



18<sup>th</sup> ANNUAL

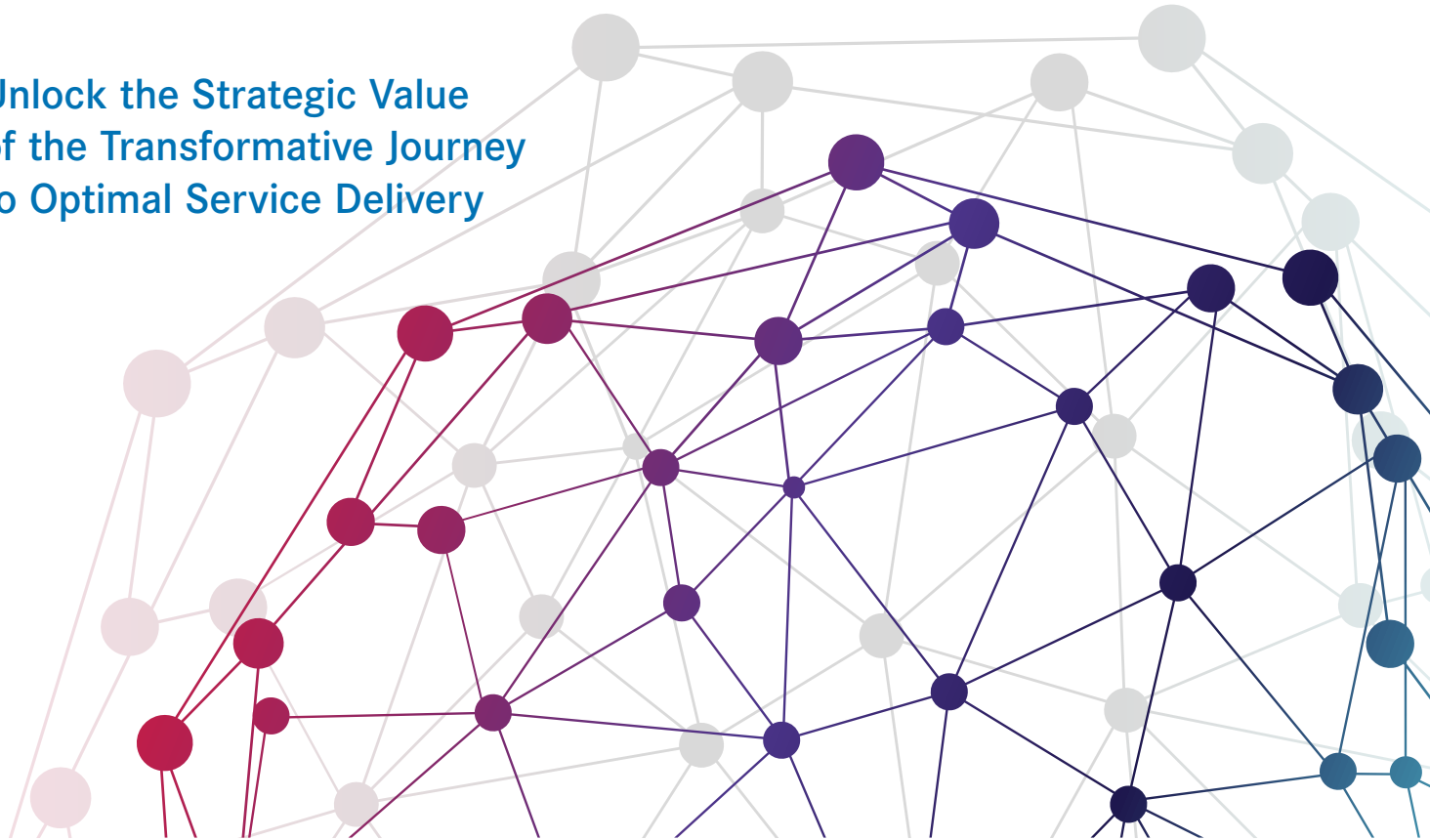
# GLOBAL BUSINESS SERVICES CONFERENCE

October 8-10, 2014 | Westin New York at Times Square

PRE-CONFERENCE SEMINAR October 8, 2014

Service Delivery Optimization through Strategy Realization and Cultural Transformation

