



Integrating Your Services Spend:
Next-Generation Strategies

8th Annual ISM Services Conference

presented by
Institute for Supply Management™

November 29-30, 2007

Pointe South Mountain Resort
Phoenix, Arizona



www.ism.ws • 800/888-6276 or 480/752-6276, extension 401



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!

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Integrating Your Services Spend:

Next-Generation Strategies

8th Annual ISM Services Conference

November 29-30, 2007

Pointe South Mountain Resort • Phoenix, Arizona

The 8th Annual Services Conference offers lessons learned and real-world accomplishments from some of the world's most visible and successful organizations. 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

Realize a high ROI when you direct your supply management expertise to the world of purchasing services. Discover how to translate your knowledge about sourcing and buying tangible goods into the services arena, and reveal hidden savings in the process. Currently, only 27 percent of the purchase of services dollars is handled by supply management professionals (according to CAPS Research) — find out how to turn your coworkers into customers and streamline your 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. Networking time is 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 10 Continuing Education Hours (CEHs) for your participation.

Built-in value.

This program delivers five general sessions, three concurrent sessions and ample networking time.

Agenda

Thursday, November 29, 2007

8:00 – 8:15 am **Welcome**

8:15 – 9:15 am **General Session**

TA Services Sourcing Savvy: Strategies for Optimizing Your Services Expenditures

LISA MARTIN, C.P.M., Senior Vice President, Worldwide Procurement
Pfizer Inc
Chair, ISM Board of Directors

Look for effective strategic sourcing strategies from the unique world of services. The presentation includes high-level strategies that apply across service types. Learn how Pfizer used these strategies to its fullest advantage.

9:45 – 11:00 am **General Session**

TB Talent Development for Purchasing Professionals

RICHARD A. HUGHES, Vice President, Global Purchases
The Procter & Gamble Company

Hear how Procter & Gamble approaches talent development, skill training and related talent systems. Explore capabilities and key competencies as well as success drivers. Review global skill development and several key skills along with other important components of P&G's talent systems, including creation and tracking of staff development plans and career progression.

11:15 am – 12:15 pm **Concurrent Session I**

TC Preferred Supplier Programs for Professional Services

SCOTT BERRIER, C.P.M., Senior Vice President & Director, Professional Services
Wachovia

This session offers an overview of how supply chain management can develop a professional services sourcing program framework. Learn how Wachovia Corporation, one of the largest financial services providers in the U.S., identified key strategies and measures for several professional service areas (IT hourly, nontechnical contingent workforce, management consulting, outsourcing/offshoring) and achieved process efficiencies and compliance. Discover the importance of business partner support and internal change management. The discussion includes overall supplier performance and relationship management.

TD Expanding the Impact of Services Procurement for the Human Capital Spend

BRIAN ST. ANDRÉ, SENIOR, Subcontracts Administrator, Commercial, State & Local Group
Northrop Grumman Information Technology

Discover how Northrop Grumman used a services procurement solution resulting in a positive impact on its human capital spend. Using a supplier management system, Northrop Grumman built strategic relationships with suppliers and increased the use of small, women and minority-owned businesses, achieving significant cost savings and capturing hundreds of millions of dollars of services spending through an iterative roll-out.

1:45 – 3:00 pm **General Session**

TE Leadership Under Fire

BRIGADIER GENERAL NICK HALLEY, (U.S. Army, Retired) President
One Star Productions, Inc.

Our leaders are currently operating in a very hostile leadership environment. To help you be a successful leader both today and in the future, General Halley discusses the most important leadership lessons learned from his experience at West Point, 30 years in the military, three combat commands (Vietnam, Grenada and Iraq) and his years at several international electronics firms, including Motorola. Leadership lessons are illustrated with compelling and entertaining military and corporate war stories.

