

Hit the high notes Tuning into the opportunities

Annual Shared Services and Business Process
Outsourcing Conference

Four Seasons Hotel, Dublin, Ireland
13-14 October 2010



Welcome



Dear Colleague,

As companies dare to look towards brighter economic conditions, Shared Services Centres (SSCs) need to position themselves to respond quickly to the growth aspirations of the businesses they support.

Whilst the focus on cash and efficiency will not disappear, shared services leaders need to tune into the opportunities presented by multi-functional business services, responsive technologies, cost effective locations and value-adding Business Process Outsourcing (BPO). In doing so, SSCs can transform themselves into true Business Partners.

The 2010 Deloitte Shared Services and BPO Conference will bring together business leaders from companies including: **BP, JT International, Bombardier Transportation, Aviva, Sony Pictures Entertainment, Pearson, Oracle, Eaton, Dell, AP Moeller Maersk, Pfizer, Marks & Spencer and Yahoo!** to reveal how they have exploited the opportunities available to them.

Topics you won't want to miss include:

- How to speed up benefits realisation.
- Increasing the impact of your shared services centre by moving from a local or regional, to a global approach to service delivery.
- Harmonising your enabling technologies in order to create touch-less processes.
- Customer services innovation in the context of shared services.
- Taking finance transformation beyond the realms of shared services.
- Shared services and BPO: creating a joined up approach to enable a seamless offering.

New this year: Shared Services Leaders Panel

For our 2010 conference, we're also pleased to introduce the Shared Services Leaders Panel. The Leaders Panel consists of three shared services practitioners with combined experience of more than 64 years. They are: Geoff Lewins, Director of Financial Strategy, **Rolls-Royce**; Jo Hart, Director of Shared Services Finance, **A&N Media Finance Services Ltd**; and Kirk Wilkenson, Director Business Process Architecture & Change, Shared Services, **Colt Technology Services**. Our Leaders Panel will be your voice during the plenary sessions – asking the sort of questions of our speakers that you always wished you asked but didn't dare. Meet the Leaders Panel on page 19 of this brochure.

Attendance at the Annual Shared Services and BPO Conference is free of charge to invited delegates - with last-year's event over-subscribed, act now to secure your place and avoid disappointment.

Register today at:

www.deloitte.com/ie/sharedservicesconference2010

Peter Moller, Partner
Deloitte

Shane Mohan, Partner
Deloitte

Main conference sponsor:



Conference Planner

Day 1 - Wednesday, 13 October

The conference planner is designed to provide you with a short overview of the conference agenda. Use it to navigate quickly and easily through the programme, and to select the sessions that sound right for you.

For more detailed information on each of the sessions, please turn to pages 5 to 17. Look out for the symbols below, which will give you an indication of the content of the interactive sessions.



09.00	Introduction and current market assessment. <i>Peter Moller & Shane Mohan, Deloitte</i>
09.45	Plenary 1: Unlocking value from your outsourcing service partners through captive centres of excellence. <i>Philip Whelan, Head of Business Services Centre Europe, BP</i>
10.25	Plenary 2: Moving from a local to a global approach to shared services. <i>Mattijs Backx, Vice President Global Business Service Centres, JT International; Olivier Guitton, Vice President, Finance Shared Services, Bombardier Transportation; Mickey Corcoran, Senior Vice President Global Shared Services, Sony Pictures Entertainment</i> <i>Facilitated by: Elias van Herwaarden, Deloitte</i>
11.10	The evolution from shared services to global business services in Ireland. <i>Dermot Clohessy, IDA Ireland</i>
11.20	Coffee and networking break.
11.45	Breakout sessions: 55 minutes.
	1: How far can you push the scope of your shared services centre? <i>John Ashworth, Managing Director & Marc Williams, Finance Director, Pearson Shared Services</i>
	2: The evolution of a global shared services model: Achieving globalised processes and technology. <i>Maria Smith, VP - Global Controller Operations, Oracle Corporation</i>
	3: Cleaning up your processes: How lean can you get? <i>Stuart Clark, GL Process Leader, Financial Shared Services EMEA, Eaton Limited</i>
	4: Adopting a local-country statutory reporting strategy that works for your shared services centre. <i>Steve Foster, Senior Tax Director & Kieran McDaid, Accounting & Compliance Director, Dell; and Chris Platteeuw & Claus Madsen, Deloitte</i>
12.40	Lunch and networking. Sponsored by Ariba.
14.00	Special interest sessions: 75 minutes.
	1: Assessing the feasibility of implementing shared services. <i>Christian Hagman, Susana Cambeiro-Gesto & Eugene Lynch, Deloitte</i>
	2: Managing the design of and migration to shared services. <i>Dorthe Keilberg & Jeppe Larsen, Deloitte</i>
	3: Business Partnering: What does your business want from Finance? <i>Nick Prangnell & Iris Yates, Deloitte</i>
	4: Sustainable shared services governance – more than just SLAs. <i>David Wright & Juliana Seah, Deloitte</i>
	5: Site visit: Oracle Global Controller Operations.
15.15	Networking break.
15.40	Plenary 3: Using shared services as a key enabler of finance transformation and customer engagement. <i>Steve Hampson, Head Of Finance Operations Shared Services, Aviva</i>
16.20	Plenary 4: Case study of a rapid shared services implementation: 100 countries in 18 months. <i>Karsten Lund, Director – Finance & Accounting Processes, Global Service Centres, AP Moeller Maersk</i>
17.00	Quick tempo introduction to Hungary. <i>ITD Hungary</i>
17.05	Leaders panel session: Emerging trends in shared services and lessons learned from the day. <i>Geoff Lewins, Director of Financial Strategy, Rolls-Royce; Jo Hart, Director of Shared Services Finance, A&N Media Finance Services Ltd; Kirk Wilkenson, Director Business Process Architecture & Change, Colt Technology Services, Dermot Clohessy, Executive Director-Business Development, IDA Ireland</i> <i>Facilitated by: Derek Moriarty, Deloitte</i>
17.35	Summary and close of day 1.
18.30	Depart for evening event – The Royal Hospital, Kilmainham.

