Attendees will get a crash-course on the major growth areas poised to shape our economy and society – and how those growth areas will define tomorrow's outsourcing environment. This session will explore how the accelerating pace of technological change is set to disrupt everything around us. This session will also examine several emerging workplace trends, and who (and what) will make up the future workforce. This session will push attendees' thinking beyond the paradigm of more conventional outsourcing and toward the rapidly evolving future of other sourcing (a series of technologies poised to either disintermediate human labor or collaborate with human labor) to increase productivity in the future. Prepare to leave this session with heightened preparedness for the opportunities of tomorrow and a new lens through which to view the future of outsourcing.

Jared Weiner is Executive Vice President and Chief Strategy Officer of The Future Hunters, one of the world's leading futurist consulting firms. He serves on the Board of Directors of the World Future Society, American Express OPEN's Digital Advisory Board and the Young Luxury Marketers' Council advisory board. Jared has keynoted some of the world's most prominent industry conferences with a focus on future related issues. He holds a B.A. from the University of Rochester, and an M.B.A. from the Simon Graduate School of Business at the University of Rochester.



12:15pm – 12:30pm

What is Influencing Where Outsourcing is Headed?

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

Bobby Varanasi, COP-GOV, CEO, Matryzel Consulting Inc

Many diverse, yet inter-related forces are going to change what future looks like. Outsourcing profession will have to anticipate and adopt to remain relevant. Two of IAOP's thought leaders will share their views on what to expect.





Robotics, AI & Technology: Revolutionizing Work and Changing the Face of Outsourcing

Monday, February 20

2:35pm – 3:20pm Monday, February 20

RPA: Governance Challenges and Opportunities

Andrew Gottschalk, Director – KPMG



Focusing on key governance considerations for buyers integrating RPA solutions into corporate environments, this session looks at how RPA solutions impact critical areas including risk/compliance, change management, performance management and relationship management. We will also discuss how governance requirements can change depending on the type of RPA solution deployed and how the solution is sourced.

Andrew Gottschalk is a director in KPMG's Shared Services and Outsourcing Advisory practice with more than 15 years experience leading across the sourcing lifecycle.

2:35pm – 3:20pm Monday, February 20

The Shift to a "Liquid" Workforce and the Role of Crowdsourcing

Kishore Durg, Managing Director – Application Services, Accenture



Businesses demand speed and agility to compete successfully. Agile, iterative approaches call for wholly new different ways of thinking and working. As a result, the traditional outsourcing-based IT services model is under immense pressure. Successful digital transformation demands new skill sets and a "liquid" workforce - one that is adaptable, change-ready and responsive to business requirements.

Crowdsourcing can be used by organizations to complement their traditional IT delivery capabilities, dramatically enhancing agility and providing near-instant scalability. This liquid workforce will offer unprecedented flexibility at three levels: skills, projects and the organization as a whole, allowing organizations to respond to changes in a much more agile manner.

Kishore Durg is the Managing Director - Application Services with overall responsibility for Accenture's Application Services business globally. He is also shaping Accenture's automation services as well as leading Accenture Testing Services practice.

3:30pm – 4:15pm Monday, February 20

Getting Beyond SMAC – A Fresh Approach to Transforming Industry Outsourcing

Dan Glessner, Vice President – Digital, Genpact



Today's Enterprises ask how to utilize technologies best like social, mobile, analytics and cloud (SMAC) to digitally enable and provide the best customer experience to their clients. Service providers often address this with band-aid approaches or siloed point technology solutions based on current environments, legacy infrastructure, inefficient processes, dated software, and disparate systems. With limited budgets, increasing pressure on top/bottom lines and short timelines to produce results, COO's often spend on the front-end "shiny objects," yielding short-term results and marginal improvements at best. Hear a point of view that blurs the definitions of everything we know and do in outsourcing today. An approach focused on transformation through digital reimagination using 12 industry-leading, process-centric technologies that promise to deliver speed, agility, performance, industry relevance, and standardization ultimately resulting in customer delight.

Dan Glessner is Vice-President – Digital for Genpact and is responsible for Digital Partners, Innovation Centers and Product Marketing. Mr. Glessner has more than 20 years' experience in leadership positions with technology, software and service companies in Silicon Valley, ranging from Fortune 50 leaders to start-ups. He holds a B.S. in Engineering and B.A. in Economics from Swarthmore College and an M.B.A. from Harvard Business School.



Robotics, AI & Technology: Revolutionizing Work and Changing the Face of Outsourcing

4:45pm – 5:30pm Monday, February 20

Harness the True Power of Business Process Automation to Drive Business Efficiencies and Improve Customer Satisfaction



Ayesha Kareem, Global Head – Polaris Robotic Process Automation – Virtusa

Enterprises across industries continually invest in large business process transformation programs to lower operation costs while consistently delivering high-quality customer experience. However, changes in business environment, industry compliance and audit requirements demand that business operations change to meet these external changes. These are typically handled by adding employees or short-term solutions, creating significant challenges to business operations. This session will deliver an innovative approach for a robust operations solution that eases the burden of the operations team, allowing growth and change of business processes and RPA tools to keep pace with the dynamics of the industry and lead the competition.

Ayesha Kareem is the Global Head of the VirtusaPolaris Robotic Process Automation practice. The RPA practice helps our Clients with enterprise-ready RPA implementations and solutions. We have developed RPA solutions, service offerings and frameworks to extend the capabilities provided by RPA Tools to meet the needs of Enterprises.

4:45pm – 5:30pm Monday, February 20

Digital Services Automation: Law and Order Comes to the Wild West in San Antonio

Lee Coulter, CEO – Ascension Health

Pat Geary, Chief Marketing Officer – Blue Prism Limited

John Hindle, Managing Partner – Knowledge Capital LLC

Craig Nelson, Managing Director, ISG/Alsbridge



Buyers, advisors and technology developers are prospecting for gold in the automation stream, and the territory is wide open for business. The good news is that standards and benchmarks are on the way to help bring order to the growing world of RPA, Cognitive, and AI. Learn how to spot claim jumpers and tell fool's gold from the real thing with tools from the newly opened assay office.

