

**PROGRAM**



**ORLANDO, FLORIDA  
FEBRUARY 18-21, 2018**

**[www.IAOP.org](http://www.IAOP.org)**



# 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 instantly begin networking with other attendees, but you also can take advantage of IAOP's Knowledge Center and PULSE magazine.

**2. Receive unprecedented value.** There is simply no other industry 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 speakers, sponsors, colleagues, peers, and potential partners.

**3. Take it to the next level.** It's been proven beyond a doubt that strategic partnerships can lead to dramatic cost savings, when done right. Ultimately, the new capabilities learned at the Summit will give you a leading edge.

**4. Become your in-house expert.** For over 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. Takeaways! Takeaways! Takeaways!** It is of the utmost importance to IAOP that our sessions provide attendees with real takeaways that you can begin utilizing immediately. You also have access to all the materials, for all sessions, whether you were able to attend or not.

# from the CEO

It's an exciting time for our industry as we continue to evolve, adapt and find ways to be responsive to the new paradigm. This is why we chose the theme "The Reincarnation of Outsourcing: From Disruption to Domination (When Disruption is Everywhere)."

You're now faced with new business models, processes and philosophies; Technology, like RPA, cognitive, AI and blockchain, are at the forefront of this disruption, but it's not just tech: Geopolitics have stormed to center stage, turning globalization on its head. The 'gig economy' is changing the labor force. How do you make sense of the opportunities and maximize them?

All of this is of utmost importance to how the industry looks and acts but core topics such as governance, contracts, negotiations, innovation and creating value are still as important as ever.

I'd like to personally invite you to attend OWS18, to stay engaged and help us answer these questions together as we learn, share and shape the future of outsourcing.

I look forward to seeing you in February!



Debi Hamill, CEO, IAOP





# Renaissance Orlando at SeaWorld

**6677 Sea Harbor Drive, Orlando, Florida 32821**

**Phone: +1.407.351.5555**

The deluxe accommodations and premier location across from SeaWorld® and other famous Orlando attractions inspire unforgettable experiences. Well-appointed guest rooms offer ample space for relaxing and boast thoughtful and comfortable amenities for a sound night's sleep or productive business day. Four restaurants, a Starbucks and ice cream shop will please all palates. Looking to explore Orlando like a local? Ask our friendly Navigator for tips about hidden gems.

IAOP has reserved a block of rooms for conference delegates at the Renaissance Orlando at a preferred rate of \$249 plus tax (resort fee optional), per night. You can make your resort reservation by visiting the venue section of IAOP's website at [www.IAOP.org/Summit](http://www.IAOP.org/Summit) or by calling **1.800.266.9432** and referencing **OWS18**.



## **New this Year! Exclusive Benefits available to those who stay at the Renaissance Orlando:**

- Complimentary usage of the **I-Ride Trolley** for 5 consecutive days (voucher provided by IAOP at check in).
- Show your room key to the OWS18 Registration desk and receive **2 additional drink tickets** to Sunday evening's welcome event



# inspiring keynotes

At the crux of each day's OWS18 programming are the keynotes. These presentations by some of the industry's most inspired thinkers cover a wide range of compelling topics meant to get you thinking about the big picture.



*Program is as of January 29, 2018 and is subject to change.*

**12:45pm – 1:00pm****Introduction****Debi Hamill**, CEO, IAOP

Hear from the woman at the helm of the world's largest outsourcing association as she highlights more than 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 association'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 One Host****Welcome!****Megan Carlyle**, Interim Head of the Office of O&T, Fannie Mae and Chair, IAOP's SAB

*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.*

**1:00pm – 2:00pm****Incremental Innovation is Not Enough - Reimagining the Future of Outsourcing****Jared Weiner**, Executive Vice President & Chief Strategy Officer, The Future Hunters

The world around us, largely due to the evolution of technology, is changing more rapidly than ever before. While the speed of change can be daunting, it is also a very exciting time for innovators. This session will help put the future in context. We'll look at several major technological, economic, political and social developments – each with the potential to unlock tremendous opportunities for innovation in the world of outsourcing. Some topics for consideration include: "Other"sourcing – the disintermediation of human labor, the future of globalization, advancements in virtual and augmented reality, our "green-to-blue" model of value chain sustainability, and the industrial Internet-of-Things. In the end, the future will be less about incremental innovation, and more about true imagination. Prepare to leave this session ready to dive in to the rest of the agenda...and galvanized for the future.

*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.*





## 2:30pm – 3:15pm

### Inside the Minds of CXOs

**Atul Vashistha**, COP, Chairman of Neo Group, sourcingboard.org and IAOP board member, leads this panel of experts including **Tiger Tyagarajan**, COP, CEO, Genpact; **Suzanne Leopoldi-Nichols**, Head of GBS, ADM; **Steve Rudderham**, VP, Global Business Services, Kellogg; and **David Brown**, Global Lead, Shared Services and Outsourcing Advisory, KPMG.



Hear from these leaders as they share how automation, analytics and talent will shape the industry in 2018 and beyond.



- *Atul Vashistha is the Chairman of Neo Group, a company recognized globally as the leading sourcing data, analytics and advisory firm. Neo Group's Supply Wisdom is innovating global supplier and location risk monitoring. Atul is also the founder of SourcingBoard.org, a unique peer wisdom curated network.*
- *Tiger is credited as one of the industry leaders who pioneered a new global business model and transformed a division of GE (formerly GE Capital International Services) into Genpact, a global professional services firm focused on delivering digital transformation for its clients.*
- *Suzanne is the Global Head of Shared Services for Archer Daniels Midland Company (ADM). Suzanne and her teams support ADM's operations including 250 ingredient manufacturing facilities and 32,000 employees.*
- *Steve is leading Global Business Services function within the Kellogg's Company. He is responsible for ongoing operations as well as continuous improvement, global expansion and innovation. Operations in USA, Mexico, Romania, India and the Philippines.*
- *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.*



## 3:15pm – 4:00pm

### Q&A: Inside the Minds of COPs

This inspiring panel offers a rare insider's look at how COPs work. From core topics to current issues, panelists will discuss how they approach challenges, how they problem solve and much more. Plus, they'll cover opportunities they are taking advantage of right now like talent, automation and analytics. This Q&A style session will rotate four COPs at a time and we encourage you to ask your most pressing questions! Join us and put these COPs to the test...and take away practical tips!



