

ANNOUNCING BIG NEWS!

13TH SHARED SERVICES & OUTSOURCING WEEK LATIN AMERICA

SSOW

IS COMING TO

San Jose, Costa Rica!

SEPTEMBER 9-12TH, 2019

13th Latin American



**SHARED SERVICES &
OUTSOURCING WEEK**

**Unlocking the Potential of SCC in
Latin America through Demonstrating
Business Value**

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WHAT TO EXPECT AT SSOW *Latin America*

Latin America has become an increasingly popular destination for organizations looking to establish shared service centers, either serving domestic markets or as part of regional or even global shared services strategies. Whether you are new to implementing shared services in LATAM or working to optimize an existing organization, you won't want to miss out on this exceptional opportunity to take home game-changing solutions and insight that will enable success in every stage of your SS journey.

NEW TO SHARED SERVICES?

- ▼ Find out what it takes to successfully set up a new SSO in the LATAM Region
- ▼ Discover how to successfully partner with stakeholders to develop a powerful SS model that effectively drives current business objectives while also enabling future business growth
- ▼ Explore how to develop a compelling business case to get stakeholder buy-in
- ▼ Gain first hand knowledge on implementation strategies and cutting-edge solutions with seasoned industry experts
- ▼ Gain the insight necessary to establish a vision for success and ignite your SSO journey once you return home

LOOKING TO OPTIMIZE AN EXISTING SSO MODEL?

- ▼ Reach new heights of performance and efficiency by embracing innovative process optimization tools and strategies such as GPO and RPA to streamline cross-functional processes from end-to-end
- ▼ Take your SSO to the next level by unleashing the power of strategic metrics and analytics to drive evidence-based decision making within your business-units
- ▼ Transform your SSO by cultivating a culture of innovation and continuous improvement to ensure growth and success
- ▼ Leapfrog the maturity curve and add significant value back to the business with Global Business Services (GBS)

Speakers



Mayda Reyes Díaz
Head of Internal Customer
Relationship SSC
Aeromexico



Guilherme Baeta
Director of Shared Services
Braskem



Leandro Cresta
Latin America CIO and Global
IT Director - Data & Analytics
BIC



Rolando Alvarez
Director GBS LAO
Kimberly Clark



Miguel Lucero Coeto
Shared Services Center
Director
Arca Continental



Ricardo Wolf
Advisory Board Member
Finance SSC, Senior Director
PepsiCo LATAM



Ethel Meneses S.
I2P Director, Global Financial
Solutions, Invoice to Pay
Pfizer Inc.



Xavier Rodriguez
Advisory Board Member
Managing Director Finance
Shared Business Service
Technicolor



Juan Araya
Site Lead
Stryker



Jazmin Alvarado
Global Services Director
Grupo Bimbo Global Services



Speakers



Brad DeMent
Partner
Scott Madden
scottmadden



Honorio Padrón
Partner
ScottMadden
scottmadden



Phil Searle
CEO & Founder
Chazey Partners
Chazey Partners



Esteban Carril
Managing Director,
Latin America
Chazey Partners
Chazey Partners



Julian Chaves
LATAM COE Senior CommOps
Manager
Uber
UBER



Alberto Castro
Head of Centers of Excellence
LatAm
Uber
UBER



Jason Cordero
Vice President - Global Project
Execution Manager
Citi
citi



Marco Roldan
Director Shared Services
Kyoto Motors
KYOTO MOTORS



Rodrigo (Cordova)
Cal, PMP
Advisory Board Member
Vice President, Global Finance
Shared Services
Stryker
stryker®



Veronica Monzon
R2R Manager & Site Controller
Finance & Accounting & R2R
Manager, Costa Rica SSC
Equifax
EQUIFAX

Speakers



Beth Bourg
Senior Product Marketing
Manager
Fortress IQ



Matias Olmedo
Advisory Board Member
Shared Services and
Corporate Accounting Global
Director
Altisource Labs



Adrian Sibaja
Director, Global Delivery
Centers Costa Rica/Chile
Experian



Christian O.
Yllescas Correa
Advisory Board Member
Head LBS AMERICAS
**LEDVANCE BUSINESS
SERVICES**



Gabriel Stern
Head of Shared Services
Center, Americas
Experian



Miguel Rivera
Controller
Intel Corporation



Many more to come!

SITE *Tours*

MONDAY, SEPTEMBER 9TH, 2019

Explore the grounds of **Citi**, **Uber**, and **Bridgestone Costa Rica** and meet various leaders while networking with your peers.



Want a breakdown of who attended last year?

Access Past Attendee Snapshot

[DOWNLOAD SNAPSHOT](#)



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[DOWNLOAD LETTER](#)

WELCOME

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2019 AGENDA

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Please note, the Workshops are NOT “sit back and just listen” sessions. You will be asked to participate in the group exercises, so please be prepared to put your “thinking hat” on when attending these sessions.

