Dear SIG Summit Delegates,

It is with great pleasure that I welcome you to the 41st Sourcing Interests Group Summit at the Jersey City, Hyatt overlooking the wonderful New York City skyline. Boasting one of the most diverse populations in the United States, Jersey City is host to an array of ethnicities and cultures. Living up to its legacy as a Tapestry of Nations, the City is composed of substantial communities of Jewish, Italian, Cuban, Filipino, Polish, Indian, Irish, Puerto Rican, Dominican, African, Arab, and Asian descent. With the historic Ellis Island within its borders, it is not surprising that Jersey City has become renowned for its diversity.

At SIG, we embrace diversity as well. As our community grows, SIG represents more countries than ever before. With the expanded reach of our members, we can provide compelling reasons for companies to consider offshoring to diverse options around the globe. With the importance of diversity at the top of our minds, we are committed to bringing you a wide variety of opportunities to expand your thinking. At this Summit, we offer everything from panel discussions to roundtables, from general sessions to networking sessions, from initiation-level topics to advanced sourcing and outsourcing conversations.

The Summit kicks off with a manufacturing roundtable and advanced workshops, along with Executive Roundtables for C-level delegates across all functions, including sourcing/procurement, outsourcing, finance, IT, and legal. We have amazing keynote speakers lined up and fabulous breakout sessions on best practice innovations. This Summit is defined by a diversity of subjects with a variety of deep subject matter experts sharing their experiences with you and satisfying your thirst for the next best practice and critical success factors for attaining it. We know that no two members are identical and no single solution fits across the board. We recognize that while we are all sourcing professionals, our day-to-day lives vary dramatically and that it is not a “color-by-numbers” workbook that will solve the different issues we face, but rather the opportunity to collaborate with and learn from our peers.

Of course, it wouldn’t be a Summit if we didn’t build in some entertainment and relaxation into the events. The agenda offers a lot of time to network, build connections and deepen relationships, culminating in a luxurious harbor cruise on Thursday evening, capped off by a stop in Manhattan for anyone wanting to enjoy the proximity to one of the most diverse cities in the world.

Please make sure that we get a chance to say hello and connect for the first time or reconnect if we have met before. Also, it goes without saying that the entire SIG staff is excited for you to be here and dedicated to delivering value to you every moment you are with us.

Warm regards,

Dawn Tiura Evans
CEO and President, Sourcing Interests Group
# Global Sourcing Summit Schedule

## At a Glance

<table>
<thead>
<tr>
<th>Time</th>
<th>Open to All</th>
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<tbody>
<tr>
<td>7:00 am</td>
<td>Summit Registration Open Hudson Pre Function Area</td>
<td>Free Time</td>
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<tr>
<td>8:00 am</td>
<td>Manufacturing Roundtable Sponsored by MFG.com</td>
<td>SIG Advisory Board Meeting 9:00 to 11:30 am</td>
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<td>9:00 am</td>
<td>8:00 - 10:00 am Harborside II</td>
<td>Harborside I</td>
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<tr>
<td>10:15 am</td>
<td><strong>WS1</strong> Outourcing Unscripted - Part V - An Interactive Session Dealing With</td>
<td><strong>WS2</strong> Beyond Procurement Transformation: How to Sustain a High-Performing</td>
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<td>the Most Difficult Challenges Faced By Customers and Suppliers (CLE Session)</td>
<td>Organization that Delivers Value into the Future</td>
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<td>Microsoft / Credit Suisse / Infosys / Leek &amp; Leek / PA Consulting / Xerox</td>
<td>Denali Group</td>
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<td>10:15 - 11:15 am Palisades</td>
<td>10:15 - 11:15 am Liberty</td>
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<tr>
<td>11:15 am</td>
<td>11:15 - 11:30 am Break</td>
<td><strong>WS4</strong> Sourcing and Outsourcing Document Processing Services in the Digital Era</td>
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<td>11:30 am</td>
<td><strong>WS3</strong> Measuring Performance in Outsourcing Transactions: Service Levels</td>
<td>Oci Business Services, Inc.</td>
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<td>Benchmarking and Gain Sharing (CLE Session)</td>
<td>11:30 am - 12:30 pm Liberty</td>
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<td>BlackRock, Inc. / Venable</td>
<td><strong>WS11</strong> Executive Roundtables for Sourcing/Procurement; Outsourcing/IT and Legal</td>
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<td>11:30 am - 12:30 pm Palisades</td>
<td>Executive Roundtables Facilitated by Collabera; Denali Group; Emptoris, an IBM</td>
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<td>12:30 pm</td>
<td>Light Lunch in Workshop Rooms 12:30 - 1:00 pm</td>
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<td>2:15 pm</td>
<td><strong>WS7</strong> The Five Key Forces Reshaping IT Services and Strategic Sourcing</td>
<td><strong>WS8</strong> World Class Category Planning and Sourcing Execution with Outsourcing</td>
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<td>Softtek</td>
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<td>2:15 - 3:15 pm Palisades</td>
<td>Materials Solutions / PwC</td>
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<td>3:15 - 3:30 pm Break</td>
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<td><strong>WS9</strong> Negotiating Skills Workshop</td>
<td><strong>WS10</strong> An Interactive Deep Dive into Developing an Effective Vendor (Risk)</td>
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<td>Morgan Stanley / AArete</td>
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<td>3:30 - 4:30 PM Palisades</td>
<td>Expense Management Solutions, Inc. / ONTALA Performance Solutions, Ltd</td>
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<td>3:30 - 4:30 PM Liberty</td>
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<td>6:30 pm</td>
<td>First-Time Delegate Cocktail Party 6:30 - 7:00 pm Manhattan I/II Sponsored by</td>
<td>4:00 - 6:00 pm Hudson I/II/III</td>
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<td>7:00 pm</td>
<td>Cocktail Welcome Reception 7:00 - 10:00 pm Manhattan I/II Sponsored by</td>
<td>Free Time</td>
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* For CLE Sessions: The CLE Credit Addendum – SIG 2012 Global Sourcing Summit will provide additional details.
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<th>Time</th>
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<td>Outsourcing</td>
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<td><strong>eWork: Services Procurement in the Cloud at Johnson &amp; Johnson</strong></td>
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<td><strong>Resurrecting Corporate IT: The Roles of Talent and Outsourcing in the New IT Operating Model</strong></td>
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* For CLE Sessions: The CLE Credit Addendum – SIG 2012 Global Sourcing Summit will provide additional details.
### Thursday

**7:00 - 8:00 am**
Delegate Breakfast

**Hudson Ballroom**

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**8:00 - 9:00 am**

#### Featured Session

**Hudson Ballroom**

- **Developing Character-Based Leaders**
  - Colonel Bernard Banks, Ph.D., Deputy Department Head (Chief Operating Officer), Department of Behavioral Sciences & Leadership, West Point

**9:00 - 9:15 am**
Coffee Break, Sponsored by Firstsource, **Hudson Foyer**

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<thead>
<tr>
<th>Track</th>
<th>Sourcing</th>
<th>Outsourcing</th>
<th>Performance Management</th>
<th>Governance</th>
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<td></td>
<td>Realize Accelerated Savings through Next Generation Category Management Strategies</td>
<td>Debate: Outsourcing is Finished vs. Outsourcing is the Future</td>
<td>Best Practices for Ensuring Quality of Service in Multinational Outsourcing Engagements (CLE Session)</td>
<td>Achieve Higher ROI from Outsourcing by Transforming Your Organization</td>
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<td>The Category Management Journey at Blue Cross Blue Shield of Florida: A Practical Overview for Initiating Category Management</td>
<td>Innovation: What is the Ideal Outsourcing Arrangement to Drive Innovation, While Balancing Costs and Quality?</td>
<td>Hunting and Farming Suppliers - A Perspective on Effective Enterprise-Wide Supplier Risk and Performance Management</td>
<td>The New Reality: Procurement’s Involvement in Real Estate Services Acquisition and Vendor Management Generates Tremendous Value</td>
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<td>Stories from Kimberly-Clark’s Global Procurement Transformation: Lead, Manage, Innovate</td>
<td>Managing Global Product Innovation</td>
<td>Harnessing the Power of the Team - Customers and Suppliers Discuss Value Leakage in Sourcing (CLE Session)</td>
<td>Launching an Enterprise Vendor Governance Office - Prudential’s Journey</td>
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<td>Procurement’s Business Imperative: What Got Us Here, Won’t Get Us There</td>
<td>Procurement Outsourcing Journey: Moving from One Partner to Another - Transition and Implementation</td>
<td>Three Step Program to Operationalizing SOW Contracts - How to Simplify Sourcing, Create Killer Contracts and Grow to Great Results</td>
<td>Beyond Sourcing 101 - Strategies for Delivering Sustainable Stakeholder Value</td>
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<td>Corporate User Networking Industry / Functional Area Provider / Provider Speed Networking</td>
<td>Vested Outsourcing - Readiness Assessment</td>
<td>Walking the Walk: The Value of Change Management in Successful Procurement Transformation</td>
<td>Corporate User Networking Industry / Functional Area Provider / Provider Speed Networking</td>
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<td>Dinner &amp; New York Harbor Cruise</td>
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* For CLE Sessions: The CLE Credit Addendum – SIG 2012 Global Sourcing Summit will provide additional details.
Ambassador Susan C. Schwab, Professor of Public Policy, University of Maryland; and Former U.S. Trade Representative and Presidential Cabinet Member

Ambassador Schwab served as United States Trade Representative (2006-09), and as Deputy USTR from 2005-06. Her career has spanned the public, private and non-profit sectors, with an emphasis on international trade and competitiveness. As USTR, she concluded free trade agreements (FTA) with Peru, Colombia, Panama and South Korea and helped achieve Congressional approval of FTAs with Peru, Bahrain and Oman. Schwab launched the initial Trans Pacific Partnership trade negotiations and worked to close the WTO Doha Round negotiations. She was able to settle a two-decade long dispute with Canada over softwood lumber; initiated and resolved multiple trade disputes with China and others; and concluded the United States’ bilateral WTO accession agreement with Russia, as well as seeing the admission to the WTO of Vietnam and Ukraine.

