

Detailed Agenda

Conference Day 1 – Wednesday 19 November

Key



Sessions include HR-specific content



Runs concurrently with Discussion forums



Runs concurrently with Focus/Tools & methodologies sessions

08:45 **Welcome and Introduction to current market trends**
Peter Moller, Deloitte

09:30 **Plenary 1: The reinvention of finance at Philips: creating a culture change and launching Lean in order to create an effective BPO partnership and build credibility**
Back in 2007, Philips sold its shared services organisation to BPO provider Infosys and has been a customer of those services ever since. During the course of this relationship, Philips has invested heavily in the partnership and has pushed the scope of service delivery up the value chain. This shared history was both an opportunity and a challenge for Philips as it approached the end of the initial contract. Having now entered into a new contract with Infosys as well as expanded services into Enterprise Information Management, Philips has wasted no time in making the changes which it believes will position them for future success; both in terms of its relationship with the provider as well as its own internal Finance shared services organisation. Simone Noordegraaf will pick up on their incredible story she shared last year to cover:

- History of Philips's BPO relationship with Infosys.
- Opportunities and challenges presented by the end of the initial contract and why Philips decided to maintain its relationship with Infosys.
- Philips's plans for a new Finance organisation: creating cultural change within Finance and across the BPO partner organisation.
- Embedding Lean in shared services and BPO.
- Increasing credibility as a business partner.

Simone Noordegraaf, Global Head of Finance Operations, Philips

10:05

Plenary 2: SMAC – when and where should you be exploiting the new Social media, Mobility, Analytics and Cloud technologies in your shared services organisation?

Rio Tinto's hybrid GBS organisation consists of 5 main service towers – procurement, IT, people services, real estate & facilities management, and finance services. It covers 50 geographies from 12 centres around the world including a global centre in Singapore. With ambitions to expand scope beyond transaction processing into business operations, Rio Tinto is taking an innovative approach to the exploitation of Social media, Mobility, Analytics and Cloud (SMAC) technologies. During this session Scott Singer will shed light on Rio Tinto's SMAC strategy and share his evaluation of which of these technologies can really make a difference to the effectiveness of shared services, GBS, and outsourced organisations.

- Social media technologies: how do you set up and govern these technologies, and what are the value opportunities associated with this?
- Mobility services: where are the smart companies investing?
- Analytics technologies: what are the technologies that can underpin your bid to bring analytics into shared services and GBS environment? What are the quick wins and how can you engage the business in this?
- Cloud: What are the opportunities presented by Cloud? To what extent can Cloud replace what you may have traditionally outsourced?

Scott Singer, Head of Global Business Services, Rio Tinto

10:40

Coffee and networking

11:10



Focus sessions (45 minutes)

Focus sessions are designed to give delegates the opportunity to explore specific topics in detail. These sessions will be facilitated by subject matter experts.

Focus 1: Aligning tax and statutory accounts processes with the creation of a shared services centre

During this session, participants will gain insight into how you can incorporate the delivery of tax support into your shared services, GBS or outsourcing strategy. Discussions will include:

- Building a business case for streamlining the delivery of tax and statutory accounts processes.
- What is best practice when it comes to delivery of tax and statutory accounts processes? How does this fit with your shared services, GBS or outsourced model?
- What are the typical objections and challenges you are likely to encounter and how do you overcome these?

Dave Wright, Deloitte

Focus 2: Becoming an 'equal citizen': from back office to business partner

With just 12,000 employees Swiss Re is a leader in the reinsurance industry and has a strong reputation and brand in the market. Swiss Re started its shared service journey in 2004 with a centre in Bangalore, India and then added Bratislava, Slovakia in 2007 – both mainly focusing on transaction processing-based activities. Having built a solid foundation Swiss Re has since completely transformed its shared services capability from back office provider to front office business partner and in doing so has shifted focus away from KPIs to focus on the 'value' they can bring to the business. This session will focus on the following:

- The history of shared services at Swiss Re: how you grow in a consensus-driven environment.
- How you build effective relationships with the business across both captive and outsourced centres.
- Positioning shared services for growth into the higher value activities: why it's important to get the messaging right.
- How Swiss Re has structured the provision of analytics.
- Measuring performance in a 'strategic' business partner function: from KPIs to value-based discussions.
- Managing and inspiring employees across a breath of services and creating a 'one team' approach.

