

Shared Services SUMMIT CANADA



Best Practices for Optimizing Cost Savings and Process Improvement through Shared Services

August 27-29, 2007 | St. Andrew's Club and Conference Centre | Toronto, Ontario

Understand what Shared Services can do for your organization – and learn practical techniques like:

- **Developing** the business case to gain management support
- **Overcoming** organizational challenges and change management for seamless implementation
- **Creating** a governance model to support Shared Services initiatives
- **Evaluating** pricing and costing methodologies for optimal fees and funding models
- **Assessing** service offerings and aligning them with business needs
- **Establishing** performance metrics to evaluate effective service delivery

Featured speakers include:

Daniel Mangieri, Chief, HR Service Delivery,
NASA Shared Service Center
Shared Service Excellence Awards Winner, Top Best Shared Services Organization

Robert J. Bruder-Mattson, National Vice President,
Shared Services, **American Cancer Society, Inc.**
Shared Service Excellence Awards Winner, Best Mature SSO

Angelyn H. Mathews, SVP, Director, CFS Accounting &
Controls, **Wachovia**

Ed Martinez, Executive Director,
AT&T Affiliate Services

Vijay Jog, President,
Corporate Renaissance Group

Get the inside story from these public sector visionaries:

- Natural Resources Canada • Ontario Shared Services
- Public Service Commission • U.S. Department of State
- Lambton Shared Service Centre • Quebec Government Shared Service Center

Media Partners:



Pre-Conference Workshops

MONDAY, AUGUST 27, 2007



A 8:00 am - 11:00 am Registration - 7:30 am (Breakfast included)

Shared Services 101: Planning and Launching Shared Services

With the increasing pressure to accomplish more strategic goals with limited resources, the benefits of Shared Services are clear. In order to achieve the top objectives of Shared Services, including cost reductions, improved services, improved service quality, and more, it is necessary to understand the opportunities and risks involved in developing a Shared Services Centre.

How You Will Benefit:

- Developing a compelling story/business case
- Understanding the time line for Shared Services and setting realistic targets

- Developing a broader understanding of the change management issues that must be overcome for getting the project approved

What Will Be Covered:

- Data collection requirements and techniques
- The implementation methodology and roadmap
- Effective change management approaches

Kevin Church, Practice Director, Parson Consulting

B 11:15 am - 2:15 pm Registration - 11:00 am (Lunch included)

CASE STUDY Understanding Key Components of a Successful Shared Services Strategy

This workshop is for those who are interested in learning from real world examples to drive the maximum benefits from a holistically designed service delivery and service management framework for shared services that is designed as an enterprise model. The workshop will introduce and expand on the service management framework and provide specific real world examples of the implementation of this framework as well as provide a framework for best practice implementation.

How You Will Benefit:

- Learn from leading practices of SSO implementation
- Understand the importance of key components of a successful implementation
- Appreciate the importance of demand management and the client engagement process for an enterprise wide SSO architecture

- Get all key ingredients for an implementable architecture

What Will Be Covered:

- The role of establishing base line costs of services
- Designing a service catalogue
- Outside in method of implementation
- Charge back practices and importance of third party like behavior
- Service settlement and customer satisfaction
- Client engagement governance
- Design of an end to end SSO platform

Dr. Vijay Jog, President, Corporate Renaissance Group; Chancellor Professor, Sprott Faculty of Business, Carleton University

C 2:30 pm - 5:30 pm Registration - 2:15 pm

Facing the Cultural Challenges of Offshoring Shared Service Centers

As Shared Service Centers (SSCs) continue to 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. This workshop will help provide the tools and strategies necessary to successfully establish and manage an offshore SSC.

How You Will Benefit:

- Gain understanding of the key cultural challenges facing offshore SSC
- Learn the major cultural and talent management dimensions driving workplace behaviors in popular SSC locations

- Examine success strategies and different sets of best practices in offshore SSC

What Will Be Covered:

- Overview of critical offshore challenges
- Analysis of key behavioral dimensions affecting offshore SSC performance
- Tools to better design organizational structure and select talent
- Formulation of effective selection and management strategies

Mark Frederick, PhD, Director, Global Performance Solutions, IOR Global Services

D 5:45 pm - 8:45 pm Registration - 5:30 pm (Dinner included)

A Roadmap for Shared Service Growth: Issues, Challenges and Options Beyond the Initial Stages

Services scope expansion and scale extensions are considered by SSC executives as an important issue in relation with the long term viability of their service organization. Indeed, after an initial stage of implementation, where SSC efforts are focused on setting their infrastructure and developing a customer centric culture to generate the expected benefits, they face an increased pressure from stakeholders to maintain or accelerate benefits. This workshop will help you to successfully handle your SSC growth challenges.