Previously, in academia, Schwab had served as dean of the School of Public Policy at the University of Maryland, and president of the University System of Maryland Foundation. In the private sector, she was director of corporate business development for Motorola, Inc., negotiating joint venture agreements in China and elsewhere in Asia. And in government, Ambassador Schwab served as assistant secretary of commerce and director-general of the US & Foreign Commercial Service, responsible for the global network of export promotion professionals who work with small, medium and large U.S. firms interested in doing business internationally. Prior to that, she had been legislative director for Senator John C. Danforth (R-MO), a trade policy officer at the U.S. Embassy in Tokyo, and an agricultural trade negotiator.

Schwab serves on the boards of FedEx, Caterpillar, Boeing, and the Signature Theatre, and Chairs the U.S. Air Force Academy Board of Visitors. She is also on the board of advisors of Miller Buckfire and is a member of the Aspen Strategy Group.

She holds a B.A. from Williams College, a Master’s from Stanford University, and a Ph.D. from The George Washington University.

Colonel Bernard Banks, Ph.D., Deputy Department Head (Chief Operating Officer), Department of Behavioral Sciences and Leadership, West Point

Colonel Banks is currently serving in the U.S. Army and is the Deputy Department Head (Chief Operating Officer) of West Point’s Department of Behavioral Sciences and Leadership. With over 25 years of leadership and management experience in organizations of all size in the U.S. and abroad, he frequently presents on the topic of leadership at notable institutions like the University of Pennsylvania’s Wharton School of Business and General Electric’s John F. Welch Leadership Center. He has also consulted to, and conducted training on behalf of numerous corporate clients, such as GE, P&G, Mercedes Benz, 7-Eleven, and IBM.

Phil Hadcroft, Ph.D., BPO Strategy Advisor to the Heilongjiang (China) Government and Managing Director, Practical Logic

Dr. Hadcroft is a leading authority in the field of Business Process Outsourcing, having entered the industry in 1988. He attained the world’s first PhD in that discipline in 2002 and was appointed as the official BPO Strategy Advisor to the Heilongjiang (China) Government in 2006.

Working extensively on the supply-side of sourcing, his work has taken place in 27 countries throughout the world, ranging from up-state New York and the United Kingdom to working with companies in India, Thailand, Taiwan and the Philippines. He is best known for his work in China, on which he recently published an extensive services sourcing directory. Dr. Hadcroft is the Managing Director of Practical Logic, a specialist management consultancy in services outsourcing, based in Sydney, Australia.
Despite the slow and uneven global economic recovery, lingering fears of inflation, festering European debt crisis, and rising political instability, international commerce must go on. In this keynote address, Schwab will provide insight on a number of pressing concerns, including:

- What are the key global economic and political issues smart firms will be watching?
- Where are the new markets companies will be turning to?
- What are the tools and opportunities firms can leverage to insulate against and take advantage of new global trends?

The global financial crisis and the sovereign debt crisis have changed the global economics of supply and demand for outsourced services. Nations are adjusting their relative competitive strategies, sometimes retracting offshore sourcing to protect domestic labor markets; sometimes accelerating outsourcing as a means of lowering the total cost of production. Countries in Asia, typically, are taking a long term view. When selecting sourcing locations, it will be valuable to understand how those strategies will impact risk, and the changing attributes of cultural alignment and future sources of supply. The Philippines presents exceptional synergies for US corporations. However, it is China, in particular, that presents both the greatest threat and the greatest opportunity for sourcing professionals over the next decade. In this session, you will learn:

- The high-level relative competitive positions of Asian sourcing destinations
- The strategic emphasis that China is placing on services outsourcing as an economic driver
- The emerging context for global competition between the world’s leading supply nations

In his keynote address on Thursday, March 29th, Colonel Banks will discuss the concept of how leadership lies at the core of everything an organization does. He will highlight how developing leaders constitutes a critical function for any enterprise’s short term performance and long term vitality and will describe how West Point develops character-based leaders. In addition, he will address how the U.S. Army is approaching the challenge of rigorously examining its existing leader development practices in service of adroitly adjusting them to build the leaders it will require in the future.
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Achieve More
Tuesday Workshops
**Legend for Lifecycle Phase Designation**

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<th>Steady State</th>
<th>Optimization</th>
<th>Closure or Renewal</th>
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<td>Total Cost Improvement</td>
<td>Value Added</td>
<td>Terminate / Close</td>
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**Workshops**

**WS 1**
Outsourcing Unscripted - Part V - An Interactive Session Dealing With the Most Difficult Challenges Faced By Customers and Suppliers *(CLE Session)*

This interactive forum will focus on tackling the unique and most difficult challenges and issues facing customers and suppliers when establishing and managing outsourcing agreements and relationships. Suggested topics include:

- How can outsourcing agreements yield a true partnership agreement?
- What are the best collaboration models for getting customers and suppliers to work together effectively?
- How best can customers/suppliers innovate in today's market?
- How are outsourcing strategies evolving in light of the increasing sophistication of both customers and suppliers?
- How can contracts be made more effective and flexible for both parties?
- How well are risks shared between the customer and supplier? How can risks be shifted to the party best able to manage the risks?
- How can deal failure be averted?

**YOU WILL LEARN:**

- Best Practices in Structuring and Negotiating Outsourcing Relationships (Through All Stages - Strategy, Deal, Transition, Governance)
- How Issues are Tackled From both a Customer's and Supplier's Perspective
- How Other SIG Members are Addressing Similar Issues

**Panelists:**

Microsoft, Troy Kendrick, Senior Supplier Relationship Manager

Credit Suisse Securities (USA), Tony O'Connor, Director & Counsel

Infosys, Jenny McGlennan

ACS, a Xerox Company, Trudy D. Fountain-James, Senior Vice President

**Moderator:**
Loeb & Loeb LLP, Steve Semerdjian, Partner
Michael Latchford, Managing Consultant

**WS 2**
Beyond Procurement Transformation: How to Sustain a High-Performing Organization that Delivers Value into the Future

Once you have completed an extensive Procurement Transformation process, how do you sustain all of the changes you have put in place to maintain best-in-class performance on a daily basis? It is not always easy; however, a successful Procurement Transformation has numerous long-term benefits. This workshop will cover those key elements for achieving sustainability, including: hiring the right staff and developing talent, instituting resources like Centers of Excellence (COE), selecting and rolling out technology that meets your business needs, and tracking performance and results for organizational communication and continuous improvement.

**YOU WILL LEARN:**

- How Procurement Transformation Can be Simplified and Accelerated Through Focused and Collaborative Efforts, Intelligent Upfront Planning, and the Use of Innovative Approaches
- How to Create a Holistic Blueprint and How to Roll It Out Across the Organization to Achieve Program Acceptance and Long-Term Sustainability
- Key Metrics to Effectively Track Performance for Ongoing Improvement

**Presenters:**
Denali Group, John Evans, Managing Partner
Conrad Snover, Partner

**WS 3**
Measuring Performance in Outsourcing Transactions: Service Levels, Benchmarking and Gain Sharing *(CLE Session)*

To maximize value in an outsourced arrangement, performance characteristics relevant to the delivery of an overall service must be well understood. Similarly, tools and methodologies to measure such performance should be clearly defined. We will provide tips and guidelines on how to manage risk through the effective use of measurement and monitoring tools, including service levels, service credits and benchmarking service performance and costs.

**LEARNING POINTS:**

- Common Pitfalls in Service Level Provisions
- Important Elements of Benchmarking Provisions
- Mechanisms for Incorporating Continuous Improvement over the Term of the Agreement

**Presenters:**
BlackRock, Inc. Wayne Weil, Director of Sourcing and Vendor Management
Venable LLP, William T. Russell, Partner
Michelle Ontiveros Gross, Associate

This session is eligible for CLE Credits. The CLE Credit Addendum – SIG 2012 Global Sourcing Summit will provide additional details.
**WS 4**

**Sourcing and Outsourcing Document Processing Services in the Digital Era**

Organizations spend up to 3% of revenue producing, distributing, and consuming document services such as Print, Mail, Scanning, Records and eDiscovery. Procurement and outsourcing professionals play a critical part in sourcing or outsourcing these services. This interactive workshop will introduce and discuss the tools needed to help support these professionals sourcing and managing this indirect spend. This will include strategies and tactics on how to take advantage of opportunities to minimize total cost, maximize Return on Investment (ROI) and increase customer satisfaction. Attendees should expect to learn from case studies and best practices for contract performance management, relationship management, communication / implementation plans and governance models.

**YOU WILL LEARN:**
- The Basics about Each Document Service So You Can Ask the Right Questions and Communicate Better with the Line of Business Manager
- The Proven Strategies That Minimize Costs and Maximize ROI As Well As the Emerging Trends
- The Key Business Requirements in Each Service, SLAs, KPIs, Service Quality and Delivery Options
- From a Case Study in Each Service Category Including Results Achieved
- Costs and Realistic Cost Savings That May Be Achieved In Each Service
- Contract Content - Terms, Service Level Agreements (SLAs), Key Performance Indicators (KPIs)

**Presenters:**
- PwC, Marc Sterk, Director
- Océ Business Services, Inc., Ted Ardelean, Director of Segment Marketing
- Dr. Michael Field, Director of Product Development

**WS 5**

**The Three Tenets of Global Business Services Execution: Customer Alignment, Accountability, and Economies of Scale**

Many organizations are faced with processes that are non-standard, fragmented and sometimes siloed. Prior investments have often led to dispersed and duplicative shared services centers, uncoordinated contracts, inefficient use of human capital with multiple points of contact and systems that are redundant and not agile enough to support a dynamic business environment. Leading organizations have worked to develop a Global Business Services strategy that is aligned with their corporate strategy and that enables a centrally managed global sourcing function that includes shared services and outsourcing and promotes collaboration among internal functions and third-party providers.