Lee Coulter has been leading major change programs for almost 30 years. He has strong background in leadership, IT, business process and operating model transformation, operations, outsourcing, general management/ P&L, and shared services.

John Hindle has an extensive international business background, with over 35 years' experience as a senior marketing executive and adviser to companies in the US and Europe in areas of technology and outsourcing. His experience includes service on the Strategic Advisory Board of IAOP and Vice-Chairmanship of the HR Outsourcing Association.

Craig Nelson is a Partner with ISG-One and was formerly a Managing Director with Alsbridge. Craig founded and led the change management practice growing these service lines to become significant contributors to the remarkable growth of Alsbridge. With the acquisition of Alsbridge by ISG he was named Partner to contribute to the growth of ISG's emerging Organization Change Management business.

Tuesday, February 21

11:45am – 12:30pm Tuesday, February 21

The Digital Transformation Journey: Thrive or Die



Kevin Parikh, COP, CEO – Avasant

How can organizations remain relevant in the digital age? Innovative digital technologies have a transformational impact on business and society. It is time to move away from cost optimization and service improvement strategies and embrace the challenges of the new generation by adopting a digital strategy focused on business impact and results. Digital strategies can drive new revenue, open up new markets, better position services and products, and provide more efficient ways to engage with customers, partners and suppliers. Each industry has unique challenges and ways to leverage digital. Don't miss this presentation on the problems and opportunities across different industries.

Kevin S. Parikh is a noted expert and thought leader on digital and business transformation. He has published numerous widely distributed white papers, articles and texts on the subject and authored a book on digital enterprise transformation. Kevin also advises both private and public sector clients on risk management, corporate governance, and service and vendor negotiations. Before joining Avasant, Kevin led the Global Sourcing practice for Gartner Consulting. He has a bachelor's degree in Economics and Political Science from the University of California Davis and received his J.D. from American University.



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Robotics, AI & Technology: Revolutionizing Work and Changing the Face of Outsourcing

11:45am – 12:30pm Tuesday, February 21

Client Case Study by ISG

This session will focus on a successful case study with one of ISG’s biggest clients



2:45pm – 3:30pm Tuesday, February 21

Disruptive Technologies Open Forum

Jay Desai, Outsourcing Leader, Transformation Strategist – AbbVie

Jeffrey Shooter, VP and GM Finance and Accounting BPO, North America – IBM

Sean Tinney, Services Executive, Automation and Technology - North America – IBM



Join BPO leaders from IBM and AbbVie on our expert panel, as we discuss topics including RPA, Intelligent Automation, Cognitive and Blockchain. The Panel will also review the impact of disruptive technologies on the talent and skills needed to stay relevant and thrive in our changing business environment.

At AbbVie, Jay has been responsible for creating and operationalizing the Outsourcing Center of Excellence (COE), which has been chartered with the enterprise-wide responsibility and accountability to develop the firm’s outsourcing strategy and provide governance to drive sustainable value through AbbVie’s outsourcing relationships while mitigating the associated risks.

Jeffrey Shooter has 21 years of consulting, sales, and delivery experience with IBM, Accenture, Pearson and EquiTerra (KPMG). He specializes in leading large global organizations through complex restructuring of their back office service delivery models and has a deep expertise in backoffice operations.

As a pioneer and early implementer in the field of Robotics Process Automation (RPA) Sean is responsible for managing client solutions within IBM in order to identify business opportunities, solution levers and new technologies and services that create compelling business cases for our clients. An industry recognized professional with domain expertise in service delivery, solution design, cognitive automation, analytics and transition management



Creating Value: Business Models, ROI and Best Practices

Monday, February 20

2:35pm – 3:20pm Monday, February 20

How to Provide Insanely Great Customer Care Using Data Science

Mark Wang, Chief Data Scientist – Alorica



In this presentation, Chief Data Scientist Dr. Mark Wang will present how his team finds Big Potential from within Big Data, compelling patterns and the story buried within the data. Data science and advanced analytics are used to improve client performance and customer satisfaction across all of Alorica’s businesses. Dr. Wang will describe how he builds a multi-skilled, interdisciplinary team of data scientists, and the corporate culture that is necessary for data-driven success. This presentation will be strategic, for leaders of organizations that generate large volumes of data, and want examples of how to unlock its potential.

Dr. Mark Wang is an MIT-trained Ph.D. particle physicist and Chief Data Scientist at Alorica, a worldwide leader in customer experience outsourcing solutions. Dr. Wang also had a long career at the RAND Corporation “Think Tank,” at Internet startup Chegg.com through its IPO, and as a venture capitalist in Silicon Valley.



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 2:35pm – 3:20pm *Monday, February 20*

The Role of Impact Sourcing in Global Site Strategy

Jon Browning, *President – Global BPO Solutions*



This session will be in partnership with the Rockefeller Foundation. We will provide an overview of the major BPO locations and explain how trends in the industry are creating opportunities to combine social responsibility with a strong business case for investing in impact sourcing locations. Impact sourcing will be discussed in detail with specific examples for how contact center and back office BPO companies can apply it to their location strategy. Recent success stories will be highlighted from major BPO buyers and providers.

Jon Browning serves as President of Global BPO Solutions with a focus on emerging markets and global location strategy. He is partnering with the Rockefeller Foundation on the global impact sourcing initiative and works in close collaboration with the BPO industry to promote job creation in underserved communities.

 3:30pm – 4:15pm *Monday, February 20*

Leveraging Outsourcing to Modernize While Maintaining Applications – Anthem’s New AMS Approach Proves You Don’t Need to Pick One or the Other

Bobby Samuel, *Staff Vice President, Strategic Claims and Mainframe Modernization – Anthem, Inc.*

Harry Wallaesa, *President & CEO – WGroup*

Tony loele, *Managing Principal – WGroup*

Domenic Colasante, *Chief Marketing Officer – WGroup*



In light of changing regulatory requirements and evolving customer expectations, Anthem desired to transform its approach to application maintenance sourcing. Anthem does not consider application maintenance and modernization to be separate initiatives and believes that modernization done right is self-funding. Learn how Anthem has developed and implemented a unique sourcing model that incorporates core system modernization into the day-to-day application maintenance operations for more efficient AMS sourcing at a significantly reduced total cost. Hear how Anthem conceptualized their advanced strategy for application management from business case development, through leveraging hackathons during vendor evaluation to re-platforming in Agile and DevOps operating models.