Day 2 - Thursday, 14 October



09.00	Introduction to day 2. Peter Moller & Shane Mohan, Deloitte
09.05	Plenary 5: Balancing shared services and BPO to speed up finance transformation. Keith O'Neil, Managing Director, Global Shared Services & Nigel Coffey, Service Delivery Director, Pfizer
09.45	Panel discussion: The tempo of change: Are you taking advantage of the opportunities BPO has to offer? Philip Whelan, Head of Business Services Centre Europe, BP ; Nigel Coffey, Service Delivery Director, Pfizer ; Kaushik Guha, Senior Vice President, Finance & Accounting, WNS ; Punit Bhatia, Deloitte . Facilitated by: Peter Moller, Deloitte
10.30	Coffee and networking break.
10.55	Special interest sessions: 75 minutes. <ul style="list-style-type: none"> 1: Shared Services as part of a larger finance transformation agenda. John Haughey & Claus Madsen, Deloitte Input from Fiserv (Conference Sponsor) 2: Is it feasible to implement shared services in a small to medium sized organisation? Shane Mohan, Michael Regan & Andy MacDonald, Deloitte 3: How shared services can contribute to cost reduction in the Public Sector. Roelant Reijmerink & Werner Mullink, Deloitte 4: Harmony and incentives: Creating a win-win situation with your BPO provider through vendor selection and contracting. Punit Bhatia, Tom Hynes & Mandeep Gill, Deloitte. Input from TCS (Conference Sponsor) 5: Site visit: Pfizer shared services centre.
12.10	Lunch and networking. Sponsored by Ariba.
13.20	Breakout sessions: 55 minutes. <ul style="list-style-type: none"> 1: Harmony or dissonance: How locations can make or break the shared services centre's success. Mattijs Backx, Vice President Global Business Service Centres, JT International; Elias van Herwaarden & Alexander Hodac, Deloitte 2: Creating focus and enthusiasm around process improvement. Andrew Smith, Finance Programme Office Manager & Lucy Wilson, Head of Operations and Service Management, Marks & Spencer 3: Lean Six Sigma in a shared services environment. Peter Jordan, Deloitte 4: Black, white or grey: The change management imperative for shared services and outsourcing. Deborah Kops, Chief Marketing Officer, WNS
14.15	Networking break.
14.35	Plenary 6: How to integrate BPO into your shared services delivery model. Dan McCarthy, VP Finance and EMEA Controller, Yahoo!
15.15	Plenary 7: From accounting hub to profit making business services centre: How the shared services centre's passion for excellence contributed to business success in a difficult market. Gary Critchley, Head of Business Services & Information, Marks & Spencer
15.55	Summary and close of conference.

Detailed Agenda: Day 1

Wednesday, 13 October



Shared Services
feasibility and
set up



BPO



Shared Services
optimisation



People and
culture



Technology



Site visit



Other

09.00 Introduction and current market assessment. *Peter Moller & Shane Mohan, Deloitte*

09.45 **Plenary 1: Unlocking value from your outsourcing service partners through captive centres of excellence.**

BP has a number of outsourcing services partnerships (OSPs) established on a multi-tower basis across Finance, IT, Customer Services and general back office administration functions, and is regarded as one of the pioneers of outsourcing. With thousands of employees engaged through various OSP relationships, BP has a multi-geographic delivery model across Asia, Europe and the United States. In the past few years, BP has also expanded this strategy to include the establishment of dedicated centres of excellence which they call Business Service Centres (BSCs).

Philip Whelan joined the BP team in February 2009 with a remit to establish a European BSC as well as drive the global BSC platform. His work has resulted in the creation of a governance model focused on achieving better integration between the OSP partners and BP's BSCs. In his presentation, Philip will provide some context on this operating model, including:

- The BP services landscape: OSPs and captive BSCs - the challenges BP faces.
- How the governance model has evolved: Aligning goals, objectives and collaboration between the OSPs and the BSCs.
- Development of the BSC in Budapest: How BP splits process delivery between BSCs and OSPs.
- Why the big savings come from unlocking the value of your centres rather than through labour arbitrage.
- How to ensure the service appears 'joined up' to your customers.

Philip Whelan, Head of Business Services Centre Europe, BP

10.25 **Plenary 2: Moving from a local to a global approach to shared services.**

The majority of companies typically start off with a regional or local SSC and gradually move towards a global approach. However, the last few years have seen some instances of companies increasing the speed of transition by moving directly from fragmented in-country processes to global shared services organisations (SSOs). This session brings together a number of shared services leaders to cover:

- What level of risk do you face when moving directly from a local or regional, to a global SSO?
- What level of labour arbitrage opportunities can be achieved?
- Which locations work for global SSOs?
- How do you ensure your target operating model (TOM) is aligned to your company vision?