**YOU WILL LEARN:**
- The Most Significant Challenges Facing an Organization Implementing A Global Business Services Strategy
- How the Global Business Services Team Can Become a Strategic Partner with the Business
- The Components of a Successful Global Business Services Delivery Model
- Leading Process and Technology Practices for Implementing a Global Business Services Organization

**Presenters:**
- Morgan Stanley, Allison Jacobs, Director Strategic Sourcing
- Vantage Partners, Danny Ertel, Partner

**WS 6**

**When Deals Go Wrong - Part II: A Hands-On Workshop on Diagnosing and Remediating Troubled Outsourcing Relationships**

Most outsourcing relationships run into some kind of trouble at some point. How well you handle that trouble determines how much value is destroyed (for both sides) and whether you ever achieve your objectives. In this hands-on workshop led by two experienced practitioners from Morgan Stanley and Vantage Partners, participants will work in small groups to diagnose some of the common causes of under-performance and conflict in outsourcing relationships and will review tools and techniques for addressing them. This session is a return engagement from the standing-room-only workshop at the 2011 SIG Global Leadership Summit in Seattle, addressing new and different causes of relationship challenges. Take-aways will include a checklist participants can use to diagnose the causes of problems in their outsourcing relationships.

**YOU WILL LEARN:**
- How to Assess Your Outsourcing Relationship and Take Preventive Action
- How to Recognize and Address Barriers to Innovation
- How to Deal More Effectively With Conflict and Escalation

**Presenters:**
- PwC, Marc Sterk, Director
- Océ Business Services, Inc., Ted Ardelean, Director of Segment Marketing
- Dr. Michael Field, Director of Product Development
- Morgan Stanley, Allison Jacobs, Director Strategic Sourcing
- Vantage Partners, Danny Ertel, Partner
WS 7  The Five Key Forces Reshaping IT Services and Strategic Sourcing

Technology is characterized by rapid evolution, and so are sourcing and procurement roles. Yet, five key forces are now at play, signaling a major shift that is radically transforming what is expected from IT and sourcing organizations. Consumerization, unprecedented rates of innovation, new disruptive delivery models, and a growing gap in vendor performance, all point to a new sourcing paradigm in IT services. In this presentation, you will be introduced to these five key forces, and see how these trends affect IT outsourcing, creating opportunities and challenges to sourcing and outsourcing leaders.

YOU WILL LEARN:
- About Five Key Forces That Are Set To Change Outsourcing, Sourcing And Procurement, And Explore The Challenges And Opportunities They May Bring. The Forces Are:
  - Unprecedented Period of Technology Innovation
  - Consumerization of IT and Empowered Business Users
  - Drop in Credibility Due To Dismal IT Industry Performance
  - Reshaping Of The IT Services Industry
  - Every Business Is a Software Business

Presenter:
Softtek, Beni Lopez, Chief Globalization Officer

WS 8  World Class Category Planning and Sourcing Execution with Outsourcing Partners

This session provides the “how to” to aggressively align your global supply base and address the impact of recent global supply chain shifts, drive significant savings, and improve relationships.

The presentation will showcase the process undertaken by Motorola Solutions, Inc., to proactively tackle supply chain concerns and mitigate operational risk, prior to the recent supply chain disruptions caused by the natural disasters in Asia. By implementing a world class category planning process, they were able to establish best practices, policies and procedures across their organization and with their outsourcing partners to drive continuity and progress during turbulent market conditions.

YOU WILL LEARN:
- How to Develop and Execute a Strategic Category Planning Process
- Execute Strategic Sourcing Events to Optimize Supply Base
- Establish a Supplier Relationship Management Program to Drive Improved Service Levels
- Negotiate Competitive Global Contracts to Maximize Return on Investment

WS 9  Negotiating Skills Workshop

Sourcing professionals negotiate on a daily basis; none of the parties want to be taken advantage of; and all are aiming to win. These dynamics sometimes make negotiations difficult. Negotiations can be challenging because of corporate personalities involved, the situation, or other unique circumstances. In this session, we discuss how to approach challenging negotiations to achieve the best results for all parties.

YOU WILL LEARN:
- How to Approach and Prepare For Negotiations
- How to Handle Difficult People and Difficult Situations
- How to Negotiate Best in High Impact or High Stress Situations

Presenter:
Morgan Stanley, John Fafian, Executive Director AArete, Lindsey Meling, Manager

WS 10  An Interactive Deep Dive into Developing an Effective Vendor (Risk) Management Program

Join two leading experts in the field of vendor risk management, Linda Tuck Chapman and Michele Flynn, in an interactive workshop designed to generate actionable content that can either form the basis of your vendor management program or enhance what you have in place. Building off a pre-conference survey, extensive research each firm has conducted, and the results of SIG’s vendor risk management working group, Linda and Michele will lead a discussion of best practice policies, processes and actual working programs to provide a clear roadmap to developing an effective vendor risk management program.

YOU WILL LEARN:
- How to Segment Your Vendors Effectively and Avoid Boiling the Ocean
- Best in Class Risk Metrics and How to Determine Which Are Relevant For Your Organization
- Effective Strategies for Assessing Vendor Controls
- How to Implement Effective Risk Mitigation across a Distributed Vendor Base

Presenter:
Expense Management Solutions, Inc., Michele Flynn, President
ONTALIA Performance Solutions Ltd., Linda Tuck Chapman, President

end of Workshops
Featuring Senior Speakers From the Following Companies:

Aramark  Corn Products  Motorola
BAE Systems  Credit Suisse Securities  Procter & Gamble
Bank of America  EMI Music – Capitol Records  PSEG
Bank of NY Mellon  Estée Lauder  Queens College, CUNY
Best Buy  The Hartford Group  State Street
BlackRock  Hewlett-Packard  Prudential
Blue Cross Blue Shield of Florida  Huntington National Bank  State Street Corporation
Bridgestone-Firestone  Ingram Micro  Silicon Valley Bank
Bridgewater Associates  Johnson & Johnson  Symantec
Bristol-Myers Squibb  Kimberly-Clark  Triumph Aerostructures
C.B. Fleet Company  Marsh & McLennan  UMG
Capital One  McGraw-Hill  University of Tennessee
Cardinal Health  Merck  West Point
CIGNA  Microsoft  Xerox
Colgate Palmolive  Morgan Stanley 
Proven Best Practices
Non-Commercial Environment

SIG Summits are unlike any other events out there. SIG’s explicit no-selling rules mean providers don’t sell to corporate buyers. The result? A relaxed and open setting in which participants let their guard down and exchange practical solutions freely. Presentations are up-close and transparent; interactions are natural and direct.

SIG’s Global Leadership Summit is packed with the latest best practices, cost-cutting strategies and risk-mitigation approaches. You’ll hear from industry thought leaders and have the opportunity to network with like-minded professionals facing similar challenges. There’s no better place to get trusted insight and make powerful connections. Period.

Who attends the Summit?

Global 1000 Senior-Level Executives

Sourcing Interests Group membership is enterprise-wide, with the majority of our buy-side members representing Fortune 500 and/or Global 1000 companies. Our Summits reflect our membership, with nearly 70% of attendees from buy-side organizations. Although the content is geared towards sourcing and outsourcing executives, best practices are often shared that affect cross-functional teams in Finance, IT, HR, Legal, Supply Chain Management, Operations and Enterprise Risk Management.

Our events attract very senior professionals from all areas of these global companies. Recent Global Summits have had more than 50% of our delegates with a C-level (CEO, CPO, CFO, CIO, COO), Vice President or Managing Director/Partner title, with nearly 75% holding a Director title or above.

Summit Attendance Benefits

- Opportunity to network with other industry thought leaders in a non-commercial setting
- Ability to benchmark with best-in-class companies
- Access to immediately implementable cost savings and innovative ideas
- Opportunity to attend executive events, advanced sourcing and outsourcing workshops, engaging keynote speeches and “next practice” breakout sessions
- Ability to get the latest thought leadership and best practices for little to no cost other than travel and lodging

Summit Highlights

- Advanced Workshops
- Executive Roundtables
- Featured Speakers
- Focused Tracks
- Breakout Sessions
- Speed Networking Sessions
- Special Evening Events
- Free Spouse Program

I have tried many sourcing conferences over the last 12 years but the one that I keep returning to is SIG. It is simply the best source of current and real-world information available for the sourcing professional.

Carter Cherry
Director Supply Chain
PNM Resources, Inc.

Leadership Summit Speakers include:

Bell Canada
Boeing
BP
CA Technologies
Del Monte
Dow Chemical
Google
HealthNet
Hewlett-Packard
Johnson & Johnson
KeyBank
Kimberly-Clark
Microsoft
Panasonic
Puget Sound Energy
Rogers Communication
ServiceMaster
State Street
Symantec
T-Mobile
Universal Music Group
Verizon
Visa
Wolters Kluwer

“My observation after attending the Global Summit was that the quality of the sourcing professionals (SIG members) was the best I had been exposed to compared to any other sourcing conferences. I believe membership is a must for any internal sourcing organization.”

Ken Gains
VP, BPO Strategy
Equifax, Inc.

Visit www.sig.org to learn more.
Wednesday
Agenda & Session Descriptions
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#SIGSource
1. **Tackling the Bottlenecks in Your Enterprise: Optimizing Technology, Processes and Results**

   Cardinal Health, Inc. is a Fortune 20 health care services company whose essential business is improving the efficiency and cost-effectiveness of health care. This session will examine the principals, processes and technologies the company used to make its own business more efficient and effective, with a specific focus on the sourcing and contract management processes.

   Learn how Cardinal Health has streamlined and automated the contracting process for a system that manages thousands of contracts annually. Advanced sourcing technology has also facilitated a decrease in project cycle time by more than 50% and an increase penetration and savings in both indirect and direct materials. We will review the six year project that transformed Cardinal Health's procurement operations by optimizing internal processes and technologies.

   **YOU WILL LEARN:**
   - The Principles, Processes and Technologies Utilized In the Procurement Transformation at a Fortune 20 Company
   - Insights and Practical Advice on How to Successfully Implement Contract Management Technologies and Expedite Automation and Results
   - How to Push the Envelope in Sourcing Process Optimization, and How to Turn That Efficiency into Improved Results

   **Presenters:**
   - Cardinal Health, Inc., Patrick Eckhert, Director, Procurement Services
   - Emptoris, an IBM Company, Patrick D. Quirk, Chief Executive Officer

2. **BAE’s Lessons Learned from a Unique Gain-Sharing Procurement Outsourcing Relationship**

   Decision makers and sourcing professionals know that the key drivers for global process outsourcing (GPO) include the desire to focus on core spend and activities and to optimize the supply chain along with other perceived benefits such as sustainable savings and efficiencies. In addition, the cost base for non-core procurement outsourcing is fundamentally different and significantly larger than most other business process outsourcing segments (BPO).