Bobby Samuel is a seasoned IT professional with expertise in application development and delivery, strategic sourcing, and mainframe modernization. As Staff Vice President, Strategic Claims and Mainframe Modernization at Anthem, Bobby takes a hands-on approach to ensuring changes in IT maintain the goal of increasing IT's value to the business. As the President & CEO of WGroup, Harry provides creative inspiration behind what WGroup does. Through diligent research and passion for staying on top of industry trends, Harry guides his customers with large strategic problems while managing our staff and overseeing all company operations.

Tony loele has 30 years of experience across the Information Technology disciplines with demonstrated ability to transform business opportunities resulting in a competitive advantage, increased customer satisfaction and positive financial impact for his customers. Tony is a senior leader with a unique blend of strategy, technology, security, risk, finance, personnel, operations, business and process management skills and experiences.

Domenic Colasante is an accomplished marketing professional with broad experience in many facets of B2B marketing and sales. He has excelled in operational and management roles at leading technology provider and services organizations and is passionate about aligning sales and marketing functions to drive measurable revenue growth.

 3:30pm – 4:15pm *Monday, February 20*

Roadmap to Service Operation Center 2020

Mike Groesch, *Vice President, Services Enablement – NCR Corporation*



As more organizations deploy the Internet of Things and look to manage consumer endpoints of all types in the cloud, this explosion of interconnected devices requires a fundamental shift in how organizations structure their customer contact center operations. This presentation will detail how NCR established a worldwide organization of service operations centers, including a worldwide center of excellence in Belgrade, Serbia to deliver incredible service to more than 6 million endpoints across seven continents and 120 countries for some of the world's largest banks, retailers, airlines and telecommunications service providers.

Mike Groesch is vice president of Services Enablement for NCR Corporation, a global leader in consumer translation technologies. Groesch leads an organization of approximately 3,000 professionals responsible for developing the operational capabilities and processes to support NCR's global field service organization. Prior, Mike worked at Microsoft for 13 years.

3:30pm – 4:15pm *Monday, February 20*

Maximizing Value through Managed Services & Driving Innovation

Atul Vashistha, *COP, Founder – Neo Group*

Steve Rudderham, *VP - Global Business Services – Kellogg Company*



Why are companies not realizing greater value from sourcing? Why are the supplier engagement models stuck in the contractor or staff augmentation model? Sourcing leaders recognize the need to evolve the sourcing model. Evolving to a sourcing model that better matches the scope of work to the right engagement model. One such model is managed services. For many this is a dramatic shift, where one has to progress to an outcome management model rather than a people management model. Cost savings is a given but see beyond cost savings. The shifting of incentives provides a dramatic opportunity to realize greater value. Managed services shifts the incentive to the supplier. It incentivizes the partner to be more efficient and productive. Time Warner has leveraged this dynamic with engaged partners to drive not just cost savings but also acceleration of its strategic initiatives, many of which are focused on revenue impact and competitive advantage.

Atul Vashistha is the Founder, Chairman and CEO of Neo Group, a company recognized globally as a leading supply and outsourcing analytics, monitoring and advisory firm.

Steve leads Global Business Services function within the Kellogg's Company. He is responsible for on going operations as well as continuous improvement, global expansion and innovation. Operations in USA, Mexico, Romania, India and the Philippines.

4:45pm – 5:30pm *Monday, February 20*

Survival of the Fittest or How Do You Deepen the BPO Value Chain

Torsten Malchow, *Vice President, BPO – Lexmark Enterprise Services*



Today, smart BPO providers are working to position themselves as trusted long-term business partners to their customers and deepening the BPO value chain. Successful BPO providers are looking beyond low-cost labor as a competitive strategy. To meet new demands, BPO providers must automate increasing complex business process and deliver scalable, repeatable solutions and best-practice services to their clients.

Torsten is Lexmark Enterprise Software Vice President BPO and a global thought leader in Business Processing Solutions in the BPO industry. Being a trusted advisor for Lexmark's BPO customers since many years (formerly at ReadSoft and foxray) and identifying new technology for BPO needs to make the difference fascinates him.

4:45pm – 5:30pm *Monday, February 20*

The Business-Driven Promise of As-a-Service

Michele Martin, *Managing Director, Accenture Operations*



As-a-Service represents a move from tactical decision-making to those driven by business outcomes. The complexity of many organizations' operations, in terms of their major functions and business processes, necessitates a business-driven As-a-Service strategy. But moving to an As-a-Service strategy requires a very different mindset. Executives might encounter some resistance, and there might be some inherent roadblocks that will inhibit adoption. That is why partnering with an As-a-Service provider is important. An As-a-Service provider can help companies adopt an As-a-Service strategy, and achieve the business outcomes they seek. Ms. Martin will discuss the journey to As-a-Service—from the business-driven promise, to the inhibitors, trigger points, and the value to be realized along the way.

Michele Martin is responsible for Accenture Operations' North America Products business, across Business Process Services, Infrastructure, and Cloud. In this role, she educates clients on our as-a-Service offerings that include Artificial Intelligence, Analytics, and Automation, and then to deliver packaged services across technology, consulting and operations to accelerate client's cost cutting or growth plans. Previously, Michele has served in other industry leadership roles including leading North America Technology Consulting for Health and Public Service, Technology Consulting for Insurance, and IT Strategy for Financial Services.

Tuesday, February 21

11:45am – 12:30pm Tuesday, February 21

Now You See Me, Now You Drive: Outsourcing for The Best Customer Experience

AI Nanji, SVP Operations, Revenue Management – Discount Car and Truck Rental

Ramesh Anand, Vice President, Business Development – SPi CRM



Renting a car or truck has just become a little more convenient. Simply walk up to the kiosk, pick up the phone, the phone agent handles your paperwork, and you walk through the door to jump in your car. DCTR has combined the best features of a kiosk with the comfort level of live agent technologies to create a multi-channel experience for customers of all ages. The session will provide a video clip of the process, an interaction model with the outsourcing partner, and a description of how it has changed their business.

