IAOP

The 2014 NorCal Outsourcing Tools & Technology Symposium

Leading Users and Providers of Advanced Tools and Technologies in Outsourcing to Share Experiences and Best Practices in Silicon Valley on September 18, 2014

The *IAOP's Northern California (NorCal) Chapter and Tools & Technology Innovation Chapter* are hosting a ½ Day Symposium where leading outsourcing customers, providers and advisors will share their experiences and best practices in the use of advanced digital tools and technologies to improve the value from outsourcing and shared services operations. Speakers will share how they have used these tools and technologies to positively impact the financial performance, service quality, capabilities delivered, risk/compliance and overall governance of their existing contracts/relationships. Industry leading outsourcing and shared service center tools providers will come together to demonstrate how their solutions can be put to work quickly and affordably to deliver enhanced business value to your organization.
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Who should attend?

Attendees at this event will be outsourcing and shared service center professionals from customer, provider and advisor organizations who are responsible for building, implementing, advising or managing all types of outsourcing (ITO, BPO and KPO) or shared service center contracts/relationships. The symposium will be positioned to address the interests of a wide range of professionals interested in outsourcing and shared service centers such as:

- CIOs, COOs, CTOs and CAOs
- Chief information security officers (CISOs) including internal auditors & information security professionals
- VPs, directors and managers of procurement and user departments involved in outsourcing/shared services
- Customers, service providers and advisors focused on SaaS, BPaaS, and other cloud-based providers
- ITO, BPO, KPO and shared service center professionals
- Sourcing advisors and consultants
- Outsourcing tools providers and developers
- Investors and analysts interested in the rapidly emerging digital tools and technology market in outsourcing

Key Benefits

Whether you are a customer or service provider of outsourcing or shared services, you are being asked to deliver improved business outcomes across an increasingly complex and global portfolio of digitally enabled or outsourced business processes and IT capabilities. The Internet of Things and social networking technologies are providing new business opportunities for the enterprise with too little expertise to develop, deliver and optimize these new digital solutions. This ½ Day Symposium will help you to:

- Understand the current market demand and requirements for advanced tools and technologies in the global outsourcing and shared services industry,
- Understand how advanced tools and technologies can help improve the overall health and value derived from your existing outsourcing and shared service center relationship(s),
- Make informed decisions about leading-edge tools providers capable of assisting you and your organization,
- Understand the future direction and likely business impact of rapidly advancing digital tools and cloud enabled social technologies on the global outsourcing and shared service center industry.

Facts and Figures

- Location: Headquarters Offices of Cooley, LLP, 3175 Hanover Street, **Palo Alto**, CA 94304 +1 650 843 5000
- Registration open to IAOP Members & Non-Members
- Maximum of 100 registrations accepted
- Complimentary coffee breaks & networking reception immediately following the Symposium
- Contact Matt Shocklee/Advisor at +1.415.694.2807, Pete Burns/Legal Advisor at +1.650.843.5251, Dr. Beena George/Academic at +1.713.364.4942 or Eric Budgin/Customer at +1.415-371-2513 to learn more about the event.

Register through: IAOP NorCal Chapter Page

Chapter Leadership

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Event is not available via webinar — on-site attendance only.

Program: Thursday, September 18, 2014

Location: Offices of Cooley, LLP, 3175 Hanover Street, **Palo Alto**, CA 94304 +1 650 843 5000