9:00am Registration & Breakfast

9:30am WORKSHOP A: INTELLIGENT AUTOMATION BOOTCAMP

While RPA has been the buzzword for the past few years, it has become clear that the question of “Is it just hype?” has been laid to rest. Instead, the question is “How is your institution leveraging RPA, cognitive and AI technologies?” This Boot Camp will discuss what is involved in establishing an intelligent automation program including the benefits it can provide, the roadblocks to its success and its potential to add value to your institution.

Phil Searle, CEO & Founder, **Chazey Partners**

Esteban Carril, Managing Director, Latin America, **Chazey Partners**



THEORY (30 MINUTES)

The workshop leader will spend 30 minutes discussing:

- Intelligent automation’s capabilities and what it can offer in the years to come
- How the technology works including a real-live demo and solution provider comparison
- Applicable processes that can utilize these technologies and case studies of successful implementations
- How to develop a stakeholder engagement plan and a robust business case
- How to determine a realistic timeline for your intelligent automation journey
- Pitfalls to avoid

PRACTICAL (30 MINUTES)

Delegates will be broken up into four rotating group huddles based upon the session’s focused topics. They will be assigned a series of mini projects each group needs to complete before moving onto their next group huddle. At the end of the session, each group will share their project and what they learned.

TAKE-AWAYS (30 MINUTES)

Leave with a blueprint to develop an IA program and a successful business case that will get stakeholders onboard.

CONTINUOUS IMPROVEMENT

PROCESS EXCELLENCE

LEVERAGING TECHNOLOGY

11:00am Morning Networking Coffee Break

11:15am WORKSHOP B: SHARED SERVICES 101: WHAT YOU NEED TO KNOW TO SUCCESSFULLY DESIGN, BUILD & IMPLEMENT A SSO IN LATIN AMERICA

How do you ensure that your new Latin America Shared Services operation is successfully established and able to provide value immediately back to the business? Do you know the pitfalls to avoid when building a SSO in this region? Join us for this interactive workshop where we will discuss the fundamentals of how to ensure a successful implementation and future growth of your SSO. This workshop focuses on the essential activities to plan and launch a new shared services operation in Latin America, including setting the strategy, defining the opportunity, setting up work streams to ensure all implementation resources are used efficiently and effectively.

Brad DeMent, Partner, **Scott Madden**

Honorio Padrón, Partner, **ScottMadden**



FOCUS (40 MINUTES)

Workshop leader will share insight on:

- Strategic considerations for designing shared services
- Characteristics of a leading service delivery model
- The most important activities required for successful implementation
- Common implementation mistakes and how to avoid them
- Challenges associated with building a SSO in Latin America
- Traditional vs. technology advanced SSC

PRACTICAL (30 MINUTES)

After the presentation, you will be tasked with taking what you have learned and designing an action plan to build a SSO. Each group will be asked to develop a strategy based on each focus point. You will be brought back together as a one group to shared your plan

TAKE AWAYS (20 MINUTES)

Coming back together as one group, you will share your plan, discuss what you learned during the project and walk away with a blueprint for implementing a SSO for long-term growth and success

BUSINESS VALUE

PROCESS EXCELLENCE

PRE-CONFERENCE *Workshops*

TUESDAY, SEPTEMBER 10, 2019

12:45pm **Networking Lunch**

1:15pm **WORKSHOP C: HOW COGNITIVE PROCESS INTELLIGENCE CAN HELP DEFINE AND MEASURE THE ROI OF AUTOMATION PROGRAMS**

What stage are you in with your automation plans? Have you implemented RPA, or are you still in the planning phase? Do you struggle with how to gain executive buy-in? Is your objective to start off with a strategy that will scale?

Attend this workshop to engage with subject matter experts and learn how detailed business process discovery that incorporates user behavior enables successful automation deployment and facilitates a deeper understanding of the current state of your business. You will learn how to create a business case championing the need for digital process discovery as the key step in executing an automation plan. Additionally, you will walk away with real-life business process examples to champion and enable the creation of your custom business case.

Beth Bourg, Senior Product Marketing Manager, **Fortress IQ**

Hosted by: **Fortress IQ**

SPEAKER PRESENTATION (30 MINUTES)

Benefits of Digital Process Discovery, Mapping, and Documentation

BREAKOUT SESSION (70 MINUTES)

Mapping Business Processes

Process exercise: Working together in small groups, you will draft a business journey and document a process to compare against real-life examples. Teams will then identify areas for automation and start a plan for use in their departments.

REVIEW (30 MINUTES)

Group Discussion and Documentation Review

CONTINUOUS IMPROVEMENT

PROCESS EXCELLENCE

LEVERAGING TECHNOLOGY

2:45pm

Networking Break

Workshop D & E will run concurrent



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3:00pm **WORKSHOP D: TRANSFORMING YOUR SHARED SERVICES ORGANIZATION TO ACHIEVE OPERATIONAL EXCELLENCE**

Operational Excellence is a key element to achieve profitability and success for shared services organizations. The growth of shared services across Latin America and rising customer expectations have created a competitive landscape, putting tremendous pressure on SSOs to achieve operational excellence. The workshop leader will start the workshop with a discussion on how to agile, digital transformation all play an important role in your operational excellence strategy and share Case studies on how organizations have successfully developed a winning strategy to This workshop will provide a blueprint that will guide your organization on its journey to operational excellence.