Vesta Bovair, Head Global Service Operations, Swiss Re

Focus 3: Change management: A top down, bottom up approach

Building employee engagement in any kind of change is never easy; just ask Jamie Davies who took on responsibility for implementing BT's shared service centre's Continuous Improvement (CI) methodology in 2013. Whether you are implementing CI, expanding the functional scope of your centre or moving up the value chain, the methodology is the easy bit: How you get there with your team engaged is what most companies struggle with. During this presentation, change expert Jamie Davies will share practical ideas on how you can drive change top down by creating a high performing leadership team and bottom up, by empowering and engaging your teams:

- Who drives the change? Why pushing your leadership team to just 'make it happen' isn't always the best approach.
- Building employee trust and involvement in your change project: Getting your messages right at the outset.
- How to leverage the power of a team working 'live' on both their collective and individual performance goals.
- Countering the challenge "Why would we work on something that might result in us losing our jobs?"
- How do you achieve purpose and clarity of scope for your leadership team?
- Getting leadership teams to embrace change: Recognising the need to evolve.

Jamie Davies, (Now) Finance Shared Services Manager, Computacenter

Focus 4: Using mobile applications in the delivery of shared services: What are the opportunities for public sector shared services operations and their customers and what can the private sector learn from this?

Mobile technologies (accessible via smart phones and tablets) to support finance and HR processes are becoming increasingly sophisticated, which provides a huge opportunity for shared services. Join this session to engage in conversation around how public sector shared services, specifically Hampshire County Council, is using mobile applications to enable customer self-service as well as how the private sector is exploiting this opportunity:

- The context for mobile self-service and how it is transforming customer interaction.
- How to get customers ready for mobile self-service.
- What's next? Stretching the scope of services delivered through mobile technologies.

Carolyn Williamson, Director of Corporate Resources, Hampshire County Council; & David Harker, Deloitte



Focus 5: Sizing with precision – Driving effective capacity management in an HR shared services environment

Data-driven analysis can significantly help companies to review their overall HR model and improve processes, roles, structure, and sizing. There are now a number of powerful software tools available which can dynamically model your organisation giving you the ability to generate powerful insight, accelerate your speed to value, and discover hidden efficiency gains. Explore with Neera and Craig how to get the right size and shape to provide an efficient customer experience:

- How can qualitative and quantitative research techniques be used to elicit data and gather a complete view of your HR organisation?
- How can you maximise your capacity and plan for the future. What are the tools available to support you?
- Ideas of how to improve customer experience by re-evaluating your HR roles and service model.

Neera Mayor and Craig Renshaw, Deloitte

Focus 6: BPO showcase session

During the sponsor showcase session you'll have the opportunity to receive a fast paced series of demos from our conference sponsors. The focus of this first showcase session is BPO. The session is an easy and efficient way to bring your market knowledge up to date.

For the latest list of sponsors speaking at this session, please visit the website: www.deloitte.co.uk/makeconnections

“This is the one conference I make sure I attend. The speakers give great insights on how things really are: the break-outs allow for deeper discussion, and the networking is second to none.”

BPO Relationship Leader, Kimberly Clark

11:10



Discussion forums: 45 minutes

Ever feel like you get a lot from the conference, but wish that there was time to swap ideas with your peers in smaller, more interactive forums? In that case, the discussion forums are designed for you! These forums which are purely discussion based will be kept as small as possible to boost interactivity. A Deloitte expert will be on hand to provide facilitation and structure to the meetings, but there will be no PowerPoint slides, so you will drive the agenda and content based on your interests and experience. Attendance may be limited to one attendee per company to ensure we have a breadth of experience in the room.