Mattijs Backx, Vice President Global Business Service Centres, JT International

Olivier Guitton, Vice President, Finance Shared Services, Bombardier Transportation

Mickey Corcoran, Senior Vice President Global Shared Services, Sony Pictures Entertainment

Facilitated by: Elias van Herwaarden, Deloitte

11.10 **The evolution from shared services to global business services in Ireland.**

During this session Dermot will comment on the evolution of shared services that IDA has observed over the last 25 years, and highlight what Ireland has to offer.

Dermot Clohessy, IDA

Detailed Agenda: Day 1



11.20 Coffee and networking.

11.45 **Breakout sessions. 55 minutes.**

Breakout sessions are designed to give delegates the opportunity to explore specific topics in detail. Most of the breakout sessions are case study led and will be facilitated by a shared services practitioner. A Deloitte expert will also be present in all sessions to conduct discussion and debate amongst participants.



Breakout 1: How far can you push the scope of your shared services centre?

The scope of the SSC at Pearson has grown by stealth rather than by design. Despite this, it is a shining example of what can be achieved with the right level of determination, business sponsorship and change management skills. Today, the process scope includes: finance & accounting, customer services, IT, procurement, supply chain management, facilities management and distribution.

During this session, John and Marc will challenge your perception of what can be delivered from a SSC. Specifically, they will share their experiences of the Pearson approach to transitioning and reengineering processes. Topics will include:

- Looking at activities which can be run remotely: What if you had no preconception of what should be in scope for shared services?
- How do you get buy-in from the business once you have gone beyond the remit of transaction-based finance processing?
- Pearson's approach to moving activities into the centre: Does one size fit all in terms of managing transitions?
- How Pearson is taking the centre to the next level of maturity by mixing in BPO.

*John Ashworth, Managing Director & Marc Williams, Finance Director, **Pearson Shared Services***

*Discussion facilitated by: Kim Burton, **Deloitte***



Breakout 2: The evolution of a global shared services model: achieving globalised processes and technology.

Oracle Corporation first adopted shared services almost 20 years ago. Since then, it has evolved its operating model into a highly effective and value-adding organisation. This session charts the evolution of shared services in Oracle, from regionally based SSCs in the late 1990s, to a global hub in 2010. Maria will also discuss key enablers, such as:

- How globalised processes and technology enabled Oracle to achieve streamlined transaction processing.
- How Oracle has effectively organised its 'controllership functions' such as tax and compliance.
- How the SSC contributes to acquisition accounting and management.
- How Oracle has turned the spotlight onto continuous improvement.

*Maria Smith, VP - Global Controller Operations, **Oracle Corporation***

*Discussion facilitated by: Alan Flanagan, **Deloitte***

Detailed Agenda: Day 1



Breakout 3: Cleaning up your processes: How Lean can you get?

The Eaton SSC was set up 12 years ago and is well respected for its ongoing success in driving productivity savings and achieving Lean Six Sigma processes both within the SSC itself and across the business.

Robust IT systems that enable Eaton to track productivity to a detailed level, as well as process automation have been key enablers of success. However, it is the SSC's focus on business process improvement underpinned by Lean Six Sigma tools, which has enabled it to gain the trust and respect of the business.

During this discussion-based session, Stuart will talk about how Eaton employs Lean Six Sigma, share examples of tools which has been adapted for use by the SSC team, and answer questions on:

- The Business Process Improvement (BPI) approach to process improvement.
- How Eaton engages the business in all process improvement.
- Process improvement tools that work best in a shared services context.
- What Eaton has achieved.

Stuart Clark, GL Process Leader, Financial Shared Services EMEA, Eaton Limited

Discussion facilitated by: Laura Okafor-Withers, Deloitte



Breakout 4: Adopting a local-country statutory reporting strategy that works for your shared services centre.

While you may have centralised your finance and tax function in a SSC, you are not off the hook with regards to local regulations including: local statutory accounts filing, indirect tax and corporate income tax returns, company secretarial and payroll. It is not surprising, therefore, that these regulations pose some of the most significant barriers to delivering a truly centralised finance and tax function. During this session, with input from Steve and Kieran from Dell, Chris and Claus will examine the different models that companies have adopted in order to comply with local statutory reporting requirements. Specifically the session will cover:

- How far can centralisation be applied to the local statutory functions? What models exist?
- How can you identify and overcome the biggest obstacles to 'staying legal' after a migration?
- How can you ensure that your management reporting runs smoothly in centralised and outsourced models?
- What is considered best practice in terms of effective interaction between shared services, global finance, corporate income tax and indirect tax groups?

Steve Foster, Senior Tax Director & Kieran McDaid, Accounting & Compliance Director, Dell

Chris Platteeuw & Claus Madsen, Deloitte

12.40

Lunch and networking. Sponsored by Ariba.

Detailed Agenda: Day 1



Shared Services
feasibility and
set up



BPO



Shared Services
optimisation



People and
culture



Technology



Site visit



Other

14.00

Special interest sessions: 75 minutes.

The special interest sessions enable presenters to explore topics in more detail with delegates in an interactive format. Delegates will also be invited to bring their own experiences to the table, raise specific challenges, or share best practice.



Special interest session 1: Assessing the feasibility of implementing shared services.

