

16-17 October 2003  
Hotel Metropole, Brussels

# Going head-to-head on global shared services

Shared services executives challenge consultants & service providers in a 36-hour event to thrash out ways of transforming back offices into value-added service enterprises



The definitive meeting place for those looking to capitalise on the cost benefits of creating European shared services or BPO deals

Learn and interact with our panel of global shared services leaders:

**3Com**  
**Hewlett Packard**  
**Ericsson**  
**General Motors**  
**Agilent Shared Services Centre**  
**Royal Bank of Scotland**  
**Schlumberger**  
**SBPOA**  
**BuyIT**  
**ArvinMeritor**  
**Dow Corning**  
**Goodyear Dunlop**  
**Eastern Health Shared Services Centre**  
**Barclays**

- Evaluating the challenges of creating global shared services and how to meet them
- Creating an EMEA centrally operated shared services in a company which is regionally organised
- Selecting a regional BPO provider versus an off-shore provider
- Creating a culturally diverse shared services centre to achieve real competitive advantage
- Implementing charge-backs across border to effect positive process improvements
- Moving up the value chain and the next generation of European shared services centres

Pre-conference masterclasses,  
16 October 2003:

**E-procurement for shared services**  
Facilitated by David Eakin, Professional Services Director, BuyIT

**Adding value through shared services**  
Facilitated by Nick Higgins, Corporate Scientist,

NEW FEATURE: Take part in the problem solving round table sessions designed to enable you to generate business strategies from the information shared during the conference!

# Going head-to-head on global shared services

Shared services executives challenge consultants & service providers in a 36-hour event to thrash out ways of transforming back offices into value-added service enterprises

## Here's what previous attendees have said about our events:

*"I had a wonderful time at the event and left with a wealth of knowledge and networking connections to put me in the best possible position to succeed with our shared service initiative."  
( TI Automotive)*

Dear Colleague,

As organisations become increasingly 'global' from an operational standpoint, shared services practitioners are under pressure to increase the geographical, and in some examples the services, scope of their shared services operation.

Adding to the challenge is the drive for increasing cost-effectiveness, competition from an ever-growing range of providers and a widening choice of low-cost locations.

The SBPOA European challenge is the place to tackle head-on the issues facing shared services centres of the future. Expert speakers, leaders in delivering creative solutions to the challenges of globalising shared services, will set the scene and challenge consultants and service providers to come up with solutions to help you formulate a winning strategy for your business.

Once the scene is set on day one, you will be directly involved in the debate working in small groups facilitated by expert practitioners. You will hear what your peers have to say as you identify key issues and concerns. You can select from these topics:

- Finance and accounting – implementing effectively across borders
- Shared services and adding value in M&As
- Delivering shareholder value from global and regional shared services
- Process re-engineering and self service
- Getting the change process right
- Process re-engineering and e-procurement
- European shared services

Day two is the chance to get answers from selected consultants and service providers who will draw on their experience to address your issues and concerns and provide solutions. There will be ample time to confront your particular questions face-to-face, in an informal environment where expert facilitators will focus on getting answers and sharing knowledge.

Looking forward to your participation!

**Andrew Kris**  
Chairman of the SBPOA Advisory Board

### **Pre-conference workshop A** **09.00 – 11:30am, 16 October 2003**

#### **E-procurement and payment for shared services**

E-procurement is much more than e-enabling a purchasing relationship with low-value suppliers. It also involves integrating the purchasing and payments processes, electronically connecting suppliers, automating the payments processes and so on. Choosing the right solution(s) has become complex and implementation requires reconsidering some basic business processes. Whether you are at the early stages of implementing e-procurement in shared services, or would like to maximise your existing efforts, you will have the opportunity to share best practices with BuyIT. During this workshop delegates will:

- Help develop the business case for implementation of the many elements of e-procurement
- Appreciate what e-procurement is and how it fits into shared services
- Understand the tools and options available and issues involved in choosing e-procurement applications
- Understand how to relate the use of an e-procurement tool to good purchasing practice
- Identify what can go wrong in an IT project and how to resolve problems
- Assess the support programmes needed for internal staff and suppliers

**Facilitated by David Eakin, Professional Services Director, BuyIT**  
BuyIT comprises major early adopters of e-procurement participating in a regular programme of experience sharing and benchmarking activities, and leading service providers who contribute to Guideline Development and communication.

