21st Annual Global Business and Shared Services Conference
Moving GBS & Shared Services to a Digital Operating Model

CONFERENCE
October 12–13, 2017
New York Marriott East Side
New York City

PRE-CONFERENCE SEMINAR:
Robotic Process Automation (RPA) for Shared Services Seminar
October 11, 2017
The Conference Board
Conference Center
845 Third Avenue, NYC, 3rd Floor

Register Now - www.conferenceboard.org/globalbusinessservices
Pre-Conference Seminar:
Robotic Process Automation (RPA) for Shared Services

Wednesday, October 11, 2017
The Conference Board Conference Center
845 Third Avenue, NYC, 3rd Floor

8:00 - 9:00 am
Registration, Breakfast and Networking

9:00 - 9:15 am
Chairwoman’s Welcome and Opening Remarks
Gina Schaefer, Managing Director, Deloitte Consulting

9:15 - 10:15 am
How to Implement RPA Into Business Services Operations to Drive Significant Long-Term Value
How does an organization get started on the automation journey? How do you implement RPA? What tools are needed? What processes are suitable for RPA? How does an organization work with service providers? This kick off session discusses what the RPA journey entails, what is needed to change to make this a reality and overcoming challenges and issues when developing pilot programs. Adopting an open and innovative mind-set when it comes to deploying RPA, thus making your digital workforce more antifragile- starting with Proof of Concepts ad Pilots. During Q&A hear from others on what has worked and didn’t work for them, and what they wish they knew before they started.

Moderator: Mic Locker, Managing Director, Deloitte Consulting
Panelists:
Juliano Godoy, Head of North America Business Services, Kraft Heinz
Alison Hager, Senior Director, Finance Portfolio Management & Optimization, Pfizer Inc
Patrick Johnson, Finance Senior Manager, CSS Project Services, Corning Incorporated

10:15 - 10:35 am
Networking and Refreshment Break

10:35 - 11:35 am
Case Study 1

11:35 am - 12:50 pm
Lunch

12:50 – 1:50 pm
Case Study 2
How To Secure Buy-In From C-Suite And IT Managers & Estimate The Cost Benefit
Running a successful RPA program requires upper management buy-in and IT involvement in the early process, often and effectively. This ensures a smoother RPA implementation and allows the IT function to leverage the technology to improve service delivery. Hear how to explain RPA to stakeholders, set realistic expectations within the boardroom, and engage IT (and other peer constituencies) in the start-up of the RPA program. It is imperative to address ROI of your RPA program and learn how to estimate cost and savings associated with automation.

Hiren Kotak, Managing Consultant, Automation Advisory, Strategy & Transformation, DOX, Wipro

1:50-2:10 pm
Networking and Refreshment Break

2:10 - 3:10 pm
Case Study 3
Is Your BPO Robo-Ready?
This highly practical interactive session explores the intersection of outsourcing and robotics. Topics include how: Robotic Process Automation (RPA) impacts sourcing; RPA affects the outsourcing business model; Contingencies in existing deals may introduce the benefits of RPA. This session is conducted by an experienced, business-oriented outsourcing attorney and is designed to provide insights that you can immediately implement.

Ed J. Hansen, Partner, Morgan, Lewis & Bockius

3:10 - 3:30 pm
Afternoon Networking and Refreshment Break

3:30 - 4:30 pm
Case Study 4
Developing a Center of Excellence Is Important To Have as a Focal Point
The most common error in implementing RPA is the failure to have and stick to, an automation strategy (aka “center of excellence” or CoE). Hear how American Express has developed and evolved their CoE to ensure its highest quality and compliance by having the robotic process adhere to all IT policies and government.

Adrienne Hill, Vice President, Automation COE, American Express
Todd Oulton, Vice President, Financial Integrity Initiatives, American Express

4:30 - 4:45 pm
Chairwoman’s Wrap-Up And Closing Remarks
Gina Schaefer, Managing Director, Deloitte Consulting

For sponsorship opportunities, please contact michael.felden@conferenceboard.org
21st Annual Global Business and Shared Services Conference

Agenda

Day One – Thursday, October 12, 2017

8:00 - 9:00 am
Registration, Breakfast and Networking

9:00 - 9:10 am
Chairwoman’s Welcome and Opening Remarks
Deborah Kops, Senior Advisor, The Conference Board
Principal, Sourcing Change

9:10 - 10:00 am
General Session A
Moving To a Digital Operating Model: A Call To Arms
In response to business disruption, shared services and GBS operations are being forced to embrace digital operating models for a host of reasons: drastically improve customer journeys; take internal processes to the next level; deliver additional ROI and tap into diverse global talent pools. Robotics, AI, cognitive, and other technology advancements now present the opportunity to automate a wide range of tasks that are currently operated by human labor, while new communication tools enhance the customer experience. Evolving to digitization to deliver value presents a challenge to shared services leaders like none other. This conference kicks off with a call to arms, helping delegates understand the imperative for change, the range of digitally-driven models available for implementation and the challenges inherent in the transformation journey. At the end of the session, delegates can identify what solutions are available for them to have a breakthrough regarding their shared services digital transformation.