During this session, Christian, Susana and Eugene will provide practical insight into conducting a shared services feasibility study, including:

- How to articulate your strategic objectives: Why shared services and why now?
- How to structure your feasibility study: What do you need to include in your feasibility study and when should you do it?
- How to devise an appropriate scope for your study: Which geographies, business units and processes should be in scope?
- How to develop a business case: What costs should you include in the business case and what should you include in terms of non-financial factors?
- How to take the step from feasibility to implementation: At what point do you engage the business?

Christian Hagman, Susana Cambeiro-Gesto & Eugene Lynch, Deloitte



Special interest session 2: Managing the design of and migration to shared services.

During the migration to a SSC, many activities take place at the same time. You will need to transfer knowledge, handle your stakeholders and plan for the cut over - usually at the same time that the retained organisation is struggling to deliver everyday services. During this session, Dorthe and Jeppe will talk you through the migration lifecycle, focusing in particular on what they consider the 'pain points' and how you can plan ahead:

- Migration, road maps and major milestones: Is there a generic approach?
- Knowledge transfer, tools and techniques: Have you got your toolbox set up?
- Language: Is English ambitious enough or do your stakeholders require more?
- Migration pain points, risks and mitigations: Can you plan for everything?
- Designing the local organisation: Lights out, re-design, or leave it?
- The new team structure, knowledge transfer, and skills: How do you integrate the new team?
- Culture, new and old: Should you mix it up or start from scratch?

Dorthe Keilberg & Jeppe Larsen, Deloitte



Special interest session 3: Business Partnering: What does your business want from finance?

In 2009, Deloitte conducted in-depth interviews with business leaders to get a real perspective of how well finance and shared services directors are performing in their role as Business Partners. This session will give you detailed insight into the research – revealing how your customers think you could do better, and providing you with hints and tips on how to make Business Partnering work when you get back to the office.

Whether you are implementing or optimising shared services, real value can be gained or lost from Business Partnering, so don't miss out on the opportunity to discover:

- What is Business Partnering?
- What are the activities that you can perform from the SSC that are most valued, and which can make a real difference?
- Self-evaluation and how your organisation stacks up.
- Takeaways to implement next week.

Nick Prangnell & Iris Yates, Deloitte

Detailed Agenda: Day 1



Special interest session 4: Sustainable shared services governance – more than just SLAs.

Which elements of your governance and service management framework do you really need in order to manage your customers effectively? 'What gets measured gets done' is a phrase often used to reinforce the need to have clear metrics in place to govern your SSC. But how many times have you come across stories of SLAs gathering dust on shelves, or shared services directors sending out detailed performance reports – only to find no one reads them?

During this session, David and Juliana will take a fresh look at SSC governance and service management in order to identify the key elements that will work for you, your customers and your team. Discussion topics will cover:

- How to meaningfully manage your operational service delivery while delighting your customers.
- How to build an organisation and culture that supports your strategy and helps balance stakeholder demands.
- The range of processes, tools and techniques that you can employ to ensure success.
- Why a charge-back model should be about more than simply allocating cost.

David Wright & Juliana Seah, Deloitte



Site visit: Oracle Global Controller Operation.

During this session, you will be able to benchmark your organisation against Oracle's technology-savvy centre in Dublin. Find out what is possible with the right enabling technologies.

Year set up: 1995; **Number of FTE:** 180; **Geographical scope:** global; **Process scope:** statutory and tax accounting and reporting, controllership, acquisition accounting, project management, M&A Financial Integration.

Visit facilitated by: Clare Simmonds, Deloitte

15.15 Networking break.

15.40 Plenary 3: Using shared services as a key enabler of finance transformation and customer engagement.

In 2008, Aviva UK Life took the decision to embark on a finance transformation programme which would seek to leverage the opportunities provided by shared services and BPO. The first key stage in the transformation was to redesign the Aviva UK Life Finance operating model to create a network of high value internal and external shared services centres, outsourcing relationships and specialist service functions. The division of activities between these centres creates efficient end-to-end processes and a seamless service for customers.

During this presentation, Steve will discuss:

- The journey Aviva UK Life has been on.
- Insights into how Aviva is approaching the outsourcing of some of the higher-value processes.
- Impacts on employee and leadership engagement.

Steve Hampson, Head Of Finance Operations Shared Services, Aviva

Detailed Agenda: Day 1



16.20	<p>Plenary 4: Case study of a rapid shared services implementation: 100 countries in 18 months.</p> <p>The economic downturn in 2009 hit the container shipping industry particularly hard. This was the background against which AP Moeller Maersk initiated a huge cost reduction programme where increasing the scope of finance back office activities from 30% to 70% was one of many elements. Although AP Moeller Maersk's goals were not untypical, the speed at which it implemented its shared services was. In the space of 18 months, it successfully transitioned 100 countries into its five shared services locations in India, China and the Philippines. During this presentation, you will hear the story of what was achieved in a relatively short space of time, including:</p> <ul style="list-style-type: none">• Achieving the buy-in of the business for what was perceived as a high risk project.• Managing multiple implementations in different geographies.• Planning and managing the people aspect of the transformation.• How quickly AP Moeller Maersk stabilised and realised the savings from the shared services implementations.• Insights into AP Moeller Maersk's approach and lessons learned: Would the team do it again? <p><i>Karsten Lund, Director – Finance & Accounting Processes, Global Service Centres, AP Moeller Maersk</i></p>
17.00	<p>Quick tempo introduction to Hungary. ITD Hungary</p>
17.05	<p>Panel session: Emerging trends in shared services and lessons learned from the day.</p> <p>During the final session of the day, we will maintain the tempo of discussion with quick-fire questions and answers, during which our Shared Services Leaders Panel and Conference Sponsor, IDA, will reflect on key take-aways from the day. Discussions will cover:</p> <ul style="list-style-type: none">• What are the key trends in the market which all shared services directors should have on their agenda?• What are the key lessons from the presentations covered during the day: how can shared services directors avoid some of the pitfalls which other centres have encountered?• What are the predictions for the next 12 months? <p><i>Geoff Lewins, Director of Financial Strategy, Rolls-Royce</i> <i>Jo Hart, Director of Shared Services Finance, A&N Media Finance Services Ltd</i> <i>Kirk Wilkenson, Director Business Process Architecture & Change, Colt Technology Services</i> <i>Dermot Clohessy, Executive Director-Business Development, IDA Ireland</i> <i>Facilitated by: Derek Moriarty, Deloitte</i></p>
17.35	<p>Summary and close of day 1.</p>
18.30	<p>Depart for evening event – The Royal Hospital, Kilmainham.</p>