1:00 pm – 1:30 pm	**On-Site Registration & Pre-Event Networking**
1:30 pm – 1:40 pm	**Welcome & IAOP Chapter Introductions** *Hosts: Cooley, LLP, Pete Burns – Partner & Attorney* *University of St. Thomas, Dr. Beena George – Dean, Cameron School of Business*
1:40 pm – 2:20 pm	**"Global Sourcing Insights and How Advanced Tools & Technologies are Impacting the Global Financial Services Industry"** *Sean Eddy, Senior Vice President* *Enterprise Global Services – Wells Fargo*
2:20 pm – 2:25 pm	**Coffee Break**
2:25 pm – 3:15 pm	**Breakout Sessions – Part 1.**
	Session 1A: "Brace for Impact: Why Robotic Process Automation Will Forever Change Outsourcing" *by Dan McCue, Senior Vice President, F&A Practice, Sutherland Global Services and Dan Hudson, |Managing Director and Co-Founder, Virtual Operations* **Session 1B: "A Case Study – Transforming Strategic Partnership Governance using Tools and Automation at UCB - a Leading Global Bio-Pharma Enterprise"** *by Constanze Nuesperling, PHD, VP Partnership & Performance Management and Nipun Sehgal, CEO of Enlighta, Inc.* **Session 1C: "How Delphi, a leading automotive manufacturer is using advanced technologies to unlock new value from their *Systems of Record* utilizing *Systems of Engagement* solutions"** *by Gary Lynam, VP Genpact Akritiv Operations*
3:15 pm – 3:20 pm	**Coffee Break**
3:20 pm – 4:10 pm	**Breakout Sessions – Part 2.**
	Session 2A: "Financial Services Regulatory Compliance and Supplier Performance Management – USAA's Journey to Transform Enterprise-Wide Supplier Management" *by Glenn Ellis, Director Enterprise Supplier Management, USAA and Nipun Sehgal, CEO of Enlighta, Inc.* **Session 2B: "A Case Study - Governing Multi-Sourcing Environments Using Advanced Tools & Technologies"** *by Claude Marais, President & Co-Founder of Sirion Labs*
4:10 pm – 4:15 pm	**Coffee Break**
4:15 pm – 4:55 pm	**"Reshaping the Extended Enterprise through Social Media Technologies"** *Bob Zukis, Chief Executive Officer* *Bloomfire and Author of Social Inc.*
4:55 pm – 5:00 pm	**Closing Comments & Future IAOP Chapter Meeting Information** *Hosts: Cooley, LLP, Pete Burns – Partner & Attorney* *University of St. Thomas, Dr. Beena George – Dean, Cameron School of Business*
5:00 pm – 6:30 pm	**Networking Reception – Sponsored by Cooley, LLP**

Register at [IAOP NorCal Chapter Page](#)

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Thursday, September 18, 2014

On-Site Registration & Pre-Event Networking
1:00 pm – 1:30 pm

Meeting Kick-off & Chapter Introduction
1:30 pm – 1:40 pm

IAOP Northern California (NorCal) Chapter Co-Chair
Peter Burns, Partner & Attorney, Cooley, LLP
Peter Burns is a partner at Cooley LLP where he focuses on outsourcing and transactions involving the acquisition, development and commercialization of technology. Peter's practice focuses on domestic and international intellectual property and technology related transactions with an emphasis on structuring and negotiating deals involving business process and information technology outsourcing, clean technology, Software as a Service, OEM, VAR and other distribution arrangements and other technology related matters. He represents emerging to multinational public companies in the renewable energy, wireless communications, semiconductor, Internet, banking, software, services, and hardware industries. He also counsels clients on the intellectual property aspects of strategic alliances, joint ventures, mergers, acquisitions, and financings. Peter was named by The Legal 500 as a leading lawyer in the field of technology transactions.

IAOP Outsourcing Tools & Technology Innovation Chapter Co-Chair
Beena George, Ph.D. Dean, Cameron School of Business, University of St. Thomas – Houston
Beena George serves as the Dean of the Cameron School of Business at the University of St. Thomas, Houston, Texas. Beena is co-chair of the Tools & Technology Innovation chapter, and a member of the Executive Advisory Committee of the Texas chapter of the International Association of Outsourcing Professionals. Her current research in the area of outsourcing management examines the governance of outsourcing arrangements and the use of software tools to support and manage outsourcing arrangements.

Opening Keynote Speaker

1:40 pm – 2:20 pm
Global Sourcing Insights and How Advanced Tools & Technologies are Impacting the Global Financial Services Industry
During this session, Sean Eddy will share his experience and insights on the global financial services industry and how tools and technology are playing a bigger and bigger role within Wells Fargo. The Enterprise Global Services Strategy team partners with Wells Fargo businesses to identify workforce opportunities and thoughtful global sourcing solutions. This team is also responsible for EGS strategic initiatives, financial performance, and accounting oversight.

