



Deepen Partnerships  
Harness Collaborative Innovation  
Drive Competitive Advantage



12<sup>th</sup> Annual  
**Strategic Sourcing and  
Supplier Relationship  
Management**  
CONFERENCE

Deliver Enhanced Value through  
Partnerships and True Collaboration

**Pre-Conference Workshop:**  
March 29, 2016

**Mastering the Softer Side of SRM:**  
Culture, People, Skills, and Change Management

**Conference:**  
March 29-30, 2016  
Regents Hall, Lewis Towers  
at Loyola University Chicago

Supporting Sponsor:

**vantage** partners

In collaboration with:



**QUINLAN**  
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# Pre-Conference Workshop

Tuesday, March 29, 2016

Registration and Breakfast: 8:30 – 9 am

9 am – 12:30 pm

## Mastering the Softer Side of SRM: Culture, People, Skills, and Change Management

The most challenging aspect of supplier relationship management (SRM) and the biggest driver of its success is change management. SRM changes the way people work together, both externally and internally, by reconfiguring the way multiple operations within a company conduct business. Communicating and enabling this enterprise-wide change (which requires not just new processes and tools, but also new attitudes and skills) is no simple matter—and it takes the ongoing engagement of all stakeholders. Furthermore, having the right people in place to execute SRM strategies is crucially important to driving initiatives and realizing the financial and strategic value. Building and sustaining collaborative supplier relationships calls for new mindsets and skillsets, not only in procurement and supply chain organizations, but across the enterprise.

During this workshop, you will learn practical ways to manage the softer side of SRM, with a particular focus on the latest thinking and practices in change management. The discussion will cover:

- Effective ways to change the organizational mindset around working with suppliers, including ways to build trust, improve communication, and optimally balance collaboration with traditional competitive sourcing strategies
- How to ensure SRM initiatives are embraced across the enterprise through stakeholder commitment and leadership alignment
- Skills development strategy, including key competencies and skillsets required for SRM program success and how to recruit or train your team to handle responsibilities and expectations
- Ways to effectively articulate the value and ROI from SRM so that you receive adequate budget and resources for the program to generate additional value
- The critical role of cross-functional collaboration in enabling SRM success

**Jonathan Hughes**, Partner, Sourcing and Supplier Management Practice Leader, **Vantage Partners**

Lunch for Workshop Attendees Only: 12:30 – 1:30 pm

# Agenda

Day 1: Tuesday, March 29, 2016

Conference Registration: 1:00 – 1:30 pm

Welcome and Networking Activity: 1:30 – 1:45 pm

Kick off the conference by participating in an activity to meet your peers in a relaxed, fun, and unique way.

Session A: 1:45 – 2:35 pm

## Supplier Relationship Management: A Maturing Discipline with Revolutionary Potential

Supply management and SRM have evolved and matured over the past few years and they increasingly appear on the strategic agenda of many C-suite executives. Mastering the art of partnering has never been more important in this current era of economic uncertainty, race for innovation, disruptive technologies, changing vendor landscape, robust deals market, and intricacies of operating in global markets. But where do we go from here? Gain new perspectives on the top trends that will enable your business to succeed in a complex world. Company case studies and recent research will provide insights into how roles, relationships, investments, and strategies have evolved over the past few years and where we can expect to see trends moving in the future. The discussion will include ways you can continue working with suppliers to ensure both parties are able to keep pace and adapt to the changing needs of the business and discipline as a whole.

**Jonathan Hughes**, Partner, Sourcing and Supplier Management Practice Leader, **Vantage Partners**

Session B: 2:35 – 3:35 pm

## Operational Transformation of Sourcing and Supply Management to Move the Conversation from “Cost” to “Value”

Today’s sourcing and procurement executives are under tremendous pressure to extract cost savings from the supply base while also trying to maintain quality, ensure supply continuity, and leverage suppliers to support innovation and market growth. These goals can work in opposition to each other when you try to be both more strategic and collaborative with suppliers. Don’t let short-term behavior jeopardize the future prosperity of the business. Hear seasoned experts explain how they employed proven change management and stakeholder engagement techniques to motivate and enable new, positive behaviors across the organization. The discussion will include ways to break down silos and foster internal collaboration across the enterprise to enable suppliers to become strategic assets.