“The sessions were very informative and as always with these events, the networking opportunities proved most valuable.”

- BT

Evening Event, Royal Hospital Kilmainham Wednesday, 13 October

Sponsored by:



Ireland has a wealth of entertainment genres associated with its traditions and modern way of life. After a busy day at the conference, what better way to unwind than to soak up some of the sounds, tastes and hospitality that Ireland is famous for.

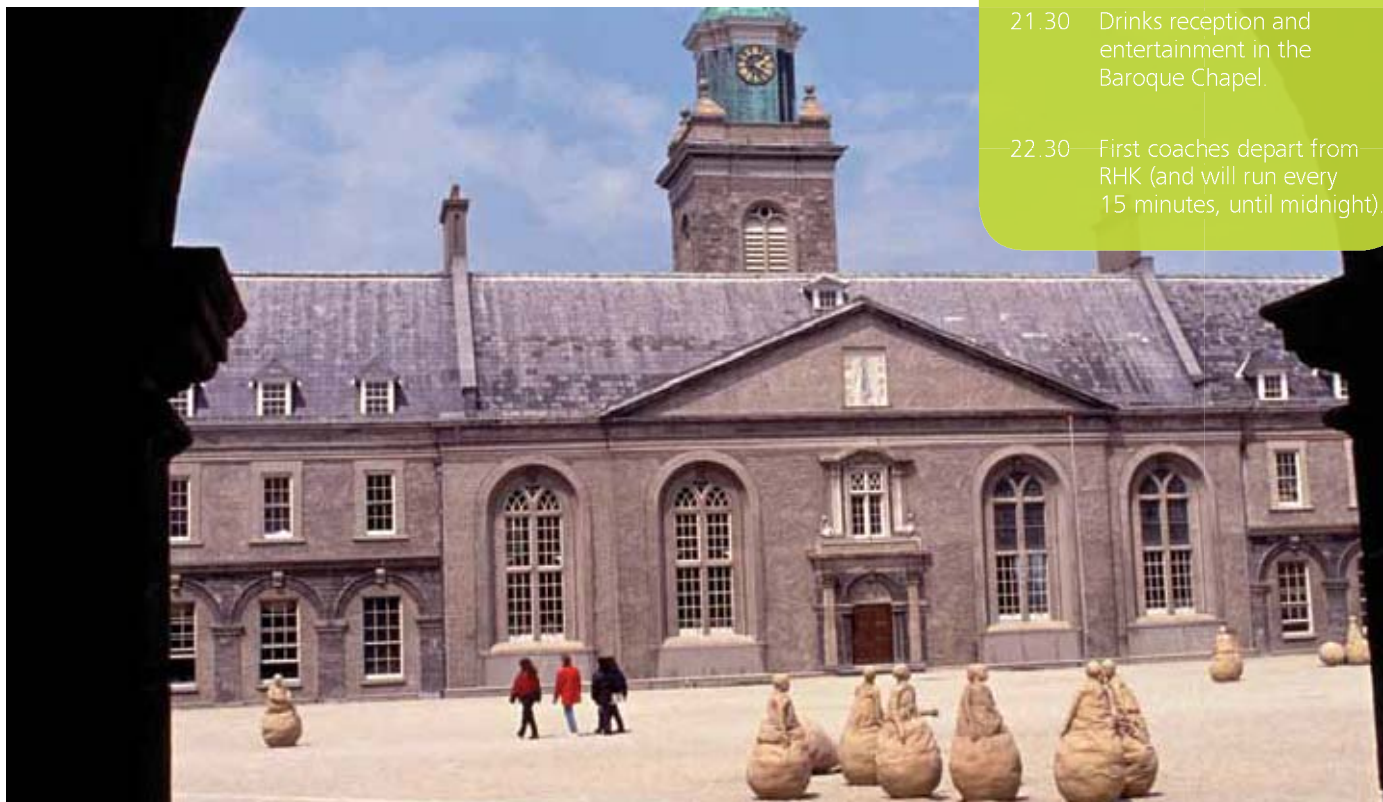
This year, the evening event will take place in the spectacular 17th century Royal Hospital in Kilmainham. On arrival in the courtyard of the Royal Hospital, you will be treated to a lively display of entertainment and traditional Irish

music. Once inside the venue, you will enjoy a drinks reception in the historical Catacombs of the building, accompanied by the smooth sounds of a jazz saxophone quartet. A sit down dinner will then be served in the Great Hall to enable you to continue networking into the night.

Coaches will depart back to the hotel in regular intervals between 22.30 and midnight.