Aparajita Rathore, Principal, Strategy & Operations, Deloitte Consulting LLP

10:00 - 10:45 am
General Session B
Connecting the Dots: Moving From a Functional Shared Services Model To a GBS Model
While some organizations are dismantling their GBS models, others are actively connecting the dots—combining mature functional shared services under a global GBS umbrella. Stakeholder challenges, costs and unrealistic expectations all combine to challenge the status quo. Learn how prestigious companies are creating a GBS organization by implementing strategies that avoids all the usual pitfalls, and navigates the dark waters of stakeholder intransigence.

Rebecca Durkee, Senior Director Strategy and Portfolio Management, Global Business Services & Enterprise Tech, Walmart
Christopher Wood, Vice President Transformation, Corporate Business Services, FedEx Services

10:45 - 11:15 am
Networking and Refreshment Break

11:15 am - 12:00 pm
General Session C
Given the Geopolitical Turmoil and Advances in Automation, Should Enterprises Revisit their Re-Shoring and In-sourcing Decision-Making Process?
With increasing political pressure on retaining jobs onshore, concurrent with the introduction of more accessible intelligent automation tools, is offshoring shared services still a viable strategy? Does this “perfect storm” result in a rethinking of outsourcing strategy? Can shared services leaders truly replicate the cost advantage of offshore labor arbitrage? What are the key factors to consider when revisiting the delivery network decision?

Jay Desai, Senior Director, Outsourcing COE, AbbVie
Steven Jo, Head of Procurement, Silicon Valley Bank
Erin O’Farrell Lambert, Global Head of Sourcing, Bloomberg
Global Data, Bloomberg

12:00 - 1:00 pm
Lunch

1:00 - 1:45 pm
General Session D
How Do You Create A Governance Program That Effectively Manages Digital Delivery?
Shared services operations understand the criticality of good governance mechanisms and routines. But today, the majority of the practices focus on the governance of humans and processes, not a hybrid of people, process and intelligent automation. How do you govern a robot? How do your stakeholders interact with digital workers? Learn how a well-constructed governance framework can make digital and people decision-making seamless, and creates value when the model is in flux.

Samir Bagri, Director, Global Business Services, Delphi
Lee Coulter, Chief Executive Officer, Ascension Ministry Service Center

1:45 - 2:30 pm
General Session E
Best Practices: Harnessing The Power Of M&A and Divestiture
GBS and shared services models play a critical role during an M&A process. Not only do shared services promote integration, but by harnessing the power of a shared business process model, it is possible to reduce redundancies and eliminate cost through economies of scale and standardization. Hear how two shared services veterans coped with and used the power of the model to achieve integration and divestiture goals.

Moderator: Jay Desai, Senior Director, Outsourcing COE, AbbVie
Panelists: Susan Halliday, Vice President, Shared Services, Walgreens
Edward Skowronski, Vice President, Global Services Strategy and Operations, Johnson & Johnson

www.conferenceboard.org/globalbusinessservices
Margaret Magner, Assistant Vice President, Change Management, HR Shared Services, MetLife

4:35 - 4:50 pm
Networking and Refreshment Break

4:50 - 5:50 pm
General Session H

Achieving True GBS: Is It Just A Dream or Is It Working?
Most shared services leaders aspire to implement a GBS model that is global, multi-functional and integrated under one management structure. But, not all organizations can move up the proverbial maturity curve to that status. Certain organizations have moved toward that direction and either stopped short of true GBS and its value or abandoned their vision while others have created their own version of “GBS”. When does an organization stop deploying the GBS model? When do you know that it is performing to its peak performance? Are your stakeholders no longer endorsers? Learn from leaders who share the successes and challenges from their GBS journey.

Moderator: Jean White, Principal, Deloitte Consulting
Panelists: Derek Rahman, Managing Director, Enterprise Transformation, Marsh & McLennan Companies
Janet Ramey, Senior Vice President, Employee Services, Cisco
Tammy Weinbaum, Executive Vice President, Global Business Services, American Express

6:00 - 7:00 pm
Networking Cocktail Reception

Day Two – Friday, October 13, 2017

8:00 - 8:30 am
Continental Breakfast and Networking

8:30 - 9:15 am
General Session I

Case Study - Process Transformation: The Art Of The Possible
Bethmara Kessler, Senior Vice President, Integrated Global Services, talks about how Campbell Soup Company’s GBS organization is transforming the way shared services fuels growth for the business. She takes you along the company’s unique journey to transform global processes by harnessing the power of design thinking, collaborating hubs (a mechanism used to explore innovation and work through problem solving), robotic process automation, and more.

Bethmara Kessler, Senior Vice President, Integrated Global Services, Campbell Soup Company

9:15 - 10:00 am
General Session J

How is Digital Reshaping Customer Experience?
With relationships increasingly more interactional and less transactional, support is becoming more interwoven with customer experience. In a digital shared services model, how
is this changing the way we interact, creating a more satisfying and aligned customer experience? How is digital changing the way shared services deals with disparate stakeholders? This session features certain case studies that enable attendees to experience first-hand how digital affects support structures, customer relationship management and changing feedback mechanisms.