### **Pre-conference workshop B** **09:00 - 11:30am, 16 October 2003**

#### **Adding value through shared services**

Despite an emphasis on shared services as a value adding activity, shared services practitioners continue to spend too much time on administrative and transactional activities. These activities limit them to traditional back office roles, rather than align them with strategy. Clearly further transformation is required.

This adding value through shared services workshop is designed to provide you with the experience to initiate positive change in your shared services organisation. During the workshop you will interact with Nicholas J Higgins and discuss the following issues:

- How do you make the transition from back office to a value adding function?
- Scorecard design
- How do you measure the value contribution of shared services to the business?
- How do we establish measurement as a core shared services discipline and instil a business unit mindset?

**Facilitated by Nicholas J. Higgins, Corporate Scientist**

## Day one, Thursday 16 October, 2003

- 11:30 Conference registration
- 12:00 Networking lunch
- 13:15 Chairman's introduction  
*Andrew Kris, Chairman, SBPOA*

### Creating a European / global shared services operation: what are the challenges from a process, people and technology point of view?

- 13:30 **The challenges of creating a truly global shared services organisation and how to meet them**  
Having achieved dramatic cost savings by centralising their global shared services operation into three regional shared service centres, 3Com is now looking to low-cost locations such as Singapore to add additional value to the business. During this presentation, Phil Searle will discuss why the 3Com approach to shared services has been successful to date and the following related key topics:
- Making the transition to a truly international operation: understanding local requirements and how to meet them
  - Leveraging technology to meet multiple accounting and reporting requirements (management, legal, tax and local statutory)
  - Achieving the right balance between systems, process, people and ERP strategy
  - Assessing the challenges and issues of embarking on any change project and how these can be addressed
  - Getting the migration right from a cultural point of view
  - Evaluating outsourcing today in finance and accounting and whether this can compete with an effective internal shared services organisation
  - The next generation of shared services delivery and migrating to a global shared service location

*Phil Searle, VP Finance, Head of Worldwide Shared Accounting Services, 3Com Corporation*

- 14:15 **Introducing electronic invoicing to meet shared services targets at ArvinMeritor**  
In January 2003 ArvinMeritor, a first tier component supplier to the automotive industry, made the move to shared services in France in order to streamline processes and reduce operating expenses. On recognising that shared services targets might not be met, the company wanted to deliver a 'quick win' to secure the hoped-for ROI. Consequently the company examined its operations for areas where process and costs could be improved further. It became clear that accounts payable was an area ripe for process and cost improvement. To this end ArvinMeritor made the decision to move to electronic invoicing in a bid to remove the costs and inefficiencies that processing large volumes of paper inevitably involves. In this presentation ArvinMeritor's Finance Process Improvement Manager Lidija Foley will cover:
- Evaluating electronic invoicing: the options considered
  - ArvinMeritor's chosen solution to 'the invoicing problem'
  - Cross border VAT compliance
  - Targets set and ROI seen
  - Next steps

*Lidija Foley, Finance Process Improvement Manager, ArvinMeritor*

- 15:00 Coffee and networking

- 15:20 **Creating a culturally diverse shared services centre to improve customer satisfaction and create competitive advantage**  
Agilent made the decision to consolidate order-processing functions in a shared services centre in May 1999. Following their initial successes the project was expanded

the following year to include analytical business support functions for South America, accounts payable and receivable, and finally worldwide database management.