**8:45am – 9:00am**

**Day Two Host**

**Welcome!**

**Neil Hirshman**, COP, Partner, Kirkland & Ellis LLP and Vice Chair,  
IAOP's Strategic Advisory Board

*Neil co-leads Kirkland's Outsourcing Practice. For more than 20 years, Neil has represented both customers and service providers in ITO and BPO transactions across a variety of industries. He is the founder and co-chair of IAOP's Chicago and NorCal Chapters and sits on IAOP's Strategic Advisory Board as well as its North America Regional Advisory Board. Neil has been selected as a Leading Lawyer in Outsourcing by Chambers USA and Chambers Global and named one of The Best Lawyers in America in the area of Technology Law.*



**9:00am – 9:45am**

**Digital Singularity: The End or a New Beginning?**

**Kevin Parikh**, COP, CEO, Avasant

Digital technology is now omnipresent, and it's doing nothing less than rewiring human society. The brick-and-mortar approach to selling consumer goods is disappearing—fast, and the very definition of what constitutes work (and what constitutes value) is shifting beneath us. There is profound uncertainty in all this change, but there is also profound, unparalleled opportunity that's happening before our eyes. In this session, we'll talk about the society-wide solutions that the Digital Age demands, and we'll argue a case for why humankind is better positioned to engineer those solutions than ever before.

*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.*



**9:45am – 11:00am**

**Beyond Bitcoin: Blockchains for Business**

**Part I: Dr. Mary C. Lacity**, COP, Curators' Distinguished Professor of Information Systems – UMSL;  
Visiting Scholar – MIT CISR

**Part II: Nilesch Vaidya**, Executive Vice President, Capgemini



In 2017, IAOP observed, “It’s a whole new game, played by new rules.” Perhaps no other technology will change the rules of business more than Blockchain. Technically, a blockchain is a peer-to-peer distributed record that validates and permanently stores transactions based on encryption and community consensus. Blockchain is to transactions as the Internet is to information: it has the potential to decentralize, democratize, and disintermediate transactions. How will financial services be disrupted when blockchains authenticate ownership and prevent double spending? How will auditing be transformed in a blockchain world where every transaction is observable and verified over and over again? How will law and legal compliance change when blockchains facilitate and execute smart contracts? How will supply chain management be transformed when the precise location and current status of each asset is visible to every partner? Is your organization ready? Lacity will present research findings on how enterprises across various industries are building blockchain capabilities. She will parse the reality from the hype and present an action plan for preparing for the future today.

“It’s being hailed as a revolution—a major technological breakthrough,” says Nilesch Vaidya, Executive Vice-President of Capgemini Financial Services. Blockchain technology will shake up just about everything, especially the financial sector. But what is it exactly? Part II of this session will focus on the what, why, when, where and how of blockchain and how it will revolutionize the flow of transactions and the daily lives of hundreds of millions of people around the world.

- *Mary C. Lacity is leading a research project to answer the question: How are enterprises preparing for blockchains? She has held visiting positions at the London School of Economics, Washington University, and Oxford University. She is a Certified Outsourcing Professional ©, Industry Advisor for Symphony Ventures, and Co-editor of the Palgrave Series: Work, Technology, and Globalization. She was inducted into IAOP’s Outsourcing Hall of Fame in 2014, one of only three academics to ever be inducted. She has published 27 books, most recently Robotic Process and Cognitive Automation (2018), which will debut at OWS18, as well as Robotic Process Automation and Risk Mitigation: The Definitive Guide (2017) and Service Automation: Robots and the Future of Work (2016) (SB Publishing, UK, co-author Leslie Willcocks).*
- *Executive Vice President Nilesch Vaidya globally leads Capgemini’s Financial Services Banking and Capital Markets consulting practice and solutions. During more than 17 years at Capgemini, he has become an expert when it comes to capital markets, blockchain technology, disruptive and transformative FinTech solutions and Open Banking and open source/application programming interfaces (APIs). Nilesch earned an MBA at the Indian Institute of Management, Calcutta, and a Bachelor of Science degree in electrical engineering from the Indian Institute of Technology, Varanasi.*



**8:30am – 8:45am**  
**Day Three Host**  
**Welcome!**

**Jagdish R. Dalal**, COP, President, JDalal Associates, LLC and Chief Advisor, Thought Leadership – IAOP

*Jag is a noted speaker and publishes extensively on business strategies, outsourcing and information technology management topics. He is a “futurist” with a view toward surviving in the changing world. His series of lectures on outsourcing and future of business have been recognized as “pushing the envelope” in strategic thinking, while providing a practical framework for businesses and professionals. He has been interviewed and quoted by Wall Street Journal, Fortune®, TIME, Financial Times, Times of India, CBS News, NPR and more. He has held senior MIS leadership positions at Carrier Corporation, PwC, Xerox, Unisys, Data General, Brookhaven National Laboratory and Teledyne. In 1994, as Vice President of Information Management at Xerox, Jag created the strategy and led the team responsible for a \$3.2B global outsourcing contract for EDS, documented in a Harvard Business School case study. Jag developed the curricula, text book and testing process for IAOP’s training and certification program used globally by outsourcing professionals. He was inducted into IAOP’s Leadership Hall of Fame in 2014.*



**8:45am – 9:45am**  
**Vested Outsourcing: Redefining Winning in Business Relationships**  
**Kate Vitasek**, Faculty, Graduate & Executive Education, University of Tennessee

The 21st century demands businesses innovate, create value, and get sustainable results. The University of Tennessee’s Kate Vitasek has been studying some of the world’s most successful outsourcing relationships — including IAOP GEO award winners - for over a decade. The results? The best achieve award-winning results by redefining how they “win” in their business relationships. Her work has led to six books, including *Vested Outsourcing: Five Rules That Will Transform Outsourcing* and *Vested: How P&G, McDonald’s and Microsoft are Redefining Winning in Business Relationships*. Passionate in her quest to help companies transform their business relationships, Vitasek will inspire you to think differently about how you approach your outsourcing relationships. Attendees will walk away with five game-changing “rules” to help them improve their own outsourcing deals.

*Kate Vitasek is an international authority for her award-winning research and Vested® business model for highly collaborative relationships. Author of 6 books and a faculty member at the University of Tennessee, she has been lauded by World Trade Magazine as one of the “Fabulous 50+1” most influential people impacting global commerce. Vitasek has been featured on CNN International, Bloomberg, NPR, and on Fox Business News. Her work has also been featured in over 300 articles.*



**9:45am – 11:00am**

### **The Sandbox: Bringing it All Together**

Hopefully you joined IAOP, facilitators and delegates Monday morning for Key Issues: Buyer Roundtables and Provider/Advisor Roundtables — where we kicked-off the conference with expert-led topical discussions that allow for open discourse among your peer group — because we are culling the topics that garnered the most enthusiasm and debate at the roundtables and on Wednesday, bringing all stakeholder groups together to share the learnings - including best practices, problems solved, and ideas for the future. Get the opportunity to ask questions of buyers, providers and advisors and successfully play in the “sandbox” with professionals “across the aisle.”