Evening Programme

- 18.30 Departure from hotel to Royal Hospital Kilmainham.
- 18.50 Drinks reception in Royal Hospital Catacombs.
- 19.30 Dinner and entertainment in the Great Hall.
- 21.30 Drinks reception and entertainment in the Baroque Chapel.
- 22.30 First coaches depart from RHK (and will run every 15 minutes, until midnight).



The Annual Shared Services and BPO Conference evening events have developed a reputation for providing great opportunities to boost your networking in a more informal environment.

Don't forget to register for the evening event when you book your place at the conference!

Detailed Agenda: Day 2

Thursday, 14 October



09.00 **Introduction to day 2.** *Peter Moller & Shane Mohan, Deloitte*

09.05 **Plenary 5: Balancing shared services and BPO to speed up finance transformation.**

Pfizer started its shared services journey in 2003 and today has three captive SSCs in Memphis, Dublin and China, as well as three centres outsourced to Genpact in offshore locations.

Traditionally, the scope of all the centres has been finance transaction processing such as accounts payable, accounts receivable, general ledger and intercompany accounting. However, based on increased customer confidence, Pfizer is looking at evolving the captive centres into centres of excellence and increasing the scope to include decision support activities such as reporting, planning and budgeting. The captive SSCs are also playing an increasingly important role in supporting the integration of acquisitions into the business – a role which they are well placed to perform due to their ability to rapidly re-engineer and transform processes.

During this presentation, Keith and Nigel will discuss:

- How the split of activities between the captive and the BPO centres is constantly evolving.
- Challenges of managing virtual shared services teams.
- Key success factors for quickly and effectively increasing the scope of your centre (whether through internal or external acquisitions of service scope).
- The role of shared services in supporting the integration of acquisitions.

Keith O'Neil, Managing Director, Global Shared Services & Nigel Coffey, Service Delivery Director, Pfizer

9.45 **Panel discussion: The tempo of change: Are you taking advantage of the opportunities BPO has to offer?**

Whilst there are still a number of companies jumping straight to outsourcing from a decentralised back office, other companies are choosing to use BPO in a more strategic way to complement (rather than replace) an existing shared services organisation. During this lively debate, BPO companies and their customers will discuss:

- Advantages and disadvantages of moving straight to BPO.
- Can shared services and BPO exist side by side and if so, how should activities and responsibilities be split?
- How do you get governance right where you are dealing with shared services and BPO?
- Should relationships with BPO centres be managed by your core finance function, or can shared services centres take up the reins?

Panel members:

Philip Whelan, Head of Business Services Centre Europe, BP

Nigel Coffey, Service Delivery Director, Pfizer

Kaushik Guha, Senior Vice President, Finance and Accounting, WNS

Punit Bhatia, Deloitte

Facilitated by: Peter Moller, Deloitte



Detailed Agenda: Day 2



10.30 Coffee and networking.

10.55 **Special interest sessions: 75 minutes.**

The special interest sessions enable presenters to explore topics in more detail with delegates in an interactive format. Delegates will also be invited to bring their own experiences to the table, raise specific challenges, or share best practice.



Special interest session 1: Shared Services as part of a larger finance transformation programme.

Shared services in itself isn't the goal – but a strong and effective finance function is. In response to this challenge, this session looks at how organisations can position shared services as part of a wider finance transformation journey with the potential to realise benefits far beyond salary arbitrage and process efficiencies. John and Claus will take you through:

- Finance characteristics that make a difference to business performance.
- Building your Finance vision to drive continuous improvement.
- Developing a transformation roadmap that delivers benefits ahead of the SSC payback.
- Methods for ensuring transformation programmes deliver the expected outcome.

John Haughey and Claus Madsen, Deloitte

With input from Fiserv (Conference Sponsor)



Special interest session 2: Is it feasible to implement shared services in a small to medium sized organisation?

Shared services is nothing new. However, the adoption of SSCs has traditionally been restricted to large multi-national companies due to the need for scale. During this presentation, Shane, Andy and Michael will take a look at what the business case could look like for small to medium sized organisations and examine benefits that could be available even without scale. They will cover:

- Conducting a business case for shared services in a small to medium sized organisation.
- What benefits could you expect beyond the financials?
- Where should you locate your SSC?
- Is outsourcing an option?

Shane Mohan, Michael Regan & Andy MacDonald, Deloitte



Special interest session 3: How shared services can contribute to cost reduction in the Public Sector.

Over the last couple of years, there have been various studies and articles in the press which conclude that the Public Sector could save billions by implementing shared services. But in reality, how much progress has been made and who (if any) has really reaped benefits from shared services? During this session, Roelant and Werner will examine:

- Recent developments in the Public Sector.
- What is the most appropriate solution (organisation, transition, scope) for Public Sector organisations considering shared services?
- So, you've implemented shared services - but how can you really get value from it?
 - What should be your motives?
 - What level of savings can you expect?
 - How do you achieve continuous process improvement?
- Lessons learned: Case study examples of Public Sector shared services implementations.

Roelant Reijmerink & Werner Mullink, Deloitte

Detailed Agenda: Day 2



Special interest session 4: Harmony and incentives: Creating a win-win situation with your BPO provider through vendor selection and contracting.

During this session, Deloitte's Outsourcing Advisory team will take you through their experiences of setting up BPO relationships that truly hit the high notes. Specifically Mandeep, Tom and Punit will cover:

Vendor Selection:

- Evaluation criteria based on areas beyond price and capability.
- Scoring for providers who look to innovate and create win-win outcomes.