The drivers behind the decision to centralise in Barcelona were the desire for increased quality and increased cost savings. Barcelona proved to be the ideal location due to availability of a skilled workforce, competitive employment costs, availability of quality office space at low cost, and a strong communications infrastructure. In addition, Barcelona has the capability to attract and retain the best professionals from Europe. During this presentation Carlos will discuss:

- The drivers behind the decision to consolidate the back office in Barcelona and the migration of activities and processes to the new centre
- The migration of countries to the shared services centre, including the in-country incentive schemes to assist business continuity
- Change management and cultural integration of the shared services staff
- The importance of the cultural diversity in the shared services centre and how that has created customer satisfaction and provided Agilent with competitive advantage
- How the shared services centre has accelerated the process of creating an integrated European business

*Carlos Vivas, General Manager EMEA, Agilent Shared Services Centre*

### BPO versus shared services

- 16:00 **Outsourcing locally and beyond: BPO in low cost locations**

In 2002, ACS took over the management of General Motors' outsourced shared services centre. Since then, GM have achieved an additional 25% savings on top of the 30% savings they gained when the centre was first handed over to Andersen. This is an impressive achievement for the shared services centre, which now looks after finance and accounting for fifteen different countries.

During this presentation Ulrich Hildebrand will discuss the migration to an outsourced shared services centre, in particular he will focus on the KPI's and measurements which drive best practices. He will also discuss the focus on re-engineering processes as well as further cost cutting initiatives, including the re-location of certain back office functions to low cost locations in Asia Pacific.

- Why General Motors took the decision to outsource their shared services
- What was the migration procedure GM followed to outsource their shared services?
- What were the key challenges and how did they overcome them?
- How important are measures and metrics? How did GM and ACS establish metrics which would provide GM with ROI?
- Why is GM focusing again on the re-engineering process?
- How will low cost locations add additional value to the shared services centre in Barcelona?
- India and other low cost locations

*Ulrich Hildebrand, Director of European Shared Services, General Motors*

- 16:40 Coffee and networking

- 17:00 **Creating an EMEA centrally operated shared services in a locally organised company**  
Ericsson is currently laying the foundations for a big bang migration to a single EMEA shared services operation. For a locally structured company, a centrally operated shared

services centre is contrary to the core culture and operating structure of the business as a whole. Here, Hans de Weijer will discuss the process of educating the business and achieving stakeholder buy-in which enabled them to action a 'quick and dirty' approach to shared services.

- Achieving significant cost cuts without resources: how to be creative in your shared services strategy
- Creating a single European shared services: chartering the migration process
- Re-educating the business around centralisation versus locally disparate operating units
- Getting the balance right between finance and HR, and future visions within Ericsson

*Hans de Weijer, Manager HR Services, EMEA Business Support Centre, Ericsson*

How shared services can add value in M&As	Delivering shareholder value from global and regional shared services	Getting the change process right <b>Simon Tarsh, TPI</b>
Ensuring value from IT investments	Optimising SAP as a strategic enabler for shared services <b>Ramesh Varsani, Business Applications Associates</b>	Process re-engineering, self service, e-procurement
Finance & accounting – implementing shared services effectively cross-border <b>Susie West, Open Business Exchange</b>		

**17:40 Breakout sessions facilitated by SBPOA board members and shared services experts**

These round table sessions are designed to enable delegates to engage with a shared services expert or thought leader in a more interactive environment. Tables will be divided into interest groups to enable delegates to tailor their learning experience to meet a specific requirement. Solutions providers will be excluded from this initial session to enable delegates to discuss their challenges openly. On day two the issues will be fed to the relevant solution provider who will help the group find answers to the challenges. Delegates will leave the round table discussions with a thorough understanding of the issues and an action plan to overcome them.