**11:30am – 12:30pm**

### **Governance TODAY!**

**Moderator: John Bree**, SVP & Partner, NeoGroup **Panelists: Michael Nacarato**, COP, Senior Director, Transamerica; **Megan Carlyle**, Interim Head of the Office of O&T, Fannie Mae; **Donald Mones**, COP, Director, MUFG Union Bank; **Ian Watt**, Director, Wipro

Regulators both in the US and globally are increasing their scrutiny of sourcing controls and governance. They are expanding the requirements to cover internal sourcing providers and not just external third parties. Management Board approved outsourcing strategies are a key focus of regulators and auditors. There are increased expectations that companies will incorporate continuous vendor lifecycle monitoring beyond initial risk assessments and episodic follow up reviews. Hear from IAOP's Strategic Advisory Board members on all things governance, from how they are doing it and what's working to what's not.



*John is a financial industry professional with a proven track record in developing and managing Vendor & Third Party Sourcing Risk Management, AML/CTF, KYC, and Anti-Fraud programs; Michael heads Third Party Management and Procurement at Transamerica, headquartered in Cedar Rapids, Iowa and has designed, developed and implemented several global outsourcing programs in India, the Philippines, Costa Rica and the Caribbean as key strategic levers to increase operational effectiveness, efficiency and strengthened business continuity; Megan 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; Prior to his role at Union Bank, Donald was VP of Outsourcing, Risk Management and Oversight at Morgan Stanley; Ian is a Director on Wipro's Advisor Relations and Strategic Engagements team. He took up this role in 2017 after ten years with the Advisory firm ISG (Information Services Group, also TPI). At ISG he was responsible for leading strategy work, transactions (usually, but not exclusively, ADM), and transitions. He led the ISG global transition practice. Prior to ISG, Ian held positions as Director at McDonald's and Allstate Insurance.*



# inspiring breakout sessions

A multitude of OWS18 breakout sessions will help you polish your skills, inspire new ideas and provide you with key takeaways and tangible to-dos to improve your outcomes.





## Maximizing Business Value by Creating the Right Governance for the Cloud



**Arno IJmker**, COP, Managing Partner, Quint Wellington Redwood

With new cloud propositions accelerating the change in the landscape of outsourcing services, organizations need to fundamentally re-think their internal governance. Business units no longer want to depend on their central IT organization when making valuable choices for their long term business strategy, using the different cloud options the market offers. In this session, we will look to the market place offerings, their pros and cons, the role of vendors, and how to make sure internal governance maximizes the benefits of these.

*Arno has been active in the field of outsourcing as an advisor for the last 18 years and was inducted into IAOP's Leadership Hall of Fame in 2016. He is a trusted advisor for many large corporations advising them on their sourcing strategy and governance challenges.*



## Developing Responsible AI Solutions

**Kishore Durg**, Growth and Strategy Lead, Accenture Technology Services

Artificial intelligence will fundamentally and profoundly change the way we work and live. At Accenture, we view AI as the biggest single trend we've seen to date in the information age. The goal is to move AI from hype to a hard working engine for growth and transformational impact. This starts with a Responsible AI approach that is built on the premise that a company's AI strategy needs to be aligned to its core values and ethical principles in order to benefit customers, employees, business and society.

*Kishore Durg is the Growth and Strategy Lead—Accenture Technology Services. He also has overall responsibility for Accenture's Application Services business globally and is shaping Accenture's automation services as well as leading the Accenture Testing Services practice. Before joining Accenture, Mr. Durg spent 10 years in the United States working on system integration and consulting assignments around the world for Communications, High Tech and Travel verticals. He is currently based in Bangalore, India.*



## How Can Companies Disrupt Themselves?



**Ulla Riber**, Head of Corporate Garage, ISS

ISS has taken the full step and invested in a corporate innovation unit with its own physical location and business model. Called the ISS Corporate Garage, the purpose of this unit is to unleash the innovation power of ISS. Instead of just talking about how do they get big changes and innovation on the agenda – they have actually done something about it. In this session, we will share concrete and relevant experiences gained in the ISS Corporate Garage. Expect to get insights into what works and what is challenging when you try to do innovation from inside a corporation, what does a corporate start-up look like, how to install an innovative mindset and more!

*Ulla Riber joined ISS in January 2017 as Head of Corporate Garage. The Corporate Garage is a key initiative for ISS. It is an autonomous unit operating outside of ISS with the purpose to "Unleash ISS Innovation Power." In the Corporate Garage, we will work with innovation on themes in alignment with ISS purpose and strategic ambitions.*

**Anatomy of an Outsourcing Negotiation: Pivots and Pricing**

✓ advanced

**John Beardwood**, Senior Partner, Fasken Martineau DuMoulin LLP**Dave Hornett**, CEO, Inflight Strategy**Gabriel M.A. Stern**, Senior Associate, Fasken Martineau DuMoulin LLP

This session outlines a “soup to nuts” case study based on real life examples of a contentious negotiation of an outsourcing master agreement. Starting from the initial procurement, this case study then tracks the evaluation of vendor proposals, negotiations with the proponent through gateway issues, an early start agreement and the final master agreement, and then finally post-negotiation vendor management, with a particular focus on flexible goal-oriented-negotiation, understanding when and how to pivot on major deal principles, and ensuring that the negotiated “wins” are captured post-execution.

- *John Beardwood is senior partner of, and chairs the Technology Law Group at, Fasken Martineau LLP; is regularly listed among the world's preeminent outsourcing, internet and e-commerce lawyers; and is Chair of the IAOP Canadian Chapter.*
- *Dave Hornett, CEO of Inflight Strategy, works closely with public and private sector clients to manage, negotiate, and advise upon complex enterprise infrastructures, national and international IT operations management, and large and complex outsourcing engagements.*
- *Gabriel M. A. Stern, PhD, is a senior associate at Fasken Martineau DuMoulin LLP. He practices law in the area of Information Technology Law, advising on a wide-range of information technology, outsourcing, licensing, procurement, e-commerce, privacy, consumer protection, record retention, health sector and intellectual property-related matters.*

**Select the Right Process – Start Your ROI****Donna Martin**, Senior Vice President, Global Healthcare, HGS

What's the first step to RPA ROI? It's finding the right process to drive real outcomes. So much of the hype is around vague criteria: rules-based processes or structured vs. unstructured data. Let's push beyond basics and seize the optimal opportunity. We'll let the group vet sample process opportunities, discussing and deciding together whether to automate. Come prepared to test and share your knowledge.