3:30 – 5:00 pm **Concurrent Session II**

TF Fundamental Strategies and Best Practices for Supply Chain Organizations and Services Spends

ROBERT J. ENGEL, C.P.M., National Director of Client Service
Resources Global Professionals

One of the gratifying trends in supply chain management is that many organizations actively realize the importance of their services spend in addition to the traditional focus on direct and indirect goods and materials. The positive impact is that as supply chain professionals, we can not only achieve savings for our organization but also be a participant in improving company performance, effectiveness and efficiency. Many supply chain organizations have moved toward executing strategies considered world-class or best practice, including those related to traditional services spend areas previously considered to be off-limits or out of scope. Supply management leadership is now challenged with

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.

taking the reins to lead their organizations to new levels of achievement. In this session, we will review supply chain initiatives that we believe are key to building a best-in-class supply chain organization.

TG Services Supply Management Around the World and Around the Clock

JEFF DANIS, Vice President, Supply Chain Management
Royal Caribbean Cruises Ltd.

The cruise industry has a very complicated supply chain considering this is a global brand operating 24/7, 365 days per year. Just-in-time takes on new meaning when it's either make the appointed delivery time or the customer is on to the next port. The interplay of logistics and supply management is critical, and the team at Royal Caribbean has overcome some unique obstacles as it redefines a services orientation. This session focuses on the incredible breadth of products and services Royal provides, how it organizes to provide critical services, the challenges of its operating environment, what it's learned from other industries such as manufacturing and the road it has followed to turn around an organization in need of revitalization. Hear about Royal's six-point plan and its evolution into a strategic plan, the importance of recruiting and retention, quality management and some best practices.

5:00 – 6:30 pm **Networking
Reception and
Select Supplier
Showcase**

Friday, November 30, 2007

8:00 – 9:30 am **General Session**

UA Driving Value Through Organizational Synergy

GARRY BADDOCK, Vice President, Global Procurement & Worldwide Services
Unisys Corporation

Learn how to drive greater value to your company using strategies and techniques from Unisys, a worldwide technology services and solutions company. Just like Unisys, use the full power of supply management and real estate operations integration to achieve greater alignment with business priorities and drive a larger percentage of savings to your bottom line. Discover the process Unisys adopted and find out how it achieved this objective in a short three-month timeframe. This session provides a takeaway tool that lets you evaluate the proposition of fully integrating with another function to determine if it can add tangible value to both your company and your supply management organization.

9:45 – 10:45 am **Concurrent
Session III**

UB Meetings and Procurement: The Perfect Marriage

LEE ANN ADAMS MIKEMAN, Assistant Vice President,
Conference Planning & Special Events
Science Applications International Corporation (SAIC)
Co-Chair
**National Business Travel Association Groups & Meetings
Committee**

PAMELA MCTEER, C.P.M., CTC, Senior Supply Manager
Coors Brewing Company
Member
**National Business Travel Association Groups & Meetings
Committee**

The unique characteristics of meetings procurement make it more than a specialized segment of your travel spend. It's common for meetings to be booked with little input from procurement or travel departments and outside of established policies governing individual business travel. Learn how meeting planning and procurement professionals can successfully collaborate to achieve mutual goals/objectives suggesting strategic sourcing tactics that have been proven to work, such as adopting a meeting/event approval process, distributing online RFPs through a central technology system, using standard hotel contract terms/conditions to protect organizations and so on. Engage with experts who have implemented strategic meetings management programs (SMMPs) and see what a valuable role procurement plays in making these successful. Learn tips for minimizing risk associated with large meetings, conferences and special events. Identify differences between travel and meetings procurement, leading to a more effective use of resources.

UC Consulting Category Management

ANDREA GRABLE, C.P.M., World Wide Director, Category Leader of Consulting, Temp Labor and Professional Services
Johnson & Johnson
JOHN G. CATERO, CPIM, Managing Director
Leverage Intelligence Consulting LLC

Hear from Johnson & Johnson, 2007 winner of an ISM R. Gene Richter Award for Leadership and Innovation in Supply Management, on how it created a consulting category management process which improved the visibility, sourcing practices, contracting and the value received from its consulting spend. An internal team made up of 30 leaders benchmarked internally and externally, then designed and implemented a robust process which provides more value to internal business partners. The process resulted in increased spend capture, savings and the ability to identify and leverage opportunities.