AI Nanji has worked at Discount Car & Truck Rentals for 20 years, the last 7 as Senior Vice President of Operations. Discount has 300 locations coast to coast, making it one of Canada's largest car and truck rental companies. He attended York University and studied Public Policy and Administration. His career started in the technology arena where he worked with government, crown corporations and private industry.

Ramesh Anand is a Business Development Professional with over 30 years of global experience in CRM, Business Process Outsourcing, SaaS Platforms and Solutions and Enterprise Software. His experience spans from start-ups to Fortune 500 companies in Telecom, Software, Financial Services and Health Care verticals.

11:45am – 12:30pm Tuesday, February 21

The Reinvention of Outsourcing with Insights from Deloitte's 2016 Global Outsourcing Survey

Daniel Brown, Senior Manager – Deloitte Consulting

Sonal Bhagia, Specialist Lead – Deloitte



The use of outsourcing is growing even as it radically reinvents itself. The quest to create business value through outsourcing was once focused on cost-cutting, and this will remain a key motivation, but the results of Deloitte's 2016 Global Outsourcing Survey indicate that outsourcing is becoming an important way to drive innovation into the enterprise. Join us to learn how outsourcing is changing; why it is becoming a channel for accessing innovation capabilities as well as transformative technologies, products and services; and, how you can reconstruct your organization to take advantage of this trend.

Daniel Brown is a Senior Manager in Deloitte's Human Capital service line, where he focuses on HR service delivery transformation. He plays a leading role in Deloitte's Human Capital Outsourcing Advisory practice and recently led Deloitte's 2016 Global Outsourcing Survey efforts.

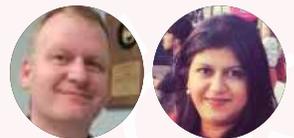
Sonal Bhagia is a Specialist Lead in Deloitte's Strategy and Operations practice, with a focus on global service delivery transformation. She advises clients on structuring their business models for core back office functions such as Finance and Accounting, Procurement and HR. She has over 14 years of experience guiding global organizations through their outsourcing and shared services journey from strategic assessment and operating model design through to successful facilitation of transition and implementation

2:45pm – 3:30pm Tuesday, February 21

Application Managed Services: Delivering More Value at Lower Costs

Jack Jones, Application Services Manager – Shell Oil Company

Shikha Agrawal, Supplier Delivery Manager – Shell Oil Company



This session will highlight some of the key aspects of Shell's approach to Application Managed Services. Highlights will include history, approach, contract template information, value delivered, and cost savings secured by Shell via Application Managed Services.

Jack Jones has over 25 years of IT experience primarily serving the oil industry. His IT roles include service as an application designer, Project Manager for global projects, and IT Sales Account Executive. Currently, Jack serves as an IT Deal Orchestrator for Shell. His responsibilities include vendor selection and contract negotiation for the support of over 1,000 applications used to support oil exploration, research, refining, and retail operations.

Shikha Agrawal has seventeen plus years of diverse experience in IT Sourcing, Program Management and Client Servicing.

2:45pm – 3:30pm *Tuesday, February 21*

Economic Inclusion and Supplier Diversity: How can Inclusive Outsourcing Make a Positive Impact on the Economy and Give You a Competitive Advantage?



Michael Serghiou, COP, Director Externalization – Merck

Tara Spann, Director Global Economic Inclusion & Supplier Diversity – Merck

In this session, panelists will discuss the business imperative that Economic Inclusion and Supplier Diversity (EI & SD) has on ITO/BPO outsourcing and how the absence of inclusion could negatively affect our competitive advantage. The speakers will share various EI & SD key performance indicators (KPIs) that measure success and how Merck has leveraged this model to gain a competitive advantage by working closely with their respective strategic suppliers across different outsourcing functions.

Leading Merck's strategic work to utilize outsourcing and offshoring capabilities in support of our use of third parties to deliver services, Michael provides direct externalization expertise to corporate functions including Information Technology, Finance, IFM, Labs, Procurement and Human Resources.

Tara Spann, Director, Global Supplier Diversity, is responsible for the execution of Merck & Company, Inc.'s global supplier diversity strategy and outreach.

4:00pm – 4:45pm *Tuesday, February 21*

Multi Sourcing Integration

Mark Latham, Sourcing Governance Officer – GTA

Phil Habuda, Vice President, Infrastructure – Capgemini



Have you asked yourself these questions before? "how do I shape the future", "what do I do next", "how can I improve my approach", "how can I safely introduce a change", or "how can I reduce IT constraints for the business". All of these questions could have the same answer, Multi Sourcing Integrator. Having an expert partner helping you to manage the day to day business of getting multiple vendors to work together in one eco system for your best interests isn't easy but it does work. Come and listen as this case study shows how one Multi Sourcing integrator has worked as a partner to show business results in less than a year.



Ins and Outs of Innovation

Monday, February 20

2:35pm – 3:20pm Monday, February 20

Innovative Approach to End of Life Products Outsourcing

Gowrishankar Chandrasekaran, Purchasing Manager – Intel



Intel Corporation has a very significant R&D establishment to breakthrough new technologies and maintain the famous Moore's Law. Some of the engineering resources to define these breakthroughs come from external R&D services providers. The engagement has been very product specific, though often we find a very common set of requirements across multiple products. The Intel Corporate Strategic Procurement team has evaluated all these engagements which total to identify commonalities and similarities to create collaboration across the Company. This paper describes the specific engagement and approach for end of life products as they reach maturity, how to leverage the ecosystem and the value provided back to the corporation and the supplier jointly. These dual benefit allows us to create long term strategic partnerships with our supply base while delivering value beyond traditional supply chain strategies.