*Donna has over 20 years of experience in developing sales and marketing teams within the BPO and Healthcare industries. Her background includes Payer, Provider, Pharmaceutical and Medical Device Manufacturing practices. Donna is currently SVP, Global Healthcare, Business Development for Hinduja Global Solutions (HGS), a global BPO services provider.*



### Panel: The State of Outsourcing in Europe

IAOP's European Outsourcing Council (EOC)

Join members of IAOP's EOC for an in-depth review of drivers, risks and trends in the European outsourcing market. They'll touch on the fundamentals but also discuss how new technologies are providing new challenges and new opportunities.



### Politics of Outsourcing

Moderator: **Donald Mones**, COP, Director, MUFG Union Bank

Panelists: **Lawrence Kane**, COP, Sr. Leader, ITI Strategy & Sourcing, Boeing

**Ashish Malhotra**, COP, Independent Advisor, Formerly with Time Warner Inc.

**Prem Shanker**, COP, Director, Sourcing, McKesson Corporation



One year into the new USA Government administration this expert panel will compare, contrast, agree, argue, discuss the real impacts (positive/negative/neutral) on outsourcing the new political environment has created. Beyond the politics, this session will be a real time Country Risk Assessment of the top Outsourcing decisions INCLUDING the USA.



- *Prior to his role at Union Bank, Donald was VP of Outsourcing, Risk Management and Oversight at Morgan Stanley.*
- *Lawrence is a leader at Boeing, where 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.*
- *Ashish is an independent advisor and works with acclaimed advisory firms to assist them and their clients achieve outstanding business results.*
- *Prem is Director, Sourcing at McKesson Corporation. He leads a talented team that sources Services categories for the company, including all IT outsourcing, IT consulting, IT temp staffing (contingent labor), business consulting (HR, Education and Training, Audit, Tax, Marketing and Finance).*



## **The New Face of Governance** **Cynthia Batty**, Director, ISG

advanced

Strategies of managing service providers have evolved since 2000, when companies began to realize that managed services required meaningful change in management technique and operating models. Governance by service levels does not promote the innovation that is essential today in business-critical Agile and DevOps services. These relationships must grow into a model that sets a different relationship standard that permits these enhanced outcomes. This session provides a brief history of how governance approaches have evolved, highlights limitations in current governance, and introduces the concept of Coactive Governance as a way forward.

*Cynthia Batty is ISG's Chief Knowledge Officer. In this role, she is the ISG service methodology architect and global integrator of the company's products and services, and is the leader for developing, growing and leveraging ISG's accumulated intellectual property resources. Prior to this role, during her 14 years with the firm, Cynthia was a lead in ISG's Governance and Transformation practices, and maintains a continuing role in the Organizational Change Management practice.*



## **RPA and Cognitive Automation: Risks and Smart Actions of Leading Companies**

**Leslie Willcocks**, COP, Professor of Technology, Work and Globalization,  
London School of Economics and Political Science

Drawing on research with Professor Mary Lacity into multiple client adoption stories, Leslie identifies the eight major risks experienced with robotic process automation and details key action principles that have been adopted by successful companies. Cognitive automation, often called cognitive intelligence or AI, remains an immature market.

Based on market surveys, and cases in insurance, banking, education and management consulting, Leslie focuses on the distinctive challenges experienced, how RPA and CA can be complementary, and the lessons for those moving into the next phase of their automation journeys. The presentation includes illustrative adoption stories and the critical success factors in each case.

*Leslie P. Willcocks is Professor in Technology Work and Globalization at the Department of Management at London School of Economics and Political Science. Leslie has a global reputation for his work in robotic process automation, AI, cognitive automation and the future of work, outsourcing, global strategy, organizational change, and managing digital business.*



## Impact Sourcing in the BPO Industry – Panel Discussion

Moderator: **Jon Browning**, CEO, Strategic Sourcing Advisors

Panelists: **Becky Lossing**, Outsourcing Partnership Manager, Glassdoor

**Sarina Gujral**, Senior Project Manager, Samasource

**Fernando Hernandez**, Supplier Diversity & Sustainability Director, Microsoft

Jon will introduce the concept of impact sourcing and how it is being applied in the BPO industry on every continent by combining job creation with social responsibility. Impact sourcing models will be discussed in detail with specific examples for how businesses can apply this strategy including lessons learned and recommendations. In addition, this session will be led as an open forum panel encouraging delegates to engage in the conversation with panelists who specialize in impact sourcing.

- *Jon Browning serves as CEO of Strategic Sourcing Advisors and partners with the Rockefeller Foundation on the global impact sourcing initiative to promote job creation in underserved communities.*
- *Becky Lossing oversees workforce extension partnerships with Samasource in Kenya and Open Access in the Philippines, coordinating between teams to ensure high quality and productivity across several inter-departmental projects.*
- *Sarina has 5 years of Project Management and Consulting experience in the international economic development space. She specializes in risk management and process improvement.*
- *Fernando serves as Supplier Diversity & Sustainability Director for Microsoft Corporation. In this capacity, he drives Microsoft's strategies to achieve supplier diversity objectives. He is responsible for Microsoft's \$2.7 Billion annual Supplier Diversity initiative and \$4 Billion in Sustainability.*



## Getting Ahead of the Digital Disruption with Multisourcing Paradigms

**Johny Makhija**, COP, Global eDiscovery IT Leader, Ernst & Young

**Madhu Ponnueetil**, Consulting Principal, Cognizant

Digital 2.0 is poised to advance further over the next few years and impose secular changes across industries and regions. This rapid pace of digitization will mandate an enhanced, tighter focus on governance and conscious reshaping of the human workforce and related skillsets. A well thought out multisourcing strategy is needed in order to balance human and machine intelligence as we step into the digital realm. Objective of this session is to put forward a well-thought out sourcing framework to help organizations reach the appropriate maturity level and get them ready for multisourcing.

*Johny Makhija is known for providing analytic vigor, reliable strategic insight, and enterprise-wide perspective. As a result, he has been a driving force behind highly effective global sourcing solutions aligned with corporate objectives of streamlining operations, reducing costs, and improving service levels. Madhusudan (Madhu) Ponnueetil is a Principal with Cognizant's Banking & Financial Services (BFS) consulting practice. He has extensive experience in leading global transformations across a broad range of topics that span business, operations, and technology.*



## Sourcing & Vendor Management's Excellence Adventure

**Lawrence Kane**, COP, COP-GOV, Sr. Leader, IT Strategy & Sourcing, The Boeing Company  
**Kelly Kujawa**, IT & DA Sourcing Strategy & Vendor Management, The Boeing Company

Would you like to become a trusted-advisor for sourcing strategies and increase outsourcing success? Join this session to hear about Boeing's journey to inculcate IAOP's best practices into its management structure and operating processes for Strategic Sourcing, Procurement, and Vendor Management. You will see an award-winning case study that demonstrates how harnessing this baseline program enabled the organization to travel through the IAOP five-stage gated approach to develop an outsourcing strategy, complete supplier stratification, selection, and implementation of a contract that resulted in multi-million dollar cost savings and increased value for an existing IT service within Boeing.