Sean Eddy, Senior Vice President, Enterprise Global Services, Wells Fargo
Sean Eddy leads the Strategy team within Wells Fargo's Enterprise Global Services (EGS). EGS is a central organization that comprises over 11,000 team members and third party resources in seven countries that provide technology, back office, contact center and knowledge service support to all Wells Fargo businesses. Sean has been with Wells Fargo for ten years, in a variety of strategic planning & general management roles in Community Banking, Corporate Finance, and Technology and Operations. Within these businesses and staff functions, Sean has managed and led a broad range of strategic initiatives and projects, covering topics that impacted Board Room strategy decisions, Data Center operations, and numerous topics in between. Throughout his Wells Fargo tenure he has worked with almost all 90+ Wells Fargo lines of business and staff functions. Prior to joining Wells Fargo, Sean was a Strategy and Operations Consultant at Deloitte Consulting, serving Fortune 500 companies in the financial services and retail industries. Sean received a Bachelor of Science in Business Administration from Washington & Lee University and his Masters in Business Administration from Northwestern University's Kellogg School of Management. Sean has traveled to more than 35 countries and currently lives with his wife and daughter in San Francisco Bay Area.

Thursday, September 18, 2014

Breakout Sessions – Part 1.

Session 1A
2:25 pm – 3:15 pm

Brace for Impact: Why Robotic Process Automation (RPA) Will Forever Change Outsourcing

*"*We are now at a stage where machine intelligence will lead the optimal form of creative destruction in business and IT services." Gartner, the End of Outsourcing As We Know It, 2014. Robotic Process Automation (RPA) is a leading example of machine intelligence already impacting the world of outsourcing, back-offices, and shared- services centers. Early adapters of RPA are now experiencing its many core benefits such as significant labor cost-reduction, operational efficiency, greatly reduced cycle times and highly reliable accuracy. Those that wait too long or do nothing with RPA risk quickly losing ground to their peers and perhaps fading into irrelevancy. Join this session to learn what RPA represents and hear best-practices for introducing it into your organization.

Dan McCue, Senior Vice President, F&A Practice, Sutherland Global Services
A CPA with over 15 years of BPO and 25 years F&A experience, Dan has structured and managed Accounting and BPO services for many large and medium size companies in the Retail, Banking, Manufacturing, Travel, Communication and Technology sectors. He has designed and implemented process re-engineering and optimization programs in Accounts Payables, Collections, Reconciliation, Reporting and Cash Applications. In addition to his vast experience in BPO with several leading companies like Accenture and Perot Systems, Dan has an extensive background in financial accounting consulting and managing large accounting operations.

Dan Hudson, Managing Director and Co-Founder, Virtual Operations
Dan has an outsourcing sales and delivery background of more than 30 years, including executive leadership positions at BancTec, DecisionOne, IBM and TRW. Dan's experience extends across industries including IT outsourcing and services, business process outsourcing, computer hardware and software, health care and telecommunications. He has worked for companies and clients including Capgemini, Unisys, CSC, Perot Systems, EDS, Dell, US West and ATT.

Session 1B
2:25 pm – 3:15 pm

A Case Study – Transforming Strategic Partnership Governance using Tools and Automation at UCB – a Leading Global Bio-Pharma Enterprise

UCB is a global bio-pharma with operations across 40 countries, with multiple strategic outsourcing partners across the whole value chain. UCB has made a strong investment in tools to improve business outcomes from strategic outsourcing arrangements. This session will present why a tool was important to UCB, key criteria UCB used to select the tool, what is the tangible business benefit derived and the key learnings at UCB in the implementation and rollout of the tool.

Constanze Nuesperling, Ph.D. – VP Partnerships & Performance Management, UCB
Constanze has a key executive role at UCB to govern and foster strategic partnerships. Prior to UCB, Constanze was the Director of European Shared Services for Pitney Bowes. She has also held management positions at A.T.Kearney and Accenture.

Nipun Sehgal – President & CEO of Enlighta, Inc.
With over 20 years of experience in management and global delivery, Nipun is the principal architect, visionary and executive responsible for global product strategy and services delivery at Enlighta.

Thursday, September 18, 2014

Session 1C
2:25 pm – 3:15 pm

How Delphi, a leading automotive manufacturer is using advanced technologies to unlock new value from their *Systems of Record* utilizing *Systems of Engagement* solutions

Delphi case study of their successful global deployment of *System of Engagement* technology to globally consolidate multiple and disparate *ERP* systems and achieve process standardization and increase governance, efficiency and effectiveness. *System of Engagement* (SOE) Technology is key to driving sustained tangible and transformational benefits to enterprises today. Over the years, massive technology investments have been made in acquiring, customizing and maintaining transactional based systems (i.e., multiple ERP's, CRM, EDW, etc). Such *'Systems of Record'* (SOR) have been the backbone of customers' enterprise systems for decades. They are designed around discrete pieces of information ("records") with a heavy focus on ensuring the scalability and reliability of highly structured data, and reflect a rigid "Command and Control" governance model.