Juan Araya, Site Lead, **Stryker**

FOCUS (30 MINUTES)

The session leader will start the workshop with a discussion on how agile and digital transformation play an important role in your operational excellence strategy and share case studies on how organizations have successfully developed a winning strategy to achieve operational excellence.

- How to implement and commit to a longer term strategy
- Key strategies to add to your OE toolbox
- Ways to ensure you are meeting the organization's needs
- Strategies to roll out and stabilize your operational excellence plan to support your front end and back end
- How to sell your vision and get stakeholder buy-in
- Using operational excellence tools to create a positive culture of continuous improvement
- Operational Excellence and Agile: Differences and Similarities when it comes to Lean thinking and Culture

PRACTICAL (30 MINUTES)

Based upon what was learned in the focus discussion, you will be tasked with developing a short term and long-term operational excellence plan that will get stakeholder's buy-in, keep the different business units aligned during the journey, create a positive culture of continuous improvement, and meet the needs of your organization.

TAKEAWAYS (30 MINUTES)

A blueprint to take back to your organization that will enable you to successfully develop and implement a winning operational excellence plan that will ensure your SSO is positioned to support your expanding business.

CONTINUOUS IMPROVEMENT

PROCESS EXCELLENCE

LEVERAGING TECHNOLOGY

3:00pm **WORKSHOP E: BUILDING A ROBUST CHANGE MANAGEMENT STRATEGY TO EFFECTIVELY COMMUNICATE THE BUSINESS VALUE OF SHARED SERVICES AND DRIVE ADOPTION**

Resistance is a natural defense mechanism that can quickly spread across an organization and seriously hinder the outcome of the transformation. Shared Services Executives are always searching for the best practices to successfully adopt a change management strategy within their organizations, industries and functions in order to improve existing workflow, or implement new procedures. However, many Change Management initiatives focus on the initial communication and training before a program or technology rollout, but change management should continue long after the initial change.

FOCUS (40 MINUTES)

The session leader will begin the workshop with an overview of the factors that come into play when jump starting and enhancing your change management program. How to effectively communicate the benefits of change including operational excellence. Discussion points include:

- Align all your stakeholders to a common vision- showing them the "What's In It For Me?"
- Incorporation of key tools for successful transitions
- Structuring your plan with company culture in mind
- Effective communication and education to counter change resistance and monitor your strategy through early stages of development
- The lasting benefits of a successful change management strategy

PRACTICAL (30 MINUTES)

Based upon what was discussed in the preceding section, you will be tasked with creating a Change Management and Communication plan based on the need of your SSO. Your plan will also include the expected challenges and strategies to overcome resistance. A communication strategy that highlights how the savings from operational improvements will lead to more innovative projects and greater career opportunities. Identifying those impacts of transition that may be detrimental to adoption

You will each have the opportunity to share your plans and compare notes/strategies. You will leave this workshop with a blueprint in hand to develop and (or) enhance a successful Change Management and Communication plan.

Alberto Castro, Head of Centers of Excellence LatAm, **Uber**

BUSINESS VALUE

CHANGE MANAGEMENT

4:30pm **End of Workshops**

MAIN CONFERENCE: *Day One*

WEDNESDAY, SEPTEMBER 11, 2019

8:30am **Registration & Networking Breakfast**

9:00am **Chairperson's Opening Remarks**

9:15am **OPENING PANEL: SERVING THE US FROM LATIN AMERICA**

Latin America continues to be a favorable location for shared services setup, attracting both global multinationals and U.S. middle market organizations. However, despite a strong talent pool, cost-attractiveness, nearshore advantages, operating efficiency and economies of scale, setting up a SSO in Latin America comes with challenges, whether negotiating for real estate, navigating complex tax regulations, or finding the right C-suite leadership. In this panel, senior shared services executives with existing shared services operations in the region will share insight on pitfalls to avoid when setting up or expanding a SSC in LATAM, and detail their experience in:

- Setting up and running a Latin America SSO and why they chose this region to support their North American organizations
- Benefits achieved and key challenges still to be overcome
- English skills, talent availability and cultural affinity with North America

Adrian Sibaja, Director Global Delivery Centers Costa Rica/Chile, **Experian**

BUSINESS VALUE

10:00am **HOW TO DESIGN AND DEVELOP MODERN PLATFORMS TO UNLOCK THE POWER OF DATA & ANALYTICS TO GENERATE REAL BUSINESS VALUE**

Shared services and GBS leaders have a tremendous opportunity given digitalization, to use analytics to enhance processes, workforces, and digital operating models, as well as to provide actionable insight back to the business. This session is designed to show you that the future and sustainability of your SSO can be found in your own data. From making improvements to existing workflow, recruitment of new staff, making decisions to expand your services, and even choosing the right solution provider, your data has a voice. But it needs to be easily accessible and organized in a modern platform! Walk away from this session understanding what data can do for your company to influence decision making procedures.