   In this session, BAE and Xchanging will discuss key drivers of Procurement Outsourcing (PO), the scope of work, the selection criteria, the program structure and the lessons learned from the Gain-Sharing arrangement. Rather than the traditional pricing structure, this engagement focuses on generating value and rewarding success. BAE and Xchanging have partnered in this innovative, gain-sharing initiative.

   **YOU WILL LEARN:**
   - Why It Is Important and How to Continually Involve Key Stakeholders in the Implementation and Engagement
   - Why It Is Important and How to Secure an Executive Champion and Sponsor
   - Other Key Success Factors Like Building Global Trust
   - The Major Benefits of Such an Engagement

   **Presenters:**
   - BAE Systems, Bob Lazenby, Procurement Director for Strategic Sourcing
   - Xchanging Procurement Services, Indy Ghosh, Vice President, Head of Business Development, Marketing & Advisor Relations

3. **Worker Misclassification - Are You Prepared For an Audit?**

   The use of Independent Consultant (IC) and Freelance workers is increasing as companies are hesitant to build back their headcounts after the recession. Dynamic business conditions call for expert talent to help advise and guide companies in areas like Marketing, Human Resources, Information Technology (IT), and Project Management. At the same time the U.S. government (both Federal and State) is clamping down on independent contract classifications because they do not get the same tax withholding and see the IC as a cause of their tax income shortfall. This has created a large increase in the frequency and severity of compliance audits. In this session we bring an experienced practitioner to share and explain what is involved in an audit of this type. Warner Music Group has performed a due diligence effort around this requirement, and their SVP & Chief Employment and Corporate Infrastructure Counsel will share wisdom and solution best practices on preventing, or at least preparing for an audit.

   **YOU WILL LEARN:**
   - The Legal Tests for Compliant Independent Contractor Status
   - The Common Triggers That Lead to an External Audit
   - How to Prepare for an Audit
   - The Process for Conducting an Audit
   - The Consequences if you are found to be Non-Compliant
   - The Lessons Learned From the Due Diligence Process of Selecting a Solution, Post Audit

   **Presenters:**
   - Warner Music Group, Maryrose Maness, SVP & Chief Employment and Corporate Infrastructure Counsel
   - MBO Enterprise Solutions, David Putt, Vice President and General Manager, Eastern Region
4 Complex Services Procurement Rock Stars: Capital One’s Secret to Gaining Traction and Adoption

How does one of the largest financial services providers in the U.S., offering diversified products and services to many different types of customers across various states, become a procurement rock star? Join us as Capital One shares their evolutionary journey, which resulted in one of the largest indirect complex services programs in existence. In addition, we will cover how Capital One has been successful in going through a change management process of gaining internal consensus and executive support to centralize indirect complex services procurement programs at the company. Through using a phased vertical-to-horizontal (V2H) type of process, we will demonstrate best practices from proofs-of-concept to continuous improvement and creating momentum for procurement.

YOU WILL LEARN:
- How to Identify and Approach Untapped Indirect Complex Services Procurement Categories
- How Methodical/Phased Approaches can Accelerate Future Program Expansion
- How Using a Few Basic Business Premises can be applied to Create Lasting Procurement Success
- About Volume Lead Adoption

Presenters:
- Capital One, Charlie Flocco, Director Global Procurement Services
- HCMWorks, Ted Weyn, Managing Partner
- Dan Roehrs, Vice President Business Development

5 Sourcing Cloud Service Providers - Moving Your Infrastructure to the Cloud

Attend this session to hear a case study of how one company moved all of its non-ERP hosting infrastructure to the cloud including mail, desktop, office applications and the integration of other SaaS solutions. Included in this case study are: key considerations around security, service provider capabilities, unique contracting aspects, change management and governance. The discussion will cover cutting edge technology such as Virtual Desktop Infrastructure and business case implications.

YOU WILL LEARN:
- Some Of the Unique Contracting Issues Such As Pricing and Resource Elasticity
- How to Define the Vision before Embarking On This Type of Program
- Key Considerations in Sourcing Cloud Service Providers

Presenters:
- C.B. Fleet Company, Inc., Patricia Arthur, Director of Global Information Technologies
- Archstone Consulting, Maureen Piche, Principal
- Joe Mello, Manager

6 How Innovative Sourcing Customers Like Procter & Gamble Are Addressing the Challenge of Dispute Resolution (CLE Session)

For decades, outsourcing customers and service providers have operated under the flawed assumption that the time, expense and relationship damage associated with litigation or arbitration would compel contracting parties to amicably resolve routine contract disputes. However, in practice, the understandable reluctance of contracting parties to invoke these draconian remedies has resulted in an avalanche of unresolved disputes or has forced one or both to accept unfair or unfavorable resolutions to obtain critical products or services. At last, an experienced outsourcing customer and a leading law firm have confronted this problem head-on and have formulated innovative strategies to address such disputes in an efficient and cost-effective manner and with minimal damage to the relationship.

YOU WILL LEARN:
- Innovative Approaches, Such As “Baseball Arbitration,” That Incentivize the Parties to Evaluate Their Positions Realistically and Offer Reasonable Compromises at an Early Stage in the Process
- Streamlined Processes for the Presentation of Contract Disputes to Neutral Third Parties, Including Accelerated Deadlines, Limitations on Discovery, and Truncated Arguments and Evidentiary Showings
- Cost and Fee Shifting Options That Deter Parties from Pressing Unreasonable Positions

Presenters:
- The Procter & Gamble Company, Wolfgang Kreutzer, Associate Director Legal
- Mayer Brown LLP, Daniel Masur, Partner
- Paul Roy, Partner

This session is eligible for CLE Credits. The CLE Credit Addendum – SIG 2012 Global Sourcing Summit will provide additional details.

7 The Keys to Implementing a Successful VMS/MSP Program and How to Continually Grow and Expand Your Business Model

You have selected a Vendor Managed System (VMS) and/or Managed Service Provider (MSP) but where do you go from here? How do you get started, how do you foster a healthy, productive engagement that supports your investment and provides continued benefits? In this session, the presenters will discuss implementation best practices that will help to solidify the success of your flexible workforce program and ease adoption roadblocks within your organization. You will also learn how to continuously evolve your program year over year, to better control services spend across the organization, and to ensure you meet your organization’s strategic program initiatives.

YOU WILL LEARN:
- Implementation Best Practices
Steps to Driving a Successful Program after Implementation
How to Determine Which Managed Services Model Is Best For Your Organization

PSEG, Meghan McVeigh, Program Manager Workforce Management
Beeline, Beth Perdue, Vice President Strategic Solutions

8

EMI Music/Capitol Records Case Study and Lessons Learned: Developing and Implementing a Global Outsourcing Strategy

Recorded music is one of the primary mediums of entertainment for consumers worldwide, generating $27.8 billion in retail sales (in 2008 per IFPI), with the top five territories (U.S., Japan, U.K., Germany and France) accounting for 74% of these sales. While the sales of music digitally are increasing substantially, physical sales have been declining for a decade. No wonder that EMI/Capitol Records turned to outsourcing to better manage its global supply chain, creating efficiencies by cutting costs and improving service quality, allowing Capitol Records to focus on piracy issues and the development of digital distribution channels. In this session, you will hear some lessons learned by EMI and SNR Denton. Some of these lessons are applicable to any outsourcing engagement – but in the current music distribution global-pressure-cooker the challenges, like some of the music, are on steroids! Join us for more on the Capital Records global outsourcing journey.

YOU WILL LEARN:
- Key Considerations in Structuring Local Deals for a Global Company
- How Key Stakeholder Buy-in With Senior Sponsorship Globally and Locally, And A Well-Defined Retained Organization Are Critical When A Global Company Outsources
- How Development of the Business Case on a Local and Global Level, and Creative Financing and Pricing Are Key Components to Success
- How Scope Must Be Coordinated Across Regions

Presenter(s)
EMI Music - Capitol Records, LLC, Gareth Thomas, President, Global Procurement and Physical Supply Chain
SNR Denton, Rosemary L. Gullikson, Partner

Candidate Sourcing in the New World of Social Media Recruitment

We have entered a social and business revolution. With the changing social contract the recruitment industry is going through its own revolution. The constant evolution of social media is facilitating recruiters with endless tools to source top talent and opening up new ways to dramatically increase the ability to find the right people quickly. As we look at the future of candidate sourcing, this session will examine key factors companies need to include as part of their workforce and talent acquisition strategies.

YOU WILL LEARN:
- How Recruitment Is Embracing Social Media
- How Global Factors Are Impacting Talent Acquisition
- Key Marketing Solutions for Employer Branding
- How to Make Informed Decisions for Sourcing Candidates Using Social Media

Presenter(s)
Best Buy Co., Inc., Craig McKenney, Vice President of Procurement and Vendor Management, Global Business Services
Allegis Group Services, Bruce Morton, CMO

The Benefits of Integrated Facilities Management – A Look into the Integrated Facility Management Value Chain

Integrated Facilities Management (IFM) is gaining attention as companies see the benefit of outsourcing services which are not a core piece of their business operations. IFM providers are disciplined and focused on managing all aspects of FM and have been delivering outstanding results for leading clients. A.T. Kearney will share developing trends for this category as well as FM insights and a perspective from the consumers Corn Products and Aramark. Learn how your organization can accelerate the process to begin realizing the benefits associated with outsourcing FM services.

Presenter(s)
EMI Music - Capitol Records, LLC, Gareth Thomas, President, Global Procurement and Physical Supply Chain
SNR Denton, Rosemary L. Gullikson, Partner
YOU WILL LEARN:
- Why NOW is the Time to Explore Facilities Management (FM) Outsourcing
- 2012 Developing Trends and Best Practices in FM
- What You Can Do To Prepare Your Company to Move to a FM Outsourced Solution
- Real Life Examples of and Best Practices for Successful Implementation

Presenter(s):
Pattie Vollmar, Associate Director, Colgate Palmolive
A.T. Kearney, Bernard J. Going, III, Director
Daryl Watkins, Senior Manager

Achieving Procurement Excellence at Colgate Palmolive

The challenges with implementing procurement solutions have always been adoption and standardization in documents, processes, and usage. Colgate Palmolive has successfully leveraged an eProcurement solution to deliver a single set of global purchasing standards and is achieving procure-to-pay excellence. Attendees will learn how catalogs and a self-service procurement environment drive high user adoption, on-contract spending, and over $3 Billion in indirect spend under management globally. With optimized usage, Colgate-Palmolive has now been able to further extend its procurement reach with mobile shopping cart approvals – increasing productivity and shortening approval cycle times. The session will include a short introduction by SAP.