Contracting:

- Innovative pricing models, gain-share mechanisms and other commercial models to eliminate discord.
- Governance and relationship management: Designing an organisation to foster partnering vs. using your governance structures as an escalation route for fire fighting.
- Managing multiple vendors: How to bring together different providers to create harmony.

Punit Bhatia, Tom Hynes & Mandeep Gill, Deloitte

With input from TCS (Conference Sponsor)



Site visit: Pfizer shared services centre.

This is your chance to visit Pfizer's SSC in Dublin, experience an 'optimised' SSC and discover how it works with its outsource service providers.

Year set up: 2003; **Geographical scope:** 15 markets; **Process scope:** accounts payable, accounts receivable, credit & collections, record to report, intercompany, indirect tax, inventory, treasury, finance systems controls

Numbers will be capped to guarantee interactivity, so book early to avoid disappointment.

12.10 Lunch and networking. Sponsored by Ariba.

13.20 Breakout sessions: 55 minutes.

Breakout sessions are designed to give delegates the opportunity to explore specific topics in detail. Most of the breakout sessions are case study led and will be facilitated by a shared services practitioner. A Deloitte expert will also be present in all sessions to conduct discussion and debate amongst participants.



Breakout 1: Harmony or dissonance: How locations can make or break the SSC's success.

The credit crunch has pushed an ever larger number of corporations to either consider shared services for the first time, or reassess existing shared services structures. Unsurprisingly, shared services leaders are forced to seek new locations that will deliver. The decision trade-offs are complex and multiple: some locations may give you access to cost savings immediately but could lack scalability for future scope extension; labour arbitrage advantages may quickly erode as shared services destinations mature at an ever-increasing speed.

This breakout session will take a deep dive into the topics of Wednesday's second plenary session "Moving from a local to a global approach to shared services". JT International's Mattijs Backx who has set up 5 SSCs around the globe and Deloitte's site selection professionals will share the latest thinking around:

- How the credit crunch reshuffled the location options for SSCs.
- Global location trends: the outlook for Central Europe as a SSC destination.
- Location tactics for multi-functional SSCs and Centres of Excellence.
- Myths and facts about cultural proximity and language skills in SSC location selection.
- Location risk: what you should really be concerned about when selecting your SSC destination and how you can mitigate risks.
- From prime city to phase-in: lessons learned from setting up SSCs in so-called 'Under-the-Radar' locations.

Mattijs Backx, Vice President Global Business Service Centres, JT International

Elias van Herwaarden & Alexander Hodac, Deloitte

Detailed Agenda: Day 2



Breakout 2: Creating focus and enthusiasm around process improvement.

To support the business through the current economic climate, the Marks & Spencer (M&S) SSC stepped up its game and drove both cash flow benefit and income direct to the income statement. During this session, M&S will share with you the tools and techniques that were implemented in order to make the transition to strategic Business Partner and most importantly, how it ensured the team contributed to the success of the initiative. Specifically, Andrew and Lucy will discuss:

- Building an environment focused on continuous improvement.
- Using Lean Six Sigma.
- How M&S SSC has added both cash flow and bottom line benefit to the wider retail business.

Andrew Smith, Finance Programme Office Manager & Lucy Wilson, Head of Operations and Service Management, Marks & Spencer

Discussion facilitated by: Cormac Hughes, Deloitte



Breakout 3: Lean Six Sigma in a shared services environment.

One of the reasons that BPO organisations often manage to be more efficient than shared services centres is undoubtedly the widespread use of Six Sigma and Lean Six Sigma. So, what lessons can you learn from the BPO providers and how can you leverage the lean tools in your own shared services environment? Peter will take you through this practical session during which he will discuss:

- Why use Lean Six Sigma rather than traditional business process reengineering techniques in shared services? Which tools are most appropriate for shared services?
- What outcomes can or should be expected from Lean Six Sigma?
- Where can Lean Six Sigma fail to deliver, what are the critical success factors?
- How do you ensure sustained results after a Lean Six Sigma project?
- What scale is required to justify having an internal Lean Six Sigma team (in a shared services environment)?

Peter Jordan, Deloitte



Breakout 4: Black, white or grey: The change management imperative for shared services and outsourcing.

For some outsourcing or shared services implementations, change management is perceived to be about communications only, or becomes an afterthought for HR. Yet a recent study of over 250 corporate shared services and outsourcing clients indicates that change management constitutes the greatest challenge when moving to shared services or outsourcing. This inability to change culture and behaviour in the aftermath of a shared services or BPO implementation can often be the reason why many organisations fall short of achieving the anticipated business case savings. During this workshop, Deborah will discuss:

- The real purpose of change management.
- Why change management for shared services and outsourcing is “revolutionary” rather than “evolutionary”.
- Risks to implementation and sustainability when change management principles are not incorporated in every phase of the sourcing journey.
- Innovative strategies for inducing change.

Deborah Kops, Chief Marketing Officer, WNS

Discussion facilitated by: Emma Lawson, Deloitte

Detailed Agenda: Day 2

14.15 Networking break.

14.35 **Plenary 6: How to integrate BPO into your shared services delivery model.**

Yahoo! makes considerable use of BPO in its overall shared services delivery model, enabling its retained organisation to focus on process management, governance and improvement, and also tier one accounts. In this session Dan will discuss:

- Yahoo!'s evolution to a hybrid delivery model.
- The vendor selection and management process.
- How the captive operation can now focus on process management.

