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HR Shared Services Summit

November 28-30, 2006

Renaissance Atlanta Hotel Downtown • Atlanta, GA

Featuring presentations from these leading organizations:

JPMORGANCHASE

CAPITAL ONE

PRICEWATERHOUSECOOPERS

STATE FARM

PFIZER

BLUE SHIELD OF CALIFORNIA

H & R BLOCK

US FOOD AND DRUG
ADMINISTRATION

SOUTHERN COMPANY

IKON OFFICE SOLUTIONS

POWELL GOLDSTEIN LLP

XILINX INC.



How you will benefit by attending this conference:

- Learn to design and implement an HR Shared Services model that reduces costs by more than 50%
- Identify the HR service delivery model most appropriate for your organization
- Hear best practices on change management initiatives and the transformation required to build an HR shared services team
- Develop an HR shared services model that adds value for the customer
- Implement a HR shared services performance measurement system
- Align HR shared services with organizational strategy

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1-800-882-8684

HR Shared Services Summit

November 28-30, 2006 • Renaissance Atlanta Hotel Downtown • Atlanta, GA

Dear Friends and Colleagues:

Join us at the HR Shared Services Summit in Atlanta to learn about how to maximize the benefits of your HR Shared Services. Come with your ideas and issues for discussion with top industry leaders.

HR Shared Services can reduce your organization's HR costs by up to 50%. Attend this conference to streamline your Shared Services and learn real-world best practices for:

- **Delivering** HR Shared Services more effectively
- **Designing** and implementing HR Shared Services
- **Evaluating** the technologies available for HR Shared Services
- **Deciding** between outsourcing or handling HR functions internally
- **Handling** the change in organizational structure

This conference was developed with your specific challenges in mind. A unique panel discussion has been created based on your feedback. Attend this conference and hear from JPMorganChase, State Farm and PricewaterhouseCoopers about their experiences in HR Shared Services.

Don't delay! Register yourself and a team of key people today, and receive the early bird discount. We've made it easy to sign up. Call 1-800-882-8684 to reserve your seat today.

I look forward to meeting you in Atlanta.

Sincerely,

Nina Sartori

P.S. Don't miss our 4 interactive Workshops!

Nina Sartori
Vice President, HR Service Delivery Executive Asia
JPMorganChase

Who Will Attend: VPs, Directors and Managers of:

- **Human Resources**
- **Employee Services**
- **HR Operations**
- **Shared Services**
- **HR Service Centers**
- **Payroll and Benefits Administration**



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Continue to earn credits towards your PHR, SPHR and GPHR with HR Shared Services Summit! Human Resources IQ is a HRCI approved provider. This program, HR Shared Services Summit, is approved by HRCI as a recertification credit program. For more details, please go to event website or visit HRCI website at www.hrci.org.

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Sponsorship and Exhibition Opportunities

Sponsorships and Exhibits are excellent opportunities for your company to showcase its products and services to high-level, targeted decision makers attending **HR Shared Services Summit**. Shared Services & Outsourcing Network, Human Resources IQ and HR Shared Services Summit help companies like yours achieve sales, marketing and branding objectives by setting aside a limited number of event sponsorships and exhibit spaces – all of which are custom-tailored to help your company create a platform to maximize its exposure at the event.

Visit us on the Web and see what other exciting and information-packed conferences are being offered by the International Quality and Productivity Center! To find out more about upcoming events, e-mail Shannon Forrester, 212-885-2719, sponsorship@iqpc.com

IQPC Would Like to Hear from You

We are looking to expand our course offerings. Do YOU have an interesting "story to tell" or a "hot" conference topic idea? If so, please send a short e-mail to regina.huang@iqpc.com.

Main Conference Day One

WEDNESDAY, NOVEMBER 29, 2006

8:00 **Continental Breakfast and Registration**

8:30 **Welcoming Address and Opening Remarks from the Chairperson**

8:45 **Defining Shared Services for Human Resources**
What falls into HR Shared Services for one organization may not work for another. How do you decide what functions move to the centralized environment and what functions are better served in traditional field HR shops? Topics of discussion include:

- Organization readiness and how it can help you decide what should be centralized
- Operational structure of the Shared Services Center (SSC) for best results
- How a Shared Services Center fits into the overall strategy of HR and the organization
- Making the most of the partnership between field HR and the SSC

Greg Graham, Associate Services Center Supervisor, STATE FARM

Lori L. Olson, Associate Services Center Manager, STATE FARM

9:45 **Driving a More Strategic HR function with a Shared Services Center**
This speaker will take the audience on the HR journey to add more strategic value to the business by leveraging its Shared Service Center - discussing how to be a good business partner by delivering human resources services through technology, centralized support and strategic partnerships. This speaker will also talk about the reasons companies decide to centralize HR functions, outsource specific functions and the benefits involved as well as the lessons learned along the way.