How You Will Benefit:

- Assess your SSC progress against a long term SSC growth roadmap

- Understand the available options to orient your SSC growth
- Outline the building blocks of your transformation strategy

What Will Be Covered:

- Foundations for growth and generic roadmap of the SSC journey
- Options for growth: underlying rational, required competencies and key success factors
- Transformation strategy: managing sequence and pace of systems, processes and human dimensions in the change process

Charles Armstrong, Director, Secor Consulting

Mid-Conference Workshop TUESDAY, AUGUST 28, 2007

E 5:45 pm - 8:45 pm Registration - 5:30 pm (Dinner included)

Reflections on Public Sector Shared Services: Successes, Failures and Strategies for Success

Shared services as a business strategy has been around for almost two decades. There have been many initiatives in both the private and public sectors. Based on our observations and experience, and drawing upon research of others, our presentation is a summary of our beliefs on what impacts successful - or not so successful - initiatives in the public sector.

How You Will Benefit:

- Hear first hand from practitioners who have had direct, hands-on experience with multiple public sector shared services models across Canada
- Learn about real issues impacting public sector shared services success
- Learn why the public sector has unique challenges in achieving successful shared services initiatives

What Will Be Covered:

- Foundation of implementation: defining expectations, alternative models and considerations
- Why the public sector is different
- Integrating performance measures
- Implementation: chargeback in the public sector, governance vs. service delivery, SLAs
- Operations: what issues or elements will jeopardize success
- Moving beyond centralization
- Developing a service culture for success

**Robert S. Cooke, Senior Partner, Focis Consulting Inc.
Ray Johnston, Senior Partner, Focis Consulting Inc.**

Free Book Raffle Five complimentary copies of "Shared Services: Mining for Corporate Gold" will be raffled off to workshop participants.

www.iqpc.com/ca/ssoncanada • 1-800-882-8684

Main Conference Day One

TUESDAY, AUGUST 28, 2007



7:45 **Continental Breakfast and Registration**

8:15 **Welcoming Address and Opening Remarks from the Chairperson**

8:30 **Establishing a Culture for a Shared Service Office**

- Challenges faced by Natural Resources Canada (NRCan) in the transition to a Shared Service environment
- Differences among the Shared Services and how they affect the cultural transition
- The importance of organizational context
- The types of knowledge work involved
- Developing and implementing strategies

Henry Sano

**Acting Executive Director of the Shared Services Office,
Natural Resources Canada
Government of Canada**

9:15 **Creating a Governance Model to Ensure Ownership and Accountability**

- Skills needed: planning, top-down ownership, cross departmental cooperation and change management
- Globalization's role in the process and cultural due diligence
- Defining the governance model's objectives and who needs to be involved
- Creating buy-in at the highest levels of the organization and managing the change across the organization
- Introduction of post implementation compliance tools to ensure that the change has been effective and the model does not encourage any unintended behavior

Angelyn H. Mathews

**SVP, Director, Corporate Financial Services
Accounting & Controls
Wachovia**

10:00 **Morning Networking and Refreshment Break**

10:30 **CASE STUDY Developing the Business Case for Change to Gain Buy-In**

- Unique challenges faced when integrating over twenty ministries' financial systems
- Facing resistance by senior management
- Gaining management support to communicate with and engage staff
- Educating staff on how system integration will affect their work/processes

Maureen Buckley

**Finance and Business Management Council
Ontario Shared Services**

11:15 **Pricing and Costing Methodologies for Shared and Common Services for Optimal Fees and Funding Models**

- Evaluating chargeback strategies for your organization
- Challenges and issues: setting fees and finding the right funding model
- Understanding your costs: how activity-based costing/management helps your organization set fees
- Differences between central funding and unit funding

Daniel Le May

**Director, Financial Management
Public Service Commission**

12:00 **Networking Luncheon for Speakers and Delegates**

1:00 **CASE STUDY Transitioning to Shared Services: Challenges and Lessons Learned**

- NSSC journey: challenges experienced before opening the NSSC (contract protest and Hurricane Katrina)
- NSSC organization: snapshot of organizational structure, functional areas, transition schedule and additional background
- Challenges: unique challenges encountered in transitioning activities with an emphasis on HR specific activities
- Lessons learned: learning during the transitions

Daniel Mangieri

**Chief, HR Service Delivery
NASA Shared Service Center**

1:45 **Afternoon Networking and Refreshment Break**

2:15 **Performance Metrics for Evaluating Effective Service Delivery**

- Using balanced scorecard approach to measure operational performance
 - Ensuring strategy is communicated to all employees
 - Understanding objectives
 - Providing feedback on strategy
- Developing a performance framework

Ed Martinez

**Executive Director
AT&T Affiliate Services**

3:00 **Panel Discussion: Shared Services and the Big Picture**

This panel discussion will draw on various experiences in implementing a Shared Services program. What has worked and what hasn't? How do you implement, build, amend and sustain Shared Services in your organization? How do Shared Service Centres (SSCs) evolve over time and what is the future of Shared Services?