YOU WILL LEARN:
- Learn How eProcurement Can Drive Global Procurement Standards and Significant Savings
- Appreciate Key Lessons Learned To Successful End-User Adoption
- Understand How to Incorporate Mobility into Your Procurement Plans

Presenter(s):
Colgate Palmolive, Patty Vollmar, Associate Director, Global Supply Chain Development
SAP, Emily Rakowski, Head of Procurement Solutions Marketing

The Price is Right: Intelligent Product Engineering at Xerox

Did you happen to catch the story about Steve Jobs demanding a huge change in the iPhone six weeks before the release date? Apple immediately met with their suppliers and implemented an almost real-time product innovation, which satisfied the decree and took the iPhone from plastic to glass.

Too often our engagements are governed as a series of fumbles in a blame game and we end up paying for the inefficiencies - all because we don’t invest in the time or tools to intelligibly work and innovate with suppliers. Join Xerox at this session to find out how they combine the science of Product Cost Engineering and Best of Breed with the art of global sourcing to procure direct materials for their products. Learn about how these concepts are being applied to services, as well.

YOU WILL LEARN:
- About How Xerox Has Gone Beyond Governance and Has Utilized the Talents and Skills of their Engineers
- About Product Cost Engineering (PCE) and Best of Breed (BOB)
- How to Have Intelligent Conversations that Result in Efficiencies in Process and Total Costs
- How to Use These Tools to Optimize Cost and Deepen Your Relationships with Your Suppliers and Your Manufacturers

Presenter(s):
Xerox, Brad Bulger, Manager, Global Purchasing Market & Industry Intelligence
Patty Roy, VP Procurement Solutions North America

Controlling Tail End Spend at Bristol-Myers Squibb - A Savings Opportunity Worth Exploring

Bristol-Myers Squibb recently started a new project with a focus on spend analysis and data management. From this exercise, the company realized an opportunity by identifying the non-core functions associated with Tail End Spend, providing potential savings in the millions of dollars. The company has adopted a standard definition of tail end spend and strategy for managing it in categories such as IT, Research & Development, and Corporate Services. This methodical approach will help to consolidate suppliers and increase visibility. The presenters will discuss specific spend category examples, such as IT, outlining the methods used to centralize and structure spend activities, reduce resource allocation, and improve savings.

YOU WILL LEARN:
- How to Define Tail End Spend
- How to Standardize Tail End Spend Management Practices
- How This Important Step Has Led to Additional Strategic Opportunities like Electronic Sourcing
Outsourcing of Legal Services: A Strategic Sourcing Perspective

Sourcing and Legal haven’t always seen eye to eye on the sourcing of legal services. The rise of Legal Process Outsourcing (LPO) has created an opportunity for Sourcing to change how they partner with Legal and to contribute much more than the ability to drive down law firm billing rates. In this panel discussion you will hear from experienced practitioners about what has worked well to help law departments along the path to transforming the delivery of legal services. This session will provide a strategic sourcing perspective on the evolution of legal services outsourcing.

YOU WILL LEARN:
- Evolution of the Legal Department Sourcing Process
- A Framework to Determine Legal Department Readiness
- Types of Legal Outsourcing Models Adopted
- Case Studies and Examples

Presented by: Bristol-Myers Squibb, John Tuttle, Executive Director, IT Sourcing
Corbus, Doug Cunningham, Vice President, Supply Chain Management

Panelists:
- Hewlett-Packard, Jill Zunshine, Vice President, Americas Region, Global Procurement
- CIGNA, Ojas Sampat, Director, Strategic Sourcing
- Mindcrest, Ganesh Natalarajan, President and CEO
- Vantage Partners, Danny Erkel, Partner

Managing Commodity Price Volatility through Forecasting

Price volatility is a fact of life for Procurement professionals across the globe, with far reaching ramifications across the supply chain as well as the bottom line. It is critical to not only understand the issue of price volatility but also know how best to react and manage it. This session will present a fundamental discussion of price volatility, its various influencing factors and present intelligence tools and frameworks that the procurement executive can utilize to immediately improve this critical element of their strategy. The discussion will be explained using technical examples as well as real world examples from Merck.

YOU WILL LEARN:
- Factors That Affect Commodity Price Movements
- The Basis for Strong Price Forecasting, While Also Accounting For/Understanding Potential Inaccuracies
- Potential Strategies to Combat Price Volatility

Presented by: Merck, Stephen Fecho, Global Category Leader, Research Procurement
The Smart Cube, Inc., Mark Bjedov, Managing Director, Corporate Research Services

What’s All the Fuss About Data Security and Privacy Risks? A Practical Approach to Explain the Legalese (CLE Session)

Why is there so much talk about data security and privacy concerns in each transaction? Are these real risks or just “buzz words” creating confusion? Can these risks be managed in a “cloud” environment? This session will feature industry experts who will translate the legalese, provide an update on latest developments, and discuss strategies for making real world assessments of data security and privacy risks and risk mitigation.

YOU WILL LEARN:
- The Key Issues Relating To Data Security and Privacy
- Current Developments and Pending Legislation
- Practical Approaches to Assess and Manage Data Security and Privacy Risks
- How to Address “Cloud” Concerns
- Tactics for Contract Negotiation

Presented by: Bank of America, Richard Borden, Assistant Vice President, Assistant General Counsel
The Hartford Group, Inc., Deb Hampson, Assistant Vice President and Assistant General Counsel
Loeb & Loeb LLP, Kenneth A. Adler, Partner and Chair, Technology and Outsourcing Group
Ieuan Jolly, Partner

Supply Chain Legal Rights and Wrongs (CLE Session)

Today’s supply chains are global, complex, and subject to both laws of local and distant countries and to corporate requirements imposed by the customer at the end of the chain as well as by upstream and downstream companies in the chain. The laws and requirements, many with cross-border effect, cover privacy, anti-bribery rules, employment, energy and water efficiency, environmental standards and more. Some emerging markets are closing borders to imports, thereby disrupting supply chains. While mature markets explore reshoring opportunities as the true Total Cost of Ownership of globalization in a volatile and constantly changing world becomes more apparent. The lawyers on this panel work closely with multinational corporations across a range of supply chain issues and understand how to address the risks that these laws and regulations impose and the business opportunities that arise for visionary companies.
YOU WILL LEARN:

- How a New California Disclosure Requirement Can Impact Your Business Even If Your Company Does Not Do Business In The State, And How Similar Requirements Are Emerging Elsewhere
- Where To Look For Supply Chain Requirements, Including On Customer Websites
- How a Supplier Can Lose Business By Failing To Comply With Its Customer’s Environmental Requirements
- How To Prove Compliance And Best Practices For Collecting And Reporting Proof
- How Rapidly Evolving Privacy And Data Protection Laws Impact Supply Chain Operations
- What U.S. Companies Need To Report To Investors About Cyber-Security Risks

Presenter(s): Baker & McKenzie LLP, Michael S. Mensik, Partner
Kaye Scholer LLP, William A. Tenenbaum, Partner

* This session is eligible for CLE Credits. The CLE Credit Addendum – SIG 2012 Global Sourcing Summit will provide additional details.

18  eWork: Services Procurement in the Cloud at Johnson & Johnson

Are your strategies for sourcing talent stuck in 1984? This session will explore the unique opportunities and challenges of finding and working with talent in the cloud, and the solutions that exist to open this new workforce to the enterprise. Learn how Johnson & Johnson was able to increase turnaround time and reduce costs by working with Elance to build a marketing workforce in the cloud. Attend this session to discover how your company can benefit from this emerging talent strategy.

YOU WILL LEARN:

- How Technology Is Unlocking New, Direct Channels to a Global Supply of Talent
- The Benefits of Building Specialized Workforces in the Cloud
- How to Incorporate eWork into Your Services Procurement Strategies

Presenter(s): Johnson & Johnson, Julia Santos, COP, Head of Global Business Optimization
Elance, Fabio Rosati, President and Chief Executive Officer

19  Resuscitating Corporate IT: The Roles of Talent and Outsourcing in the New IT Operating Model

The business can increasingly turn directly to the market to satisfy its IT requirements. For corporate IT to remain relevant it must develop a better model. The currently dominant Supply-Demand model needs revision. Further, the conventional outsourcing processes’ focus on selecting the “right” provider is overblown. Outsourcing success is more about having the right internal talent, organizing them into the right operating model, getting them to collaborate, and managing performance.

YOU WILL LEARN:

- Fostering the Right Culture and Relationships for Outsourcing Success
- Identifying and Developing the Right Talent You’ll Need to Succeed
- Devising an Operating Model That Truly Takes Advantage of Outsourcing
- Changing the Conventional Outsourcing Process to Emphasize the Real Success Drivers

Presenter(s): Estée Lauder, Earl Newsome, Vice-President
PA Consulting, Scott Lever, Managing Consultant

20  Deploying Optimal Category Strategies - Coordinated Globally and Executed Locally

As companies expand their operations around the globe, it is crucial to deploy a globalized approach that effectively addresses all types of spend - from large recurring to small one-time purchases - across all business areas with the right strategies and expertise for each supply market. In this session, Symantec will share how they are delivering a blend of global, regional and local strategies, market insights and talent to optimize spending and maximize business impact.

YOU WILL LEARN:

- How Symantec Has Structured Procurement to Provide Global, Regional and Local Category Management
- How Symantec Develops Global, Regional and Local Strategies that are Coordinated Globally and Executed Locally
- How Global Supplier Relationships and Contracts Are Managed

Presenter(s): Symantec, Michelle Barr-Billhartz, Director of Americas Strategic Sourcing
Anne Stewart, Director of Strategic Sourcing EMEA & APJ
Procurian, Tim Brown, Business Development
Thursday

Agenda & Session Descriptions
21 Realize Accelerated Savings through Next Generation Category Management Strategies

It is the same old challenge; how do you create savings this year from the same categories you sourced last year? Successful sourcing programs leverage an optimal mix of Category Intelligence, Strategic Sourcing technology and a sound Category Management Strategy to execute shorter sourcing cycles, maintain bottom-line savings, and extend their sourcing efforts globally.