Hear how to:

- Stay abreast of and capitalize on the latest technologies and data tools
- Cultivate a data-driven and innovative culture both within shared services and beyond

Leandro Cresta, Latin America CIO and Global IT Director - Data & Analytics, **BIC**

BUSINESS VALUE

10:45am **Morning Networking Break & Demo Drive**

Solutions Speed Dating with a Twist! Preview the tools that will help you in your shared services implementation and expansion at our Demo Drive. You will have the opportunity to win some fabulous prizes along the way!

“ Great networking opportunity and benchmarking of the region.

Eduardo Prada Consulting & Executive Training

TRACKED SESSIONS BEGIN

Choose one of the Below Tracks Based on Interest and Maturity of Your SSO

TRACK A From Vision to Reality: Planning & Launching Your LATAM SSO

Are you just starting out on your SSO journey? Overwhelmed with information and don't know where to start? This track is for you. Learn from thought leaders who have been through the LATAM implementation challenges and can give you insight to build a staircase to success.

TRACK B Taking Your Mature LATAM SSO to the Next Stage in Its Evolution

Are you an evolving or mature SSO looking for new opportunities to take your SSO to the next level? This track will give you key insight that will help you on this journey.

11:45am

GETTING IT RIGHT FIRST TIME: GOING FROM STRATEGIC TO TACTICAL

Rushing into the design and implementation of a Shared Services without taking the time to analyze and build a vision will result in failure. So how can you ensure you get it right the first time? What key decisions need to be made to ensure a successful migration? How can you identify and mitigate risks before they occur? This presentation covers the importance of starting with "why" to understand and develop your strategic vision, why are you moving to a SSC, what does the end result look like?

- Building a plan from strategic vision to tactical execution
- Focusing on change management
- Standardizing and centralizing areas that support your strategic vision
- Mitigating risk: Common pitfalls and knowing what to look for

Jazmin Alvarado, Director Shared Services, **Grupo Bimbo Global Services**

BUSINESS VALUE

PROCESS EXCELLENCE

BLUEPRINT TO DRIVE A CONTINUOUS IMPROVEMENT CULTURE IN YOUR SSO

For a Shared Services organization to evolve and move up the value-chain, a Continuous Process Improvement (CPI) foundation is critical. The process of driving innovation and fostering a culture of continuous improvement in your LATAM SSO should include several important elements, among them a mindset of personal and collective accountability to deliver results and a climate that empowers your staff to drive improvements.

In this session you will learn how to:

- Develop transparent top-to-bottom metrics
- Achieve organizational engagement that will lead to support from the highest levels of your organization
- Embed CI within your team and across all business functions

Xavier Rodriguez, Managing Director Finance Shared Business Services, **Technicolor**

BUSINESS VALUE

CONTINUOUS IMPROVEMENT

TRACK A From Vision to Reality: Planning & Launching Your LATAM SSO

TRACK B Taking Your Mature LATAM SSO to the Next Stage in Its Evolution

12:15pm

A 101 GUIDE TO DEVELOPING A COMPELLING BUSINESS CASE TO GET STARTED ON YOUR SSO JOURNEY

Before you can successfully launch a new shared services organization, you must first prove that it will create value for your organization by putting together an evidence-driven and persuasive business case.

Join us in this session to learn how to master the 3 key steps of building a solid business case – calculating the anticipated benefits, projecting potential costs, and conducting risk analysis of a new shared services initiative.

Hear best practices on how to:

- Develop an accurate current state baseline to compare against external benchmarks and highlight key opportunities for cost reduction
- Successfully quantify and communicate both the financial and strategic benefits of shared services in a way that is meaningful to the business
- Why getting executives aligned on the “why” is critical before moving to the “what” and “how”

Miguel Lucero Coeto, Shared Services Center Director, [Arca Continental](#)

BUSINESS VALUE

MOVING UP THE VALUE CHAIN: HOW TO GROW YOUR SSO FROM SINGLE TO MULTI-FUNCTIONAL

As your Shared Services organizations become more complex, the need to cross collaborate and leverage resources becomes even more important. This is especially true when evolving from a single-function to a multi-function SSO. Join us to learn how you can effectively move up the value curve in a sustainable manner and with executive buy-in.

You will:

- Explore ways to reduce complexity and respond faster through collaboration
- Dissect ways to further distinguish between commodity and strategic services
- Review operating models and how to reassess them once you reach critical mass
- Discuss gradually adding value to your shared service, rather than a big bang

Miguel Rivera, Controller, [Intel Corporation](#)

BUSINESS VALUE

12:45pm

Networking Lunch

Expand your learning and networking opportunities during lunch. Join a table of your peers based on your country to discuss similar challenges and solutions.