Dan McCarthy, VP Finance and EMEA Controller, Yahoo!

15.15 **Plenary 7: From accounting hub to profit making business services centre: How the shared services centre's passion for excellence contributed to business success in a difficult market.**

In 2003, Marks & Spencer (M&S) centralised its finance and accounting activities as a cost saving initiative, in a centre in Salford, Greater Manchester. Three years later, a new management team was brought in and since then the team has evolved the centre from an accounting hub into a cost efficient and value-adding SSC. The onset of the credit crunch created a need for the centre to reinvent itself again, and by creating a strong focus on continuous process improvement enabled by Lean Six Sigma, the team were able to take on new business, expand the scope beyond finance processing and become a profit making business services organisation. During this presentation, Gary will discuss this journey, specifically:

- How M&S elevated its position from accounting hub to business services centre.
- How the centre achieves year-on-year efficiency savings.
- What Business Partnering means for the M&S business services centre.
- Ensuring your team acts as the catalyst for change: Lean Six Sigma at M&S.
- The 2013 Business Strategy: How the business services centre will continue to evolve.

Gary Critchley, Head of Business Services & Information, Marks & Spencer

15.55 Summary and close of conference.

“It was a great opportunity to meet other shared services organisations with similar programmes and objectives. I made contact with one particular organisation and we had follow up discussions about our P2P projects that were beneficial to us both. Well worth attending the conference for that opportunity”

- GSK

Information

Conference dates	13-14 October 2010.
Language	English.
General information	The two day conference and evening event including refreshments, is free of charge to invited delegates. Other costs such as travel, accommodation and general expenses are the responsibility of the individual delegate.
Venue	Four Seasons Hotel, Dublin.
Registration	To register for the conference and to reserve your accommodation please visit our website and complete the online registration form: www.deloitte.com/ie/shareservicesconference2010 . If you have any queries in relation to registration please email Deloitte's event organisers at deloitteconference@mci-dublin.com . Please note, registration closes on 4 October. Please book early to avoid disappointment.
Accommodation	<p>The Four Seasons €133.75 single B&B Simmons Court Road, Ballsbridge Dublin 4, Tel: +353 1 6654000 www.fourseasons.com.</p> <p>Herbert Park €128.25 single B&B Ballsbridge Dublin 4, Tel: +353 1 6672200 www.herbertparkhotel.ie.</p> <p>Bewley's Hotel €85.45 single B&B Merrion Road Ballsbridge Dublin 4, Tel: +353 1 6681111 www.bewleyshotels.com.</p>
Location & transport	The hotels are located on the south side of the city, approximately 30 minutes by taxi from Dublin airport, or 15 minutes by taxi from the city centre. If you are coming by car, parking is available at all of the above hotels.
Currency	The local currency is Euros.
Attire	Casual business attire is recommended for the conference and evening event.
Weather	By October, the weather should be cool, with average temperatures of around 11°C degrees. Make sure you wrap up warm if you intend to do any sightseeing as part of your trip!
Event coordinator	If you have any general queries about the conference, please contact Zack Deasy at Deloitte on: Tel: +353 1 4173801. Email: zdeasy@deloitte.ie .



Leaders Panel

The Leaders Panel will be your voice during the plenary sessions - asking key questions of our speakers on your behalf.

Jo Hart A&N Media Finance Services Ltd

Jo Hart, Director of Shared Services Finance at A&N Media, is currently leading the expansion of the finance service centre to migrate more business units into the centre and increase the range of services offered to include finance activities, payroll, and procurement.

Jo has specialised in shared services for 20 years. This has included the management and leadership of starting, developing, expanding and, in the case of Arthur Andersen, closing, multi functional centres across many countries in a number of blue chip companies. Jo has also led a feasibility project for a Dow Jones company assessing the options for outsourcing and off-shoring the existing SSCs in North America and Eastern Europe.

As a Chartered Accountant, Jo understands the importance of the numbers, and getting it right first time, every time. He also believes that shared service operations can make a difference in organisations and ultimately can deliver competitive advantage when appropriately positioned, resourced and structured.

Geoff Lewins Rolls-Royce

Geoff Lewins is Director of Finance Strategy at Rolls-Royce, where he is responsible for the Company's global finance transformation programme. A key enabler in this programme is leveraging the shared service model up the finance value chain, as well as along the end-to end process.

Geoff is a Chartered Accountant and, after a period in public practice he joined Rolls-Royce. In the 24 years that Geoff has worked for Rolls-Royce, he has carried out a variety of roles covering audit, systems implementation, financial control and business improvement including implementation of Rolls-Royce's successful UK finance shared service centre. His experience in both successful and less successful projects have convinced him that, in addition to delivering benefit as a standalone project, shared services can be a powerful aid to deploying and embedding change.

Kirk Wilkenson Colt Technology Services

Kirk Wilkenson, Director of Business Process Architecture and Change for Colt Technology Services, is leading transformation initiatives for Colt to improve efficiency and effectiveness throughout the organisation. Kirk established Colt's captive Finance SSC in India and recently completed Colt's Next Generation Billing Initiative.

Prior to joining Colt, Kirk had extensive experience in designing, building and managing shared services in North America and Europe in industries including consumer products, entertainment, and transportation. Kirk's 20 years of business leadership also includes several senior roles in finance and IT driving global change programmes, re-engineering business processes and improving operational effectiveness.

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