*Lawrence is a leader at Boeing, where 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. Kelly is a Portfolio Lead and Partner Management Specialist in Boeing's IT & Data Analytics, Sourcing Strategy & Vendor Management organization. She has blended over 20 years of technical experience in IT systems administration and server operations with a Bachelor of Science in Global Business Management to help her achieve organizational goals to mature and help build a team for the governance, oversight, and relationship management of IT service providers within Boeing.*



## Reshaping an Industry with a Cloud State of Mind

**Kris Vandaele**, Group VP and Head of IT Production for North America, The Adecco Group

With customer preferences and user expectations for IT evolving, the Adecco Group, a \$25B staffing firm headquartered in Zurich, has embarked on a strategic IT evolution of their own. By embracing cloud and digital transformation to enhance user experience and boost enterprise agility, Adecco is setting out to not only transform how IT delivers services to their employees, partners and customers, but they are also setting out to reshape the future of the staffing business altogether through an ambitious roadmap enabled by cloud and digital IT.

In this session, Kris Vandaele, Group VP and Head of IT Production for North America at Adecco, will chart the organization's global IT infrastructure transformation initiatives, and discuss the value of a cloud state of mind as he juggles dynamic service delivery requirements across public and private cloud models, while enabling his organization's robust digital business aspirations.

*Kris Vandaele is the Group VP for IT Production at Adecco Staffing, North America. As the head of the IT production group with the responsibility to deliver IT infrastructure services, Mr. Vandaele's portfolio includes end-to-end IT infrastructure management services across DC, Service Management and End User services for all of the Adecco group of companies for North America. He also holds a global IT strategy and transformation position as part of the broader Adecco group (\$25B staffing firm headquartered in Zurich, Switzerland).*



### Intelligent Automation

**Tanvir Khan**, President, BPO, NTT Data

**Daniel Thomas**, VP, Automation, Integration, and Alliances, NTT Data

NTT DATA Services brings an integrated strategy to Intelligent Automation, combining Application and BPO services to help clients improve speed and accuracy as well as enable them to implement new ways of doing business. With analytics as the foundation of an automation strategy, NTT DATA helps clients assess how automation can help them achieve their goals and then implement solutions using proprietary tools and partnerships with automation leaders like Blue Prism, AutomationAnywhere, and IPsoft. NTT DATA has also developed cognitive bots that have helped clients shorten processes from six weeks to 24 hours. Hear Tanvir Khan, President, BPO and Daniel Thomas, VP, Automation, Integration, and Alliances talk about how automation has helped clients achieve better business outcomes.

*Tanvir Ali Khan serves as president of BPO, NTT DATA Services. Tanvir is a veteran of the BPO industry and has spent more than 23 years in IT and outsourcing. He is a hands-on BPO practitioner who drives process transformation combining technology, process optimization, analytics and automation. Daniel Thomas is vice president of Automation, Integration and Alliances, NTT DATA Services. His team delivers autonomics, business process management, and enterprise content management solutions to global businesses. The worldwide team comprises consulting, presales, solutions, and service delivery professionals that enables its clients to deliver next generation solutions both internally and externally.*



### Riding Disruption Through Innovation in the Era of 4th Industrial Revolution

**Srinivas Rao**, Unit Client Solutions Head, Infosys

The fourth industrial revolution has caused disruption everywhere, especially in outsourcing. Just in the last decade, the reason why clients want to outsource has changed completely. If outsourcing vendors continue to operate in outdated ways, then they have the risk of perishing soon. The only approach to ride this wave of disruption is via grass roots level innovation. In this session, we will cover how Innovation can be adopted as a culture in organizations with laser focus on customer needs right from the bottom of the pyramid. How do we change the workforce mindset from 'problem solving' to 'problem defining' and allow machines to handle the 'problem solving?' This session also focuses on the need for organizations to not worry about cannibalizing their own business via innovation.

*Srinivas Rao is head of client solutions at Infosys. Srinivas has 24 years of experience in the outsourcing industry and was involved in supporting clients in their innovation journey by helping them develop innovative products and services over the years. Srinivas was involved in building large teams of 500+ FTEs and driving entire teams toward innovative solutions. Srinivas holds a Bachelor's Degree in Electronics & Communications Engineering and MBA from Coventry University.*



### **Cleveland Clinic Sourcing Model Initiates Broad Scope IT Transformation**

**Doug Smith**, Former Interim Chief Information Officer, Cleveland Clinic

The Affordable Care Act has created significant cost pressure for healthcare providers and is causing healthcare organizations of all sizes to look for opportunities to deliver efficient and affordable services, while improving patient care quality. Like many healthcare organizations, the Cleveland Clinic operated all IT via an insourced delivery model that was costly, inefficient, saddled with Technical Debt, and had insufficient time to innovate. The Clinic initiated a sourcing cycle to drive rapid infrastructure modernization, and then expanded the transformation effort to optimize Run Operations, including application portfolio modernization, vendor management, governance, and security programs.

*As Interim CIO for Cleveland Clinic, the #2 ranked hospital in the U.S., Doug was responsible for leading an IT modernization effort that empowered the delivery of outstanding and affordable patient care. He is a visionary IT leader and strategist with 20 years' experience of leveraging technology to positively transform organizations.*



### **How Real Estate has Impacted the Transformation of a 150-Year-Old Company**

**Ted Uzelac**, President, Fischer Company

**Greg Smook**, Assistant Vice President, Corporate Real Estate, Guardian

A Fischer client is transforming their company by implementing new technology, redefining workplace strategy, creating work styles of the future, and identifying innovative ways to service their customers. This initiative of disruption and change has provided a platform to transform their real estate portfolio, which is directly impacting employee morale, retention, recruitment, and company image. During our discussion, we will provide details of how the team is transforming the real estate portfolio and the resulting benefits.

*As President of Fischer, Ted is responsible for directing business development efforts, maintaining client relationships and guiding the overall strategic planning for the company. Ted's leadership skills have helped him foster new professional relationships and contribute to the success of Fischer's continued expansion. Ted also serves on Fischer's board of directors, providing leadership, client relationship management and strategic counsel. Greg has over 20 years of corporate real estate experience, working for some of the world's most respected corporations. He is a highly versatile business executive with expertise in real estate, finance, and client relationship management. Greg is well versed in strategic planning, portfolio management, operations, and leading large teams in delivery of high quality customer service. Greg is responsible for Guardian's real estate portfolio and leading his internal Guardian team, as well as the group of qualified service providers, through the recent completion of some of the most high profile and transformational projects in the company's history.*





## How Do You Build an Automated Data-Driven Outsourcing Governance Practice that Delivers the Results?

**Brad Killinger**, President, Sapience Analytics

**Rajan Vig, MD**, Group CTO Americas, Credit Suisse

Join Rajan Vig, MD Credit Suisse, and Brad Killinger, President Sapience Analytics, for an in-depth conversation about challenges faced in governing outsourcing engagements; how an automated data-driven approach can solve these challenges and build an effective governance practice. This session will explore how Rajan and his team at Credit Suisse used this data-driven approach to transform their governance practice and saw increased value from the outsourcing engagements, and also the pitfalls to avoid when setting up a governance practice.