Registration

Wednesday,
November 28, 2007
4:00 - 6:00 pm

Thursday,
November 29, 2007
6:30 am - 4:30 pm

Friday,
November 30, 2007
7:00 - 11:00 am

10:55 am – 12:10 pm

**General
Session**

**UD Supply Management Professionals:
Academic and Practitioner Future
Perspectives**

Panelists:

MARTY BELL, C.P.M., A.P.P., Supply Chain Manager
American Family Insurance

CHRISTOPHER FLUM, C.P.M., Vice President, Global Indirect
Supply & Procurement
Harman/Becker Automotive Systems

GARY L. RAGATZ, PH.D., Associate Professor of Supply Chain
Management, Department of Supply Chain Management
**Eli Broad Graduate School of Management, Michigan State
University**

WILLIAM A. VERDINI, DBA, Associate Professor, Supply Chain
Management
W. P. Carey School of Business, Arizona State University

BRET J. WAGNER, PH.D., Associate Professor & Director,
Integrated Supply Management Program, Department of
Management
Haworth College of Business, Western Michigan University

Supply management organizations have identified functional
excellence as a critical success factor for an organization's
financial and overall success. A key challenge to achieving
excellence is to increase the visibility and integration of
the supply management organization. To accomplish this,
organizations must:

1. Establish strong supply management leadership roles.
2. Develop constant cross-functional education and training to ensure operational integration and execution.
3. Create formal supply management employee development programs for skill enhancements (pre-hire to experienced veterans).

The purpose of this panel discussion is to address in
detail the various skill sets and competencies required by
organizations including those taught by leading university
supply management programs. The discussion covers
a partnership approach that organizations can use with
universities to establish a continuous improvement process
for supply management education, thus guaranteeing a
knowledgeable workforce.

12:10 – 12:25 pm **Closing Remarks**

CYBER CAFÉ

Take advantage of our Cyber Café while you're at the
conference. There's nothing worse than returning to the
office and facing a full mailbox. Check your e-mail and get a
jump on things while you're out.

Registration Information

Accommodations — Please make your own hotel
reservations. All sessions are at the Pointe South Mountain
Resort, 7777 S. Pointe Parkway, Phoenix, AZ 85044. For
reservations, call 877/800-4888. Be sure to mention ISM to
receive the special room rate of \$135 single/double. The
ISM rate is offered until November 1, 2007; rooms sell out
quickly so please be sure to reserve your room early. For
more information about the resort, visit
www.pointesouthmtn.com

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
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 to the Procurement of Services*,
Seminar #4456, and save \$100 on your 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 continuing 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, November 29, 2007,
continental breakfast, lunch and a networking reception
in the evening. Friday, November 30, 2007, continental
breakfast. Your confirmation letter will include details for
these events.

**The following
amenities/
services are
included in your
hotel room rate:**

- Unlimited local calls
- Unlimited access for credit card, toll-free and collect phone calls (Some restrictions apply.)
- One daily in-suite pot of coffee
- Delivery of *USA Today* newspaper Monday-Friday
- Fitness center admittance
- Tennis, volleyball and croquet court time
- Shuttle to Arizona Mills Mall
- Incoming/outgoing fax
- Admittance to The Oasis Water Park (see Web site for hours)
- High-speed Internet access



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

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, November 29, 2007

| | | |
|----------------|------------------|----------------|
| 7:00 – 8:00 am | 11:00 – 11:15 am | 3:00 – 3:30 pm |
| 9:15 – 9:45 am | 12:15 – 1:45 pm | 5:00 – 6:30 pm |

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.