TRACK A From Vision to Reality: Planning & Launching Your LATAM SSO

TRACK B Taking Your Mature LATAM SSO to the Next Stage in Its Evolution

1:45pm

CASE STUDY: GUIDING PRINCIPLES TO HIRE THE RIGHT TALENT FOR YOUR NEW SSO

With competition for millennial and Gen-Z talent in Latin America at an all-time high, ensuring that the people you hire to jumpstart your SS initiative will remain loyal and grow with your organization is a plus. And for that you need an acquisition and retention strategy. In this session, presenter will share a case study on their talent recruitment and management strategies. Discussion will include:

- How to bolster the lifestyle company benefits you can offer
- Leveraging succession planning, rotational programs and reward/recognition systems to ensure shared services employees are engaged and motivated
- The new skill sets needed for to meet the demands of the digital age
- Embracing next generation recruiting techniques to ensure your SSO effectively identifies and attracts the right talent

Rodrigo (Cordova) Cal, PMP, Vice President, Global Finance Shared Services, **Stryker**

TALENT MANAGEMENT

PANEL DISCUSSION: CREATING VALUE - UNLOCKING CAPACITY BY BRINGING NON-TRADITIONAL FUNCTIONS INTO SHARED SERVICES

“Value Addition” is the buzz word in today’s LATAM SSCs as they are aiming to move up the maturity curve and generate more value for the business. Interested in what your peers are doing to sell more services? How they are combating fear of job loss by adding more opportunities to create value in SSO? This session will present ways to serve your customers outside of traditional Finance, HR and other areas. By adding innovative, higher-value and knowledge-based processes like sales and marketing, and analytics – SSOs can create greater value, increase employee engagement contribute to enterprise wide decision support. Hear first hand insight on:

- What worked and what did not?
- Commercial and operational challenges associated with adding new services
- How to get key stakeholders onboard
- What higher-value tasks are LATAM SSCs looking to undertake?

BUSINESS VALUE



TRACK A From Vision to Reality: Planning & Launching Your LATAM SSO

TRACK B Taking Your Mature LATAM SSO to the Next Stage in Its Evolution

2:15pm

HOW TO USE METRICS TO BUILD & ACHIEVE OPERATIONAL EXCELLENCE IN YOUR SSO

Building a world-class shared service center in Latin America requires establishing goals and measuring progress towards those goals. However, metrics and KPIs are often developed without that objective in mind. If the wrong items are measured, or measured in the wrong way, those measurements provide no value. How do you establish the right metrics to achieve realist goals to improve the quality of service provided by your shared services operation?

Share your experiences with metrics and what is most useful to your team in this interactive session.

What you will learn:

- How to identify actionable and relevant metrics
- How to create annual, quarterly, and monthly goals that can be measured
- How to track progress towards goals and build a culture of continuous improvement and achieve process excellence

Mayda Reyes Díaz, Head of Internal Customer Relationship SSC, **Aeromexico**

BUSINESS VALUE

CASE STUDY: LEADERSHIP DEVELOPMENT-- IDENTIFY AND DEVELOP TOMORROW'S SHARED SERVICES LEADER TO ENSURE FUTURE SUCCESS

Cultivating the next generation of leaders for your Latin America SSO is one of the most important responsibilities Shared Services managers and executives have. Considering it's often more cost-effective to promote from within, this session will discuss strategies for leadership development and training programs for high-potential Latin America SSO talent. Presenter will include a case study on how their organization is successfully identifying and developing future leaders.

Attend and discover how to:

- Identify and nurture high-performers with frequent, constructive feedback and coaching
- Develop succession and career planning strategies to support and engage the next generation of shared services leaders
- Empower SSO employees to identify pain points and propose/execute potential solutions to increase both SSO performance and employee engagement

Adrian Sibaja, Director Global Delivery Centers Costa Rica/Chile, **Experian**

TALENT MANAGEMENT

2:45pm

Networking Break

During the first 30-minutes of this break, we invite you to join us for a TEDx style discussion, where you will hear from different LATAM government agencies on the growth and success of SSO in their countries.

3:45pm

PANEL DISCUSSION: WHAT TO WATCH OUT FOR BEFORE & DURING YOUR IA JOURNEY

Anticipating the challenges that may arise when introducing and implementing IA technologies into your organization are key to whether your process yields successful results. In this session, we will discuss some key considerations for developing your Proof of Concept, strategy, and actual implementation process.

In this session we will discuss

- What to look for when identifying and choosing the processes for IA implementing
- Managing employees and stakeholders who view “bots” as a threat and educating and communicating with them to show them how IA their work life easier and more productive
- Setting realistic goals and expectations regarding IA adoption so to ensure the process stays on track, does not lose momentum, and buy-in and the support of all parties concerned
- Selecting the proper IA tools for your business that are capable of full-integration and connectivity with your existing and future systems

Hosted by 

INTERACTIVE DISCUSSION GROUP (IDGS)

Our facilitated, Interactive Discussion Groups (IDGs) optimize peer-to-peer learning by crowdsourcing solutions to common challenges surrounding SSOs. The connections you make through the IDGs will likely be your most valuable takeaways. You will have the opportunity to sit in on two 30-minute sessions with groups capped at 10 to maximize the value of conversations. Choose from TWO of the below.