*Bradley Killinger is the President of Sapience Analytics. Brad has 20+ years of leadership experience and has served in several key Global Leadership roles at major technology companies like IBM, Oracle and Unisys. Rajan Vig is Managing Director, Head of CTO Americas at Credit Suisse and leads global teams across Enterprise Services, Cloud Adoption, and Testing Services.*



## Wowing Customers in the Age of AI and the Gig Economy advanced

**Mike Morris**, CEO, Topcoder

Great customer experience is key to the success of every business, but with a continually changing technology landscape it's harder than ever to keep up with customer demands. In this session, you'll learn how leading enterprises are tapping into the gig economy and embracing new technologies like AI and blockchain to build next-generation solutions that wow customers.

*Mike is responsible for both Topcoder's success and that of its customers/partners. He believes Topcoder's 1 million+ strong, on demand global software development community will continue to redefine business. Second only to his passion for family—and perhaps waterskiing—Mike inspires with his connection to Topcoder since its founding, as well as the proof in how the world's top competitive technology community revolutionizes enterprise software.*



## Achieving the Best-of-the-Best RPA Results: Learn What It Takes advanced

**Michel Janssen**, Chief Research Guru, Everest Group

**Peter Quinn**, Managing Director of Automation, SEI Investments

Human nature makes us want to know what the best are thinking about doing. However, while interesting, these findings do little to help move our own organizations forward in the use of RPA. In this session, you'll get an exclusive preview of just released Everest Group research that details the capabilities the most successful organizations – Pinnacle Enterprises™ – have leveraged and the RPA journey they have taken to realized superior business outcomes. This analysis is based on research that directly compares and correlates business outcomes with the capabilities required to achieve those results. You'll walk away armed with the comparative information you need to start designing a roadmap to be competitive today – and in the future.

*As co-founder of Everest Group's research practice – and with a broad and varied career in the global services industry – Michel offers profound insights and analysis to enterprises and service providers alike. Leveraging his extensive experience identifying and understanding emerging trends, Michel helps organizations to maximize their global services efforts. Michel is particularly noted for his ability to posit clever and challenging ideas based on his fact-based insights from across business and IT processes, sourcing models, and industries. Peter is the Managing Director of Automation at SEI Investments.*



## Embracing Blockchain: Why You Need to Prepare for This Transformative Technology

**Melanie Cutlan**, Technology Innovation Senior Principal, Accenture Operations

According to Accenture's Intelligent Operations research, over 90 percent of enterprises feel they need to partner closely across the ecosystem to exploit market opportunities. But many players struggle to forge such close relationships due to data and process constraints that make it difficult to link their operations. Blockchain promises to change all that. It's a powerful new tool that enables traditionally independent players to work together to streamline and integrate processes—using controlled access to sensitive data rather than relying on redundant, siloed systems. When deployed across a value chain, blockchain can deliver greater security, improved cost efficiency, more reliability, and optimized reconciliations—which can translate into hundreds of millions of dollars in gains for everyone involved.

*As the Technology Innovation Senior Principal within Accenture Operations Growth and Strategy, Melanie Cutlan leads the Blockchain Practice for Accenture Operations. She explores emerging technologies, applies them to the business and advises Accenture's senior leaders on future implications due to blockchain technology. She helps clients use design thinking to lay out the art of the possible, and then works with technical experts to chart a plan to take real and impactful steps towards a reimagined future.*





### Do You Have the Wrong Vendor and the Right Functions or the Right Vendor and the Wrong Functions?

**Cara Koppenhoefer**, COP, Strategic Consultant, Humana  
**Maggie Cajka**, Operations Manager, Humana

How do you evaluate the costs of disruption and automation versus flexibility and expense? How do you even get started? What are the ramifications of disruption to your organization? We will share our journey with you! We will walk through our experience of disruption. We will begin with the idea, the evaluation proposal and the struggles and successes of our pilot. Discussions will include: Right Vendor wrong function? or Wrong Vendor right function? We will cover our insights as we moved into the pilot stage. We will review the costs and our final disruption plan for the future.

*Dr. Koppenhoefer is currently a Solutions Delivery Leader at Humana's Transcend Insights Organization and spent 13 years working in the telecommunications industry, in various roles from training to project and operations management, focusing on telecommunications startups. Maggie Cajka is currently an Operations and Process Improvement leader within the Medicare division of Humana. She joined Humana in 2008 and has focused on Vendor Management, IT Maintenance and Support, outsourcing including nearshoring and offshoring, Operations Management, leadership development, and leading large teams blended from resources offshore and traditional onsite and remote employees.*



### Botshore: Imagining the Future of Customer Relationships

**Arnaud de Lacoste**, CMO, Ventures & Innovation, Sitel

Imagine AI coinciding with an evolution of customer relationships and the appearance of new trades – it's closer than you think. Conversations are already being initiated by bots and continued by agents. This man-machine cooperation will multiply and new roles will undoubtedly emerge: bots trainers and bots managers with real customer experience knowledge. These new roles can supervise dozens of bots in parallel and intervene in case of an obstacle. This learning process feeds the AI engine, but what does this mean for the contact center industry and the future of your customer relationships?

*As Sitel Group's Chief Marketing & Innovations Officer, Arnaud de Lacoste is committed to reshaping the CX Management industry. He is focused on enhancing the company's global marketing organization, strengthening the company's digital presence and aligning the marketing and sales efforts by leveraging the company's solutions and ventures.*



### Five Secrets to Crafting an RFX **Mary Lewis**, Manager, Sourcing, Sprint



In this fast-paced session, attendees will get an overview of best practice techniques for constructing a competitive sourcing event. Amp up your ability to get meaningful, actionable information to objectively compare and score suppliers, while reducing cycle time. Examples used in this session are based on real-world scenarios of what's worked, what hasn't, and some of the "gotchas" that customers need to avoid. Attendees will also walk away with a framework and checklist of key topics that can be used to craft their next RFX.

