

December 6-7  
**2012**

The Pointe Hilton  
Tapatio Cliffs Resort  
Phoenix | Arizona



# 13th Annual ISM Services Conference

presented by the ISM Services Group

Services Contracting • Sourcing Strategy • Legal  
Telecom • Software Licensing • Negotiation • Practitioner Research  
Collaborative Roundtable Discussions • Facilities Management



stay competitive  
**move forward**



## 13th Annual ISM Services Conference

**December 6-7, 2012**

The Pointe Hilton Tapatio Cliffs Resort • Phoenix, Arizona

### Move Forward

Each year, ISM develops the best presentations for supply chain professionals with a services spend. The Services Conference not only informs you, it makes you more competitive in today's tumultuous business environment. With the scope of topics covered in this year's conference ranging from technology spend to legal considerations, and the very popular industry roundtable discussions and networking opportunities, this conference promises to be our best yet. You won't find this content anywhere else. By attending the 13th Annual Services Conference, you'll be able to put significant distance between your organization and the competition.

Stay Competitive. Move Forward.

### Who Should Attend

This program is designed for supply management professionals responsible for not only acquiring services, but also for developing the supply chain strategies that support the goals and objectives that move the organization forward. Supply management professionals with a solid foundation will benefit from this program. Additionally, team leaders, project managers and members of cross-functional teams will profit from this unique experience. Even if you've attended previous ISM Services Conferences, this program has evolved to keep you current by building on the previous year.

### Why You Should Attend

Direct your supply management expertise to the world of purchasing services and get ahead. Discover how to translate your knowledge about sourcing and buying tangible goods into the services arena, and uncover hidden savings in the process. Find out how to turn your coworkers into customers and streamline crucial services purchases. Explore the role of your stakeholders in the sourcing decision and optimize the process. This is an opportunity to learn from other practitioners and experts. Roundtable discussions and networking time are built into the schedule to allow you time to find out how your colleagues are leveraging the power of this multibillion-dollar proposition.



The saguaro cactus is found only in the Sonoran Desert, which includes about 120,000 square miles of California and Arizona. You won't find saguaros above an elevation of about 3,500 feet because they can't handle much frost.

**Earn 9.50 Continuing Education Hours (CEHs) for your participation.**

**Built-in value.** This program delivers six general sessions, four concurrent sessions and ample networking time.

# Agenda

Thursday, December 6, 2012

**7:00 a.m.-7:50 a.m. Continental Breakfast**

**7:50 a.m.-8:15 a.m. Welcome/Opening Remarks**

**8:15 a.m.-9:15 a.m. General Session**

## **TA The Art of Procuring Services**

**JOSEPH C. BLACK, JR.**  
Member, ISM Board of Directors  
Chief Procurement Officer  
**Aetna Inc.**

Services represent a unique challenge for the procurement professional. Unlike other goods-based purchases where specifications can often be more readily codified, procuring services typically requires considerable efforts to define an experience that accompanies the delivery of a service. This makes scope definition more complex and the effective comparison of supplier options more challenging. It also means that there is often a very high relationship component to the purchase, further complicating the ability to dispassionately and objectively select the best alternative among equals. All of the above renders procuring services more of an art than a science.

**9:45 a.m.-10:45 a.m. Concurrent Sessions**

## **TB Intel's Indirect Procurement Dedicated to Negotiations Center of Excellence**

**MARK CAMPBELL**  
Contracts and Negotiations Senior Manager, Corporate Strategic Procurement  
**Intel Corporation**

Learn the best practices used by Intel's Indirect Corporate Strategic Procurement (CSP) group to modify its organizational structure to implement a center of excellence service focused on contracts and negotiations. Intel will provide the key drivers, challenges, lessons learned and key metrics as well as how the service has improved efficiency, throughput time and quality as well as increasing affordability value by 81 percent over the past four years.

## **TC Facilities Management: Services Planning at Its Best**

**MAUREEN A. DONNELLY, C.P.M.**  
Senior Manager, Facility Planning and Construction  
**Ryder**

Hear from a professional who has more than 20 years in facility planning and construction. Learn the best practices in facilities management and preventative maintenance, and how the best savings in facilities

management come from doing your research and learning, and cost avoidance.