Unlock the Strategic Value  
of the Transformative Journey  
to Optimal Service Delivery



**EXPLORE** opportunities with how shared services and global business services (GBS) can help move from process efficiency to enterprise business value

**MOTIVATE** and enable new and constructive behaviors through change management and stakeholder engagement principles

**EXECUTE** an effective roadmap to performance and organizational excellence

Lead sponsor

**Deloitte.**

**Save \$200**

register by 9.22.14

To Register | [www.conferenceboard.org/globalbusinessservices2](http://www.conferenceboard.org/globalbusinessservices2) | +1 212 339 0345

## Gain Valuable Strategies for Optimal Service Delivery

Attend The Conference Board's Global Business Services Conference to learn from peer organizations at all stages of the shared services and global business services maturity spectrum on how to leverage your platform to deliver step changing value creations to your business in a long-term sustainable way including how to:

- Create top-line growth and bottom-line savings with emerging trends and capabilities
- Motivate and enable new and constructive behaviors through change management and stakeholder engagement principles
- Gain maximum effectiveness and reduced redundancies through role redesign
- Achieve greater impact for your organization with GBS maturity assessment to determine "what's next"
- Execute an effective roadmap to performance and organizational excellence

## Plus! Working Group Sessions Just for You!

In order to address the needs and issues of individuals regardless of where they might be in their journey to optimal service deliver sessions during the afternoon of day one will break-out to give you a deep dive into the topics and challenges specifically for you. Choose from:

- Topics Related to the Maturing Shared Services Organization
- Topics Related to Global Business Services

## Who Should Attend

The conference is intended for executives who approve of and are actively involved in their organization's shared services and global business services ventures, including professionals in:

- Business Strategy
- IT
- Finance
- Human Resources
- Procurement

### Pre-Conference Seminar

## Service Delivery Optimization through Strategy Realization and Cultural Transformation

Wednesday, October 8, 2014

REGISTRATION AND CONTINENTAL BREAKFAST 8:30-9 AM

WORKSHOP A 9 AM-12 PM

### Embracing Change and Fueling Employee Engagement to Drive Superior Business Results

Change is a constant. It is a fundamental function of successful future operations and can be viewed as the underappreciated necessity of shared services. Regardless of where your organization may be in the maturity spectrum of shared services, change is always happening, as it should be, and the ability to manage change as part of your day-to-day operations is crucial to ensure the cultural transformation needed for execution and growth. During this workshop we will demystify change management and employee engagement techniques by exploring the practical applications, tools, and latest practices. Included in the discussion:

- What mechanisms are needed to drive both operational and strategic change?
- Identifying and targeting key stakeholders who will cascade your message throughout the enterprise
- "What's in it for me?" mastering ongoing communication that is relevant and resonates with stakeholders and employees

Robin Stout, Senior Director, Global Employee Services,  
McGraw Hill Financial

LUNCH 12-1 PM

WORKSHOP B 1-4 PM

### Benefits Realization in Shared Services

The transition to shared services or Global Business Services (GBS) is no simple task and involves a large investment of time, money, and a fundamental change in the way an organization operates. Results achieved from this endeavor may take years to realize and it is a struggle to ensure the organization maintains focus and support throughout the journey while little reward is being realized. During this session the facilitator will explore the concept of benefits realization within shared services in order for you to be able to create a culture of sustained support. Included in the discussion:

- Effective communication strategies to ensure continued support throughout your journey and help leverage future expansion opportunities
- Create a working tool for strategic planning, organizational assessment, and clear/consistent messaging to ensure continued support of your initiatives
- Uncover effective ways to provide and communicate meaningful operational and customer, measures leading to a culture of continuous improvement

Paul Nicolaisen, Vice President Global Shared Services,  
Becton Dickinson

## Thursday, October 9, 2014

REGISTRATION AND CONTINENTAL BREAKFAST 8–9 AM

CHAIRPERSON'S WELCOME AND OPENING REMARKS 9–9:10 AM

A 9:10–10 AM

### What's Next on the Horizon: A Visionary Exploration into the Future of Shared Services and Global Business Services

To set the stage for the conference, explore the emerging trends and capabilities within shared services and GBS and how these are shaping the ever-changing landscape. Explore the strategic value of GBS today and what the future state will bring, including discussions around the future of the workforce. Furthermore, as GBS is the hub of organizational intelligence for the enterprise, explore how to harness this capability to further enhance the value proposition and more effectively align strategy to overall corporate goals.