**Please make your choice of tables when booking for the event by ticking the appropriate box.**

**11:15 Shared services and finance transformation: delivering shareholder value from global and regional shared services**

During this presentation, Martin Fahy will draw together the points discussed to date to explore the following issues:

- Establishing the governing objective for BPO and Shared services
- Local, regional and global finance processes: who does what, where and why?
- Global reach processes
- Global reach technologies
- What's the worst that can happen?
- Roadmap to SSC 2010

*Martin Fahy, European Advisor, SBPOA*

<b>How shared services can add value in M&amp;As</b> Facilitator: Tony Williams, HR Director, RBSG	<b>Delivering shareholder value from global and regional shared services</b> Facilitator: Martin Fahy, Advisor for European Affairs, SBPOA	<b>Process re-engineering, self service</b> Facilitator: Miles Warner, HR Director, Schlumberger
<b>Getting the change process right</b> Facilitator: Andrew Kris, Chairman, SBPOA	<b>Process re-engineering, e-procurement</b> Facilitator: David Eakin, Professional Services Director, BuyIT	<b>Finance &amp; accounting – implementing shared services effectively cross-border</b> Facilitator: Richard Colla, Dow Corning

**Applying the discipline of the external market place to internal shared services**

**12:00 Creating shared services in a public sector environment: getting your client relationships right**

Now in its third year the Eastern Health shared services centre is successfully serving five clients across 100 locations from a SAP platform. As a public sector organisation operating in a consensus environment, getting buy-in from clients from the outset was an essential part of their success. Even now clients believe they should have the option to self-source or outsource some finance, HR and ICT services and EHSS has had to embed its mandate through strong leadership and influence, as well as demonstrably improved service levels and value.

During the presentation Valerie Judge will discuss the charge back system implemented last year, and how that created a need to examine the value of the services and products from a customer point of view. In addition, she will discuss the decision to include value-adding activities within the shared services centre.

- Identifying value-adding activities that customers will pay for
- Operating shared services from a consensus environment: what lessons can we learn from the public sector?
- Measuring the value of activities from a cost perspective as a means of implementing charge backs: how do you manage your customers differently in this new environment?
- Including value-adding activities in shared services: how does this affect the dynamic of shared services?

*Valerie Judge, CEO, Eastern Health Shared Services, Ireland and Philip Hewitson, Chief Executive, NHS Shared Services*

18:35 Chair's summation and close of day one

19:00 Evening networking with SBPOA

**Day two, Friday 17 October, 2003**

08:30 Registration and coffee

09:00 Chairman's introduction

**09:15 Solution provider breakout session**

During the second set of round table sessions delegates will work through the challenges raised yesterday with the relevant solution providers. This session is specifically designed to enable the groups to generate applicable business strategies for combating challenges raised on day one.

10:45 Coffee and networking

12:45 Networking lunch

14:00 **Implementing charge-backs to effect positive process improvements**

The Goodyear Dunlop shared services centre currently provides finance and accounting services to its diverse customer base, which makes up the Goodyear Dunlop portfolio. Over the coming months the centre is expanding its geographical scope to include the rest of Europe. More specifically the UK based shared services centre is implementing charge-backs and reviewing processes to drive further improvements. During this presentation Mick will discuss the process of implementing activity based, or headcount charges and the benchmarking activities they undertook in order to ensure their services are competitive with the external market. In addition, he will also focus on the cultural aspects of their company post-merger and how the receptiveness to change is a key enabler for their shared services plans:

- Building a shared services centre post merger: using change processes to implement a new way of working (partnering with customers)
- Creating a culture focused on driving process improvements
- Recording processes and activities: what mechanisms does Goodyear Dunlop have in place? (performance monitoring and control)
- How does the shared services centre communicate with the business using KPIs, SLA. What sort of relationship do you have with the business?
- Effective processes: how do you create them?
- How do you implement charge backs?