**11:00 a.m.-12:00 p.m.**

## **TD Roundtable Discussions**

Stay current with roundtable discussions designed to help you get ahead. Pick the topic that grabs your interest and interact with leaders in the services industry. Each table is moderated by an industry specialist or ISM staff member so that you get the most out of these timely discussions.

**12:00 p.m.-1:00 p.m.**

**Lunch**

**1:15 p.m.-2:15 p.m.**

**General Session**

## **TE Contracting for Success in Services**

**KATE VITASEK**  
Faculty, Center for Executive Education  
**University of Tennessee**

Contracting for services can be a challenge — especially when it is for complex outsourcing services. But how do the world's best do it? University of Tennessee researchers set out to answer that very question by studying some of the world's best outsourcing relationships and contracts. UT faculty member Kate Vitasek teamed up with the International Association for Contract and Commercial Management to write the 21st-century handbook for how to structure a sound service contract — *The Vested Outsourcing Manual: A Guide for Creating Successful Business and Outsourcing Agreements*. Vitasek will share the 10 essential elements that organizations need to not only consider — but must openly embrace and adopt — when they set out to establish a winning business relationship.

**2:45 p.m.-3:45 p.m. Concurrent Sessions**

## **TF Meaningful Involvement in Services Purchasing**

**LISA M. ELLRAM, PH.D., C.P.M., C.M.A.**  
Rees Distinguished Professor of Supply Chain Management  
**Miami University**  
**WENDY L. TATE, PH.D.**  
Associate Professor  
**University of Tennessee**

What does it mean to you to have meaningful involvement in services purchasing? Would it surprise you to learn that some of your peers in supply management have very different perceptions about meaningful involvement in services purchasing? This session is based on

## **Are you maximizing your services spend?**

- Accounting or financial services
- Advertising
- Benefits administration
- Business consultants
- Business services
- Construction
- Consulting
- Contract labor
- Delivery and messenger services
- Engineering
- Healthcare
- Human capital
- Information technology
- Insurance brokerage services
- Janitorial
- Landscaping
- Legal
- Marketing
- Outsourcing
- Relocation
- Telecommunications
- Temporary labor
- Training
- Travel
- Utility services
- Waste management



There are more than 300 golf courses in Arizona.

interactive focus groups that the presenters held with a number of services supply managers at various levels in various companies. They will present different concepts of what services supply managers can — and should — do to have a positive impact on organizational success. They will discuss everything from successful initial engagement to what the ideal would look like, and which issues — such as industry, company maturity and corporate culture — have an effect on what works and what does not work in significant and effective involvement in services purchasing.

### **TG Strategies to Effectively Source and Manage Telecom Services**

**MARY D. LEWIS, MA, MBA**

Sourcing Manager, Supply Chain Management  
**Sprint Nextel Corporation**

**NORMAN HANSEN**

Senior Director, Business Development  
**Manage Mobility**

With almost 100-percent market saturation, wireless telecom services have become commoditized in the past decade. Toss out conventional commodity management principles, though, because rapid changes in technology, intricacies of privacy laws, complicated licensing structures and accountability of up to thousands of assets have increased the complexity of this sourcing category. In this fast-paced session, you'll discover strategies for managing the sourcing-to-decommissioning life cycle of wireless assets, as well as for purchasing the telecom services that are delivered by fiercely competitive carriers. Join us and learn about:

- An overview of the wireless industry marketplace and the players in it
- The four key elements that comprise the life cycle of all wireless assets
- How to compare carrier solutions using “apples-to-apples” attributes
- How to translate client requirements and determine the wireless solution that's right for your business and the people who run it
- Licensing considerations for cloud-based services
- Performance-based measures that should be negotiated in advance
- Environmental and social responsibility questions you should be asking your carrier and why they make a difference
- How to stay current with technology — without breaking the bank
- What it takes to prevent your IP from walking out the door when an employee leaves

**4:00 p.m.-5:00 p.m.**

**General Session**

### **TH Understanding the Critical and Important Differences Between Software Licensing and Software-as-a-Service Transactions**

**PETER J. FRAZZA, ESQ.**

Chair, Technology Law Group  
**Budd Lerner, PC**

More and more companies are entering into Software-as-a-Service (SaaS) transactions without fully understanding what this type of transaction entails. To the extent that some companies are using software licensing concepts to govern their SaaS transactions, they are doing so at their own peril. In the traditional sense, a software licensing transaction is where a company licenses software and installs on its servers; but a SaaS transaction involves a company acquiring a service, and the software that provides the service is not licensed but instead is hosted by the supplier in the cloud and accessed via the Internet. This presentation will help you understand various pricing models and provisions as well as appreciate the contract language needed to protect your company, especially as it relates to protecting its data.