4:00 **Day One Sessions Conclude**

Main Conference Day Two

WEDNESDAY, AUGUST 29, 2007



8:15 Continental Breakfast and Registration

8:45 Chairperson's Recap of Day One

9:00 **CASE STUDY** Ensuring HR Shared Services Meets Customer Needs

- Addressing one of the greater challenges of implementation: ensuring the primary focus is on customer service
- Recommendations and lessons learned
- The importance of communications and change management
- Achieving customer input and buy-in during the SLA process
- Making the connection through customer outreach

Peggy Philbin

**Executive Director, Bureau of Administration
U.S. Department of State**

Melissa Lytell

**Human Resources Officer, Bureau of Administration
U.S. Department of State**

10:00 **CASE STUDY** Quebec Government Departments' Unique Shared Services Model: A Simple Way of Processing and Sharing Services

- Three-tier structure
- Customers are part of governance
- Productivity and customer satisfaction go hand in hand
- The ways and means to operate it

Marlen Carter

**Vice-President, Business Development, Support Services and
Government Information
Quebec Government Shared Service Center**

10:45 Morning Networking and Refreshment Break

11:15 **Panel Discussion: Open Q&A**

After a day filled thought-provoking presentations, this panel discussion provides an extended question and answer session. It allows delegates to discuss prominent themes of the conference as well as to discuss other topics that weren't addressed or resolved. The audience is invited to present their challenges and seek answers or insight from all participants.

Panelists include speakers from the expert speaker faculty.

12:15 Networking Luncheon for Speakers and Delegates

1:15 **Best Practices for Expanding Your Shared Services Center's Offerings**

- Understanding unique partnership between the federal, provincial and municipal levels of government and a private partner
- Expanding the facility and the Shared Services partnership
- Overview of issues from vision to design to construction to operations: "the good, the bad and the ugly" of expanding existing shared services
- Best practices, pitfalls to avoid and lessons learned from the expansion of the Lambton Shared Services Centre

Doug Ball

**Manager of Social Planning and Program Support
Lambton Shared Services Centre**

2:15 **Developing Strategic Partnerships Between the Shared Service Organization and Business Units Served**

- Maximizing the value of the SSO by evaluating service offerings and aligning them with overall business needs
- Using a process and tools to identify what services make sense to add and what services should not come into the SSO
- Selecting services that will contribute to your organization's strategic objectives, goals and bottom line
- Examples of recently added services

Robert Bruder-Mattson

**National Vice President, Shared Services
American Cancer Society, Inc.**

3:00 **Managing the Shared Services Portfolio: Delivering Enterprise-Wide Service and Performance Excellence**

- Moving beyond the "wage arbitrage driven silo approach" to an integrated approach
- Running an enterprise-wide scalable SS using a "business within a business" thought process
- Designing a client driven service delivery platform
- Optimizing service delivery management
- Designing governance and performance reporting architecture

Dr. Vijay Jog

**President, Corporate Renaissance Group; Chancellor Professor,
Spott Faculty of Business, Carleton University**

3:45 End of Conference

Rave reviews from past Shared Services events in Canada:

"A very informative conference – excellent speakers, great facilitation, superior venue."

– Director, Corporate services, CPP/OAS Review Tribunals

"Very good variety (at all levels) of speakers." – Manager, Financial Planning, Reporting and Systems, Industry Canada

"Nice cross section of speakers." – Commissioner of HR, Regional Municipality of Niagara

Shared Services SUMMIT CANADA

Join us in Toronto and experience:

- **10 Hard-Hitting End-User Presentations:** Hear real world case studies of Shared Services programs from public and private sector organizations.
- **5 Interactive Workshops:** Confront your Shared Services challenges and walk away knowing what immediate action to take.
- **2 Insightful Panel Discussions:** Join an intimate discussion with expert speakers and peers to guarantee your top challenges are addressed. Participate in talks addressing the future of Shared Services.
- **4+ Hours of Scheduled Networking:** Maximize your time and interact with conference speakers and peers who are making strides with Shared Services.
- **18 Shared Services Leaders and Experts:** Hear lessons learned regarding buy-in, change management, pricing and costing, governance models and performance metrics.