Gowrishankar Chandrasekaran (Gowri) is the GAR Purchasing Manager, responsible for managing the team of Commodity Managers covering Product Development (PD) & HR, Professional Service and Travel (HPT) in the region spanning India, Malaysia, China, Vietnam and other GAR countries. He is also the Country Manager for Procurement In India.

4:45pm – 5:30pm Monday, February 20

Innovation in Outsourcing: How a Best-in-Class Partnership Model Can Successfully Transform the Back Office

Bets Lillo, VP, Foundation Processes – AbbVie

Anita Karlsson-Dion, VP, Client Services – IBM



A global pharmaceutical company needed to transform with unprecedented scale, scope and speed. Agility and innovation needed to be embedded across an entirely new back office model in more than 100 countries in less than 18 months' time. Learn how an innovative outsourcing partnership model between the enterprise and its strategic partner IBM resulted in transforming the company's business to new systems, shared processes and a leveraged support model... without business disruption and all while promoting and building a new culture within the organization.

Bets has led the successful design and deployment of AbbVie's international back office capabilities with standardized systems, end-to-end process governance, and newly-formed transaction processing organizations.

Anita Karlsson-Dion leads IBM's global delivery teams in their BPO business, covering Finance, HR, Procurement, Managed Marketing Services and Mortgage Services.

Tuesday, February 21

11:45am – 12:30pm Tuesday, February 21

Ordinary to Magical: A Transformation of the Customer Experience through Innovation and Collaboration

Aurlisa Alwood, Director – Humana Inc.

Cristal Leslie, Manager – Humana Inc.

Philip Hehir, Director – Humana Inc.

Gregg Antenen, Managing Director – Conduent Care Integration Services



Have you ever listened to a call and thought wow, we could do this better? Have you ever wondered how all that big DATA might help? Have you ever wished that one call would take care of the caller's issues? Well Please join us in our journey to that break through



Register online at www.IAOP.org/Summit

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

experience. Let me share the journey from the formulation of this very idea to the reality of improved member experience, reduced talking time and improvement in overall issue resolution. This session will provide information on how we collaborated with one of our partners to share an innovative tool that uses aggregated data to create an enhanced customer/member experience that focuses on member centric care and communication. We will also share the journey we took with our partner to move the customer experience from ordinary to magical.

Aurlisa Alwood is the Director of Partner Service for Humana Inc. Retail Service Operations. Responsibilities include developing a governance model for vendor partnerships, strategic footprint decisions, and process efficiencies and innovations.

Mr. Philip Hehir is a certified public accountant (CPA) with experience in public accounting and healthcare finance and operations. He has served as Controller or Chief Financial Officer in residential hospitals, medical laboratories, pharmacies, home health, DME and insurance.

Cristal Leslie has over 15 years in the services industry. She has held both customer facing operational roles as well as process improvement and back office support roles. She joined Humana in 2004 and has applied those same competencies across the Retail Service Organization.

Gregg Antenen is Managing Director of Care Integration Services, a Division of Conduent Healthcare. In this role, Gregg guides the Care Integration Services team to successfully optimize member engagements for their clients. He has over 25 years of insurance industry innovation experience with a focus on leveraging data, technology, analytics and process automation.

2:45pm – 3:30pm Tuesday, February 21

Innovating Information Assurance (IA) in the Sourcing of Services: Engineer-In, Don't Bolt-On

Astrid Uka, Enterprise 360 Strategy Director – Microsoft

Mike Fabrizi, COP, Principal – The MITRE Corp

Dianna Vetter, Technical Leader – The MITRE Corp



This presentation addresses “engineering-in” information assurance in global services acquisition. Our approach includes a lifecycle approach to sourcing, a framework by which to organize activities across this lifecycle, and “information references” (standards and best practices) that will provide content and direction for the activities. The presentation will also include a means by which to view the lifecycle approach as “lego blocks” that can be assembled as needed to fit a specific situation. Finally, the presentation will examine coherence and agility as lego block assembly. Goals include outwitting bad actors yet allowing the client organization to adapt to change pro-actively.

Ms. Astrid Uka is the Enterprise 360 Strategy Director at Microsoft and the IAOP Co-Chair for the PNW Chapter. Her passion is building long-term B2B relationships focused on outcomes and whole-systems thinking. Ms. Dianna Vetter is a Technical Leader at the MITRE Corporation who has led complex public sector engineering efforts for more than 25 years. Her interests are in agile developments in complex systems.

Mr. Mike Fabrizi is a Principal Staff at The MITRE Corporation and is a Certified Outsourcing Professional (COP). His interests and responsibilities include human capital enrichment by state and local governments, complexity and complex adaptive systems, as well as the management of IA.

4:00pm – 4:45pm Tuesday, February 21

Innovate or Die: A Case Study of Business Capability Outsourcing

Andrew Guitarte, PMP, Enterprise Business Architect – Wells Fargo



Successful global capability sourcing, outsourcing, and offshoring create sustainable competitive advantages. While BPO promises cost savings between 20 to 40 percent, business capability outsourcing or BCO not only lowers costs but elevates an organization’s capabilities to innovate, reduce time to market, and develop world-class talent. BCO rides on the current wave of the Business Architecture revolution where business strategy aligns with operational tactics to promote business outcomes. By applying the Enterprise Business Architecture Framework and Business Capability Architecture, a US national bank positions itself to lead the way and shares the lessons learned.

Dr. Andrew Guitarte, PMP, PMI-ACP, CBAP, CIP is Enterprise Business Architect and Technology Strategy Lead of Enterprise Global Services at Wells Fargo Bank. He has more than 25 years of business technology transformation leadership experience as an Enterprise Architect, Business Architect, Senior Project Manager, and Business Analyst managing complex projects and teams in the United States, South America, and South East Asia. Dr. Guitarte holds a Doctor of Business Administration degree from Golden Gate University and an MS in Computer Science from Ateneo de Manila University and is an Adjunct Professor at Golden Gate University.