**5:00 p.m.-7:00 p.m.**

**Networking Reception**

**Friday, December 7, 2012**

**7:00 a.m.-7:45 a.m.**

**Continental Breakfast**

**7:45 a.m.-8:00 a.m.**

**Opening Remarks**

**8:00 a.m.-9:00 a.m.**

**General Session**

### **UA Jumping Over the Barriers**

**JASON KWAN**

Member, ISM Board of Directors

Vice President, Strategic Global Sourcing and Chief Procurement Officer

**ManpowerGroup**

In this dynamic presentation, learn how to think and act differently about breaking down the barriers so that procurement can get involved early in the process. Many services are still treated as “sacred cows,” and budget holders often hold information close to the vest. Why are the things that you used to do for direct materials not working? How do supply managers get involved without further straining a relationship that is not big on collaboration? The discussion will address the different types of skills necessary for success when approaching nontraditional areas and buying services. Are you investing too much time

in your technical skills and not enough in your soft skills? Do you think you can ever invest too much time on sharpening your soft skills? These seemingly innocuous questions are difficult to answer, but this session will help you jump over barriers!

**9:15 a.m.-10:30 a.m. General Session**

### **UB Buying the Law**

**SILVIA HODGES, PH.D.**

Adjunct Professor

**Fordham University School of Law**

Director of Research Services

**TyMetrix Legal Analytics**

**MARTY HARLOW**

Director, Professional Services Procurement

**GlaxoSmithKline**

The legal budget has been almost untouchable for the longest time. This is no longer the case. Corporate procurement has been increasingly involved in the purchasing of legal services. Large companies, in particular, rarely mandate firms without requests for proposal (RFPs) nowadays. Legal services providers are under increasing pressure to showcase improved efficiencies and cost management. Competition among law firms is fierce and new entrants into the market are offering deep price discounts on a range of legal services. How can procurement add value to the sourcing of legal services and negotiate the best deals to earn its seat at the table when

buying legal advice? Hear how GlaxoSmithKline, a pioneer in legal services procurement, cracked this new category.

**10:45 a.m.-11:45 a.m. General Session**

### **UC Developing a Great Services RFP**

**MARK TROWBRIDGE, CPSM, C.P.M., MCIPS**

Principal

**Strategic Procurement Solutions, LLC**

This general session will explore the strategic decision of when to compete, rather than collaboratively negotiate, key services requirements. It will include discussion on: ways to generate supplier enthusiasm; strengths and weaknesses of various competitive approaches; key RFP mistakes that reduce competition; five RFP strategies to achieve maximum results; and 10 characteristics of a great services RFP. Participants will take away tips and techniques that will improve the effectiveness of their future RFP initiatives.

**11:45 a.m.-12:00 p.m. Closing Remarks**

**Early-Bird Discount** – Take US\$100 off the conference registration fee by registering no later than October 26, 2012.

**Team Discount** – There is a US\$100 discount (per person) for organizations registering three or more people for this program. All registrations must be placed at the same time. (This discount offer is not available online.)

**Pre-Conference Seminar Savings** – Register for the Services Conference and for “Strategic Services Procurement: Applying Strategic Sourcing Principles to the Procurement of Services,” #4458, and save US\$200 on your registration fee.

Discounts (not to exceed US\$300 per attendee)

**U.S. Tax Deductions** – The U.S. Internal Revenue Service may permit an income tax deduction to U.S. residents for expenses (including registration fees, travel costs, meals and lodging) incurred in pursuit of continual professional education. Consult your tax adviser for details.

**Cancellation and Refund Policy** – Notification of your cancellation must be received in writing. Cancellations received up to the day prior to the program are subject to a US\$100 cancellation charge. No refunds once the program has begun. Registrants who fail to attend a program are not entitled to a refund. ISM must be contacted within 30 days of the program completion in order for a refund to be considered. ISM reserves

the right to substitute instructors. If the program is not held for any reason, ISM's liability is limited to the program fee.