Whether you are in strategic sourcing infancy or you are struggling to penetrate the next category, geography or business unit, all are welcome to come and learn the key category management strategies that business leaders use to avoid the pitfalls and realize the full potential of their strategic sourcing and category management teams.

YOU WILL LEARN:
- The Fundamentals and Importance of category Management
- The Best Practices in Adopting and Institutionalizing Category Management
- The Framework for a Full Lifecycle Category Management Process / Program

Presenters:
- Bridgestone-Firestone, Sue Hudson, Director of Indirect Procurement
- Accenture, Ellie Gutilla, Sr. Manager
- Ariba, Inc., Sundar Kamakshisundaram, Sr. Solutions Marketing Manager

22 Debate: Outsourcing is Finished vs. Outsourcing is the Future

This is a non-traditional panel discussion, where very experienced panelists will be asked to argue two opposing positions in a very structured way – first taking one position, then switching and taking the opposite position.

Resolution # 1: Outsourcing has gone as far as it can, and the days of outsourcing are numbered.

Resolution # 2: Outsourcing is a business model that will be an essential part of our environment well into the future.

The objective of this panel discussion will be to address the current challenges that businesses are facing with outsourcing from a business, management, and social responsibility perspective, to arrive at useful and thoughtful conclusions that will help audience members in their own business environments.

YOU WILL LEARN:
- The Major Impediments to Outsourcing That Businesses Face and How They Address Them
- The Best Thinking of Business Leaders Grappling With the Sometimes Ambiguous Challenges of Outsourcing
- Ways That Companies Think About Outsourcing Challenges
- When Companies Decide Not To Outsource and Why

Panelists:
- Bank of NY Mellon, Carol Britton, Senior Vice President, Director Corporate Procurement
- Kronos Incorporated, Srin Kishnamurthy, Vice President, Business Optimization
- The Hartford Group, Inc., Enrique Rodriguez, Vice President, Enterprise Sourcing Office

Moderator:
- ISG, Cynthia Hollandsworth Batty, Director

23 Best Practices for Ensuring Quality of Service in Multinational Outsourcing Engagements (CLE Session)

In this session, Ingram Micro and Sheppard Mullin will review optimal strategies for governing multi-country, multivendor outsourcing engagements for ensuring quality of service. Topics covered include best practices for customized training, real-time quality monitoring, design of effective Service Level Agreement (SLA) models, how to operate in high attrition environments, and deal terms that influence day-to-day service. Join us to learn how to design an optimal program to manage your engagements and enhance performance.

YOU WILL LEARN:
- How to Develop Effective Training Models
- How to Hedge Against Attrition Risks
- Development of Viable SLA Models That Accurately Track and Incentivize Quality
- How to Implement Multi-Vendor Governance Protocols

Presenters:
- Ingram Micro Inc., Mario Leone, Executive Vice President and Chief Information Officer
- Sheppard Mullin, Shalu Mehra, Partner, Chair Technology Transactions Group

24 Achieve Higher ROI from Outsourcing by Transforming Your Organization

Looking to create a major strategic shift in their approach to Vendor Management and to address the risk associated with misaligned vendor relationships, Best Buy needed to design and implement a Vendor Management Office (VMO). Using a proven framework, Best Buy was able to establish the operating structure, design processes, develop the VMO playbook and fully implement the VMO within six weeks of the start of organizational design.

YOU WILL LEARN:
- How to Increase Operating Efficiency and Transparency
- How to Standardize Vendor Management Processes and Operating Consistency across the Enterprise
- How to Improve Leverage of Vendor Capabilities While Mitigating Vendor Risks
- How to Enhance Scrutiny of Vendor Expenditures and Reduce the Cost of Vendor Services
Presenter(s): Best Buy Co., Inc., Craig McKenney, Vice President of Procurement and Vendor Management, Global Business Services
Albridge, Craig Nelson, Managing Director

The Category Management Journey at Blue Cross Blue Shield of Florida: A Practical Overview for Initiating Category Management

How do you align your category management activities to business strategy and objectives? How do you develop a plan and playbook for defining and executing on your category strategy? And how can you implement quickly if the concept of category management is new to your company? Ernst & Young and Blue Cross Blue Shield of Florida (BCBSF) collaborated to develop a detailed category plan and executable playbook for print. In a ten-week engagement, the team conducted a spend analysis and developed a category strategy, governance model and performance metrics tied to the business objectives and key performance indicators (KPIs) important to BCBSF. The team leveraged the strategy and developed a sub-category profile, including internal and external market analyses, and developed a strategy for sourcing and consolidating spend. Demand management, compliance and sourcing perspectives were embedded in a leading practice category management approach.

YOU WILL LEARN:
- Why a Category Plan Is Important To Generating Business Value and Stakeholder Buy In
- How to Map Category Management to Business Objectives through a Practical Example
- How to Link Category Strategy to an Executable Plan

Presenter(s): Blue Cross Blue Shield of Florida, Dannise T. Kemp, Director, Sourcing and Procurement
Ernst & Young, Doug Farrell, Manager

Innovation: What is the Ideal Outsourcing Arrangement to Drive Innovation, While Balancing Costs and Quality?

It has been said that “innovation comes from the producer.” In today’s dynamic environment, how do you ensure your company innovates in order to stay ahead of the competition and deliver unique value to customers? How do you ensure the innovation comes without sacrificing quality or escalating costs? Join this session to hear lessons learned and practical insights from Queens College, CUNY, together with Clochase, into how their outsourcing strategy helped build their innovation initiative while achieving equilibrium between cost and quality.

YOU WILL LEARN:
- How Outsourcing Can Enable Innovation in a Company
- Which Outsourcing Model Helps Achieve Innovation While Managing Costs and Ensuring Quality
- The Importance of Using the AGILE/RAD Development Model to Drive Innovation
- Key Lessons Learned That Can Be Applied To Your Outsourcing Challenges

Presenter(s): Queens College, CUNY, Naveed Husain, CIO
Clochase, Inc., Royall Du, CEO

Hunting and Farming Suppliers - A Perspective on Effective Enterprise-Wide Supplier Risk and Performance Management

One reason organizations are not always successful at driving sustainable supplier-management initiatives is because of a flawed operating and resource model. Often, a significant amount of work is performed to develop templates, schedules, scorecards, and metrics. While this effort is well-intended, the execution component is too often overlooked. Without an alignment of resources, skill sets, and a focus on execution, it is very difficult to turn quarterly reviews, surveys, and scorecards around in a timely fashion. In this breakout session, Huntington National Bank and Denali Group will discuss operationalizing supplier management and provide success stories from the field.

YOU WILL LEARN:
- How to Create an Understanding of Bottlenecks in Operationalizing an Effective Supplier Management Function
- How to Evaluate Risk And Performance In Various Stages Within The Organization’s Supplier Lifecycle
- From a Case Study as To How a Financial Institution Successfully Adopted Risk Management, Which Is a Critical Function for Their Regulatory Industry
28  The New Reality: Procurement's Involvement in Real Estate Services Acquisition and Vendor Management Generates Tremendous Value

The past few years have seen corporate procurement departments becoming more involved in corporate real estate functions. Services, such as Facilities Management, Brokerage, Architectural and Engineering, and Construction Management, which were historically procured solely by the Real Estate group, are increasingly folded into a larger corporate procurement strategy. Join State Street's Executive Vice President of Global Real Estate and Procurement and Expense Management Solutions to learn how Procurement and Real Estate collaboration can equal success.

**YOU WILL LEARN:**
- The Drivers Behind the Case for Increased Involvement in Real Estate Services Acquisition and Vendor Management
- Suggestions for How Procurement Can Build the Case and Convince Real Estate to Collaborate
- Tips on How to Ensure That the Collaboration Is Effective
- Changing Roles and Responsibilities between Real Estate and Procurement during Acquisition and Vendor Management

**Presenter:** State Street Corporation, Don Conover, Executive Vice President
Expense Management Solutions, Inc., Michele J. Flynn, President

29  Stories from Kimberly-Clark’s Global Procurement Transformation: Lead, Manage, Innovate

Kimberly-Clark’s Global Procurement Transformation is almost two years old. With a goal of creating and sustaining annual Procurement Value of 5-7% of Total Spend, the Global Procurement team must focus their time with the most value adding Procurement Activities. The key to sustaining the procurement value is Continuous Improvement. In today’s session we will discuss how Kimberly-Clark approaches the three stages of category management in order to reach their Procurement Value targets. Using a particularly volatile spend category as a case study, the speakers will demonstrate how the Lead, Manage and Innovate approach is contributing to efficiencies in operations and costs.

**YOU WILL LEARN:**
- Innovation through Category Workshops
- Global Approach to Category Engagement
- Sustainable Value Driving Activities

**Presenter:** Kimberly-Clark, Ronald Horner, Global Category Director, Nonwovens and Component Films
Protiviti, Inc, Michael Chioc, Director

30  Managing Global Product Innovation

In today’s emerging global market, demand for new product features catering to local markets is a key driver. Pressures for a competitive cost structure requiring improved operational efficiencies in manufacturing are pushing innovative approaches. There is a need for innovation with optimal research and product development spends. Creation of a worldwide supply chain with significant statutory compliance requirements is a necessity. Tata Consultancy Services has been helping customers to stay ahead of competition by providing cutting-edge Engineering and Industrial Services across the lifecycle of the product development and manufacturing.

**YOU WILL LEARN:**
- Opportunities to Leverage Outsourcing For Product Development
- How to Build an Effective Partnership
- The Value That Outsourcing Can Bring
- Examples of Results Achieved

**Presenter:** Siemens PLM Software, Raj Khoshoo, Senior Vice President of Strategy and Portfolio for Siemens PLM Software
TCS, Prashant Kulkarni, Head, Engineering and Industrial Services, North America

31  Harnessing the Power of the Team - Customers and Suppliers Discuss Value Leakage in Sourcing (CLE Session)

This expert panel, moderated by Baker & McKenzie, includes buyer and seller side in-house attorneys, a provider sales representative, and a customer side sourcing professional who will discuss leveraging a team approach to avoid value leakage in sourcing deals. Using a survey on value leakage as the discussion document, this panel will identify cutting edge techniques, and optimal strategies for the deployment of high performing teams in handling the most common issues that lead to loss of value on both sides of the sourcing equation.