Monday, February 20

2:35pm – 3:20pm Monday, February 20

21st-Century IT Services

Ravi Malick, SVP & CIO – Vistra Engery

Andrew Guzman, VP & CTO – Americas, HCL

The rules of business success have changed in the 21st Century, and HCL is the transformational IT partner of choice to more than 450 enterprises whose measures of success are based on value, innovation and enabling positive business outcomes in the digital era. During this client-led session, hear how Vistra Energy (erstwhile Energy Future Holdings) are capitalizing on the breadth and scope of HCL's 21st Century IT Services capabilities to achieve transformational outcomes in a highly competitive industry while emerging from bankruptcy.

Ravi Malick, SVP & CIO for Vistra Energy, and is responsible for ensuring the reliability, security, and continued development of the company's technology platforms as well as delivering new solutions to support the retail, generation, and corporate business units.

A visionary and thought leader with over 25 years of experience in consulting and corporate settings, Andrew is the Chief Technologist for the Americas at HCL, responsible for the orchestration and exploration of new strategic business initiatives for the Global Enterprise Technology Office. In this role, Andrew drives disruptive innovation and evangelism for next-generation IT services by leading and enabling strategic dialogue on topics like Digitalization, Internet of Things and NexGen IT Infrastructure.



3:30pm – 4:15pm Monday, February 20

Back to the Future Redux

Gregg Kirchoefer, COP, Partner – Kirkland & Ellis LLP

Howard Norber, VP and Associate General Counsel – Accretive

Aaron Lorber, Partner – Kirkland & Ellis LLP

This session discusses the agreement between Accretive and Ascension Health, the largest Catholic hospital system in the country. The agreement represents a return to the bygone era of long-term, exclusive deals from today's model of shorter terms, best of breed, without rebadging of personnel. The transaction was significant in its size and scope, which involved the provision of revenue cycle management services for affiliated hospital system having a combined annual net patient revenue of approximately \$14 billion over a ten-year term, and the rebadging of employees.

Gregg Kirchoefer, a partner at Kirkland & Ellis, is responsible for Kirkland's intellectual property/technology transactions and outsourcing practice groups. Gregg's outsourcing experience of over 30 years has covered a wide array of agreements for ITO, BPO, SaaS, and related functions, including some of the most significant transactions in history.

Aaron Lorber is a partner in Kirkland's Chicago Technology & IP Transactions practice. He focuses his practice on structuring, drafting, and negotiating complex business transactions, including corporate and M&A deals, joint ventures and strategic alliances, IP licenses, supply chain agreements, and outsourcing and other commercial arrangements.



4:45pm – 5:30pm Monday, February 20

GENDER DIFFERENCES IN NEGOTIATING: Does it really matter?

Mary Lewis, Manager, Sourcing – Sprint Corporation

You've come a long way, baby! But, have women achieved equality in negotiating? What part does gender play in making a deal? Learn some surprising results from recent studies and discover how women may be inadvertently sabotaging themselves when they can least afford it. In this session, you will get tips on how to bring out your "inner negotiator" and techniques that will help even seasoned deal-makers recognize how to avoid gender-based pitfalls. Learn practical insight, success stories, and strategies you can immediately apply whether negotiating for your next job, a promotion, or a contract.

Mary Lewis is a supply chain professional, with extensive experience in sourcing, negotiating, and managing strategic procurement agreements. A participant in Harvard University's inaugural "Teaching Negotiation: A Symposium on Excellence and Innovation for Teachers and Trainers" Mary speaks nationally on a broad range of supply chain and sustainability topics.



Tuesday, February 21

11:45am – 12:30pm Tuesday, February 21



What has Benchmarking Done for Me Lately?

Eric Simonson, Managing Partner – Everest Group **Jim Loftin**, Director, Outsourcing Strategy & Oversight, Silicon Valley Bank

It's fair to say that Benchmarking can be a meaningful endeavor – but (and it's a big exception!) if all parties view it strategically rather than using it as a metrics-led instrument for near-term tactical needs. In the case of the latter, the enterprise or the service provider may fall victim to this blunt instrument, resulting in a counter-productive relationship with a winner and a loser, rather than establishing and pursuing shared goals. The Benchmarking exercise ought to render an objective view of not just the variances but also the underlying context behind the variances with a clear map of how to improve. Only then does it offer actionable guidance and helps both parties to work towards the same outcome. The speakers will provide details on how a holistic review of an outsourcing relationship (going beyond best practice traditional benchmarking) helped rearticulate the value proposition and position the relationship for success.

Eric leads Everest Group's research practice, the leading source for fact-based analysis and insight to assist companies with attaining more value from their global services efforts (e.g., outsourcing, offshoring, shared services) - optimizing locations, refining supplier portfolios, aligning delivery models to changing needs. Everest Group's research practice combined with Everest Group's consulting services provides a distinctive ability to serve clients with a flexible range of options. Jim is a senior executive who offers over fifteen years of progressively challenging experience and proven success driving profitability and operations excellence through strategic planning, leadership and the ability to execute towards and sustain meaningful results.

2:45pm – 3:30pm Tuesday, February 21

GOING, GOING, GONE! Yes, You CAN Auction Services

Mary Lewis, Manager, Sourcing – Sprint Corporation

Technology has dramatically changed the way companies now procure goods and services. In addition to issuing RFPs electronically, eSourcing solutions are displacing the traditional negotiation process. Discover the advantages, disadvantages, risks and benefits of eAuctions. A little upfront planning can result in significant bottom-line results!

Mary Lewis is a supply chain professional, with extensive experience in sourcing, negotiating, and managing strategic procurement agreements. A participant in Harvard University's inaugural "Teaching Negotiation: A Symposium on Excellence and Innovation for Teachers and Trainers" Mary speaks nationally on a broad range of supply chain and sustainability topics.



4:00pm – 4:45pm Tuesday, February 21

Getting to Service Levels that Actually Mitigate your Cyber Risk

John Proctor, VP, Global Cyber Security – CGI Group Inc.

Do you want your security provider to deliver what you asked for or what you should have asked for? Cybersecurity is a business risk mitigation process, and the standard of monitor and protect is no longer good enough. How do you mitigate the risk in both selecting and contracting with a managed service provider? What questions should you ask your potential partner? How do ensure the right metrics are applied to the appropriate service levels? Get an insider perspective and ask the questions you need to know before signing on the dotted line.