*Mick Maltby-Russell, Operations Leader, Goodyear Dunlop*

14:45 Coffee and networking

**Getting the technology support tools right**

15:15 **Moving up the value chain and beyond**

Within two months of establishing shared services, Barclays reached stability and achieved performance standards as originally set out by the business. The slickness of their operation is largely due to effective planning, innovative use of Siebel and their decision to standardise all processes on SAP. The shared services, now over a year old, is also seen as a value adding entity. Services have been priced above a mere cost recovery basis, and value adding activities such as employee relations services, support and learning have been brought under the shared services banner. Now that they have gone beyond cost reductions expectations, and moved shared services up the value chain the challenge facing Barclays' is where do they go next. This presentation will charter the evolution of Barclays shared services and open up discussions around:

- The Barclays shared services transition from back office function to a profitable, value adding business unit
- BPO and beyond: due diligence questions for outsourcing
- Low-cost locations and the opportunities to move the transactional piece offshore
- Automation technologies: what are the options around partnering with external providers?

*Chris Beaven, Shared Services Manager, Barclays*

16:00 **Implementing and maintaining virtual shared services across EMEA**

Hewlett Packard's state of the art shared services operates across EMEA from a virtual platform. In implementing self-service technology across the entire organisation, they have reduced the need for administrative staff, and ensured that all managers have access to accurate, timely information. Cecile Staner will discuss the progress to date as well as their aggressive change management programme.

- Implementing a self-service technology platform across EMEA: how do you translate worldwide business strategies into individual countries?
- Why was the decision taken to create virtual shared

services: what are the challenges of managing that?

- Moving to the next phase of delivery: rolling out additional functionalities
- Working alongside HR business people: how has HP successfully created a joined up HR offering?

*Cecile Staner, Director of HR Operations, Hewlett Packard*

16:45 **Benchmarking exercises with the SBPOA**

During the benchmarking sessions we will bring together the collective experiences of delegates attending to assess the current and future status of shared services. Delegates are invited to contribute their own questions to the electronic benchmarking session. Delegates will be asked to contribute to discussions around:

- How would you describe the status of your shared services centre? What services do you provide?
- Is outsourcing part of your corporate or shared services strategy?
- Which ERP system do you currently use? How many instances of ERP do you have?
- Do you formally recharge for your services?
- Are you considering offshore locations, if so which ones?
- Are you using EDI: how are you achieving maximum efficiencies with EDI?
- What tools are you implementing to optimise your processes: KPIs, Six Sigma, technology?

*Andrew Kris, Chairman, SBPOA*

17:15 Close of event

**About the SBPOA**

The Shared Services and Business Process Outsourcing



Association (SBPOA) is a membership organisation for executives, managers, consultants, administrators and educators with a professional interest in gaining a better understanding of what it takes to set

up and lead best in class shared services or successful BPO activities.

The SBPOA was founded in the belief that corporations, public sector organisations and individuals, even those with substantial experience in establishing and managing shared services or BPO activities will benefit from sharing knowledge and experience in a constantly evolving field. Become a member today [www.sharedxpertise.org](http://www.sharedxpertise.org)



**MIDAS**

Chris Norwood, Head of Corporate Services at MIDAS writes: *I am delighted to be working with SBPOA on this conference. The shared services sector is constantly evolving and MIDAS shares the SBPOA's objective in promoting debate and discussion among shared services professionals.*

Manchester is one of Europe's leading shared services locations and in 2002 we enjoyed continued success in attracting two new shared services facilities to the City. Michelin chose Manchester for their pan-European SSC covering Western Europe and Marks and Spencer created a new SSC in Manchester for finance and HR in the UK. Manchester can offer a stable cost base combined with an enormous pool of labour and an excellent track record in supporting the development of shared services centres for companies such as Kellogg's, Esso, Tetra Pak and AstraZeneca. MIDAS is working with these companies and others to establish a centre of excellence for shared services in the City.

