



The 5<sup>th</sup> Annual  
**Fundamentals of Designing,  
Building, and Implementing  
Shared Services**  
SEMINAR

Navigating the Complex and Demanding  
Journey to Value Creation

June 7, 2017  
The Conference Board Conference Center  
New York, NY



Please see page 3 for more information.

[www.conferenceboard.org/sharedservices](http://www.conferenceboard.org/sharedservices)

# Agenda

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Wednesday, June 7, 2017

Registration and Coffee: 8:30 - 9:00 am

Session A: 9:00 - 9:30 am

## Conference Opening, Introductions and Expectations

This interactive seminar is tailored to meet the needs of participants; this is not a one-size fits all session. The opening session invites attendees to introduce themselves, share where they are in their shared services journey, and describe their expectations for the seminar.

**Casey Greenzweig**, Program Director, **The Conference Board**

Session B: 9:30 - 10:25am

## Executing the Roadmap for Implementation and Future Evolution

Finding the right shared services solution for your unique organization that can evolve and respond to changing business needs can be a long and winding road, sometimes filled with fits and starts. Throughout the process there are proven steps that need to be taken to build a solution that fits your company, and enables you to create a scalable platform to support future business growth. Ensuring the alignment of shared services goals to organizational strategy will create a foundation as a “value enabler” instead of simply a “cost cutter”. Learn how to move from concept to delivery through an exploration into business plans that will fuel results. Learn how to collaborate with internal business leaders to streamline your implementation and ensure sustainable support from the enterprise. Included in the discussion will be work transition and knowledge transfer methodologies to create a plan to ensure intellectual property is not lost and a seamless transition to the new organization.

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

**C. Patton Tidmore**, Executive Officer, NASA Shared Services Center, **NASA**

Networking Break 10:25 - 10:40 am

Session C: 10:40 - 11:35 am

## Managing the Process and Enabling Change

Change is a constant. The ways in which a company responds to change and your ability to manage change as part of day-to-day operations is crucially important to ensure the cultural transformation needed for your program’s execution, success and growth. Furthermore, the ability to effectively answer the “what’s in it for me?” question by mastering ongoing communication that is relevant and resonates with stakeholders and employees will ensure unwavering support of your initiatives. During this session, the facilitator will demystify proven change management and employee engagement techniques in order to keep all parties focused and engaged in the face of insecurity or uncertainty. Learn to overcome ingrained cultural resistance and barriers to achieving goals and initiatives as well as engage employees (in and out of shared services) to drive improvements and overall performance.

**Robert Malone**, Senior Vice President - Finance North America, **BASF**

Session D: 11:35 am - 12:30 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, will be the most rewarding. During this session the facilitator will take you through the roadmap to achieve operational quality/efficiency. Learn how to develop transparent top to bottom metrics, drive noticeable performance improvement and achieve organizational adoption leading to support from the highest levels of the organization.

**Cindy Gallagher**, Senior Vice President, GBS Controller, **Discovery Communications**

Lunch: 12:30 - 1:30 pm

Session E: 1:30 - 2:25 pm

## Connecting to the Customer: Branding, Promoting and Selling Shared Services Internally for Sustained Support

Shared services cannot operate on an “if you build it they will come” assumption. From the onset, marketing and branding of the SSO is crucially important to drive sustained engagement, support and investment from the business. Understanding and embracing the power of marketing will help you to achieve results in a much grander scale than without. It will create momentum, drive customer engagement and user experience, and overall customer satisfaction. During this session understand the most important marketing strategies to employ that will help you to avoid the trap of continuously “selling” your value proposition internally and build brand recognition. In addition, learn how to leverage “Voice of the Customer” and survey metrics to convert feedback into action plans, drive continuous improvement, and communicate success.

**Paul Bartley**, Director, Global Shared Services, **Becton Dickinson**

Networking and Refreshment Break: 2:25 - 2:40 pm

Session F: 2:40 - 3:35 pm

## Look Before Your Leap: Assessing Readiness, Avoiding Pitfalls and Capturing Opportunities in Shared Services Expansion

Congratulations! You have made it through the implementation stage and well on your way to providing measurable value to the company, but now what? SSOs are under constant pressure to meet the increasing demands of delivering quality and service while also being asked to add further value through expansion of services, either in functions or globally. What does it mean to expand? What does it look like? How do you get the organization aligned with the changes? How can you weed through the organizational needs as opposed to wants? Learn the ins and outs of the facilitator’s expansion strategy and the common roadblocks to be mindful of to seamlessly transition new functions into shared services.

**Melissa Klatt**, Senior Director Shared Services, **Herc Rentals Inc.**

For sponsorship opportunities, please contact [michael.felden@conferenceboard.org](mailto:michael.felden@conferenceboard.org)

Session G: 3:35 - 4:30 pm

## Robotics Process Automation: Real World Applications to Break through the Hype

Robotics Process Automation (RPA) is one of the most disruptive forces to impact shared services organizations in recent memory. It changes the way organizations think about and perform work at a lower cost, higher efficiency, greater productivity and with analytics capabilities that many feel we are only scratching the surface. What does this mean for your organization? Are you ready for the robotics revolution? During this session, break through the chatter to understand what is real and possible with this evolving technology to ensure you have the knowledge and understanding of what is appropriate for your unique organization. Hear a first-hand account of an RPA implementation for you to gain a solid understanding of this evolving technology, it's capabilities, and the ways humans and robots can effectively work together to address the needs of the organization.

**Brandon Halbert**, Director of Strategy and Operations,  
**Campbell Soup Company**

Seminar Wrap-up and Closing Questions: 4:30 - 4:45 pm

### Seminar Credits:



This program has been approved for 5.5 PDCs for the SHRM-CP or SHRM-SCP. For more information about certification or recertification, please visit [www.shrmcertification.org](http://www.shrmcertification.org).



This program has been approved for 5.5 (Business) recertification credit hour 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 HYPERLINK "<http://www.hrci.org>" [www.hrci.org](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.

#### Earned up to 6.5 CPE credits

#### Business Management and Organization Requirements:

Attendees must sign-in each day for full credit.

**Delivery Method:** Group-Live

**Program Level:** Intermediate

**Prerequisites:** Bachelors 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: HYPERLINK "<http://www.learningmarket.org>" [www.learningmarket.org](http://www.learningmarket.org).

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





# REGISTRATION INFORMATION

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

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

**Phone** 212.339.0345

8:30 am – 5:30 pm ET, Monday – Friday

Pricing:	
Members	\$1,035
Non-Members	\$1,235

Fees do not include hotel accommodations.

## Location

### The Conference Board Conference Center

845 Third Avenue (Between 51<sup>st</sup> and 52<sup>nd</sup>)

New York, NY 10022

Tel: (212) 339-0345

## 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.



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Program subject to change. May 2017

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