Discussion 1: Robotics & Gamification

To what extent can you expect transactional activities to be automated by 'robots' in the future? Where can you use Gamification (applying gaming approaches to transactional type work) to improve performance around peak times?

Discussion 2: Establishing an effective global process ownership model

How do you create global process owners (GPOs) with 'teeth'? What is the role of GPOs and what kind of value can they deliver?

11:55

Delegates move to tools and methodologies sessions or discussion forums.

12:05



Tools and methodologies sessions (60 minutes)

Tools and methodologies sessions are designed to be practical 'how to' sessions, inspiring you to make a change in your own organisation.

These sessions will run concurrently with the discussion forums so you have a choice based on your personal learning or networking objectives.

Tools and methodologies 1: GBS from design through to transition and why scale isn't prohibitive

If you are interested in setting up your own GBS organisation, but haven't yet figured out how to make the first move, then look no further than this session. Here Paul Hansen from Lundbeck, along with colleagues from Deloitte will give insight into its transition approach and how you can apply this in your own organisation. By the time of the conference, Lundbeck will still be very much in transition mode, with the first country going live with the new GBS organisation in July 2014. At the end of the journey, the GBS organisation will provide HR, Finance, IT, Procurement and first-line Service Desk support to 30 countries. The value of this approach for Lundbeck lies not just in the opportunity to achieve a global standard approach but in the added flexibility and scalability which Lundbeck require to support the future growth of the company. Topics for discussion include:

- Designing the GBS organisation which incorporates a mix of transactional and higher value-add activities: can you do this from scratch?
- How do you achieve benefits from GBS beyond co-sharing locations?
- Establishing governance structures: is it appropriate for Finance to lead this? How does Lundbeck make this work?
- Achieving stakeholder buy-in: how to tackle this across multiple functions.
- The role of the GPOs.
- Different transition models and what's working for Lundbeck.

Paul Hansen, GBS Programme Director & Zuzanna Jawor, Head of Business Service Centre Poland, Lundbeck; & Dorte Keilberg, Deloitte

Tools and methodologies 2: How do you deliver analytics in an effective manner from a shared services or GBS organisation?

'Analytics' has been on the radar for shared services directors for some time now, but not getting in place the right organisation structure to deliver analytics is what's often held organisations back. During this session, Paul Albert, from Deloitte, will provide insights into how to structure your analytics capability using reporting centres of excellence, and discuss how that should link into your shared services or GBS model:

- What is the opportunity for shared services/global business services linked to analytics?
- What is the framework you need to have in place to efficiently deliver analytics?
- How do you build an effective analytics centre of excellence?
- How should your analytics centre of excellence link to your shared services/global business services organisation?

Paul Albert, Deloitte

Tools and methodologies 3: BPO: The death of arbitrage, driving a more transformational agenda

With the BPO industry entering its third decade, an increasingly sophisticated client base and provider market are looking to move from an 'arbitrage agenda' to a more 'transformational agenda' to help drive additional value from BPO relationships. In this session Punit Bhatia and Antonio Russo will discuss a range of topics and techniques to help drive additional value from BPO, including:

- Key transformation trends in BPO.
- Commercial and operational impacts of transformative approaches to BPO.
- Aligning your sourcing approach to a transformational agenda.
- Embedding transformation at the heart of your BPO relationship.

Punit Bhatia & Antonio Russo, Deloitte

“The Deloitte conference is highly professional and gives access to deep shared services theory and practice. Great for newcomers and experts alike.”

SSC Director, Orange

Tools and methodologies 4: SMAC – embracing the enterprise applications of tomorrow

The emergence of new technologies over the past few years has resulted in a transformational change in the world around us. During this interactive session, John Tweardy will facilitate discussions around the emergence of SMAC technologies and the steps that GBS organisations can make to leverage these new solutions, including;

- What are the key technology trends in the marketplace?
- Social media & Mobility: how shared services and GBS organisations are benefiting from the growth in social media platforms and mobile technologies.
- Analytics: how shared services and GBS organisations are transitioning from a 'traditional analytics' to 'prescriptive analytics' model.
- Cloud computing: what are the opportunities presented by Cloud applications/Software as a Service (SaaS) and which are the best for shared services and GBS?
- What are the most cutting-edge enabling SMAC technologies available for shared services and GBS organisations?