4:35pm

IDG 1: PREPARING YOUR TALENT FOR THE DIGITAL AGE

With SSOs moving into the digital age:

- Which talents/ skills are SSOs seeking in today’s environment?
- How are you preparing your organizations for rapid change and how are you handling resistance?
- What are examples of modern career paths?

Jason Cordero, Vice President - Global Project Execution Manager, [Citi](#)

IDG 2: BRANDING & MARKETING YOUR SSO

Your “brand” is what your customer thinks of – both factually and emotionally – when he or she hears your name, so how are you:

- Marketing your shared service organization as though you were marketing your services to external customers
- Developing a unique brand that will resonate with customers
- Actively building relationships with your customers
- Marketing your SSO to attract millennial talent

Xavier Rodriguez, Managing Director Finance Shared Business Service, [Technicolor](#)

IDG 3: STRATEGIES TO DRIVE EMPLOYEE ENGAGEMENT, DEVELOPMENT, AND CONTROL ATTRITION

Learn tactics to create an environment and culture that keeps the team engaged, customer-focused, and innovative including:

- Consistently investing their time and career development
- Open and honest communication and empathetic Listening
- Strategies to create an engaging culture to reduce attrition

Julian Chaves, LATAM COE Senior CommOps Manager, [Uber](#)

IDG 4: RISK MANAGEMENT AND CONTROLS

Mitigating and controlling risk in your SSO is imperative to ensure a successful operation.

- What strategies do you have in place to prevent risks besides internal and external audits?
- Why does your risk management techniques need to evolve with a digital workforce

IDG 5: PROCESS MINING FOR PROCESS EFFICIENCY

Improving process efficiency and understanding process should be goals of any shared service leader. To that end:

- Where can process mining be applied in shared services functions?
- What pieces of information are needed to launch process mining?
- What will make your process mining initiative successful?

IDG 6: ADAPTING TO A WINNING CULTURE FOR SHARED SERVICES CENTERS

Linking culture to business performance and strategy is important in your SSO, so how are you:

- Enabling a culture of on-going support for business results
- Synchronize the culture and standards in shared service centers across multiple locations
- Effectively communicating your 'shared vision' across different functions

Rodrigo (Cordova) Cal, PMP, Vice President, Global Finance Shared Services, **Stryker**

5:40pm **End of Day One – Cocktail Reception Begins**

“ So interesting! Provided important information related to the evolution of SSC.

Empresas Públicas de Medellín E.S.P

MAIN CONFERENCE: *Day Two*

THURSDAY, SEPTEMBER 12, 2019

WELCOME

ADVISORY BOARD

SPEAKERS

2019 AGENDA

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8:00am **Registration & Networking Breakfast**

8:30am **Chairperson's Recap and Welcome**

8:45am **DIGITAL TRANSFORMATION - MOVING YOUR SSOS INTO THE NEW DIGITAL WORLD**

Shifting to a digital operating model promises to improve customer journeys, optimize processes, and boost ROI. However, evolving to digital presents a unique challenge to shared services leaders. If your SSO is considering going digital, this session is for you. Our presenter will walk you through the risks and pitfalls SSO and GBS face when embracing digitalization as well as the rewards of getting it right. Leave this session with insight to take your SSO into the digital age, unlock the potential gains and push the boundaries of business services.

- Constraints relating to process and workflow, talent development, and operating models
- Integrating legacy systems with newer digital technologies
- Talent and skill required to make the move to digital transformation

Ricardo Wolfe, Finance SSC Senior Director, **PepsiCo LATAM**

CONTINUOUS IMPROVEMENT

PROCESS EXCELLENCE

9:30am **GETTING A SEAT AT THE TABLE: HOW CAN FINANCE AID GBS IN THE JOURNEY TOWARDS MOVING TO NEXT LEVEL?**

To drive success and value addition, business unit leaders need true strategic partners to help guide key decisions and deliver results.