Moderator:

**Troy Kendrick**, Supplier Relationship Management – MSIT, Microsoft Corporation

Panelists:

**Glenn Ellis**, Director, Enterprise Supplier Governance, USAA

**Pam Pesta**, Vice President, Supply Management Services Nationwide

Networking and Refreshment Break: 3:35 – 3:50 pm

Session C: 3:50 – 4:40 pm

### **The Voice of the Supplier: Achieving Success in SRM from the Supplier's Point of View**

Did you ever wish you could tap into the mind of the supplier? Do you struggle to get to that next level of collaboration but can't figure out what you are doing wrong? During this session, hear a seasoned supplier share the most effective ways to break down barriers to partnering success and tap into the supplier's capabilities. Through real examples from his years of partnering experience, Kirk Weidner will share common habits/behaviors that can promote and derail the process as well as best practices around communication, metrics, and fostering a trusting environment to ensure both parties extract real value from the relationship.

**R. Kirk Weidner**, Vice President, Corporate Accounts, **Cargill**

Session D: 4:40 – 5:30 pm

### **Moving Beyond the Terms and Conditions: Utilizing the Contract as a Vehicle to Long-Term Relationship Success**

Do you know how to draft a contract that will fulfill the requirements of both parties and protect each organization from exposure and risk while also serving as a foundation for a long-term collaborative relationship? During this session, learn how to create contracts that will reflect a future partnership and act as a tool to navigate problems that can occur throughout the lifecycle of a relationship. Uncover the critical elements to include at the start of your contracting process to ensure you create the proper foundational structure for a mutually beneficial partnership.

**Courtnee Smith**, Director, Enterprise Supplier Management, **Capital One**

Networking and Cocktail Reception: 5:30 – 6:30 pm

Hosted by: **vantage partners**

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## Day 2: Wednesday, March 30, 2016

Continental Breakfast: 7:30 – 8:00 am

Session E: 8 – 9 am

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

Participants will share practical approaches and actionable ideas with others facing similar challenges, so they can gain fresh approaches to common struggles. Topics to be discussed include: working through adversarial relationships, organization structure of SRM, quest for innovation, and internal collaboration.

Moderator:

**Ashley Hatcher**, Senior Consultant, Sourcing & Supplier Management Practice, **Vantage Partners**

Session F: 9:00 – 10:00 am

### **Building Sustainable Supply Chains through Supplier Collaboration**

Historically, supply chain sustainability has been understood to be a corporate social responsibility exercise—important perhaps, but ancillary to more core supply chain goals. However, this is line of thinking is changing now that the rapidly evolving regulatory environment, social media, and the millennial workforce are making sustainability and social responsibility a more central concern.

Hear a panel of experts explore how to influence and engage your suppliers in a holistic sustainability strategy in your supply chain—one that maximizes total, long-term savings, safeguards against quality and reputation risks, and marries environmental goals with a focus on innovation and efficiency. The discussion will also cover effective metrics that can drive and communicate your sustainability efforts to ensure long-term support and engagement from internal and external stakeholders.

Moderator:

**John A. Caltagirone**, Executive Director, Supply and Value Chain Center, Quinlan School of Business, **Loyola University Chicago**

Panelists:

**Mark S. Baxa**, Vice President, Global Procurement Strategic Sourcing, **Monsanto Company**

**James H. Cruickshanks**, Senior Manager - Supplier Value Maximization, **WestRock**

**Dawn J. Krueger**, Sustainability Supply Chain Manager, **3M**

Networking and Refreshment Break: 10 – 10:15 am

Session G: 10:15 – 11:05 am

### **Change Management and Engagement Issues Magnified: Ensuring Survival of SRM in the Context of an M&A**

In 2015, WestRock was formed from the completion of the merger of MeadWestvaco and RockTenn. This merger created many new opportunities and leveraged savings with key suppliers, but it also created unique challenges within SRM. One company had an established and successful SRM platform while the other lacked a formal program. What resulted was an interesting case of change management and stakeholder engagement to ensure that SRM survives in the M&A context. Considering the robust deal market of today, the cautionary tales and lessons learned from this experience are crucial for anyone to ensure that their long-term partnership strategies are not derailed and that their SRM platform continues to evolve.