Patrick Cataldo, Vice President, HR Services & Planning, CAPITAL ONE

10:30 **Morning Refreshment Break and Networking**

11:00 **Moving Towards a Global HR Service Delivery Model**
The HR Service Delivery team from JPMorganChase will share their experiences as it relates to the implementation of a Global delivery model. Topics of discussion include:

- The drivers: increasing scalability, cost effectiveness and controls
- The levers: centralization, standardization, technology, outsourcing and offshoring
- Establishing and leveraging a global hub
- Engaging clients and interacting with end state clients and HR Business Partners
- Accomplishing goals and getting things done

Sam Costa, VP, Sr. HR Operations Manager, JPMORGANCHASE

Nina Sartori, VP, HR Service Delivery Executive Asia, JPMORGANCHASE

James Rosseau, SVP, HR Service Delivery Executive North America, JPMORGANCHASE

12:00 **Luncheon for Speakers and Attendees**

1:15 **So...Your Organization Isn't Big Enough for Full Service HR Shared Services?**
Experience the journey of Powell Goldstein LLP, an international law firm based in Atlanta, and how they decided which functions made sense to centralize. Powell Goldstein LLP has been honored as one of the top 20 Law Firms in the Country to work for and received an A+ award as one of the best companies to work for in Atlanta. You will take away the following:

- Tools to help you identify which functions make sense to centralize
- How to sell the idea to management (especially when 120 of them are owners of the firm)
- Lessons learned the hard way
- Reasons why you shouldn't underestimate the resistance

Warren M. Krompf, CCP, SPHR, Chief Human, Resources Officer, POWELL GOLDSTEIN LLP

Gwendolyn D. Brown, Director of Human Resources, POWELL GOLDSTEIN LLP

2:15 **Understanding Change Management and Dealing with the Transformation Involved with Building an HR Shared Services Team**
This session highlights how Southern Company designed and implemented their new HR service center. It will focus on building the teams within the center and helping employees adapt to a Shared Services environment. Additional topics of discussion include:

- Selection of team members including leaders and delegating responsibilities appropriately
- Building and designing your team's organizational structure
- Creating excitement around the vision and direction of Shared Services
- Motivating your employees and teams
- Keeping staff elevated to recognize the importance of various services provided

Secret Holland, HR Service Center Manager, SOUTHERN COMPANY

Cindy McClain, HR Operations Director, SOUTHERN COMPANY

3:00 **Afternoon Refreshment Break and Networking**

3:30 **Panel Discussion: Open Q & A Session**
After a day filled with thought-provoking presentations, this panel discussion provides an extended question and answer session. It allows delegates to discuss prominent themes as well as to discuss other topics that weren't addressed or resolved. Delegates will also have the opportunity to present their challenges to the panelists and other members of the audience.

Panelists include speakers from our expert speaker faculty.

4:30 **Day 1 Sessions Conclude**

Main Conference Day Two

THURSDAY, NOVEMBER 30, 2006

8:00 **Continental Breakfast**

8:30 **Chairperson's Recap of Day One**

8:45 **Strategically Implementing a Change Management Model to Effectively Execute HR Shared Services**

A company's use of change management at the launch of Shared Services has tremendous impact on its success. Blue Shield of California created a Change Management Model, which has supported the successful launch of their HR Shared Services and now other large scale projects. This presentation will provide an overview of the model, show actual tools that were used and give working examples of what was created to support the launch.

- Overview of change management support of a launch
- Stakeholder analysis
- Tips on increasing adoption and sustainability of the change
- Sample tools to be used in supporting your change management model for launch

**Cathy Murphy, Vice President, HR Operations
BLUE SHIELD OF CALIFORNIA**

9:30 **Implementing Incentives to Motivate Call Center Employees' Performance**

Learn about the unique way in which Pfizer instills a strong culture among its employees in their Call Center--contributing to high service levels. This is based on how teams are structured within Pfizer's Call Center, how scorecards are measured and how specialists are motivated. Scorecards are based on the individual as well as the team and nominations are available for specialists to recognize each other's hard work. This session will also discuss the interesting awards program that is implemented monthly, quarterly and annually. Additional topics of discussion include:

- Metrics for determining the performance of your employees
- Incorporating continuous improvement at the center

**Joe Ficarrota, Senior Manager, Global HR Operations,
PFIZER**

10:15 **Morning Refreshment Break and Networking**

10:45 **Ensuring HR Shared Services Add Value for the Customer**

This session will discuss IKON's unique HR Champion program, which allows for growth and development among HR field employees, helps to resolve HR Service Center (HRSC) issues and enhances customer service levels in the HRSC by using a team approach. The HRSC's ability to support its internal "customers" is critical for IKON to successfully support its external customers. Many services provided by the HRSC are leveraged by everyone in the organization so the interaction and maintenance of relationships with departments inside and outside of HR is very important for the strategic direction of the organization.

