



# BUILDING A STRONG SERVICES PROCUREMENT STRATEGY:

Leadership, Sourcing and Global Perspectives

## 9th Annual ISM Services Conference

*presented by*

Institute for Supply Management™

December 4-5, 2008

The Ritz-Carlton

Phoenix, Arizona



**institute for  
supply management**

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## BUILDING A STRONG SERVICES PROCUREMENT STRATEGY:

Leadership, Sourcing and Global Perspectives

9th Annual ISM Services Conference

**December 4-5, 2008**

The Ritz-Carlton • Phoenix, Arizona

The **9th Annual Services Conference** offers lessons learned and real-world accomplishments from some of the world's most visible and successful organizations — Allstate, MeadWestvaco, Oracle, Colgate-Palmolive and more. After attending these sessions, you should have a better understanding of how to develop and maintain your strategic plan. Avoid pitfalls, minimize weaknesses and leverage your strengths by learning from the leaders in the field.

### 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 of the organization. Because supply managers in both the manufacturing and nonmanufacturing arenas buy services, look for many diverse examples. 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 experience. And, if you've attended previous ISM Services Conferences, this program is still for you. Each year we build on the previous year to include the latest innovations and ideas that can re-energize your services initiatives.

### Why You Should Attend

Improve your global services procurement, add value within your travel management and connect better with suppliers. Discover how to translate this knowledge into a higher ROI. Currently, only 27 percent of the purchase of services dollars is handled by supply management professionals (CAPS Research) — find out how to turn your coworkers into customers and streamline your services purchase. 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. Networking time is built into the schedule to allow you time to find out how your colleagues are leveraging the power of this multi-billion-dollar proposition.

**Earn 9.75 Continuing Education Hours (CEHs) for your participation.**

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



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.

# Agenda

Thursday, December 4, 2008

**8:00 – 8:15 a.m. Welcome**

**8:15 – 9:15 a.m. General Session**

## Services and the Global Sourcing Journey

**LORI YELVINGTON**, Vice President,  
Sourcing & Procurement Solutions,  
**Allstate Insurance Company**

Allstate Insurance Company has embarked on a new journey in its sourcing strategy: the expansion to global markets. The process includes procuring services from multiple offshore suppliers with a captive offshore technology/service center. Explore the company strategy, due diligence, governance, challenges, lessons learned and best practices. This informational presentation also highlights general industry offshoring trends and benefits.

**9:30 – 10:30 a.m. General Session**

## Supplier Relationship Management (SRM) for Indirect Materials — Services

**ERICA D. HILL, C.P.M.**, Director, Indirect Sourcing,  
**MeadWestvaco Corporation**

Traditionally, SRM has been viewed as a strategic priority for direct materials. Many companies have SRM programs in place to ensure cost, quality and delivery competitiveness as well as the added benefit of tapping into supplier innovation and expertise. However, on the indirect side, many of those same companies do not have an operational SRM program in place. While there are clear differences between direct and indirect goods and services, indirect suppliers offer enormous potential as indirect spend grows in importance. Indirect spend, like services, is rarely a top priority with senior management despite its economic and operational importance to the business. This session focuses on addressing the challenge of developing an SRM approach in the services space inclusive of key performance measures. Further, this session helps define the opportunities that launching a services SRM program can bring. Highlights include the planning needed to overcome barriers and tailor SRM concepts and practices to indirect spend while providing insights into SRM.

**11:00 a.m. – 12:00 p.m. Concurrent Sessions**

## TC Lessons Learned After Five Years of Sourcing in a Services Business

**JOANNA MARTINEZ**, Chief Procurement Officer,  
**AllianceBernstein**

Five years ago, a group of procurement executives with consumer products/goods, pharma and consulting backgrounds set out to create a best-in-class strategic sourcing team at AllianceBernstein, one of the world's largest publicly traded global asset management firms. Learn how they've taken tools used in manufacturing industries and adapted them for financial services spends. Hear interesting insights on using the influence skills needed to successfully source indirect spend items.