**Ground Transportation** – You are responsible for your own ground transportation.

### **Registration Information**

**Accommodations** – Please make your own hotel reservations.

All sessions are at the Pointe Hilton Tapatio Cliffs Resort, 11111 N. 7th St., Phoenix, AZ 85020. You can book your hotel room online at [www.ism.ws/3427](http://www.ism.ws/3427) or call +1 602/866-7500. Go online to receive the special room rate of US\$139 Single/Double. The ISM rate is offered until November 8, 2012 or until the room block is sold out, whichever comes first, so book today. The room rate includes in-room, high-speed Internet and the resort service fee.

**Pointe Hilton Tapatio Cliffs Resort:** – Nestled into the rugged terrain of the Phoenix North Mountains in Arizona and about 20 minutes from the Phoenix Sky Harbor International Airport, the Pointe Hilton Tapatio Cliffs Resort is a 584-room all-suite resort property offering luxurious services and activities. The accommodations are spacious two-room suites with one king bed or two queens, and promise a relaxing visit to the Valley of the Sun. Each suite offers the Hilton Serenity Bed & Bath™ collection, as well as high-tech and high-touch guestroom features including the Hilton Alarm Clock Radio with MP3 capabilities.

### **On-Site Registration Hours**

**Wednesday,  
December 5  
4:00 p.m. - 6:00 p.m.**

**Thursday,  
December 6  
6:30 a.m. - 4:30 p.m.**

# Sponsors



**IBM Emptoris Services Procurement** enables organizations to effectively procure and manage complex outsourced services and contingent labor to achieve substantial savings, mitigate risk by enforcing compliance with corporate policies and government regulations, and gain insight into global services spend. For nearly a decade, IBM Emptoris Services Procurement has been the powerful enterprise-level platform driving some of the most involved and sophisticated services procurement programs for leading Global 2,000 companies. For more information please visit [www.ibm.com/smarterplanet/us/en/smarter\\_commerce/overview/index.html](http://www.ibm.com/smarterplanet/us/en/smarter_commerce/overview/index.html).



For more than a decade, **IQNavigator** has been the leading provider of innovative technology solutions to global enterprises, helping them better manage all types of procured services and non-employee workforces around the world. IQNavigator enables clients to intelligently manage and optimize the cost-effectiveness, compliance, visibility and efficiency of complex services procurement and contingent workforce programs, including statement of work and project-based consultants, contractors, temporary workers and other contingent workers. For more information about IQNavigator and how its industry-leading offerings such as IQNtelligence are helping many of the world's most respected companies, visit [www.IQNavigator.com](http://www.IQNavigator.com).

## Select Supplier Showcase

### Information Leads to Innovation

Take a break and visit our Select Supplier Showcase. Use this time to gain information — find out what's new and start building a path toward complete integration.

**Thursday, December 6, 2012**

7:00 a.m. – 7:50 a.m.

10:45 a.m. – 11:00 a.m.

2:15 p.m. – 2:45 p.m.

5:00 p.m. – 7:00 p.m.

9:15 a.m. – 9:45 a.m.

12:00 p.m. – 1:15 p.m.

3:45 p.m. – 4:00 p.m.

## Did you know...

Depending on the industry, between 30 percent to 80 percent of all purchasing is services-related?

*(Survey by CAPS Research)*

Imagine the benefits of an effective services spend!



# Registration

Innovative Supply Relationships: Creating Value for Services Procurement

## 13TH ANNUAL ISM SERVICES CONFERENCE

**MEMBER FEE**      **NONMEMBER FEE**      **STUDENT MEMBER FEE**  
**US\$949**              US\$1,149              US\$250

### PRE-CONFERENCE SEMINAR #4458

#### STRATEGIC SERVICES PROCUREMENT: APPLYING STRATEGIC SOURCING PRINCIPLES TO THE PROCUREMENT OF SERVICES

December 4-5, 2012 **US\$1,399 ISM members\*/US\$1,699 nonmembers\***

\* Save US\$200 when you register 30 days or more prior to the program start date. Payment must be received at the time of registration in order to qualify for the early-bird discount.

### FOUR EASY WAYS TO REGISTER

**Internet:** Register online at [www.ism.ws](http://www.ism.ws).

**Fax:** Transmit completed form with credit card information to +1 480/752-2299.

**Mail:** Complete the form below and mail with check or credit card information to ISM Seminars, P.O. Box 22160, Tempe, AZ 85285-2160, USA.

