Tackling the Spectrum of Issues: 
From Early Implementation through 
Transformative End-to-End Global Efficiency
**Agenda**

**Day 1: Tuesday, November 15, 2016**

**Conference Registration:** 12 – 12:30 pm

**Chairperson’s Welcome and Opening Remarks:** 12:30 – 12:45 pm

**Jeff Kemmerer,** Senior Principal Consultant, *The Clearing*

**General Session A:** 12:45 – 1:45 pm

**A View from the C-Suite: The Value Proposition of Shared and Global Business Services**

Are you getting the needed support from the highest levels of your organization? What can you do to ensure greater alignment with corporate goals and objectives? During this session, benefit from hearing directly from an esteemed C-Suite executive on how they view business services. Explore the critical capabilities that add real value to the organization and the levers that you can pull to gain more internal alignment and linkages to corporate strategy. Looking ahead, understand what will be the expectations for the future evolution of your platform in response to the complexities of our fast paced global environment characterized by the feverish pace of technology. Come away with a new understanding on how to best position your organization to respond to changing business needs and capture value at every turn.

**Caleb Longenberger,** Principal, *Deloitte Consulting LLP*

**Renée B. McKaskle,** Senior Vice President & CIO, *Hitachi Data Systems*

**General Session B:** 1:45 – 2:45 pm

**Town Hall Discussion: The Evolutionary Pathway from Shared Services to GBS**

Join the discussion with our expert panel as they explore how their organizations have optimized shared services and GBS platforms to capture growth opportunities, innovation, and value. Since every organization embraces business services differently, you will hear about a variety of experiences related to the business services journey, including burning platforms, why they moved to GBS, challenges and solutions faced along the way, and what they would have done differently in hindsight. Audience members are encouraged to ask questions and share their experiences in order to provide valuable insights from a variety of perspectives.

**Moderator:**

**Paul Bartley,** Director, Global Shared Services, BD

Panelists:

**Ed Carolan,** President, Campbell Fresh, *Campbell Soup Co.*

**Mark Johnson,** Senior Vice President, *Corporate Shared Services, TransUnion*

**Matthew Murphy,** Vice President, Enterprise Standards and Productivity - Program Office, *Johnson & Johnson*

**Networking and Refreshment Break:** 2:45 – 3 pm

**General Session C:** 3 – 3:45 pm

**The Strategic Advantage: Shared Services and GBS in Context of an M&A**

It’s no secret that M&A deals are done at a feverish pace in today’s marketplace. Organizations that don’t keep up—by failing to transform, adapt, scale, and evolve—will be left behind by their competitors. Shared services and GBS can be critical components to help ensure both the speed at which deals can be sought as well as their success. Hear first-hand from an organization that has gone through an M&A to understand the value that shared services and GBS contributed. Learn how you can increase the position of your organization as a value/growth enabler and strategic partner, from due diligence to execution to integration.

**Bets Lillo,** Vice President, Foundation Processes, *AbbVie Inc.*

**General Session D:** 3:45 – 4:30 pm

**Data Analytics Capabilities within GBS: A Treasure Trove of Value at Your Fingertips**

With access to vital information across various geographical, regional, and functional systems, business services are a major data hub for an organization. Through the proficient study and assessment of analytics and insights, business services can be a powerful source of value and growth opportunities for your business. Learn how to turn data and analytics into powerful change tools that will increase your value within the organization.

**Tom Hallett,** Vice President, Global Business Services, *S&P Global*

**General Session E:** 4:30 – 5:30 pm

**Panel Discussion: Change Management, Communication, and Stakeholder Engagement - Managing and Adapting to Constant Change**

Shared service and GBS is an evolutionary process that cannot be solved by a one-time decision and a single execution plan. As business needs change, success is increasingly dependent on adaptability. This process requires a platform that can change and grow through continuous adjustments and “re-selling” of the strategy within the organization. During this session, leading practitioners will share the change management and engagement techniques they have used in order to elicit new behaviors that foster support from the entire organization.