**YOU WILL LEARN:**
- How Customers Allocate Responsibility between Legal and Procurement for the Success of Sourcing Transactions
- How Providers Allocate Responsibility between Legal and Procurement for the Success of Sourcing Transactions
- Key Drivers of Value Leakage in Sourcing Transactions
- Processes That Customers and Providers Use to Prevent Value Leakage
Launching an Enterprise Vendor Governance Office - Prudential’s Journey

Prudential is a multi-national, highly complex organization. Each division operates with a high degree of autonomy, leading to 14 different sourcing methodologies and vendor governance programs over time. Some programs were very mature and met the needs of the business. Some divisions had some elements of a governance program while others had no program. During this session, we will take you on Prudential’s journey to reconcile these extensive differences, to address the critical gaps, to gain consensus and the support of executive management, and to become compliant...all while adding value and minimizing workload.

YOU WILL LEARN:

- Prudential’s Enterprise-Wide Program Design
- How to Gain Sponsorship and Consensus across Multiple Stakeholders
- Phases and Stages for a Successful Launch
- Why This Program Raised the Profile and Reputation of Global Sourcing

Presenter(s):

Prudential, Lisa Wright, Vice President, Global Sourcing and Enterprise Vendor Governance
ONTALA Performance Solutions Ltd., Linda Tuck Chapman, President

Procurement’s Business Imperative: What Got Us Here, Won’t Get Us There

The procurement profession is in the midst of a profound transformation. Procurement has moved from the back office to the front office and become a strategic weapon providing significant business value and earning a seat at the top table. Today’s procurement professionals, therefore, must have broader business acumen, exceptional communication skills and the ability to influence and drive change at a higher, more strategic level within the organization. If procurement is to be run as a business, then procurement professionals must think like a CEO or general manager. This shift requires world-class talent who are strategic advisors to their business stakeholders. HP’s Global Procurement is taking a proactive approach to developing and enhancing these core skills within its 1000+ global employee base.

YOU WILL LEARN:

- The Profile of the New Procurement Professional [a.k.a. competencies and skills]
- The Role of the New Procurement Professional [a.k.a. job description]
- How to Enable the New Procurement Professional [skills development, experiential/rotations, talent pipeline]

Presenter(s):

Hewlett-Packard Company, Jill Zunshine, Vice President, Americas Region, Global Procurement
Procurement Outsourcing Journey: Moving from One Partner to Another – Transition and Implementation

While some companies are exploring Procurement Outsourcing for the first time, others are evaluating their contracts that are nearing term. Incorporating changing market forces such as business drivers and value proposition of service providers, we will share insights of our journey in moving from partner to partner. We will discuss integrating key elements of lessons learned from the first relationship into the new one. We will also cover strategies about how to build the right foundation for a long term success.

YOU WILL LEARN:
- What Key Areas to Focus On When Moving From One Partner to Another
- How to Incorporate Lessons Learned From Previous Relationship into a New One

Presenter(s):
Triumph Aerostructures, Tony Polendo, Director Procurement
GEP, Abhishek Pandey, Vice President

Three Step Program to Operationalizing SOW Contracts - How to Simplify Sourcing, Create Killer Contracts and Govern to Great Results

Buying and managing services (rather than “goods”) presents complex challenges for even the most mature procurement programs. When outsourcing to consultants and professional services firms (legal, marketing, etc.), the success of the project is often determined by the initial process and governance of sourcing, creating and managing the Statement of Work (SOW) contract itself. There are challenges to managing SOW spend, such as a lack of standardized measurement tools, disperse budget allocations and difficulties in determining value and return on investment (ROI). However, addressing this under managed spend is a fantastic opportunity, and one way to accomplish this is to build a solid SOW and contract.

YOU WILL LEARN:
- Real World Best Practices Utilized by some of the World’s Largest Indirect Sourcing Programs
- The Criteria and Approaches for More Successful Sourcing of Statements of Work (SOWs)
- Guidelines for Creating Killer Contracts That Set You Up For Successful Results
- How to Structure the Governance of Your Services Procurement Programs

Presenter(s):
IQNavigator Inc., John F. Martin, Chief Executive Officer of Emerging Markets / Chief Technology Officer
McGraw-Hill, Kevin Giblin, Director, Strategic Sourcing & Supplier Management
Beyond Sourcing 101 - Strategies for Delivering Sustainable Stakeholder Value

Sourcing Organizations are under constant pressure to deliver year over year cost reductions. Most mature Sourcing organizations have already Sourced commodities like Office Supplies, Courier Services, Desktop Hardware/Software etc. For these commodities, it will be quite challenging to deliver year over year cost reductions, especially in an environment where base costs could escalate in 2012. In this environment, Sourcing organizations will need new approaches to define and communicate value to justify continued investment. This session will discuss strategies to define value in areas like Supplier Innovation, Supplier Diversity, Compliance, and Risk Management, and will share an approach to sourcing complex categories like Marketing and Legal Services.

YOU WILL LEARN:
- How to Drive Value beyond Quantified Savings from “Sourced Commodities
- How to Position and Demonstrate That Value Effectively To Key Stakeholders
- An Approach to Sourcing Complex and Sensitive Categories “Such As Marketing and Legal Services

Presenter(s): Marsh & McLennan Companies, Laks Natarajan, Chief Procurement Officer
John Villani, Director, PMO/Infrastructure/Supplier Diversity

Vested Outsourcing - Readiness Assessment

Are your relationships with third parties everything they were supposed to be? Are they/sick? Is there a value short fall? How would you know? Will the Vested model work for your company or organization? Is your company or organization ready for a new and different way to structure and govern third party relationships? “This interactive presentation will show you how to use three simple web-based public tools: “The 10 Ailments,” “Business Model Mapping,” and “Readiness Assessment,” to understand where you stand.

YOU WILL LEARN:
- 10 Common Ailments
- If the Vested Outsourcing Model Is Right for You
- Readiness Assessment for Vested Outsourcing

Presenter(s): University of Tennessee, Kate Vitasek, Faculty, Center for Executive Education
Hiperos, Greg Dickinson, CEO

Walking the Walk: The Value of Change Management in Successful Procurement Transformation

In a culture of excellence and radical transparency, taking on an enterprise-wide transformation project is daunting. Add an environment of explosive growth and the stakes go even higher. When Bridgewater Associates, the largest and best-performing hedge fund manager in the world, set out to transform its procurement function to better align with the business, the ability to effectively engage stakeholders quickly became a program imperative. Join us as we share lessons in building alignment, challenging conventional practices, and balancing the needs of an entrepreneurial enterprise with the requirements of effective process governance.

YOU WILL LEARN:
- The Value of Engaging the Business to Optimize Solutions
- Recognizing When Stakeholders Really Do Know Best
- How to Measure Readiness for Change
- Tactics for Building Accountability through the Transformation Process and Beyond

Presenter(s): Bridgewater Associates, Prasad Hedge, Head of Procurement
KPMG, Patti Muldowney, Director
tweet. post. watch.

FOLLOW THE SIG conversation online

Lively discussions on LinkedIn
Peer2Peer requests on demand
InsideSource Executive Video Interviews on www.sig.org
SIGInsideSource YouTube channel
Updates, industry news and timely posts through Twitter and LinkedIn
Outsource Magazine online column
Membership & Travel Information
Sourcing Interests Group
# Membership Overview

## Making the Most of Your SIG Membership

SIG is widely known as a forum for sharing best practices and networking with executive colleagues in a trusted, non-commercial environment. SIG memberships are enterprise-wide with the majority of our buy-side members representing Fortune 500 and Global 1000 companies. Engaged SIG members find that their membership provides more than just access to best practices—it provides the beginning of long relationships.

### Corporate User Member

**BUY-SIDE**

<table>
<thead>
<tr>
<th>Benefits</th>
<th>Features</th>
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<tbody>
<tr>
<td>Network and build relationships in a trusted, non-commercial environment</td>
<td>Attendance at Global Summits</td>
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<tr>
<td>Leverage industry best practices and insights to apply to your company</td>
<td>Unlimited ability to attend Regional Roundtables, Innovation Forums and</td>
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<tr>
<td>and improve your performance</td>
<td>International Outsourcing Expeditions</td>
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<td>Gain access to great talent</td>
<td>Free registration for SIG’s weekly thought leadership Webinar Series</td>
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<td>Benchmark your company against leading-edge peer organizations</td>
<td>Access to SIG’s members-only website and SIG Resource Center, including</td>
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<td>SIG-contributed and member-contributed content and presentations</td>
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<td>Showcase and share your innovations and “next” practices with other</td>
<td>Ability to leverage HfS Research Library of 60 published reports and</td>
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<tr>
<td>Fortune 500 and Global 1000 companies</td>
<td>analyses</td>
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### Provider Member

**SELL-SIDE**

<table>
<thead>
<tr>
<th>Benefits</th>
<th>Features</th>
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<tbody>
<tr>
<td>Network and build relationships in a trusted, non-commercial environment</td>
<td>Attendance at Global Summits</td>
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<tr>
<td>Grow your organization by developing and enhancing relationships with</td>
<td>Free registration for SIG’s weekly thought leadership Webinar Series</td>
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<tr>
<td>client’s and prospects</td>
<td>Access to SIG Members-only website and SIG Resource Center, including SIG-contributed and</td>
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<td>member-contributed content and presentations from archived events</td>
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<tr>
<td>Leverage industry best practices and insights to apply to your company</td>
<td>Ability to leverage HfS Research Library of 60 published reports and analyses</td>
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<td>and improve your performance</td>
<td>Participation in Peer2Peer knowledge sharing program</td>
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<td></td>
<td>Instant access to feedback through SIG LinkedIn group</td>
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<td>Ability to opt-in to research studies</td>
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<td></td>
<td>Opportunity to post job openings and links to recruiting page on your website</td>
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<td></td>
<td>Opportunity to present at SIG Global Summits</td>
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<td></td>
<td>Free subscription to and opportunity to contribute in SIG Inside Sourcing online newsletter</td>
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### Available Optional Fee Services