**James H. Cruickshanks**, Senior Manager – Supplier Value Maximization, **WestRock**

Session H: 11:05 am – 12 pm

### **From Relationship to Business Value—Enabling Continuous Improvement, Improving Transparency, and Linkages to the Bottom Line**

Effective supplier relationship management is key for delivering business value through strategic engagement with key suppliers, enabling continuous improvement in supplier performance, improving transparency, and accelerating innovation. Explore key elements of SRM, its associated risks and benefits, and practical strategies that lead to tangible additions to the bottom line. The discussion will cover how multi-supplier collaboration acts as a catalyst for value delivery through innovation in supplier partnerships, building trust, and testing boundaries in today's dynamic economic environment.

**Luisa Swanston**, Supplier Manager – Equipment, CP Supplier Management, **Shell**

**Chuck Montgomery**, Vice President of Sales, **Flowserv**

Lunch: 12 – 1 pm

Session I: 1 – 1:45 pm

### **Supplier Events as Incubator and Accelerator for Effective SRM**

In an effort to optimize their overall communication structure with their suppliers, KellyOCG initiated a dynamic supplier communication work stream with a specific supplier communication plan, which included various channels and campaigns over the course of the calendar year. From this, they have created physical supplier workshops and focus groups with the intention of bringing their business leaders closer to their suppliers, creating mutual learning opportunities, and pushing for co-creation to tackle business issues and future offerings. During this session, Thorsten Koletschka will take us through the inner workings of this strategy and supplier workshops to provide you with tools so you can replicate them in your own organization.

**Dr. Thorsten Koletschka**, Global Lead, Supplier Strategy & Engagement, **KellyOCG**

**Peter Berndsen**, Head of MSP Partnering EU, **SThree**

Session J: 1:45 – 2:30 pm

### **Is Collaborative Innovation Real and How Can I Capture It?**

In what may seem like a search for the-ever elusive Big Foot, both buyers and suppliers agree that innovation is real, but few have been able to actually capture it. Lack of clear definition, trust, and governance inhibit getting to the next level of value creation for many organizations. Learn how to enjoy the benefits of collaborative innovation and the ways to develop an end-to-end process to harness ideas, build trust, and evaluate success and/or areas of improvement to create an environment that will promote creativity and innovation.

**Bill Myers**, Strategic Supplier Relationship Management, Global Lead, **Hewlett Packard Enterprise**

Session K: 2:30 – 3:30 pm

### **Global Supply Management: Master the Ability to Operate Globally and Speak with One Voice**

As companies continue to grow globally, so does the reach of their supply management programs. SRM can be challenging enough to implement locally. But when you expand the processes to be uniform across all locations, challenges can arise as you try to navigate the unique characteristics of the various regions. During this panel, practitioners will discuss how they have been able to find great success operating a global SRM platform to leverage a single voice among all parties involved, thereby promoting transparency, quality, standardization, and efficiency. This discussion will include how to ensure the program's integrity by incorporating adaptability and flexibility for when you may need to make accommodations for the nuances of different regions.

**Moderator:**

**Jessica Wadd**, Principal, **Vantage Partners**

**Panelists:**

**Edward Mills**, Director, Strategic Sourcing, **Leidos Inc.**

**Tony Munoz**, Global Sourcing Manager, **First Solar Inc.**

**Metani Rooms**, Head of Global Sourcing, **CSL Behring**

# REGISTRATION INFORMATION

4000

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

**Email** [customer.service@conferenceboard.org](mailto:customer.service@conferenceboard.org)

**Phone** 212.339.0345 8:30 AM - 5:30 PM ET, Monday - Friday

Pre-Conference Workshop Pricing:	
Members	\$505
Non-Members	\$605
Conference Pricing:	
Members	\$1,995
Non-Members	\$2,195

Fees do not include hotel accommodations.

## Location

Regents Hall, Lewis Towers at Loyola University Chicago  
820 N. Michigan Avenue  
(Building entrance located at 111 E. Pearson)  
Chicago, IL 60611

## 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.