- Learn how the HRSC partners with their customers to ensure their success.
- Understand how to create a win-win environment when making changes to the HRSC processes or when designing new processes.
- Learn more about the exciting IKON Champion Teams that work in many areas such as Diversity, Work-Life Payroll, SOX Compliance, and how they also benefit and add value to the HRSC!

**Angie Kenworthy, PHR, MBA, Senior Project Manager,
HR Shared Services, IKON Office Solutions**

**Bob Price, Manager, HR Shared Services Center,
IKON Office Solutions**

11:30 **Using the Voice of the Customer to Improve HR Shared Services**

Learn about the programs and practices that Xilinx Inc. has developed to anticipate and deliver strategic solutions and work

structures that meet the real needs of our customers.

Understanding how the VoC can help to define services, design tools and determine measurement is critical.

Topics of discussion include:

- HR Liaison Roles
- Creating meaningful metrics
- Establishing clear service level agreements
- Implementing change through innovation

At the end of the session, you will take away a highly customizable program model that you can implement in your company.

Lana Lucero, HR Information Center Manager, Xilinx Inc.

12:15 **Luncheon for Speakers and Attendees**

1:15 **Developing Metrics to Effectively Measure Your Contact Center's Performance**

The creation of the Office of Shared Services was the catalyst to centralize administrative and IT service requests into a consolidated source. Trained call center staff now use a service ticketing system to track work requests. These initiatives have increased the call center's ability to effectively manage Tier 0 and Tier 1 service requests and have significantly decreased the number of calls escalated to the Tier 2 level. Top takeaways include:

- An overview of a Service Level Agreement template
- An explanation of a Quarterly Balanced Scorecard approach
- An introduction to a Monthly Business Performance Reporting tool

**Kathy Cooper, Director, Employee Resource &
Information Center, US FOOD AND DRUG ADMINISTRATION**

**Paula Longhi, Operations Officer, Employee Resource &
Information Center, US FOOD AND DRUG ADMINISTRATION**

2:00 **Measuring the Success of HR Shared Services**

This session will explain the various ways PricewaterhouseCoopers measures its success in HR Shared Services. See data on how Shared Services resulted in savings for the organization as well as how Shared Services positively impacted customer service and customer satisfaction. Learn how quality councils are developed to ensure the organization is meeting the priorities and needs of the organization, especially as it relates to strategic initiatives.

**Patrick Lalor, Managing Director, Human Resources
Shared Services Center, PRICEWATERHOUSECOOPERS**

2:45 **Afternoon Refreshment Break and Networking**

3:15 **Tying Metrics and Balance Scorecards into Your Organizational Strategy**

This session will focus on the steps H & R Block has taken to utilize metrics and balanced scorecards to dramatically clean up and improve its payroll from not timely and only 60% accurate to 100% on-time and 99.87%. This is especially important given the organization's size - paying over 145,000 employees and limited timing of hiring seasonal employees. It will also cover how sharing metrics and a balanced scorecard throughout the organization can move your organizational strategy forward. It will discuss the options of outsourcing and co-sourcing payroll's tasks and processes as well as how strategic initiatives deployed by the H&R Block Payroll Team have saved the organization around \$9M. Topics of discussion include:

- Designing and organizing metrics and balanced scorecards
- System and people constraints of getting to the right metrics
- Using metrics and balanced scorecards to improve departments

Suzanne Leopoldi-Nichols, Director of Payroll, H&R BLOCK

4:00 **End of Conference**

Pre-Conference Workshops

TUESDAY, NOVEMBER 28, 2006

A 8:00 am – 11:00 am Registration – 7:45 am (Breakfast will be served)

HR Technology Demystified

This is an information-rich workshop that introduces you to tools and techniques for selecting and implementing HR technologies. Learn to make informed decisions and maximize the potential of your technological solutions with top takeaways including:

- Criteria to establish goals for technology projects
- A process-based approach for defining technology requirements
- An understanding of how a self-service solution can impact workforce productivity
- A methodology for identification and selection of a technology vendor
- Decision criteria for insourcing, co-sourcing or outsourcing
- Formulas to calculate total cost of ownership and return on investment for technological solutions
- Rules to interface HR technology with other critical business applications
- Ideas for creation of training tools to develop power users
- A process to conduct post-implementation audits and initiate improvement projects

Your workshop leader:

Fred Bentzel, Principal, 10xSolutions
CJ White, Principal, 10xSolutions

B 11:15 am - 2:15 pm (Lunch will be served)

The 3 Secrets to Benchmarking Success

Learning and understanding key metrics as they relate to other companies is only half the battle. To successfully benchmark, you must also understand what the metrics achieve, the process by which they achieve it and the thinking behind why they do what they do. Learn to:

- Use your business strategy to determine the need for change
- Understand the process: how to analyze and measure it
- Adapt best practices from other companies as it will prove more successful than adopting them

A web based, pre-workshop survey will be used to enable each participant to begin the benchmarking process during the workshop.