- Customized member surveys and research
- Sponsorship and speaking slots at unlimited SIG Regional Roundtables, Innovation Forums, and International Outsourcing Expeditions
- Sponsorship of items and events at Global Summits

[www.sig.org/membership](http://www.sig.org/membership)
## Summit Amenities

### Making Your Summit Experience Complete

| **Agenda App** | Never leave home without it—SIG Summit App with all Resource Guide information now available to download to your smart phone or device |
| **Coffee Breaks & Tech Checks** | Each day we’ve factored in breaks so you’ll have plenty of time to grab a snack, network with delegates and check your email |
| **Flash Drives** | Missed a session you really wanted to attend? Flash drives are loaded with all presentation decks and given to each delegate at registration |
| **Delegate Bags** | Practical and reusable, these bags hold all your conference items perfectly and will have a shelf life that outlives the Summit |
| **Internet Connection** | Need to check in with the office? Free WiFi available to our delegates in the Tech Lounge |
| **Laptop & Phone Chargers** | Running out of juice? We can power up devices of all kinds in the Tech Lounge |
| **Printer** | Need to print your boarding pass? We have a printer available for light use in the Tech Lounge |
| **Pashminas** | We’ve got SIG pashminas available for loan at the registration desk to warm you up in the cool conference rooms |
| **Reading Glasses** | Having a hard time reading the small print? We have an assortment of reading glasses for eyes of all ages |
| **Snacks & Energy** | Apples available in Tech Lounge; chocolate available at registration desk for a quick pick-me-up |
| **Tech Lounge** | Mentioned in many items above, the Tech Lounge is available for you to relax, recharge and reconnect |
**Network Locally Implement Globally**

### Regional Roundtables

<table>
<thead>
<tr>
<th>City</th>
<th>Date</th>
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<tbody>
<tr>
<td>Minneapolis, MN</td>
<td>8 Mar</td>
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<tr>
<td>Orlando, FL</td>
<td>19 Apr</td>
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<tr>
<td>Silicon Valley, CA</td>
<td>25 Apr</td>
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<tr>
<td>Seattle, WA</td>
<td>3 May</td>
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<tr>
<td>Columbus, OH</td>
<td>17 May</td>
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<tr>
<td>Atlanta, GA</td>
<td>31 May</td>
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<tr>
<td>Pittsburgh, PA</td>
<td>6 Jun</td>
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<tr>
<td>Dallas, TX</td>
<td>20 Sep</td>
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<tr>
<td>Detroit, MI</td>
<td>6 Nov</td>
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<tr>
<td>Washington, DC</td>
<td>29 Nov</td>
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<tr>
<td>Los Angeles, CA</td>
<td>5 Dec</td>
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<tr>
<td>Chicago, IL</td>
<td>6 Dec</td>
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<tr>
<td>Boston, MA</td>
<td>13 Dec</td>
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</table>

### International Roundtables

<table>
<thead>
<tr>
<th>City</th>
<th>Dates</th>
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<tbody>
<tr>
<td>London</td>
<td>29 Feb - 1 Mar</td>
</tr>
<tr>
<td>Toronto</td>
<td>27 Sep</td>
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<tr>
<td>Melbourne</td>
<td>12-13 Sep</td>
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### Innovation Forums

<table>
<thead>
<tr>
<th>City</th>
<th>Date</th>
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<tbody>
<tr>
<td>Toronto</td>
<td>26 Jan</td>
</tr>
<tr>
<td>San Francisco, CA</td>
<td>6 Sep</td>
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<tr>
<td>New York, NY</td>
<td>25 Sep</td>
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### International Outsourcing Expeditions

<table>
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<tr>
<th>City</th>
<th>Date</th>
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<tbody>
<tr>
<td>Changsha, China</td>
<td>7-9 Jun</td>
</tr>
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</table>

**Regional Roundtables** are intimate gatherings that provide education and local networking for members and invited non-member buy-side companies. In North America, Regional Roundtables are one-day events that enable buy-side SIG members and prospective members to converse in a collegial, non-commercial environment.

**International Roundtables** are similar to the Regional Roundtables in that they provide attendees with the benefits of networking and the sharing of best practices, but follow a slightly different format with a 1 ½ day agenda that typically includes an evening networking event and buy-side panel discussions in addition to the provider member speaking and sponsoring slots.

**International Outsourcing Expeditions** allow us to bring buy-side delegates to different outsourcing destinations, where we facilitate conversations with trade ambassadors, local providers and other country officials to better understand the cultural, political and legal implications of doing business there. Our first event will take place this summer in Changsha, China.

**Innovation Forums** are a hybrid between our Regional events and a SIG Summit, in that they include a featured buy-side presentation, concurrent breakout sessions, deep-dive analyst overviews and networking opportunities. These events are held in several of our larger North American metropolitan areas.

SIG events are held both domestically and internationally in cosmopolitan business centers to obtain the best level of attendance.

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**Note:** Calendar dates subject to change upon determination of host site
**Hotel**

**Hyatt Regency Jersey City**

The Hyatt Regency Jersey City on the Hudson, is the home to SIG’s 41st Global Sourcing Summit. This waterfront hotel offers the ambiance of a harbor village and the amenities of New York City, and is the area’s only AAA Four Diamond property. The luxurious guest rooms each have dramatic views of the Hudson River and lower Manhattan. These premier accommodations offer the best of both worlds—stunning skylines and easy access to Manhattan by boat or PATH train for sightseeing, shopping, theatre and museums.

**SIG’s Complimentary Spouse Program**

Sourcing Interests Group wants your significant others to enjoy the Summit too. Spouses are invited to join us for all meals, general sessions and entertainment, beginning with the kick-off Welcome Reception Tuesday night.

On Wednesday, breakfast is available, followed by a keynote presentation by Susan Schwab, Professor, University of Maryland and former Trade Representative. Following the General Session, the spouses have a special day planned with a guided tour/orientation drive to area highlights such as: Chelsea, Madison Square Garden, Times Square, Rockefeller Center, 5th Avenue, St. Patrick’s Cathedral, the Empire State Building, Greenwich Village, Little Italy and Chinatown. We will have time for personal reflection as we walk through the 9/11 Memorial at Ground Zero and will cap off the afternoon with lunch at Fino’s Italian Restaurant before returning to the Hyatt. Dinner and entertainment Wednesday night are not to be missed.

On Thursday, we invite your spouse to join us again for breakfast and Thursday’s keynote speaker, Colonel Bernard Banks, who will talk about developing character-based leaders. Thursday night, your significant other is invited to join us as we take a cruise on the Hudson and take in the NYC skyline from the water.

**Tuesday**
- Welcome Reception at the Hudson Ballroom Foyer

**Wednesday**
- Breakfast in the Hudson Ballroom
- Keynote Session featuring Susan Schwab, Professor of Public Policy, University of Maryland and Former U.S. Trade Representative and Presidential Cabinet Member
- Half-Day Excursion. Depart at 9:45 for a guided tour to some of the most notable New York City sites, followed by lunch at Fino’s Italian Restaurant. Return to the Hyatt by 2:00 pm. Sign-up for this complimentary event at the Registration Desk
- Dinner and Entertainment

**Thursday**
- Breakfast in the Hudson Ballroom
- Keynote Session featuring Colonel Bernard Banks, Ph.D., Deputy Department Head (Chief Operating Officer), Department of Behavioral Sciences and Leadership, West Point
- Boat Cruise on the Hudson
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SIG

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Ashwin Rao  
Collabera

Regina Sanfratello  
CA Technologies

Pamela Schott  
Bank of Montreal

Kate Vitasek  
University of Tennessee

Ted Weyn  
HCMWorks
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Collabera

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Corporate United

Corporate United is a member-based organization whose mission is to advance the collective spend management efforts of its member companies; it achieves this by combining access to market-leading leveraged agreements and the application of category lifecycle management (CLM). Through its CLM process, Corporate United handles the ongoing management of the contracts and suppliers across its more than 25 pre-negotiated indirect agreements. Corporate United is comprised of more than 175 member companies, spanning every industry sector and representing over $50 billion in aggregated indirect spend. For more information, contact us at 440.895.0938 or by visiting our website at www.corporateunited.com.
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Come learn about the category management journey at Blue Cross Blue Shield of Florida — A practical overview for initiating category management

Denise Kemp, Blue Cross Blue Shield of Florida
Doug Farrell, Ernst & Young LLP

Wednesday, March 29
10:30 a.m. - 11:20 a.m.
Session 25, Harborside
As companies once again start to prepare for renewed growth in what is likely to be a protracted recovery period, having an enterprise-wide perspective on process effectiveness may contribute substantially to overall company performance. However, the increasingly global nature of markets and business operations adds complexity to many companies’ efforts to manage business processes end-to-end. Coordinating the multitude of processes that support different business units in different locations can become a daunting challenge.

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While in Changsha, we will conduct meetings with Trade Ambassadors, make site visits, and educate our participants on legal and cultural issues. Changsha welcomes buyers who want to purchase services from Chinese vendors. US-based service providers who are looking for Chinese partners and/or investment opportunities are also invited. Participants will be introduced to provider member companies with offices in China, allowing them to leave with valuable in-country contacts and expertise in governance, cultural and business concerns. Changsha was selected as our inaugural IOE destination for a variety of reasons:

• Changsha is one of 21 model cities for outsourcing in China
• Fifteen of the top service outsourcing companies have selected Changsha as one of the best locations for doing business
• Changsha is the capital city of the Hunan Province, which represents three different governments, providing them with significant resources to invest in the growth of their region for outsourcing
• 73 high-tech parks and economic development zones are located in the Hunan Province

During the IOE, participants will have the opportunity to tour provider sites. Through these site visits, SIG will facilitate introductions to help ensure a successful start for companies considering outsourcing in these offshore locations, as well as to provide continued education for companies who are already doing business there.
Allegis Group Services offers human capital and workforce management solutions to clients in a wide range of industries. We assist you in maximizing the efficiency and effectiveness of your programs while bringing industry best practices and world class service to every engagement.

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