John Proctor, VP, Global Cyber Security, is responsible for CGI's global security portfolio and overall cyber strategy, which involves CGI's 1400+ security professionals around the world. John leads the design and negotiation of large security opportunities across the global organization, building and fostering client relationships through consistent excellence in delivery.



4:00pm – 4:45pm Tuesday, February 21

You Get What You Buy, and How You Buy Matters

Henrik Jarleskog, Global Head of Vested – EY **Maura Hudson**, Senior Vice President/Director, Corporate Solutions – JLL

The REFM chapter presents a combination of EYs global REFM Outsourcing point of view on creating value beyond savings for Real Estate & Facilities Management Outsourcing building on interviews with executives in the global market and some very exiting experiences with clients going Vested. We will also couple this with some insightful experiences presented by JLL's Mike Thompson who is a Vested Certified Deal architect on challenges and benefits of using the Vested Model.

Henrik is globally responsible for EYs offering Vested & Strategic Partnerships. A sourcing business model mind shift to buying competitive advantage and innovation through win-win partnerships that are highly collaborative

Maura serves as advocate and enabler of strategic analytics, sales operations and marketing collaboration and project management for strategic business development forecasting, corporate solutions network development and management, board and client relationship development, client and prospect communications, and other activities.



Monday, February 20

2:35pm – 3:20pm Monday, February 20

Beyond Governance – Taking a Holistic Approach to Outsourcing Management

Ves Kjenstad, Vice President – Bristol-Myers Squibb



Over the past several years many companies have mastered the Art of Governance but found ourselves struggling realizing value from the agreements we negotiated. By taking a more holistic approach, combining governance, operations, service management and quality, BMS has been able to mature their practice to the next level preparing them for the future as the outsourcing landscape changes.

Ves has 12 years of experience in building and managing outsourcing agreements combined with a comprehensive knowledge of Service Management experience. She leads IT's Quality Function. By combining these insights, she has been able to evolve the outsourcing model further.

3:30pm – 4:15pm Monday, February 20

Customized Online Outsourcing Training for RAIS (Case Study)

James Shea, COP-GOV, CEO, Cyber Defense Institute

Tony Romeo, Director – RAI Services Co.



This session will summarize the very successful delivery of a company dedicated and totally customized version of the Online Outsourcing Professional Master Class and Online Governance Workshop for an entire department engaged in outsourcing vendor management. The Online Master Class and Governance Workshop were customized by RAIS senior management and the course instructor, enabling content to be delivered that focused on real RAIS vendor management issues and vendor contracts. Using real vendor examples and issues, class templates were applied to existing contracts and RFP's; group discussions were held, and live sessions with the instructor provided. This combination of customized content, class activities, and live instruction helped RAIS focus on areas for improving existing vendor management and governance processes and reduce contract value leakage.

Jim is the founder and CEO of the Cyber Defense Institute, Inc., an organization that provides outsourced computer security, compliance audits (HIPAA, PCI, FISMA, SOX), risk assessments, penetration testing, vulnerability assessments, staff training and security policies services for small and large organizations. Previously, Jim was a Director at Syracuse University managing certification training programs in the IT field. Tony Romeo currently serves as Senior Director ITO and Compliance within the Information Management Department at RAI Services Co, a subsidiary of Reynolds American, Inc. With over 20 years in the tobacco industry, Tony has held prior roles in Procurement, International Operations, Engineering and Manufacturing.

4:45pm – 5:30pm Monday, February 20

What You Didn't Know You Didn't Know About SOWs

Lawrence Kane, COP-GOV, Sr. Leader, ITI Strategy – Boeing



We all know that SOWs are the heart of our contracts and that getting them wrong breeds expensive change orders. And, we know that the SOW for a hardware deal is very different from an outsourcing or Vested deal. But, how good are we at actually writing them really? This interactive discussion will cover the key attributes of successful SOWs leading to first time quality with reduced risk and cost.

Lawrence Kane is a Boeing Designated Expert in IT Sourcing as well as a COP-GOV. A senior leader at Boeing, he established the sourcing office, hired and developed a high-performance team, and saved more than \$2.1B by architecting the IT sourcing strategy, designing processes for managing the sourcing lifecycle, executing RFPs, negotiating with suppliers, and benchmarking resultant deals. He is also the best-selling author of 17 books. Connect with Lawrence on LinkedIn.

Tuesday, February 21

11:45am – 12:30pm Tuesday, February 21

Service Provider Governance: Best Practices from the Buyer Perspective

Laura D'Ambrosio, Director – Bristol-Myers Squibb

Brooke Dito, Director – Bristol-Myers Squibb

In 2012, BMS's sourcing strategy changed from a concentration of services delivered by three strategic partners to a mixed provider eco-system. A Governance Assessment tool was required to facilitate a consistent, objective approach to determining the right size governance depending on type, value, risk and services provided. With no such governance assessment tool available, BMS decided to develop their own solution to ensure that all outsourcing agreements have the required degree of oversight and governance. The tool helps the business engage with a wide variety of service providers from the most complex outsourcing to the smallest engagements and everything in between.

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 Governance strategy for Bristol-Myers Squibb's IT multi-sourced environment.

Brooke Dito, MBA, J.D., has 10 years of experience in strategic sourcing and supplier relationship management. He currently leads Bristol-Myers Squibb's Global Technology Sourcing group and has had prior roles in IT including Company-wide responsibility for collecting, preserving and producing electronic data in support of the legal discovery process. He was also a partner in a private company start-up selling custom developed software.



2:45pm – 3:30pm Tuesday, February 21

Outsourcing Governance Is More Art Than Science — The Dynamic Elements of Successful Third Party Governance Programs

Michael Nacarato, COP, Senior Vice President, Business Solutions, Freedom Mortgage Corporation

Donald Mones, COP, Director, Outsourcing Vendor Management, MUFG Union Bank

Tim Ternus, Director Finance, Global Business Services, ConAgra Foods

This session will focus on key foundational best practices of successful third party governance programs. Three Outsourcing Industry Professionals welcome you to participate in a dynamic conversation on strategy, delivery models, and third party risk/relationship/performance governance throughout the program maturation lifecycle. Winning in outsourcing is validated through increased value and reduced risk.