- Moving the finance function towards a business partnership model
- Implementing an enterprise-wide culture of innovation and change
- Moving away from reporting and transaction processing to generating real-time value and actionable insights

Rolando Alvarez, Dir GBS LAO, **Kimberly Clark**

CONTINUOUS IMPROVEMENT

10:15am **Morning Mingle, Recharge & Demo Drive Prize Raffle Drawing - Winners Announced**

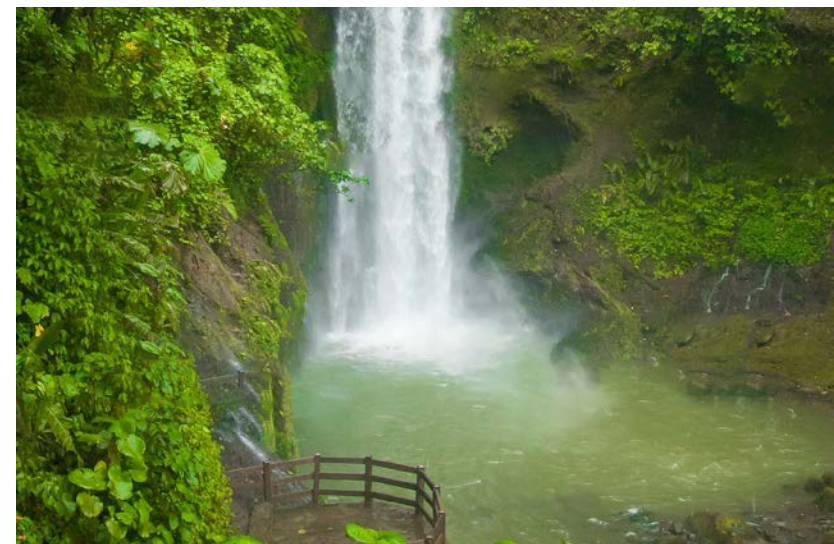
10:45am **CHANGE MANGEMENT: EMBRACING CHANGE AND FUELING EMPLOYEE ENGAGEMENT TO DRIVE SUPERIOR BUSINESS RESULTS**

Change is a constant that should be considered in all operations, especially in Shared Services. Regardless of where your organization is in Latin America or where you are on the maturity spectrum, your ability to manage change as part of the day-to-day operations is crucial to ensure the cultural transformation needed for your Shared Services execution and growth. During this session you will learn how to:

- Demystify proven change management and employee engagement techniques to overcome ingrained cultural resistance to shared services initiatives
- Drive sustainable change throughout the organization through communication, learning, and reinforcement
- Manage cultural changes while keeping employees engaged and motivated
- Create a culture in which you and your team are constantly striving for improvements

Guilherme Baeta, Director of Shared Services, **Braskem**

CHANGE MANAGEMENT



TRACK A Global Business Services: Achieving The Next Level Of Performance

TRACK B RPA As A Powerful Tool To Ensure Continued Process Improvement & Cost Savings

11:30am

UNDERSTANDING THE KEY LEVERS FOR A SUCCESSFUL MOVE TO A GLOBAL BUSINESS SERVICES (GBS) MODEL

Are you considering making the move to Global Business Services (GBS) and joining the growing number of multinational companies that have already adopted this model to expand their operations globally? If so, then this session is for you. Our presenter will walk you through:

- The common characteristics of GBS
- The typical GBS operating structures
- Common implementation challenges and how to overcome them

Leave the session with a new understanding of why a GBS model is more than just a shared services model, and the value GBS can add to your organization, and the role technology plays in unlocking the maximum value of your GBS.

GLOBAL BUSINESS SERVICES
CONTINUOUS IMPROVEMENT

PANEL DISCUSSION: HOW TO DEVELOP & MANAGE A SUCCESSFUL INTELLIGENT AUTOMATION CENTER OF EXCELLENCE (COE)

Is your organization evaluating the need to establish a CoE for your IA program, and/or would like to increase its effectiveness? If so, then this session is a perfect way to learn more about how to do just that. We will discuss:

- Effective CoE and governance process models
- How to develop a set of well-defined roles and responsibilities
- Develop a new governance model and standard operating procedures
- Realistic timelines to establish and maintain a successful CoE

LEVERAGING TECHNOLOGY
CONTINUOUS IMPROVEMENT

12:00pm

DEVELOPING THE BUSINESS CASE TO CREATE A GLOBAL BUSINESS SERVICES ORGANIZATION

As companies look to streamline processes and have more visibility throughout their global organizations, SSOs have often found they also need to make the jump from an in-country or regional SSO to a global one. This session dives into the business case for building a global business services organization including discussion of key considerations including:

- What are the “easy wins” in the global environment to justify the expansion?
- How do shared services fit in with your global strategic growth initiatives?
- What are best practices for implementing global process standards

Gabriel Stern, Head of Shared Services Center, Americas, **Experian**

GLOBAL BUSINESS SERVICES
CONTINUOUS IMPROVEMENT

CHANGE MANAGEMENT INITIATIVES THAT ENSURE SMOOTH RPA PROGRAM TRANSITION & DELIVERABLES

With any major implementation, managing changes – big and small – to the organization can be a huge undertaking. Developing and managing clear-cut yet agile change management program initiatives are essential to long term program success. Wait too long, and you may risk sabotaging the entire project before it even gets off the ground. Go too early, and you risk terrifying your FTEs with all the “what ifs” of RPA.