## TD Effective Global Travel Management

**GREG TENNYSON, C.P.M., CPCM**, Vice President,  
Global Procurement, Travel & Disbursements,  
**Oracle Corporation**

**RALPH COLUNGA**, Senior Director, Global Travel,  
Meetings & Support Services,  
**Oracle Corporation**

Discover how Oracle Corporation supports a revenue stream of approximately \$20 billion per year with nearly 80,000 employees in 145 countries and an annual travel-related spend in excess of \$600 million. The focus is on executing these strategies:

- Global roll-out of self-booking tool
- Single travel agent transitioning to a shared service center model
- A philosophy founded on standardization, simplification and automation
- Sustaining customer-of-choice mentality for both transient travelers and suppliers servicing Oracle Corporation
- Mining and leveraging global data to achieve greater economies of scale, corporate governance, enhanced delivery and service quality

Discover the tools used to implement these strategies and the results achieved.

## Are you maximizing your services spend?

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



There are more than 300 golf courses in Arizona.

## 1:15 – 2:30 p.m. General Session

### The Hub Factor: Making Connections Count

**JULIA HUBBEL**, President,  
The Hubbel Group, Inc.

The ability to form meaningful, lasting and collaborative relationships is the single most important skill of the 21st Century. As we become increasingly more technical, our face-to-face exchanges become more essential. In this highly interactive, fast-paced program, learn how to get past the business cards, ask great conversational questions, tap into your natural charisma, develop your personal power, and influence and create relationships with others. Learn how to network with anyone, anywhere, in any situation. Never be tongue-tied again when you learn these connecting techniques!

## 3:00 – 4:00 p.m. Concurrent Sessions

### TF A New Approach to Global Staffing

**DANIEL HANYZEWSKI**, Staffing Director of Global Functions,  
Nike

With more than 3,000 temporary workers supporting its operations, hear how Nike's staffing and procurement organizations collaborated to improve its human capital supply chain. Learn how they overhauled the company's disparate global staffing processes, resulting in a managed staffing program that leverages its buying power for contract labor. In addition, discover the following guiding principles for the initiative:

- The need to leverage cost of goods, sales and administration
- The opportunity to have visibility and accountability for both the acquisition and expenditure of supplemental labor
- The need to mitigate risk
- The need for sustainability — a program that can grow and move with the dynamic of the business

### TG Software Contracting From Legal and Cost Perspectives

**LATRINA S. JACKSON, C.P.A., C.P.M.**, General Manager,  
IT Supply Chain Management,  
Delta Air Lines, Inc.

**MARK GRIECO, ESQ.**, Senior Partner,  
Grieco & Scalera PA

Learn how to protect your organization and save on expenses (or learn where they hide) when procuring software. Take away knowledge of warranty basics, remedies used in software contracts and learn about things you can change in your contracts. At the same time, gain examples and learn where costs can be found and addressed.

## 4:15 – 5:15 p.m. General Session

### Your Personal Leadership Guarantees Indirect Procurement Success

**CAROL DANOFF, C.P.M., CPIM**, Director,  
Global Indirect Procurement,  
Colgate-Palmolive Company

Colgate-Palmolive is accelerating its global growth by embracing new ways to manage business processes, to strengthen internal and external partnerships, and to work as a cohesive global procurement team. Highlights include Colgate's procurement transformation journey, which focuses on optimizing efficiency and effectiveness, delivering strategic value to business operations and functional partners, and offering rewarding and interesting career opportunities to its procurement professionals. To successfully implement an indirect procurement program, you must set realistic expectations, manage the dynamics of change and demonstrate the value of procurement to key, sometimes resistant, stakeholders. Discover valuable lessons learned based on real-world experience.

## 5:15 – 7:00 p.m. Networking Reception

Friday, December 5, 2008

## 7:50 – 8:00 a.m. Welcome

## 8:00 – 9:15 a.m. General Session

### E-Sourcing for Services

Moderator:

**ANDREA GRABLE, C.P.M.**, Worldwide Director, World Headquarters Procurement and Category Leader for Consulting, Temporary Labor and Professional Services,  
Johnson & Johnson

Panelists:

**CHRIS NELMS**, Managing Supervisor  
Supply Chain Process & Systems,  
Ameren Corporation

**JERRY ROGERS**, Director, Strategic Sourcing,  
Fannie Mae

**ANGELIA A. TUCKER, J.D., MBA**, Manager  
Contract Administration/Supply Chain  
Texas Children's Hospital

Hear from a panel of supply practitioners who use e-sourcing tools to competitively bid services. Each of the panelists uses one of three systems for e-sourcing: Ariba, Oracle and SAP. They will provide background on the use of the tool, share examples of successful services auctions and review lessons learned. E-sourcing includes the strategy for the bid, the reverse auction, the process of choosing the supplier and contracting process. Includes a question and answer period.