If you are interested in taking the leap and adopting SMAC applications in your own shared services or GBS organisation, but are not quite sure on what the best way is forward, then look no further than this session.

John Tweardy, Deloitte



Tools and methodologies 5: The future direction of HR shared services

Based on the results of a feasibility study across 27 European entities of Deutsche Telekom, in June 2012 the Executive Board approved the implementation of an HR shared services centre. Deutsche Telekom is now in the process of building up an HR shared service centre near-shore in Bucharest, which will provide HR administrative support to 28 entities and supporting 20 languages.

In contrast HSBC have been running shared services for many years. Recently HSBC undertook a contact centre transformation across 75 countries serving 300,000 employees including a new Employee Portal. During this session you will hear about these changes in more detail and understand:

- How the face of HR shared services is changing.
- What are the options available to those looking for the next generation of shared services?
- What lessons have been learnt through these implementations?
- What capabilities are now needed in a leading shared services organisation? Where are the smart companies investing their resources?

Panel facilitated by: Aaron Alburey, Deloitte

Panel: Jens Rabbe, Programme Lead of HR Shared Services Implementation, Deutsche Telekom; & Mark Jones, Global Head of HR Service Delivery, HSBC

Tools and methodologies 6: Location showcase session

During the sponsor showcase session you'll have the opportunity to receive a fast paced series of demos from our conference sponsors. The focus in the second of our showcase sessions is on locations. An easy and efficient way to bring your market knowledge up to date, these sessions will run concurrently with the tools and methodologies sessions and the discussion forums.

For the latest list of sponsors speaking at this session, please visit the website: www.deloitte.co.uk/makeconnections

12:05



Discussion forums (60 minutes)

These forums which are purely discussion based will be kept as small as possible to boost interactivity. There will be no PowerPoint slides, so you will drive the agenda and content based on your interests and experience.

These sessions will run concurrently with tools and methodologies sessions.

Discussion 1: Can you deliver tax effectively from a shared services environment?

What are the risks and opportunities presented by delivering tax remotely from a shared services organisation?

Discussion 2: Shared services optimisation

How do you assess the maturity of your shared services centre? Where should you be considering investing in order to optimise?

Discussion 3: How do you effectively manage talent in a shared services or GBS environment?

What kind of framework do you need to put in place around employee engagement and retention in a GBS organisation?

13:05

Lunch & networking

14:15

Plenary 3: Is it 'one size fits all' when it comes to applying the GBS model to multiple functions?

Around 5 years ago, The Coca-Cola Company embarked on a transformation of its key lines of business, including Finance and HR. Denis Kearney and Patrick van Hoegaerden who lead Global Business Services for Finance and HR respectively will provide the answer to key questions such as 'what can both functions learn from scaling into GBS' and 'does the one size fits all model work'? Their journey will appeal to anyone with single function shared services organisations looking to join up. Specifically they will cover:

- Update on the Global Finance Transformation journey, presented to this conference in 2011 by Patrick van Hoegaerden, then Finance Transformation Lead for Europe.
- The approach to bringing HR into the GBS model: what were the early lessons learned?
- Responding to the business to employee, rather than B2B challenges: difference between Finance and HR service delivery models.
- Pushing the boundaries of scope into more 'strategic' areas: How has the model expanded both geographically and up the value chain?
- Moving towards a truly global, integrated model: Sharing locations, operational excellence models, and customer contact centres.