By attending this session, you will learn how to:

- Develop and maintain a flexible approach toward your change management programs to ensure continuous improvement after RPA implementation
- Create the proper, consistent messaging to reduce fear among your full-time employees that “the bot will take my job”
- Evaluate the strategic partnerships necessary to encourage optimal communication between stakeholders

Jason Cordero, Vice President - Global Project Execution Manager, **Citi**

LEVERAGING TECHNOLOGY
CHANGE MANAGEMENT

MAIN CONFERENCE: *Day Two*

THURSDAY, SEPTEMBER 12, 2019

12:30pm **Networking Lunch**

1:30pm

FUNCTION SPECIFIC ROUNDTABLES

Choose your table based on interest

FINANCE & ACCOUNTING TRANSFORMATION: UNLOCKING THE FULL POTENTIAL OF YOUR FINANCE SHARED SERVICE

- Innovative frameworks to maximize F&A capability
- Ensuring efficiency and cost optimization as you scale

Veronica Monzon, Controller, Finance & Accounting & R2R Manager, Costa Rica SSC, **Equifax**

BUSINESS VALUE

HR TRANSFORMATION: DRIVING HR TRANSFORMATION SUCCESSFULLY IN YOUR SSC

- Where and how to start a digital HR journey?
- Building the capabilities to analyze, understand and interpret data
- What upskilling programs do you have and how effective are they in addressing the skill requirements?

TALENT MANAGEMENT

BUSINESS VALUE

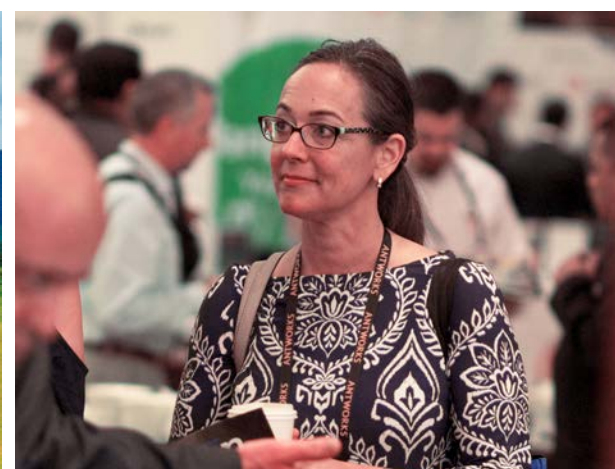
LEVERAGING TECHNOLOGY

IT: ENHANCING IT'S ROLE - CREATING A ROBUST TECHNOLOGY INFRASTRUCTURE FOR YOUR LATAM SSCS

- Integrating cross functional processes
- Attracting and retaining IT talent
- Ensuring the interoperability of new technologies with the existing technology infrastructure

TALENT MANAGEMENT

LEVERAGING TECHNOLOGY



MAIN CONFERENCE: *Day Two*

THURSDAY, SEPTEMBER 12, 2019

2:00pm **CASE STUDY: ESTABLISHING A CULTURE OF CUSTOMER EXCELLENCE WITHIN YOUR SHARED SERVICES ORGANIZATION**

Customer experience is becoming increasingly important in the world of Shared Services and Global Business Services (GBS), with customer loyalty often tied to great customer service. With this in mind, how can SS leaders formulate a robust customer services strategy, while delivering optimal services for less? In this session hear from presenter on what customers really want and how to ensure you meet their needs.

- Develop a collaborative approach – developing a culture of trust with your business units
- Create a shared vision for business services
- Agile service – building a model that can adapt quickly to changing business needs
- Re-engineering processes and workflows with the end-customer in mind

CONTINUOUS IMPROVEMENT

CUSTOMER EXCELLENCE

2:45pm **UNDERSTAND THE ROLE OF GPO & HOW TO IMPLEMENT ONE INTO YOUR SHARED SERVICES**

So you've decided that a global process ownership capability would be the best step forward in your SSO, or you've been anointed GPO. Now what? There are so many "what comes next?" possibilities, it can be daunting to create a path and follow it. This session will take you through those crucial first steps in developing a GPO capability, including:

- How to design and implement a scalable structure for sustained success?
- How does a SSO change procedures and governance guidelines into helpful tools for GPO success?
- How do you implement and utilize global measurements and metrics?
- How to investigate and understand the existing landscape and what you must do to make the global process ownership model work

Ethel Meneses S., I2P Director, Global Financial Solutions, | Invoice to Pay, **Pfizer Inc.**

CONTINUOUS IMPROVEMENT

BUSINESS VALUE

3:30pm **Networking Break**

3:45pm **CLOSING TOWN HALL: EXAMINE YOUR TOP BURNING QUESTIONS**

We will be crowdsourcing your questions throughout the day using the Thoughtexchange social learning tools. Let's face it, the greatest take-away you can bring back to your organization is sound advice that specifically addresses your questions that relate to achieving operational efficiencies and excellence in your SSO. This session will consist of open-forum Q&As with speakers answering any remaining questions collected during the day.

4:15pm **Chairperson's Wrap Up & Key Takeaways**

4:30pm **Conference Concludes**



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