**Moderator:** Will Swanson, Vice President, HR Services, North America, Global Human Resources, Schneider Electric
**Panelists:** Bob Carroll, Vice President, Partner & Foundational Services, Global Sales Operations, Hewlett Packard Enterprise
**Hiren Kotak,** Managing Consultant, Automation Advisory, Strategy & Transformation, DOX, Wipro

10:00 - 10:30 am  
Networking and Refreshment Break

10:30 - 11:15 am  
**Concurrent Track K1, K2 and K3 (Choose One)**

**MODERATED ROUNDTABLE SESSIONS**

**Concurrent Track K1**

**Are You Struggling To Move Forward On The Maturity Curve?**
Getting stuck after several years of hard shared services effort is usual for most organizations. Discover how others have been able to move along the proverbial maturity curve. Share your war stories and strategies for breaking through to the next level of maturity.

**Stephanie Thomas,** Head, Business Financial Shared Services Americas and Global Process Design, Bristol-Myers Squibb

**Concurrent Track K2**

**Going For A Land Grab for Analytics To Generate Business Value**
Shared services and GBS leaders have a tremendous opportunity given digitalization, to use analytics to enhance processes, workforces, and digital operating models, as well as to provide actionable insight back to the business. With access to vital information, business services are a major data hub for an organization. Be prepared to discuss best practices to turn data and analytics into powerful change tools and leverage that data to gain critical insight for the entire organization.

**Remzi Ural,** Senior Manager, Deloitte Consulting

**Concurrent Track K3**

**Talent Management: Recruit and Retain Future Shared Services Leaders**
As digital labor slowly takes over traditional transactional tasks of human labor, it is imperative that leaders revamp career paths to obtain and retain increasingly critical talent. Delegates contribute to a lively discussion on future proofing skill sets and job families, maintaining morale, dealing with a millennial workforce and achieving work life integration.

**Phyllis Gallay,** Site Director, North America Shared Service Center, BD

11:15 am - 12:00 pm  
**General Session L**

**How To Set Up Shared Services In A Fast Growing Company**
When the organization is growing in leaps and bounds, and has all the latest technology at its beck and call, do shared services get the attention it needs? Does the shared services organization have the opportunity to innovate with the same technologies? Can the best and brightest find challenging careers not being on the front line? Our speaker’s share their experiences in so-called unicorn companies and welcome audience Q&A.

**Sam Barani,** Head, Global Shared Services, Salesforce
**Rich Maddi,** Vice President, Global Shared Services, WeWork

12:00 - 12:15 pm  
**Chairwoman’s Conference Wrap-Up And Closing Remarks**

**Deborah Kops,** Senior Advisor, The Conference Board  
Principal, Sourcing Change

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Continuing Education Credits (CEU)

Robotic Process Automation (RPA) for Shared Services Seminar

This program has been approved for 5.2 PDCs for the SHRM-CP or SHRM-SCP.

Earn up to 6 CPE credits

Business Management and Organization

Requirements: Attendees must sign-in each day for full credit.

Delivery Method: Group-Live

Program Level: Intermediate

Prerequisites: Bachelor’s degree or higher

Advanced Preparation: None

The Conference Board is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.learningmarket.org

For more information regarding administrative policies such as complaint and/or refund, please contact our offices at +1 212 339 0345.

This program has been approved for 5.25 (BUSINESS) recertification credit hours toward PHR, SPHR and GPHR recertification through the HR Certification Institute. For more information about certification or recertification, please visit the HR Certification Institute website at http://www.hrci.org

The use of this seal is not an endorsement by the HR Certification Institute of the quality of the program. It means that this program has met the HR Certification Institute's criteria to be pre-approved for recertification credit.

21st Annual Global Business and Shared Services Conference

This program has been approved for 8.5 PDCs for the SHRM-CP or SHRM-SCP

Earn up to 11 CPE credits

Business Management and Organization

Requirements: Attendees must sign-in each day for full credit.

Delivery Method: Group-Live

Program Level: Intermediate

Prerequisites: Bachelor’s degree or higher

Advanced Preparation: None

The Conference Board is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.learningmarket.org

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The use of this seal is not an endorsement by the HR Certification Institute of the quality of the program. It means that this program has met the HR Certification Institute's criteria to be pre-approved for recertification credit.
REGISTRATION INFORMATION

Online  www.conferenceboard.org/globalbusinessservices
Email   customer.service@conferenceboard.org
Phone  212.339.0345
        8:30 am – 5:30 pm ET, Monday – Friday

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Fees do not include hotel accommodations.

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Conference Location
New York Marriott East Side
525 Lexington Avenue at 49th Street
New York, NY 11017
Tel: 212.755.4000

Pre-Conference Location
The Conference Board Conference Center
845 Third Avenue (Between 51st and 52nd St.), 3rd Floor
New York, NY 10022
Tel: 212.339.0345

Hotel Cut-Off Date: September 20, 2017

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 $150 off each person’s registration. One discount per registration. Multiple discounts may not be combined.