Patrick van Hoegaerden, Director Global HR Operations, GBS, & Denis Kearney, Global Director Finance Operations, GBS, The Coca-Cola Company

14:50

Panel: Shared Services, Global Business Services, and BPO – the shared services sponsor panel

For a number of years, this conference has chartered the development of shared services from the perspective of shared services and GBS leaders. But does the growth ambitions of shared services sit at odds with the organisations that they ultimately serve? During this panel, audiences will have the opportunity to get the CFO and HR sponsor's perspective on:

- What are the strategic objectives and direction of the organisation as a whole? How does shared services need to support this now and in the future?
- What is the value of shared services – does it go beyond cost reduction? Where is the value above and beyond outsourcing?
- How can shared services become a more effective extension of the finance or HR organisation?
- Shared services organisations are trying to get into analytics – but does that respond to the requirements of the business or are we duplicating efforts?
- Is shared service's ambition to move up the value chain at odds with the CFO's / HR leadership's ambitions? What is the right balance?

Facilitated by: Peter Moller, Deloitte

Panel: Bert Van Rompaey, Chief Human Resource Officer and Member of the Executive Committee, BNP Paribas Fortis; Colin Jones, Deputy CFO; & Rob Collie, Director of Finance Delivery & Performance, BSKyB; Javier Echave, Financial Controller & Alastair Glen, Head of Operations, Heathrow; & Philippe Mathieu, VP Finance – CFO EMEA, Oracle

15:35

Coffee and networking

16:05

Plenary 4: Recognising & realising benefits in a shared services or GBS environment

Becton Dickinson has set the benchmark in terms of how to recognise and realise the benefits generated by your shared services organisation. They have developed a rigorous methodology that treats "Benefits Accounting" with the same degree of detail as "Cost Accounting". Benefits are tracking, recognised, and reinvested in a controlled manner so as to leave no doubts about the outcomes of the transformation activities. Within this structure, BD tracks as many as 18 different categories of value. This session will provide insight into this approach. Delegates inspired by this, can also learn more by attending the focus session on day 2:

- Structuring your benefits reconciliation and realisation approach: direct benefits, indirect benefits, and intangible benefits.
- The Becton Dickinson approach to 'benefits accounting'.
- How to structure the delivery of benefits accounting within your shared services team and ensuring the approach becomes your culture.
- Linking Benefits Realisation with other operational methods including Work Transitions, Process Management, and Quality Control Systems.
- Including benefits accounting in your approach to transitioning new scope into the shared services organisation.
- Why do this? Challenging and changing your customer conversations.

Paul Nicolaisen, VP Global Shared Services, Becton Dickinson

16:40

Panel: Shared services and outsourcing leaders don't understand technology

Never shy of controversy, during this thought-provoking session, Deborah Kops will invite panel members to share their experiences of some of the new 'ground-breaking' technologies on the market. Deborah will explore the idea that an over-reliance on our ERP systems and less than productive relationship with IT has limited the way we exploit new technologies to harness the power of shared services and outsourcing as a model. She will also challenge the panel members to name their technology 'must-haves' for 2015 and beyond:

- What's stopping us exploiting new technologies: challenging over-reliance on ERP and battling the forces against us, namely the IT department!
- What should be the triggers for looking at different technologies?
- Do we need to structure differently/work differently in light of new technologies?
- What should your technology roadmap look like?
- Evaluation of: robotics, 'SMAC' technologies, and governance/management technologies.

*Panel facilitated by: Deborah Kops, Principal, **Sourcing Change***

*Panel: Jay Desai, Offshoring/Outsourcing Leader & Transformation Strategist, **Abbvie**; Steven Bandrowczak, SVP Global Business Services, **HP**; Scott Singer, Head of Global Business Services, **Rio Tinto**; & Mark Craddock, **Deloitte***

The following HR specific discussion sessions are offered to HR delegates as an alternative to the final plenaries on day 1 of the conference:

16:05



Discussion 1: Lessons learnt from implementing HR shared services

An honest discussion on the pitfalls of implementing HR shared services and hints and tricks to make your project successful featuring a case study from Deutsche Telekom.

16:40



Discussion 2: HR technology

Lessons learnt from HR technology implementations.

17:25

Close of conference day 1

19:00

Coaches depart for evening event from preferred conference hotels