Don Plotter, Principal, **Deloitte Consulting LLP**  
Steven Bandrowczak, Senior Vice President, Global Business Service/BPS, **Hewlett-Packard**

B 10–11 AM

### The Journey to GBS: True Stories from the Front Lines

There is not a “one size fits all” approach to GBS. Every organization has its own unique culture, challenges, and business needs. As such, no two organizations will embrace and achieve success via a GBS model in the same way. Hear from an esteemed panel of experts as they share lessons learned from their GBS journey, including the determining factors move to a GBS model, challenges and solutions along the way, and finally, hindsight being 20/20, what they would have done differently if they had to do it all over again.

Moderator:

Brian Warnert, Director, Global Business Solutions, **General Mills**  
Panelists

Mark C. Johnson, Senior Vice President, Corporate Shared Services, **TransUnion**  
Debbie Vander-Bogart, Vice President, Global Shared Services **Levi Strauss & Co**  
Badhri Srinivasan, Global Head, Senior VP of Global Data and Safety Monitoring and Global Delivery Network, **Quintiles**

NETWORKING AND REFRESHMENT BREAK 11–11:15 AM

C 11:15 AM–12:10 PM

### Shared Services Transformation: The Critical Importance of Leadership Development to Deliver Results

In January 2014 the Program Support Center of the U.S. Department of Health and Human Services launched a new rotational program for the Service Director role in order to see their long-term strategies come to fruition. Through the course of developing this program the organization has been able to uncover best practices and lessons learned in leadership and talent development. During this session, Ms. Ann-Marie Massenberg will share details of their successful Service Director Rotational program and detail how Global Business Services needs to take careful consideration in regards to the types of leaders that they have in place, including the core competencies of such leaders, and how a program such as the one PSC has created can help develop the types managers and leaders that are required to deliver the next level of value to your organization.

Ann-Marie Massenberg, Chief of Staff, Program Support Center, **U.S. Department of Health and Human Services**

LUNCHEON 12:10–1:10 PM

D 1:10–2:10 PM

### Change Management and Stakeholder Engagement Principles to Strike a Balance between Art and Science

Regardless of where you may be in your shared services and GBS journey, overcoming the ongoing resistance to change and understanding various stakeholders' needs, as opposed to wants, are crucial to delivering continuous value to the organization. A group of panelists have been assembled to share how they have been able to put change management and stakeholder engagement principles into practice in order to motivate and enable new and constructive behaviors. Discussions will include how these principles have enabled the organization to effectively align business line and enterprise needs, fostering sustained support and engagement from the entire organization.

Moderator

Dan McHugh, Principal, **Deloitte Consulting LLP**

Panelists

Dana Ashfield, Director, Retail and Direct Bank Transformation **Capital One**  
Brad Christ, Acting Director, Environmental, Health and Safety Services, Program Support Center, **Federal Occupational Health**  
Dan Carney, Director, Global Shared Service Center, Americas Service Delivery Lead, HR Global Operations, **Pfizer**

Specialized Working Group Sessions:

CONCURRENT SESSION 1

**Topics Related to the Maturing Shared Services Organization**

CONCURRENT SESSION 2

**Topics Related to Global Business Services**

E1 2:10–3:15 PM

### An Exploration into Effective Operating Model and Expansion Strategies to Lay the Foundation for Maximum Impact and Sustainable Results

Finding the right shared services solution for your organization that can evolve and respond to changing business needs can be a long and winding road, sometimes filled with fits and starts. Hear from one organization as they detail the critical elements of their HR Operating Model and the key lessons they have learned through the implementation and execution phases. Included in the discussion will be the ways they have been able to collaborate to effectively expand their HR operations and their current pilot strategies to enable future growth and value opportunities for the business. Be prepared to engage in a discussion with your peers to explore different operating models and expansion strategies utilized at other organizations and the pros and cons of each to benefit from a rich and dynamic exchange of ideas.