**Moderator:**

**Reva Katz,** Managing Director, *Deloitte Consulting LLP*

Panelists:

**Richard E. Arbuthnot,** Senior Vice President, Director, *SAIC Shared Services Center, SAIC*

**Nicole Morgan,** Staff VP, Business Improvement Group, *Anthem, Inc.*

**Steve West,** formerly Director, Senior Vice President, *Human Resources, Citigroup*

**Cocktail Reception:** 5:30 – 6:30 pm

---

**Day 2: Wednesday, November 16, 2016**

**Registration and Continental Breakfast:** 8 – 8:30 am

**General Session F:** 8:30 – 9:25 am

**[Moderated Roundtable Sessions] Critical Issues of Shared Services and GBS Today and into the Future**

Join your peers for a valuable roundtable discussion led by an experienced shared services or GBS practitioner. Select from one of the topics below to discuss common challenges, solutions, and insights in an informal, open environment. You will also have the opportunity to tap into the expertise of your roundtable moderator. Take away actionable information to improve your business services strategies. Topics include:

www.conferenceboard.org/globalbusinessservices
Launching a Shared Services Organization

Expanding GBS

Mark Johnson, Senior Vice President, Corporate Shared Services, TransUnion

Change Management and Stakeholder Engagement

Richard E. Arbuthnot, Senior Vice President, Director, SAIC Shared Services Center, SAIC

Customer Service

William Swanson, Vice President, HR Shared Services, Schneider Electric

General Session G: 9:30 – 10:30 am

Robotics Process Automation (RPA) at Work

During this unique session, hear from three different EMC team members who work together to ensure success of their organization's RPA applications. Learn about each speaker's role and how they support each other as they walk you through their process. Find out how they manage each step: day-to-day coordination, securing senior management engagement, gaining funding, collaboratively working with vendors, executing proof of concept, final project completion, and ROI realization. Come away with an understanding of the true applications and potential of RPA and how to integrate them with your internal resources to drive success.

Jay Flanagan, Senior Director, Strategy and Business Transformation, Global Business Services, EMC

Mark Simon, Director, Global Business Services, EMC

Networking and Refreshment Break: 10:30 – 10:45 am

Concurrent Track 1: Evolving Shared Services Organization

Concurrent Track 2: Global Business Services

Concurrent Session H1: 10:45 – 11:30 am

Roadmap for Concept to Implementation to Future Evolution

Finding a shared services solution that is right for your organization can be a long and winding road, sometimes with many fits and starts. But, there are proven steps that can be taken in order to build a solution that fits your company and enables you to create a scalable platform to support future business growth. Aligning shared services goals to organizational strategy will set your foundation as a "value enabler" instead of "cost cutter." Learn how to move from concept to delivery through an exploration of business plans. Delve into methodologies for work transition and knowledge transfer to support from the highest levels of your organization.

Robert J. Yeldell, Jr., Vice President Global Payroll Services, Accounting Business Services, Turner Broadcasting System, Inc.

Concurrent Session H2: 10:45 – 11:30 am

Enable the GBS Platform for Future Growth

There is always the need to reinvent and deliver continuous improvements year after year with GBS. But, what functions offer the greatest value proposition? What are the key considerations when expanding into new areas? In this session, we will examine functions that are being added to GBS—such as sales, marketing, procurement, and legal—and when it makes sense to expand GBS capabilities to drive additional value and become even more aligned with corporate strategy.

Concurrent Session I1: 11:35 am – 12:20 pm

Cultivating a Culture of Continuous Improvement from the Onset

Establishing an effective culture of continuous improvement is one of the most challenging aspects of shared services delivery, but when executed correctly, it can also be the most rewarding. During this session, our expert will take you through a roadmap for achieving quality and efficient operations. Learn how to develop transparent top to bottom metrics, drive noticeable performance improvement, and achieve organizational engagement that will lead to support from the highest levels of your organization.

William Swanson, Vice President, HR Shared Services, Global Human Resources, Schneider Electric

Concurrent Session I2: 11:35 am – 12:20 pm

Harness the Full Capabilities of the Global Process Owner (GPO)

The Global Process Owner (GPO) is the bridge between the business units and GBS. They play a critical role in advancing GBS within an organization by breaking down the functional silos and driving internal collaboration to increase alignment with the business strategy. In short, they are a strategic asset to the organization. So, what does this role look like? Where should they sit? What are the levers that they can pull to create alignment? During this session, we will examine the role of the GPO to understand how they can bring together critical elements of the organization.