Your workshop leader:

Brian D. Lowenthal, Managing Partner, The Benchmark Partners

C 2:30 pm - 5:30 pm

Facing the Cultural Challenges of Offshoring Shared Service Centers

As Shared Service Centers migrate offshore, critical cultural challenges arise during the three major stages of the process, including selecting the site, setting up operations and managing the center. How does one select, train and manage employees from other cultures to work effectively at the SSC? This session will help provide the tools and strategies necessary for HR to be successful in establishing an offshore Center. Topics of discussion include:

- Overview of the challenges of offshore SSC
- Analysis of key cultural dimensions impacting employee relations
- Managing and supporting operations remotely
- Examination of workplace scenarios

Your workshop leader:

Mark Frederick, PhD, Director of Business Development and Performance Solutions, IOR Global Services

D 5:45 pm – 8:45 pm (Dinner will be served)

Protecting Sensitive Information and Managing e-Risks in a Shared Services Work Environment

The trend to centralize employee services and data places a great burden on HR to ensure that external and internal threats to data security and the e-work environment are identified and that risks are proactively addressed. This session describes common problems whose risks are potentially magnified in the electronic workplace. Highlights include:

- A triad for risk exposure: people, processes and technology
- HR's role in data and computer security
- Mitigating risks with a comprehensive "living" e-strategy
- Maintaining a productive Shared Services Center

Your workshop leader:

Kathryn Terrell, PHR, President, HRinPRINT

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HR Shared Services Summit

- Conference Plus All Workshops
 Conference Plus Three Workshops..... A B C D
 Conference Plus Two Workshops..... A B C D
 Conference Plus One Workshop..... A B C D
 Conference Only
 Workshop(s) Only..... A B C D

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I cannot attend, but please keep me informed of all future events.

Pricing	Register & Pay by 9/22/06	Register & Pay by 10/27/06	Register & Pay after 10/27/06
Platinum Package	Save \$500	Save \$400	Save \$200
Conference plus 4 workshops	\$3,695	\$3,795	\$3,995
Gold Package	Save \$400	Save \$300	Save \$100
Conference plus 3 workshops	\$3,246	\$3,346	\$3,546
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Conference plus 2 workshops	\$2,797	\$2,897	
Bronze Package	Save \$200	Save \$100	\$2,548
Conference plus 1 workshop	\$2,348	\$2,448	
	Save \$100		
Conference only	\$1,899	\$1,999	\$1,999
Workshops only (each)	\$549	\$549	\$549

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TEAM DISCOUNTS

For information on team discounts, please contact IQPC Customer Service at 1-800-882-8684. Only one discount may be applied per registrant. Call 1-800-882-8684 for details.

Special Discounts Available: A limited number of discounts are available for the non-profit sector, government organizations and academia. For more information, please call 1-800-882-8684

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JPMorgan Chase

Penton Learning Systems LLC dba IQPC: 957-097239

ABA/Routing #: 021000021

Reference: Please include the name of the attendee(s) and the event number: 10734.001

Payment Policy: Payment is due in full at the time of registration and includes lunches, refreshment and detailed conference materials. Your registration will not be confirmed until payment is received and may be subject to cancellation.

For IQPC's Cancellation, Postponement and Substitution Policy, please visit www.iqpc.com/cancellation

Venue Information:

Renaissance Atlanta Hotel Downtown

590 West Peachtree Street NW, Atlanta, GA 30308

Phone: 404.881.6000 • Fax: 404.815.5010

To secure reduced rates, please contact the hotel at least four weeks prior to the conference and be sure to mention the conference name. Note: Contact hotel for direction and transportation suggestions.

Special Dietary Needs: If you have a dietary restriction, please contact Customer Service at 1-800-882-8684 to discuss your specific needs.

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HR Shared Services Summit

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November 28-30, 2006

Renaissance Atlanta Hotel Downtown • Atlanta, GA

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- 2 Call:** 1-800-882-8684 or 1-973-256-0211
- 3 Fax:** 1-973-256-0205
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