## Registration

Wednesday,  
December 3, 2008  
4:00 – 6:00 p.m.

Thursday,  
December 4, 2008  
6:30 a.m. – 4:30 p.m.

Earn 9.75 CEHs

## 9:30 – 10:30 a.m. Concurrent Session

### UB Building the Procurement Superhero

**MARK TROWBRIDGE, C.P.M.**, Principal,  
Strategic Procurement Solutions, LLC

**DAVID L. NELSON, C.P.M., CPIM, CSSBB, CQM**,  
Director of Sourcing,  
CUNA Mutual Group

Don't miss this bird's-eye view of talent management — which is a foundational factor in supply management performance. Explore innovative ways to find, select, develop and retain top-performing procurement personnel in today's competitive workplace. Key takeaways include:

- Where to find top procurement talent
- Avoid recruiting mistakes
- Identifying skill sets and professional development opportunities
- Pros/cons of skills testing/assessment methods
- The dynamic staffing model
- Training and preparing for the future
- Pros/cons of professional development approaches
- Measuring and managing staff performance
- Secrets to retaining top performers

## UC Selecting Cost-Effective Green Supply Chain Programs for Your Organization

**YALMAZ SIDDIQUI**, Director, Environmental Strategy,  
Office Depot

What are green supply chain programs? In this session, you will learn what green means to the supply chain and learn about a cost continuum of green supply chain programs. Hear how to select programs that meet your specific organizational priorities and specific tools to green your office. Get tips to help ensure success in implementation of green supply chain programs.

## 10:45 – 11:45 a.m. General Session

### Developing Internal Credibility and Adding Value Through Strategic Sourcing

**MAUREEN ACKER**, Global Procurement  
Manager for Human Resource Services,  
The Dow Chemical Company

Learn how one organization used strategic sourcing to not only add value to the company but to also improve internal partner engagement. Supply managers supporting human resources departments often struggle with engagement and support of their internal partners. Through strategic sourcing and establishing a partner engagement model, learn how you can gain credibility with your clients and help them meet their long-term strategic objectives.

## 11:45 a.m. Closing Remarks

### The Ritz-Carlton, Phoenix offers:

- High-speed Internet access
- Professionally staffed, 24-hour business center
- Elegant surroundings and gracious personal service
- Lobby / Lounge / Bistro 24
- An exquisite outdoor patio and pool deck
- Easy access to the city's finest dining and cultural amenities

### Within minutes of:

- Arizona Biltmore Golf Club
- Wildfire Golf Club
- Camelback Golf Club
- The Legacy Golf Club

## Registration Information

**Accommodations** — All sessions are at The Ritz-Carlton, 2401 E. Camelback Rd., Phoenix, AZ 85016. For reservations, call 800/241-3333. Be sure to mention ISM to receive the special room rate of \$189 Single/Double. The ISM rate is offered until October 31, 2008; rooms sell out quickly, so be sure to reserve your room early. (For availability and reservations, visit [www.ritzcarlton.com/en/Properties/Phoenix/Default.htm](http://www.ritzcarlton.com/en/Properties/Phoenix/Default.htm). Use group code ISMISMA.)

## Discounts

**Membership Discount** — Regular members of ISM receive a \$200 discount on the nonmember program registration fee. If you're not already a member of ISM, send in a completed membership application with your payment and receive the member discount. Visit our Web site at [www.ism.ws](http://www.ism.ws) and become a member online.

**Team Discount** — There is a \$25 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*, Seminar #4458, and save \$100 on your seminar registration fee.

**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 \$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.

**Food for Thought** — Your full registration includes the following meals and events: Thursday, December 4, 2008, continental breakfast, lunch and a networking reception in the evening. Friday, December 5, 2008, a continental breakfast will also be served. Your confirmation letter will include details for these events.



South Mountain Preserve, in Phoenix, is the largest municipal park in the country.

# Sponsors



IQNavigator is a leading provider of on-demand services procurement software and managed service programs. The company's award-winning suite of integrated applications enable Global 2,000 companies such as Charles Schwab, Entergy, Northrop Grumman, Schlumberger, Shell and Sony Electronics to gain control and visibility into their multi-million-dollar services procurement costs. With proven domain expertise and innovative technology solutions, IQNavigator can help customers quickly and easily turn complex services spend into a new source of value, competitive advantage, and continuous bottom-line improvement. For more information, please visit [www.iqnavigator.com](http://www.iqnavigator.com).