Michael Nacarato has spent the last 25 years of his career in the Banking and Financial Services industry holding senior leadership positions at major institutions such as JPM Chase, Bank of America, MUFG Union Bank, and Countrywide Bank. He also offered business process optimization and globalization consulting services as President of PO&G Consulting.

Prior to his role at Union Bank, Donald was VP of Outsourcing, Risk Management and Oversight at Morgan Stanley. Key to this role was to interpret the impact of outsourcing regulatory changes on outsourcing policies and procedures and to incorporate changes to ensure regulatory compliance. Prior to that role he was at Viacom Inc., as vice president of the Vendor Management office.

Tim has been with Conagra Brands for 13 years in various financial roles. He currently leads their Account Receivable team and spent the past year leading the outsourcing transition and managing the off shore team.





Workshops

IAOP's 3rd Annual Research Workshop

Sunday, February 19, 2017 – 8am - 5pm

8am – 9am: Breakfast and Registration

9am: Workshop begins

This one-day workshop, sponsored by ISG, is an opportunity for academic and industry researchers to present and discuss comprehensive research-based papers as well as research-in-progress. The intention of this workshop is to allow leading researchers to interact with global practitioners, including outsourcing buyers, providers and advisors. This is an interactive workshop that encourages attendees to serve as discussants for presented papers. Abstracts for selected papers will be made available to workshop registrants prior to the event as well as on-site. The winning paper will be presented during the Summit. *Additional fee applies.*

Outsourcing Certification Primer & Application Overview

This workshop is beneficial to those looking for an introduction to IAOP's COP certification program. IAOP certifications 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.

Get answers to the most frequently asked questions such as:

- What type of experience do I need to earn this certification?
- What is the process for certification?
- What are the benefits becoming a COP?

Participants will leave with not only a solid understanding of which designation is best for them and where they stand within the certification process, but how this program can be beneficial to bring in-house within their company.

If you've been considering training and certification or already decided to begin the COP process, this is a great workshop to help you create your own path to certification.

In part two of this workshop, we'll dig a little deeper into the application and help you understand:

- What constitutes an outsourcing project?
- How far back in my outsourcing career can I go?
- How do I document my experience?
- Does my post-graduate degree apply toward knowledge and training points?

Time will also be set aside for you to begin working on your application with IAOP team members on hand to make sure you are on the right track.

Fee: Complimentary but you must reserve your spot

COP Advanced Intensive

This complimentary in-depth annual update is exclusively for COP designation holders attending OWS17. Join this elite group and discuss the field's most challenging and critical issues, build your top-notch professional network, earn the points you need to maintain your certification in full, and best of all, hear how this coveted certification is already leading to greater opportunities and outcomes for outsourcing professionals and firms.

*This workshop is by invite only. COPs will receive a special invitation via email the week of January 5.

Fee: Complimentary but you must reserve your spot



Networking & Social Events

Sunday, February 19

12:30pm – 5:30pm

5th Annual IAOP/PULSE Publisher's Cup Golf Tournament

Join your fellow colleagues and delegates at the AT&T Canyon Golf Course on Sunday, February 19, for a 12:30pm shotgun start of 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 \$225 per person.

5:00pm – 8:00pm

Welcome Saloon

The Summit's unofficial kick-off and your chance to network, network, network! Avoid the Monday morning crowd by stopping by and picking up your badge and materials, then head over to the saloon. Get in on the networking early over a pint or two!

Monday, February 20

9:30am – 12:30pm

Customer Only Key Issues Workshop and Provider/Advisor Only Key Issues Workshop

Revamped! This event will help you meet like-minded professionals early in the conference, make stronger connections and ask the questions you want answered. These are separate opportunities: one for providers/advisors to share their experiences and best practices separately, and one for customers to share their experiences and meet potential partners. Come up with key topics to be discussed at Wednesday's networking!

11:30am – 12:30pm

Summit Kickoff Luncheon

Join fellow attendees, grab a bite to eat, and continue your connections from Sunday night!

5:30pm – 7:00pm

Welcome Reception in the Exhibitor Pavilion

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.

7:00pm – 8:00pm

COP Cocktail Reception (Invitation Only)

IAOP honors all Certified Outsourcing Professionals at this special reception

7:00pm – 8:00pm

After Hours Networking Event

Hosted by ISS, all delegates are invited to join the networking fun on Monday, February 20, from 7:00 - 8:00pm, for an evening of Fiesta!

Tuesday, February 21

7:30am – 8:45am

Networking Breakfast in the Exhibitor Pavilion

Hosted by Infosys, power up for the day and grab a bite in the exhibit hall before the sessions start at this tasty continental breakfast!

12:45pm – 2:30pm

IAOP Awards Luncheon

Join IAOP at this special luncheon honoring the 2017 inductees into The IAOP Leadership Hall of Fame, the GEO award winners and IAOP's Members of the Year.

5:00pm – 6:30pm

Cocktail Reception in the Exhibitor Pavilion

Hosted by WGroup, 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 have taken advantage of each opportunity.

Wednesday, February 22

7:30am – 8:30am

Pre-Game Show Networking Breakfast

Get your pre-game show nosh on and get ready to join in the fun, featuring questions compiled from the results of Monday's networking sessions.

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!

At-A-Glance

Sunday, February 19

IAOP/PULSE Publisher's Cup
Golf Tournament (Fee)

Early Registration

Welcome Saloon

Monday, February 20

Customer Networking
Session

Provider/Advisor
Networking Session

Summit Kick-Off Luncheon

Welcome Reception in
Global Services Mall

Tuesday, February 21

Networking Breakfast in
Global Services Mall

Awards Luncheon

Cocktail Reception in
Global Services Mall

Wednesday, February 22

Pre-Game Show
Networking Breakfast

Food for Thought
Networking Luncheon



Register online at www.IAOP.org/Summit

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



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