Sonal Bhagia, Senior Manager, Deloitte Consulting LLP

Networking Lunch: 12:20 – 1:20 pm

Concurrent Session J1: 1:20 – 2:05 pm

Assessing Readiness, Avoiding Pitfalls, and Capturing Opportunities in Shared Services Expansion

SSOs are under constant pressure to meet the increasing demands of delivering quality and service, while also being tasked with adding further value through expansion of services, either in functions or globally. So, what exactly does it mean to expand? How do you distinguish the organizational needs from the wants? And how do you get the organization aligned with the related changes? Our experts will walk you through the ins and outs, including common roadblocks as well as useful strategies for transitioning new functions into shared services.

Jeffrey Reider, Director, Global Business Solutions, Eli Lilly and Company

Concurrent Session J2: 1:20 – 2:05 pm

Embracing Digital Transformation to Drive New, Enterprise-Wide Value

Today’s digital revolution is disrupting the business environment and creating a major transformation in the way people interact and operate. This is changing overall business needs and the way organizations think about their value proposition. Discover how to utilize and leverage evolving tools by learning about the digital transformation that Bristol-Myers Squibb is currently undergoing including their utilization of Robotics Process Automation. Learn how to effectively transform your business services in the digital age and secure ongoing support from senior leadership by changing the conversation from “cost” to “value.”

Gabriel Lantos, Director, Global Process Owner, Record to Report, Global Finance, Bristol-Myers Squibb

www.conferenceboard.org/globalbusinessservices
Networking and Refreshment Break: 2:05 – 2:15 pm

General Session K: 2:15 – 3:15 pm
**Instill the Spirit of Partnership by Mastering the Fundamentals of Relationship Management**

The relationship between the internal service provider and the internal customer is key to its survival—or demise. What often complicates this relationship is that perception does not necessarily match reality when it comes to performance or service level. During this session, explore the fundamentals of relationship management that drive effective communication and collaboration with internal customers. Learn what it means to provide superior customer service to build and maintain a recognizable brand resulting in greater engagement, usability, and customer satisfaction. The discussion will include ways to align business and functional goals and deliver superior customer service/satisfaction across the enterprise.

**Mark V. Glorioso**, Executive Director Shared Services Center, NASA

General Session L: 3:15 – 4:15 pm
Panel Discussion: **Protect Your Biggest Asset: Talent Management, Generation Y Workforce, and Career Pathing Strategies to Drive Success**

The success of shared services and GBS is dependent on the caliber of talent within an organization. It is imperative to recruit, retain, and cultivate people with the key competencies required for success. So, how do you create a structure that is attractive to the Gen Y workforce? How can you adjust for a multi-generational and multi-cultural workforce? What skillsets do you need to hire to be prepared for the latest advancements in technology? We will tackle these questions and more as we explore best-in-class talent management strategies as well as proven ways to source, develop, and disperse talent.

**Moderator:**
**Jeff Kemmerer**, Senior Principal Consultant, *The Clearing*

**Panelists:**
**April Russo**, Vice President, Assistant Controller, Global Shared Services, AOL
**Robert J. Yeldell, Jr.**, Vice President Global Payroll Services, Accounting Business Services, *Turner Broadcasting System, Inc.*

Conference Wrap-up and Closing Remarks: 4:15 – 4:30 pm

---

**GET INVOLVED**

Amplify your experience and your organization's exposure.

**Speaking Opportunities:**
casey.greenzweig@conferenceboard.org

**Sponsorship Opportunities:**
michael.felden@conferenceboard.org

**Media Partner Opportunities:**
justine.platt@conferenceboard.org
Post Conference Seminar
Thursday, November 17, 2016

Robotics Process Automation Seminar
Real World Applications to Break through the Hype

The Conference Board Conference Center
New York

9 – 9:30 am
Conference Opening, Introductions, and Expectations
This interactive seminar is tailored to meet the needs of the registered participants. The opening session invites attendees to introduce themselves, share their experiences in relation to RPA and describe their expectations for the seminar.