*Mary Lewis has 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 contributes to various publications and speaks nationally on a broad range of supply chain and sustainability topics.*



**Making RFPs Fun – and Successful - Again!**

**Vik Bangia**, Founder and CEO, Verum Consulting, LLC

**Todd Anderson**, Executive Managing Director, Global Corporate Services, Newmark Knight Frank

**Monica Juan**, COP, Senior Managing Director, Global Occupier Services, CBRE



You may recognize this drill. Your company becomes overwhelmed by a problem. It could be financial. A resource issue. Competitive pressures. You put out an RFP to find an outsourcing service provider based on your perception of what it takes to find the solution. It's iron-clad, sure to address all the angles, the gaps, the risks. You pick a provider that outshined the rest, that agreed to perform to your expectations. Maybe you even selected two. And yet here you are, saddled with relationship(s) that appears and functions nowhere near the one you first envisioned. What happened?

In this session, outsourcing advisory expert Vik Bangia of Verum Consulting dissects all-too-common pitfalls in the RFP process that hide or derail true transparency and honest insight, the building blocks of strategic partnerships. With a panel of experts, Vik and team breaks down the walls of communication between customer and provider and builds up a process customized for individual requirements, reflects cultural alignment - or exposes divide - and delivers expertise and recommendations in a shorter, franker and more inspiring period of time. The group will also discuss change management approaches that convinces outright naysayers and positively engages those more quietly afraid of changing the status quo. This session is a must-attend for anyone incentivized to manage competitive, compelling, and ultimately successful long-term bid processes from start to finish.



- Vik is the founder and managing principal of Verum Consulting, LLC. He has a 25 year background in corporate real estate, real estate outsourcing best practices, strategic planning and workflow and process improvement. Vik led the corporate real estate function at Fortune 500 firms Unocal Corporation and Ameriprise Financial and has held senior leadership positions at real estate firms such as Realty, CresaPartners, United Properties/Northmarq, Struxicon.com, and CBRE.
- Monica currently serves as Client Solutions Director within the Northeast Division. In this capacity she is responsible for engaging with new and existing clients to meet their evolving portfolio requirements. Prior to this role, Monica served as Division Director for four years providing leadership to over 50MSF of CBRE's strategic global accounts including Goldman Sachs, State Street, Travelers, Cisco, Fidelity, Deutsche Bank and Macquarie. She is also a member of the IAOP's Strategic Advisory Board.
- Todd has Global Corporate Services P/L responsibility for multi-discipline business development, service delivery and account management. This comprises managing the delivery of Transactions, Facility Management, Occupancy Planning, Workplace Strategies, Project and Program Management services in over 100 counties to multi-national corporations.



## How Blockchain is Poised to Transform Contract Management in Outsourcing

**Ajay Agrawal**, CEO, SirionLabs

As outsourcing's traditional value drivers - cost arbitrage and hard-negotiations - have plateaued, effective collaboration is emerging as a key driver for value realization in outsourcing (Deloitte's 2017 CPO survey ranks supplier collaboration as one of the top value drivers for CPOs this year). The distributed ledger approach used in blockchains is redefining the role of contract management in outsourcing as an enabler of inter-enterprise (between client and supplier) and intra-enterprise (across enterprise functions) collaboration. This session will include insights on how this 'blockchain-ed' contract management works and how it delivers better outcomes in outsourcing relationships.

*Ajay has been a product visionary in legal and contract technology space for 20+ years. Presently, he is the founder and CEO of SirionLabs, a provider of advanced contract lifecycle management technology. Ajay holds an LL.M. from Columbia University, LL.B. from Trinity College, Cambridge and a B.A. in Semiotics from Brown University.*



## Cloud Contracting and the Digitization of the Sourcing Process — a Presentation of the Results of Our Annual Survey on Cloud Contracting

**Peter George**, Partner, Baker & McKenzie, LLP

For the last several years, Baker & McKenzie has been surveying industry participants on key issues and trends related to cloud contracting. This year, we expanded the scope of our survey to assess the full impact of digitization on the sourcing process globally. The purpose of this session is to present the results of our survey and explore how digitization is disrupting and optimizing the sourcing process.

*Peter George, Partner, Baker & McKenzie. Peter has been advising buyers and suppliers with respect to the structure, negotiation and implementation of outsourcing transactions for 20 years. He regularly advises Fortune 500 enterprises on strategies to mitigate and allocate risk in global outsourcing solutions and is recognized as a leading lawyer in the outsourcing space.*



## Building an Effective Governance Model

**Lula Kosanic**, Senior Director IT Procurement, Royal Bank of Canada

This session will establish the key disciplines required to building an effective governance model. It will illustrate the lifecycle of good governance including: establishing new contracts and managing updates to existing contracts; governing pricing through effective benchmarking; managing performance issues, and ensuring alignment to all policy/regulatory requirements.

*Lula Kosanic joined Royal Bank of Canada (RBC) in September 2017 to lead IT Procurement, with accountability for a \$2BB portfolio in third party annual spend. Partnering across Technology & Operations, Wealth Management, Capital Markets and other business units, Lula's team delivers value through understanding the needs of their internal business units, and working collectively to enable solutions that bring value and innovation in partnership with RBC's third party suppliers.*



# breakout sessions round 5

Tuesday | 5:00pm – 5:45pm



## Diversity is Great, Inclusion is Greater #WEinclude

**Moderator:** **Chitra Rajeshwari**, aCOP, Executive Director, Avasant Foundation

**Panelists:** **Wendy Shlensky**, Vice President, Analyst & Advisor Relations, HGS; **Steve Rudderham**, VP Global Business Services, Kellogg; **Maura Hudson**, COP, Senior Vice President, Newmark Knight Frank; **Deborah Profit**, PhD, Vice President, Otsuka Information Technology (OIT) at Otsuka Pharmaceuticals; **Cecilia Edwards**, Partner, Everest Group

Diversity and Inclusion are often used together as aspirational goals for an organization, but we rarely discuss why and how they are different concepts. If diversity is the transformational goal for your 2018 corporate values, inclusion should be your transformational goal for your corporate culture. This session will discuss and define each concept separately and why the combination of both - and the clear understanding of each - will create an enviable culture into which your employees will want to stay, your competitors will want to emulate, and your talent pipeline will exponentially grow.