Dan Carney, Director, Global Shared Service Center, Americas Service Delivery Lead HR Global Operations, **Pfizer**

E2 2:10–3:15 PM

### Mobilize the Global Organization through GBS

Designing the right organizational structure is key to creating value beyond cost and effectiveness. Learn from an organization as they share their GBS journey and processes to build and develop transformation capability across the organization, including business case creation, implementation hurdles, cross-functional engagement and governance, and their vision for their future state.

Bene Werle, Vice President, Global Business Services  
Cisco Systems

F1 3:15–4:05 PM

### Avoid Measuring for the Sake of Measuring: Truly Effective Models for Shared Services Governance

The term shared services governance is liberally used for all management structures and protocols post go-live. Yet there is often a difference between what is textbook, and what is effective. Explore the elements that are the “have-to-haves” of effective governance as opposed to the “nice-to-haves” to capture truly impactful information.

Matt Noe, GPHR, Latin America Regional Shared Services  
Manager – Latin America Human Services, Caterpillar

F2 3:15–4:05 PM

### Leveraging a Framework for Optimal GBS Governance

To effectively reap the benefits of a fully collaborative and integrated GBS model, the most sophisticated GBS organizations have a standardized approach to governance. Learn how to create and drive this business process within your global organization resulting in improved efficiency, control, and transparency. Explore the importance of the Global Process Owner and how this role positively impacts the customer’s engagement and satisfaction.

David Michelson, Principal, Deloitte Consulting LLP  
Richard Sarkissian, Principal, Deloitte Consulting LLP

G1 4:05–5 PM

### Crucial Steps to Moving Up the Maturity Curve to a GBS Model

Is GBS something that can be achievable for all organizations? What are the building blocks? What are the critical assessments to ensure that you have the ability to “look before you leap?” Explore the effective strategies to evolve shared services to the next level with a particular focus on how to ensure leadership buy-in along the way.

G2 4:05–5 PM

### Taking GBS to the Next Level—Evolving the Model for Greater Impact

At its foundation, GBS focuses on optimizing end-to-end services on a cross functional and enterprise-wide basis. By leveraging this fundamental ability to transform end-to-end processes, along with the truly collaborative nature that is a fundamental building block of this platform, the next level of value can be generated for the business. Join this session as we explore the different and newly evolving operating models of GBS, the pros and cons of each and the implications of these models on the enterprise in order to capture the next level of value creation for the business.

Sheila Welch, Head of Global Workforce Strategy, Morgan Stanley

NETWORKING COCKTAIL RECEPTION 5–6 PM

HOSTED BY **Deloitte.**

**Friday, October 10, 2014**

CONTINENTAL BREAKFAST: 8–8:30 AM

H 8:30–9:30 AM

### Peer-to-Peer Learning Experience: Breakfast Roundtable Session

Benefit from a unique peer-to-peer learning experience by sharing practical approaches and actionable ideas with others facing similar challenges/experiences in a relaxed and open environment. Participants will be able to examine and address individual challenges most relevant to them.

Moderator

Don Piotter, Principal, Deloitte Consulting LLP

I 9:30–10:20 AM

### Capitalizing on the Power of Analytics in GBS

In today’s fast-paced world, the importance of capturing and synthesizing real-time data, and actually being able to use the information to make quick and informed corporate decisions, is at the cornerstone of an organization’s competitive advantage. While the focus has been largely external, i.e., client-facing, there are clear opportunities to do so within the organization. Join this session as we explore the ever-expanding role of analytics in GBS to support business operations and to effectively utilize these tools to drive enterprise value realization, as well as, promote the highest degree of agility and responsiveness for the entire organization.