Gary Lynam, Vice President of Genpact Akritiv Operations
Gary drives the Total Customer Experience at Genpact, and oversees the consulting, product Implementation and support functions. He brings extensive experience to Genpact– both in services as well as software. He was previously part of the founding teams of Aceva Technologies and eTime Capital, serving in key leadership roles in customer acquisition and advocacy. He is focused on accelerating value for Global 1000 corporations and building customer relationships to greater levels of trust and commitment.

Breakout Sessions – Part 2.

Session 2A
3:20 pm – 4:10 pm

Financial Services *Regulatory* Compliance and Supplier Performance Management – USAA's Journey to Transform Enterprise-Wide Supplier Management

The United Services Automobile Association (USAA) is a Texas-based Fortune 500 diversified financial services group of companies. USAA *embarked* on a multi-step journey to select and deploy a Supplier Governance Tool for the best-in-class lifecycle management of third parties and their services, optimizing value and risk while ensuring regulatory compliance. This session will present why the Enlighta governance tool was a necessary component of the strategy, how USAA selected the tool, how the tool was implemented, the business value that has been realized and the key lessons/learnings.

Glenn Ellis, Director *Enterprise* Supplier Management, USAA
Glenn has an enterprise supplier governance role at USAA with responsibility for enterprise supplier management standards, processes, tools and training. Prior to USAA, Glenn was with EDS as a client delivery executive.

Nipun Sehgal – President & CEO of Enlighta, Inc.
With over 20 years of experience in management and global delivery, Nipun is the principal architect, visionary and executive responsible for global product strategy and services delivery at Enlighta.

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Session 2B
3:20 pm – 4:10 pm

A Case Study - Governing Multi-Sourcing Environments Using Advanced Tools & Technologies
We all recognize the incremental governance burden in today's multi-sourcing environment compared to single sourcing, or near single sourcing in the "good old days". Reality is that organizations today are performing fewer governance processes and in less depth due to the capacity constraints in a multi sourcing environment resulting in continued significant value leakage. During this session we will look at concrete examples of organizations in the US and UK using new technology on the market to gain efficiency and capacity in their governance organizations while also performing tasks and analytics previously considered to be impossible.

Claude Marais, President & Co-Founder of Sirion Labs.
Claude has 20 plus years in sourcing and outsourcing management with global companies such as General Motors and Coca-Cola. Subsequent entrepreneurial focus on building managed services and technology solutions to manage complex sourcing arrangements.

Closing Keynote Speaker

4:15 pm – 4:55 pm

Reshaping the Extended Enterprise through Social Technologies
As engagement costs continue to drop, transacting with the external market becomes easier, less expensive and increasingly seamless. Has the reason companies form in the first place changed dramatically as a result? Does this mean there is a coming boom in outsourcing? Yes, the need to organize and control resources under a corporate umbrella is diminishing, as there is no longer an economic incentive to do this. However, there is an economic incentive inherent in getting more out of the expanding pool of business partners that support your company. Not just a labor or cost arbitrage play anymore, outsourcing will take on more of a value creation mandate as tightly linked ecosystems will work seamlessly together to not only drive productivity but also to drive innovation—with the following caveat. This will only happen if these ecosystems are enabled through the efficient use and application of today's social technology, enabling teams to connect, communicate, collaborate and build powerful communities together.

Bob Zukis, CEO of Bloomfire and Author of the book Social Inc.
Bob is a frequent speaker on the topics of corporate IT, the future of business and social technology governance, and was named one of the Financial Times' Agenda Digital 50. He also currently serves as a senior fellow with The Conference Board. He was previously a PwC advisory partner where he worked with a global Fortune 1000 client base to help them expand into new markets and drive results with new technologies.

Networking Reception

5:00 pm – 6:30 pm

Thanks to Cooley, LLP our Host for the 2014 NorCal Tools & Technology Symposium and Sponsor of the Networking Reception to Close the Event!