Session B: 9:30 – 10:40 am
Breaking through the RPA Hype: What, Why, How, and When
We will begin the seminar by defining RPA and providing an overview of the current and future capabilities of this evolving technology. We will explore the different kinds of automation technologies available, including the benefits of each, how they are best utilized, and what we can expect in the next wave of technologies. In addition, we will uncover some of the more complex activities that robotics will be performing in the future and how you can start planning for them today.

Gina Schaefer, Managing Director, Deloitte Consulting LLP

Networking and Refreshment Break 10:40 – 10:55 am

Session C: 10:55 am – 12 pm
Getting it Right from the Start: RPA at American Express
Hear from a leading organization that has achieved great success with RPA. Learn about the criteria and components used to define the initial project that set them up for implementation success and enterprise-wide adoption. Find out how centralizing the automation allowed business teams to more easily take advantage of several core assets that would be difficult, timely, and costly to replicate across individual teams. Discover how team members were identified, which led to important engagement from key stakeholders.

Adrienne Hill, Vice President-Automation COE, American Express
Enid Martinez, Director-Automation COE, American Express

Lunch 12 – 1 pm

1 – 2 pm
Creating a Thorough Governance Program to Ensure Commitment and Fuel Results
To ensure your investment in RPA is not derailed, it is crucial that you develop an effective and thorough governance platform to not only ensure the performance of your system, but also clearly communicate the intended results. During this session, we will explore the components of a comprehensive governance structure. We will also examine a deployment framework and prioritization model, which includes team structure, steering committee arrangement, status reports, and other critical tools to ensure transparency as well as continuous improvement.

Speaker:
Mark Simon, Director, Global Business Services, EMC

Session E: 2 – 3 pm
Robotic Process Automation - Early Learning from a Financial Services Perspective
The past few years has seen dramatic changes in deployment of emerging technologies and new automation capabilities in the world of operations and services, and RPA is a key change agent in that domain. It is still in very early stage but there are already significant learnings. In this session, learn about the early learnings from a typical RPA journey.

Speaker:
Arindam Mukhopadhyay, Managing Director, Global Head of Citi Shared Services (CSS) Strategy & Re-engineering, Global Head of Citi Information Security Ops, Citi

Networking and Refreshment Break: 3 – 3:15 pm

Session F: 3:15 – 4:15 pm
[Panel Discussion] “A Robot is Taking My Job!”: Learn How to Overcome Internal Resistant through Effective Engagement and Communication Strategies
RPA is a disruptive technology that will change the way an organization thinks about and performs work. A healthy human/machine interaction is crucial to the success of your investments. Understand the best practices for communication and engagement to ensure a system is in place to manage regular internal resistance.

Moderator:
Peter Miller, Managing Director, Deloitte Consulting

Panelists:
Phyllis Gallay, NA Shared Services Center Director, BD
Laure Browne, Associate Director Business Finance Services US Record to Report, Bristol-Myers Squibb

4:15 – 4:30 pm
Applying the Learnings to Your Organization: What Will You do Differently Tomorrow?
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

Conference Pricing:
REGISTER EARLY AND SAVE!

<table>
<thead>
<tr>
<th></th>
<th>Members</th>
<th>Non-Members</th>
</tr>
</thead>
<tbody>
<tr>
<td>Members</td>
<td>$2,295</td>
<td>$2,895</td>
</tr>
</tbody>
</table>

Post Conference Seminar Pricing:

<table>
<thead>
<tr>
<th></th>
<th>Members</th>
<th>Non-Members</th>
</tr>
</thead>
<tbody>
<tr>
<td>Members</td>
<td>$1,015</td>
<td>$1,215</td>
</tr>
</tbody>
</table>

Fees do not include hotel accommodations.

Conference Location and Hotel Accommodations
New York Marriott East Side
525 Lexington Avenue at 49th Street
New York, NY 10017
+ (212) 751-3440

Hotel cut-off date: October 13, 2016

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.

Earn up to 12.5 CPE credits
Management Advisory Services
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 National Registry of CPE Sponsors. State 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.

Conference Location
The Conference Board Conference Center
845 Third Avenue (Between 51st and 52nd St), 3rd Floor
New York, NY 10022-6600
212.339.0345