Arindam Mukhopadhyay, Managing Director, Global Head of  
Strategy & Re-engineering and Reporting, Citigroup

NETWORKING AND REFRESHMENT BREAK 10:20–10:35 AM

J 10:35–11:35 AM

### The Talent Management Imperative: Attracting, Retaining, and Developing the Required Talent for Success

The key to success is undoubtedly people. The individuals responsible for executing and delivering continuous value need to have a delicate balance between strong transactional skills and a strategic enterprise-wide focus, and also be customer service-oriented. How do you nurture or recruit such unique employees, and as leaders, what can you do to harness the required competencies to fulfill this complex job role? A panel has been assembled to share how they have tackled their most challenging talent management issues, including ways to identify the various motivators of your varied workforce and career pathing to ensure you are developing talent in the most effective way.

Panelists

Brandon Bayles, Senior Director, Global HR Operations  
Halliburton

Mary Beth Drake, Vice President, HR Operations,  
inVentiv Health, Inc.

Renee Lesko, Vice President, Accounting Services, North  
America, Lafarge

**To Register | [www.conferenceboard.org/globalbusinessservices2](http://www.conferenceboard.org/globalbusinessservices2) | +1 212 339 0345**



K 11:35 AM–12:30 PM

### Examining the Business and Social Value Proposition of Impact Sourcing

Impact Sourcing is the socially responsible arm of the Business Process Outsourcing (BPO) and Information Technology Outsourcing industry. Impact sourcing intentionally employs people who have limited opportunity for sustainable employment—often in low-income areas. Through its Digital Jobs Africa Initiative, the Rockefeller Foundation is supporting the scale of Impact Sourcing globally with a special focus on Africa.

During this session learn more about this increasingly popular trend and explore the value proposition of Impact Sourcing from both a business and social impact perspective.

Sarah Troup, Associate Director, **The Rockefeller Foundation**  
Cindy Gallagher, Vice President and Deputy Controller, **AOL Shared Services**

END OF CONFERENCE 12:30 PM



Join the Conversation: Follow us on twitter at #tcbgbs2014

## Registration Information

**Online** [www.conferenceboard/globalbusinessservices2](http://www.conferenceboard/globalbusinessservices2)

**E-mail** [customer.service@conferenceboard.org](mailto:customer.service@conferenceboard.org)

**Phone** 800 942 4494 8:30 AM to 5:30 PM ET Monday through Friday

### 18<sup>th</sup> Annual Global Business Services Conference

Unlock the Strategic Value of the Transformative Journey to Optimal Service Delivery

**Conference** (924015-2) October 9-10, 2014

Westin New York at Times Square

Save \$200, register by 9.22.14

Associates **\$2,095** after 9.22.14 **\$2,295** Non-Associates **\$2,695** after 9.22.14 **\$2,895**

**Pre-Conference Seminar** (980015-2) October 8, 2014

Associates **\$1,015** Non-Associates **\$1,215**

#### Get Involved!

For more info on sponsorship opportunities, please contact Michael Felden at [michael.felden@conferenceboard.org](mailto:michael.felden@conferenceboard.org)

For more info on becoming a media partner, please contact Allison Nilsen at [allison.nilsen@conferenceboard.org](mailto:allison.nilsen@conferenceboard.org)

#### Hotel Accommodations

Fees do not include hotel accommodations. For discounted reservations, contact the hotel directly no later than the cut-off date and mention the **Global Business Services Conference**.

Westin New York at Times Square  
270 West 43rd Street  
New York, NY 10036  
Tel 212 201 2700

Hotel reservations cut-off date:  
**Friday, September 19, 2014**

#### Cancellation Policy

Full refund until three weeks before the meeting. \$500 administration fee up to two weeks before the meeting. No refund after two weeks before the meeting.

Confirmed registrants who fail to attend and do not cancel prior to the meeting will be charged the entire registration fee.

#### Team Discounts per person

For a team of three or more registering from the same company at the same time, take \$300 off each person's registration.

One discount per registration. Multiple discounts may not be combined.