As the leading international trade association for the cleaning industry, ISSA's membership includes more than 4,800 distributor, building service contractor, manufacturer and in-house service provider members. The association's new Cleaning Industry Management Standard is a valuable and free tool for purchasers to use when qualifying cleaning services and is available for download at www.issa.com/standard. The ISSA/INTERCLEAN® North America annual convention is the largest trade show in the United States designed specifically to educate buyers on the cleaning and maintenance industry. The trade show will display the newest technologies, equipment, products and services from more than 700 exhibitors. In addition, an educational conference that includes more than 30 sessions is planned that will focus on technology, workloading and outsource management, as well as a host of sessions on professional skills development. Visit www.issa.com for details.



JVKellyGroup, Inc. is a complete expense management consulting firm headquartered in New York. Our team brings innovative strategies to deploy true cost reduction throughout a corporation. We have the ability to work on a single project or provide a suite of services tailored to your companies' needs. Our clients include Fortune 500 companies as well as growing companies who can benefit from our expertise in shrinking expenses and expanding their bottom line.



Rearden Commerce, Inc. provides the first online personal assistant that helps people quickly find and purchase the services they need, based on personal preferences and company policies. The Rearden Commerce Personal Assistant provides easy access to the world's largest marketplace for services, instantly connecting people to more than 137,000 merchants. Whether it's booking a flight or a hotel, making a restaurant reservation, finding event tickets, scheduling a conference call or shipping a package, the Rearden Commerce Personal Assistant simplifies the complex services landscape into one user-friendly experience. With Rearden Commerce, the power of the intelligent Web is finally realized. Rearden Commerce is headquartered in Foster City, California. For more information, visit www.reardencommerce.com.

Registration

Integrating Your Services Spend: Next-Generation Strategies

PROGRAM NAME

Integrating Your Services Spend: Next-Generation Strategies
8th Annual ISM Services Conference

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

STRATEGIC SERVICES PROCUREMENT: APPLYING STRATEGIC SOURCING PRINCIPLES TO THE PROCUREMENT OF SERVICES #4456

November 27-28, 2007 **\$1,245 Members/\$1,545 Nonmembers**
Add \$200 if you register for Seminar #4456 after October 27, 2007.

FOUR EASY WAYS TO REGISTER

Internet: Register online at www.ism.ws.

Fax: Transmit 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 Customer Service at 800/888-6276 or 480/752-6276, extension 401. 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 #4456, November 27-28, 2007, **\$1,245 Members/\$1,545 Nonmembers**

This conference offers five general sessions and three concurrent sessions. Please place an X in your preferred concurrent workshop sessions:

Thursday 11/29/07, Concurrent Session I — 11:15 am – 12:15 pm

- _____ **TC** Preferred Supplier Programs for Professional Services
_____ **TD** Expanding the Impact of Services Procurement for the Human Capital Spend

Concurrent Session II — 3:30 – 5:00 pm

- _____ **TF** Fundamental Strategies and Best Practices for Supply Chain Organizations and Services Spends
_____ **TG** Services Supply Management Around the World and Around the Clock

Friday 11/30/07, Concurrent Session III — 9:45 – 10:45 am

- _____ **UB** Meetings and Procurement: The Perfect Marriage
_____ **UC** Consulting Category Management

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.)

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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.



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8th Annual ISM Services Conference

November 29-30, 2007

Pointe South Mountain Resort • 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 the world. Known as the “Valley of the Sun,” Phoenix averages a high temperature of 74 degrees Fahrenheit during the month of November.

The Valley of the Sun is home to more than three million residents and is a thousand square miles in area. 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 the greater Phoenix metropolitan area and other points of interest in Arizona, visit www.arizonaguide.com.

Education²

Increase your educational experience exponentially.

This seminar provides a fresh look at the strategic nature of the supply function and opportunities for expanded involvement in the area of service procurement. The accelerating growth of services as a component of total spend underscores the need for the supply function's strategic role in this area. This 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 specific to services 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 to the Procurement of Services

Seminar #4456

November 27-28, 2007

Phoenix, AZ

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SC 397 8/07 25M



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