JVKellyGroup, Inc. is a leading professional services firm that specializes in developing and implementing innovative spend management solutions. With a team of more than 65 professionals, averaging more than 15 years of hands-on, industry experience, our projects provide practical solutions and quantifiable benefits. The firm's solution set includes strategic services, operations management and performance management. JVKellyGroup has led engagements across a diverse range of industry verticals and worked with virtually every category of indirect spend. To learn more, please visit [www.jvkg.com](http://www.jvkg.com).



Peopleclick provides software and services that help global companies find, attract and hire quality people – in less time, with less risk. Delivering the most advanced and intuitive technology in the industry, Peopleclick's unique focus on talent acquisition gives you the flexibility to manage all types of labor including salaried, hourly and contingent.



## 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!

### 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 4, 2008**

7:00 – 8:00 a.m.

10:30 – 11:00 a.m.

2:30 – 3:00 p.m.

5:15 – 7:00 p.m.

9:15 – 9:30 a.m.

12:00 – 1:15 p.m.

4:00 – 4:15 p.m.

# Registration

BUILDING A STRONG SERVICES PROCUREMENT STRATEGY:  
Leadership, Sourcing and Global Perspectives

## 9TH ANNUAL SERVICES CONFERENCE

MEMBER FEE      NONMEMBER FEE  
**\$795 (USD)**      \$995 (USD)

### PRE-CONFERENCE SEMINARS

#### STRATEGIC SERVICES PROCUREMENT: APPLYING STRATEGIC SOURCING PRINCIPLES TO THE PROCUREMENT OF SERVICES #4458

December 2-3, 2008 **\$945 Members/\$1,245\* Nonmembers (USD)**, when you register for this seminar, in conjunction with the Conference. Add \$200 if you register for Seminar #4458 after November 2, 2008.

\* Seminar fees increase \$50 USD on September 1, 2008.

#### CPSM TRAIN-THE-TRAINER #4299

December 2-3, 2008 \$100 Member and Nonmembers (USD)  
<http://www.ism.ws/education/seminardetails.cfm?itemNumber=17657>

### FOUR EASY WAYS TO REGISTER

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

**Fax:** Fax completed form with credit card information to 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 ISM Customer Service at 800/888-6276 or +1 480/752-6276, extension 401, with your credit card information.

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**, December 2-3, 2008.

Check this box if you are also registering for the **CPSM Train-the-Trainer seminar #4299**, December 2-3, 2008.

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

Dr.             Mr.             Mrs.             Ms.             Miss

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

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Daytime Phone Number\*

Fax Number\*

\*For phone 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 \_\_\_\_\_

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.

Please place an X in your preferred concurrent workshop sessions:

**Thursday, December 4, 2008**

**Concurrent Session — 11:00 a.m. – 12:00 p.m.**

\_\_\_\_\_ **TC** Lessons Learned After Five Years of Sourcing in a Services Business

\_\_\_\_\_ **TD** Effective Global Travel Management

**Concurrent Session — 3:00 – 4:00 p.m.**

\_\_\_\_\_ **TF** A New Approach to Global Staffing

\_\_\_\_\_ **TG** Software Contracting From Legal and Cost Perspectives

**Friday, December 5, 2008**

**Concurrent Session — 9:30 – 10:30 a.m.**

\_\_\_\_\_ **UB** Building the Procurement Superhero

\_\_\_\_\_ **UC** Selecting Cost-Effective Green Supply Chain Programs for Your Organization

**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.)

**Team Discount** — Save \$25 per person when three or more individuals from an organization register for the conference.



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9th Annual ISM Services Conference

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The Ritz-Carlton • Phoenix, Arizona

### 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 are 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).

### Professional Focus

#### Increase your educational experience exponentially.

*Strategic Services Procurement: Applying Strategic Sourcing Principles* provides a fresh look at the strategic nature of the supply function. The seminar provides insights into current trends and opportunities for supply's involvement in service procurement, the application of strategic sourcing methods and technologies to the service spend and service supply base, and participant analysis and discussion of case studies to service spend not traditionally sourced through the purchasing function. Register for this pre-conference seminar and the Services Conference and save \$100.

#### Strategic Services Procurement: Applying Strategic Sourcing Principles

Seminar #4458

December 2-3, 2008

Phoenix, AZ

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