- *Chitra 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.*
- *Wendy has been with HGS for 3+ years as their VP of Analyst & Advisor Relations. She works with both analysts & advisors to bring market insights to HGS colleagues, as well as ensure the analyst & advisor community learn about HGS capabilities.*
- *Steve is leading Global Business Services function within the Kellogg's Company. He is responsible for ongoing operations as well as continuous improvement, global expansion and innovation.*
- *Maura is Newmark Knight Frank's Global Marketing, Operations and Solutions Executive with proven success in professional services industries, including commercial real estate, outsourcing, and financial services.*
- *Deborah has worked in pharmaceutical research and development for over two decades and is currently the Vice President, Otsuka Information Technology (OIT) at Otsuka Pharmaceuticals.*
- *Cecilia possesses 20 years of experience in strategy and management consulting, having worked with a number of Fortune 500 corporations, middle market companies, private equity firms, and non-profit organizations.*



## Transforming Customer Experience in the Real World – The Art and the Science advanced

**Todd Sale**, VP of Customer Service Operations – Fleetcor

**Ashish Bisaria**, Global Head of Client Advocacy, Alorica

In a world of increased customer expectations and ever-changing landscapes of attacking that by tools and concepts, the world often forgets the underlying principles of customer emotions, which in turn define experiences. Yes, the concepts and tools work, but how does one translate them to actual results? Hear from Alorica, a leading firm in delivering excellent customer experiences, and from their client on how they did that in the real world.

*Todd is a Customer Care Leader passionate about the science of contact center management and the challenge of managing people with extensive experience in Contact Center and Client Services management, business services, direct-to-consumer retail operation management, and general project management. Ashish is a Global Business Executive with demonstrated ability to help create and drive business strategy to execution success leveraging innovation and customer feedback. Worked with mid-size to Fortune 50 companies. Experience in both B2B and B2C environment.*





**Sunday, February 18 – 8:00 – 5:00pm**

**COP Standards Workshop**

**Mauricio Velasquez**, COP, Advisor and IAOP Authorized Trainer; **Sherry Jost**, COP, IAOP Authorized Trainer

This workshop is perfect for those interested in obtaining IAOP's COP certification, experiencing a one-day overview of the COP Master Class or looking to gain some recertification points! Workshop attendees will learn the basics of what is needed to achieve desired outsourcing results by understanding each step of the outsourcing process as described in the Outsourcing Professional Standards and COP Master Class. Participants aiming to earn their COP designation will receive 15 points toward certification and those already certified will earn 6 points toward their required recertification. This is an all-day event that will include breakfast and lunch.

*Fee: Complimentary but you must reserve your spot.*



**Wednesday, February 21 – 2:00 – 3:30pm**

**Outsourcing Certification Primer & Application Overview**

**Dana Corbett**, Director, Training, Certification & Research, IAOP

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. In part two of this workshop, we'll dig a little deeper into the application process and get your questions answered.

*Fee: Complimentary but you must reserve your spot.*



**Wednesday, February 21 – 2:00 – 5:00pm**

**COP Advanced Intensive**

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

This complimentary in-depth annual update is exclusively for COP designation holders attending OWS18. 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. Fee: Complimentary but you must reserve your spot.*

# networking & social events

**Sunday, February 18, 2018**

**12:30pm – 5:30pm**

**IAOP Networking Golf Outing** — Join us for our annual outing on Sunday morning, **February 18th** at Falcon's Fire Golf Club, recognized nationally as one of the finest public golf courses in Orlando.

While we can't guarantee the weather, we know there will be fun, good company, bad golf and lunch! (*Fees apply.*)

*In the spirit of doing well by doing good, IAOP is donating 5% of the golf outing proceeds to Second Harvest Food Bank of Central Florida.*



**5:00pm – 8:00pm**

**Welcome Happy Hour** — Pick up your registration materials and mingle on Sunday evening at your first official opportunity to make new connections and meet up with old friends and new friends over cocktails.



## Monday, February 19, 2018

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**8:00am – 11:00am**

**Registration Coffee Bar – Hosted by Cushman & Wakefield**

**9:30am – 12:30pm**

**Key Issues: Buyer Roundtables and Provider/Advisor Roundtables** — We kick off the conference with these expert-led topical discussions that allow for open discourse among your peer group. Pick a table, pick a topic and dig in. On Wednesday, all stakeholder groups will come together to share learnings and keep the conversations going.

**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 Global Services Mall hosted by Accenture** — *Come help us open the Exhibit Hall on Monday evening! This party features a selection of complimentary food and drink and is the perfect time to get acquainted with IAOP's service provider and advisor community.*

**7:00pm – 8:00pm**

**COP Cocktail Reception (Invitation Only)** — *IAOP honors all Certified Outsourcing Professionals at this Special Reception*

**7:00pm – 8:00pm**

**Post-Reception Party hosted by Solix** — *The fun continues Monday night following the opening reception. Solix, a leading provider of Business Process Outsourcing (BPO) solutions, invites you to an informal gathering. Come have a drink or two and see what they are all about!*

## Tuesday, February 20, 2018

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**7:30am – 8:45am**

**Networking Breakfast in the Global Services Mall hosted by SirionLabs** — Power up for the day and grab a bite in the exhibit hall before the sessions start at this tasty continental breakfast!

**12:30pm – 2:15pm**

**2018 Awards Luncheon** — Join IAOP and Master of Ceremonies, Eugene Kublanov, COP, Managing Director, Advisory, KPMG and Member, IAOP's Strategic Advisory Board, for this plated luncheon as we honor this year's best of the best.

**5:45pm – 7:30pm**

**Cocktail Reception in the Global Services Mall hosted by WGroup** — Join us Tuesday evening for the final cocktail reception where attendees and partners come together to connect and learn. This is your chance to speak with cutting-edge service providers, get your questions answered and start building the relationships of the future. Don't forget to stop by and see your host, WGroup, a management consulting firm with a peer-to-peer approach to IT optimization and transformation.

## Wednesday, February 21, 2018

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**7:30am – 8:45am**

**Breakfast Roundtable Discussions in the Sandbox!** — All delegates come together over breakfast for inspirational discussions on the key topics culled from Monday's Key Issues Workshops!

**12:45pm – 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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- **John C. Maher**, COP, Vice Chair, Executive Managing Director at TI Solutions, LLC

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- **David J. Brown**, Global Lead, Shared Services and Outsourcing Advisory, KPMG
- **Jag Dalal**, COP, COP-GOV, Chief Advisor, IAOP and CEO, JDalal Associates
- **Debi Hamill**, Chief Executive Officer, IAOP

- **Monica Juan**, COP, Client Solutions Director, CBRE | Global Workplace
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- **Marc Schermerhorn**, COP, Senior Manager People Services, Facebook
- **Atul Vashistha**, COP, Chairman, Neo Group and Supply Wisdom
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## Navigating the Uncharted Territory of **Disruption**

Across Europe and the globe, companies are flush with opportunities to transform their businesses, from digitalization and automation to cloud platforms, the IoT and everything in between. We know all of this affects how the industry looks and acts and how business gets done, but we also know core topics such as management, contracts, negotiations, governance and creating value are still as important as ever.

EOS18 is built around helping you understand the complexities and the opportunities of the new world of disruption, but also keep you on top of the issues that help define and grow your business today.

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