Who Will Attend:

VPs, Assistant Deputy Ministers, Executive Directors, Directors and Managers of:

- Shared Services
- Service Centres / Delivery / Integration / Management
- Operations
- Business / Technology Integration
- IT/IT Shared Services
- Information Centres / Services
- HR/HR Shared Services
- Logistics / Materials Management / Procurement
- Strategic Planning
- Finance & Accounting
- Business / Process Improvement
- Call / Contact Centre
- Supply Chain

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 Shared Services Summit Canada. The Shared Services and Outsourcing Network and Shared Services Summit Canada 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, contact Shannon Forrester at 212-885-2719 or via email at sponsorship@iqpc.com.



Conference Venue:
St. Andrew's Club & Conference Centre
 150 King Street West, 27th Floor, Toronto, ON M5H 1J9
 Phone: 416-366-4228
 Fax: 416-366-9347

Note: Contact venue for directions and transportation suggestions.

Local Hotel Information:

Hilton Toronto
 145 Richmond Street West, Toronto, Ontario
 Phone: 416-869-3456 Fax: 416-869-3187

Fairmont Royal York
 100 Front Street West, Toronto, Ontario
 Phone: 416-368-2511 Fax: 416-368-9040

InterContinental Toronto Centre
 225 Front Street West, Toronto, Ontario
 Phone: 416-597-1400 Fax: 416-597-8128

Sheraton Centre Toronto Hotel
 123 Queen Street West, Toronto, Ontario
 Phone: 416-361-1000

PRICING

	Early Bird Price Register & Pay by August 3	Standard Price Register & Pay after August 3
Workshops Only	\$549 each	\$549 each
Conference Only	Save \$200 \$2099	\$2299
Conference + 1 Workshop	Save \$200 \$2648	\$2848
Conference + 2 Workshops	Save \$300 \$3097	\$3397
Conference + 3 Workshops	Save 400 \$3546	Save \$200 \$3746
Conference + 4 Workshops	Save \$600 \$3895	Save \$400 \$4095
Conference + 5 Workshops	Save \$800 \$4244	Save \$600 \$4444

Prices in Canadian Dollars

Important! To speed registration, provide the product code located on the back page – even if it is not addressed to you!

MAKE CHEQUES PAYABLE TO: IQPC

Please add 6% GST to all prices. Discounts cannot be used in conjunction with any other offer.
 GST Registration # R135211167

Team Discounts! For information on team discounts, please contact IQPC Customer Service at 1-800-882-8684.

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

Details for making payment via EFT or wire transfer:

Bank-HSBC
 Account # 002-385-007-001
 SWIFT Code HKBCCATT

Reference: Please include the name of the attendee(s) and the event number: 10557.002

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**

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

©2007 IQPC. All Rights Reserved. The format, design, content and arrangement of this brochure constitute a trademark of IQPC. Unauthorized reproduction will be actionable under the Lanham Act and common law principles.

Shared Services SUMMIT CANADA

IQPC
60 St. Clair Avenue East, Suite 304
Toronto, ON M4T 1N5

- Conference Only
- Conference + 1 Workshop
- Conference + 2 Workshops
- Conference + 3 Workshops
- Conference + 4 Workshops
- Conference + 5 Workshops
- Workshop A Workshop B Workshop C
- Workshop D Workshop E

Your customer registration code is:

When registering, please provide the code above.

Name _____

Job Title _____

Organization _____

Approving Manager _____

Address _____

City _____ Prov. _____ PC _____

Phone _____ Fax _____

E-mail _____

- Cheque enclosed for \$ _____ (Payable to IQPC)
- Charge my Amex Visa Mastercard Diners Club
- Card # _____ Exp. Date ____/____
- I cannot attend, but please keep me informed of all future events.

5 EASY WAYS TO REGISTER:

- 1** Web: www.iqpc.com/ca/ssoncanada
- 2** Call: 1-800-882-8684 or 1-973-256-0211
- 3** Email: info@iqpc.com
- 4** Fax: 1-973-256-0205
- 5** Mail: IQPC
60 St. Clair Avenue East, Suite 304
Toronto, ON M4T 1N5

10557.002/D/KC

www.iqpc.com/ca/ssoncanada • 1-800-882-8684



present:

Shared Services SUMMIT CANADA

Don't miss this unique opportunity to learn from public and private sector organizations!

Best Practices for Optimizing Cost Savings and Process Improvement through Shared Services

August 27-29, 2007 | St. Andrew's Club and Conference Centre | Toronto, Ontario