**Phone:** Call Customer Service at 800/888-6276 or +1 480/752-6276, option 8. Please have your credit card number ready.

Check this box if you are also registering for the pre-conference seminar, **Strategic Services Procurement: Applying Strategic Sourcing Principles to the Procurement of Services #4458**, on December 4-5, 2012.

ISM Member     Nonmember    ISM ID # (if known) \_\_\_\_\_

Dr.               Mr.               Mrs.               Ms.               Miss

First/Given Name \_\_\_\_\_ MI \_\_\_\_\_ Last/Family Name \_\_\_\_\_

CPSM     CSM     CPSD     C.P.M.     A.P.P.

Title \_\_\_\_\_ Organization Name \_\_\_\_\_

MAILING ADDRESS:     HOME     BUSINESS

City \_\_\_\_\_ State or Province \_\_\_\_\_ ZIP/Postal Code \_\_\_\_\_ Country \_\_\_\_\_

Email Address \_\_\_\_\_

(       ) \_\_\_\_\_ (       ) \_\_\_\_\_

Daytime Phone Number\*

Fax Number\*

\*For numbers outside the United States, please include country and city codes.

### METHOD OF PAYMENT: (U.S. Funds Only)

Personal       Organization check is enclosed for \$ \_\_\_\_\_ Organization Name \_\_\_\_\_

Credit/Procurement Card Charge:  VISA       MasterCard       American Express       Diners Club

Charge Card # \_\_\_\_\_ Expiration Date \_\_\_\_\_ Security Code \_\_\_\_\_

Amount to Be Charged \$ \_\_\_\_\_ Cardholder Signature \_\_\_\_\_

Please indicate any special needs that we can address to make your participation more enjoyable and informative (this includes any dietary or physical requirements).

Check here if you do not wish to be included on the exhibitors' mailing list.

This conference offers seven general sessions and two concurrent sessions. Please place an X by your preferred concurrent workshop selection:

### Thursday, December 6, 2012

#### Concurrent Sessions – 9:45 a.m.–10:45 a.m.

\_\_\_\_\_ **TB** Intel's Indirect Procurement Dedicated to Negotiations Center of Excellence

\_\_\_\_\_ **TC** Facilities Management: Services Planning at Its Best

#### Concurrent Sessions – 2:45 p.m.–3:45 p.m.

\_\_\_\_\_ **TF** Meaningful Involvement in Services Purchasing

\_\_\_\_\_ **TG** Strategies to Effectively Source and Manage Telecom Services

**The ISM Guarantee** — Satisfaction with all programs is guaranteed. If you are not satisfied, a refund or free program registration will be provided. (All ISM Cancellation and Refund Policies must be followed.)



### Phoenix, Arizona

With an abundance of world-class resorts, championship golf courses, award-winning spas, fabulous shopping and exclusive art galleries, the Phoenix metropolitan area is a prime destination for travelers throughout the country and world. Known as the "Valley of the Sun," Phoenix averages temperatures in the mid-70s Fahrenheit during the month of December. The Valley of the Sun is home to more than 3 million residents and is a thousand square miles in area. Scottsdale has more than 600 restaurants ranging from Southwestern barbecue and South of the Border cuisine to Pacific Rim fare and everything in between. The climate makes outdoor activities such as desert Jeep tours and hot-air ballooning enjoyable year-round. Day trips to scenic Arizona destinations like the Grand Canyon and Sedona are an added benefit. For more information about other points of interest in the Valley of the Sun, visit [www.arizonaguide.com](http://www.arizonaguide.com).

## 13th Annual ISM Services Conference

December 6-7, 2012

The Pointe Hilton Tapatio Cliffs Resort • Phoenix, Arizona

### Professional Focus

**Increase your educational experience exponentially.**

"Strategic Services Procurement: Applying Strategic Sourcing Principles to the Procurement of Services" provides a fresh look at the strategic nature of the supply function. The pre-conference seminar provides insights into current trends and opportunities for supply's involvement in services procurement, the application of strategic sourcing methods and technologies to the services spend and services supply base, and participant analysis and discussion of case studies to services spend not traditionally sourced through the purchasing function. Register for this pre-conference seminar and the Services Conference and save US\$200.

**Strategic Services Procurement: Applying Strategic Sourcing Principles to the Procurement of Services**

**Seminar #4458**

December 4-5, 2012

Phoenix, Arizona