**For further information, please contact Chris Norwood on + 44 (0)161 877 3000**

**Bring your team and save money!**

Being able to benchmark against best practice at our events has proved invaluable for implementation teams looking at shared services or BPO. This event will enable your team to identify potential obstacles now, speak in person to those who have done it successfully and leave inspired about the project, which is why we offer significant discounts for team bookings.

**Please contact Guy Worth on + 44 (0) 20 8785 5928**

# 5 ways to book



Fax back this form on  
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## SBPOA challenge: going head-to-head on global shared services 16-17 October 2003, Brussels, Belgium

PLEASE COMPLETE  
IN BLOCK CAPITALS

Delegate 1

Delegate 2

Delegate 3

Name

Job Title

Organisation

Address

Postcode

Phone

Fax

E-mail

Signature

I have read and accepted the booking conditions

Please note: payment must be received in full prior to the event to guarantee your place

- Two day event SBPOA members: £995 / €1410
- Two day event + one year membership to SBPOA: £1295 / €1840
- Two day event only: £1195 / €1695
- Workshops each: £250 / €350

Please specify A  B

- Evening networking (free to conference attendees) 16 October 2003

For team discounts please call +44 (0)20 8785 2700



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- Payment enclosed (Cheques for the SBPOA event should be made payable to Ark Group Ltd)

- Please invoice me for the SBPOA event

### Booking conditions

1. Bookings can be submitted at any stage prior to the event, subject to availability. A limited allocation is being held and booking early is therefore recommended.
2. In the event of the booking not being accepted by Ark Group the total amount will be refunded.
3. Payment must be received in full prior to the course.
4. All speakers are correct at the time of printing, but are subject to variation without notice.
5. If the delegate cancels after the booking has been accepted, the delegate will be liable to the following cancellation charges:
  - Cancellations notified over 45 days prior to the event will not incur a cancellation fee.
  - In the event of a cancellation being between 45 and 30 days prior to the event, a 20% cancellation fee will be charged.
  - For cancellations received less than 30 days prior to the event, the full delegate rate must be paid and no refunds will be available.
6. All bookings submitted by e-mail, fax, or over the telephone are subject to these booking conditions.
7. All cancellations must be received in writing.
8. Ark Group will not be held liable for circumstances beyond their control which lead to the cancellation or variation of the programme.
9. VAT is not applicable against this event.

We occasionally allow reputable companies to mail details of products we feel may be of interest. If you do not wish to receive this service, please tick this box

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### Event venue and accommodation

Preferential rates have been arranged for delegates at the Metropole Hotel, Brussels. Please contact the hotel directly to make your reservation, quoting "Ark-Group" as your reference. In order to qualify for a preferential rate, reservations must be made up to four weeks prior to the event.

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31 Place de Broucker  
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Tel: + 32 2217 2300  
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www.metropolehotel.com

For more information, please contact Emma Barnett on  
+ 44 (0) 20 8785 2700 or email ebarnett@ark-group.com

### Can't make the event?

#### Conference documentation is available!

If you can't take full advantage of this event, the conference documentation gives you a useful record of the presentations made at the event for your reference. The set of speaker's slides is available after the event at £250 (+ UK VAT).

Contact Emma Barnett:  
Tel: +44 (0) 208 785 2700  
Email: ebarnett@ark-group.com

### Are you a shared services or BPO consultant or technology provider looking for measurable business development opportunities?

During our events the knowledge exchange that takes place opens delegates to ideas about how they can improve their organisation's performance, and how you can help them to successfully implement shared services and BPO. We legitimise your intellectual involvement in our events and pre-qualify meetings with decision makers. We believe our neutrality provides the best environment to build relationships. If you want to outsource your business development in this market, we can deliver.

Please call Henry Anson on +44 (0) 20 8785 2700  
Or email hanson@ark-group.com

### PLEASE NOTE

arkgroup cannot be responsible for assisting potential delegates in obtaining visas to the country in which this event is being held. Delegates are responsible for their own travel, accommodation and visa requirements.