

December 1-2  
**2011**

The Pointe Hilton  
Tapatio Cliffs Resort  
Phoenix | Arizona



# 12th Annual ISM Services Conference

presented by the ISM Services Group

- Nontraditional Services Purchasing
- Corporate Mobility Spend
- Temporary Labor Sourcing
- Software Licensing
- Supplier Relationship Categories
- Disaster Response Supply Management
- Negotiation
- Roundtable Discussions
- Marketing Procurement
- Indirect Sourcing
- Diversity and Green Initiatives



stay competitive  
move forward



## 12th Annual ISM Services Conference

**December 1-2, 2011**

The Pointe Hilton Tapatio Cliffs Resort • Phoenix, Arizona

### **Move Forward**

ISM believes in leading the pack, not just keeping up with it. This year's Services Conference focuses on keeping you current, connected and competitive. We've gathered some of the best leaders in the profession, covering everything in services from green initiatives to non-traditional services spend. By attending the 12th Annual Services Conference, you'll be able to put significant distance between your organization and its competitors.

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. Roundtables 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.

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

**Built-in value.** This program delivers six general sessions, two 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 1, 2011

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

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

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

## **TA Meaningful Involvement in Services Purchasing: Insights from Cases**

**LISA M. ELLRAM, PH.D., C.P.M.**

Rees Distinguished Professor of Distribution  
Farmer School of Business — Miami University

**WENDY L. TATE, PH.D.**

Assistant Professor  
University of Tennessee

Understand how you can become meaningfully involved in the area of nontraditional services purchasing. Learn the keys to maintaining a relationship with — and supporting the goals of — internal customers while positively impacting personal and organizational outcomes.

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

## **TB Saving Lives, Saving Money: Supply Chain Management at the American Red Cross**

**JILL BOSSI, C.P.M.**

Chief Procurement Officer  
American Red Cross

Many times in our professional lives, we've heard the comment, "Don't worry about it, we're not saving lives," and for most organizations that statement is true. However, for the American Red Cross, almost everything is about saving lives: from disaster response, blood donations and distribution — to the work done with the men and women serving in the armed forces. In the current economy, nonprofit fundraising has suffered and, with the exception of nationally televised disasters such as earthquakes in Haiti and Japan, donations are significantly down. The Red Cross realized it needed to change its habits, and supply chain management was the key. By developing a strategic supply chain discipline, not only did the Red Cross continue to save lives, it also saved

money. See how the American Red Cross made the journey from a nonprofit without a strategic supply vision to an organization where every dollar saved can be equated with helping save another life.

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

## **TC Enlightened Marketing Procurement: Maximizing Investment & Minimizing Waste**

**CHUCK HATSIS**

President  
Surge Consulting

**SHANNON PUHL, MBA**

Director, Supply Management Services  
Nationwide

Did you know that the market capitalizations of top marketers are six times larger? When marketing is done right, it is a tremendously valuable investment. Yet marketing productivity varies greatly from company to company, so enlightened marketing procurement professionals, like those at Nationwide, view marketing as an investment to maximize rather than as an expense to minimize. Learn how the best supply managers enhance the efficiency and effectiveness of marketing investments, are assets to their business partners and contribute to the creation of value for their shareholders. Join us and learn:

- The complexities of sourcing marketing and advertising
- How to determine the right marketing procurement strategy for your company
- Nationwide's marketing procurement journey from "good to great"
- Where the largest (and most overlooked) efficiencies in marketing are

## **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.

## **TD TCO and Relo: Reducing Costs and Driving Value Within Your Corporate Mobility Spend**

**DAVID BARLOW, SCRP, SGMS**  
Senior Vice President, Senior Consultant  
**SIRVA, Inc.**

**JON GILBERTSON, GMS**  
Vice President of Risk, Global Supply Chain & Procurement  
**SIRVA, Inc.**

Typically, mobility ranks as the second-highest HR expense, right behind healthcare. Yet gaining clear insight into total relocation costs is challenging.

Because mobility costs are often scattered throughout the organization, they are frequently overlooked during a spend analysis. Adding to the complexity, mobility services are predominantly procured based on service fees alone, which only account for three percent of the total cost — while major costs associated with the home sale, temporary living and household goods are often ignored.

We will take you through a 60-minute guide that will serve as a blueprint to better manage mobility costs. From re-engineering RFPs to identifying essential cost drivers, you will learn the methodology to obtain more visibility into your mobility spend, which can also be applied to other areas throughout HR.

**1:30 - 2:30 p.m. General Session**

## **TE What Everyone Really Needs to Understand About the Software Licensing Process**

**PETER J. FRAZZA, ESQ.**  
Chair, Technology Law Group  
**Budd Larner, PC**

Prepare for the future of your organization. Learn how to examine emerging pricing, contractual and legal issues in software licensing. Find out how to prepare for the negotiations and analyze the hidden traps in supplier form license agreements. By the end of this session, you will know how to maximize your rights and minimize the risks to move your organization forward.

**3:00 - 4:00 p.m. General Session**

## **TF The Five Golden Rules of Negotiation: Negotiation Best Practices for Services**

**MARTIN E. LATZ, ESQ.**  
Founder and CEO  
**Expert Negotiator Planning & Management Software**

This fast-paced and informative session reveals the keys to developing the strategic mind-set at the heart of effective negotiation and arms you with practical ways to implement them within

your organization, leading to more success in all your negotiations. We also show you how to defend against negotiation games you may encounter. You also learn the Five Golden Rules of Negotiation for Services, the essential keys to your success in negotiations.

**4:15 - 5:00 p.m. TG Roundtables**  
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.

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

## **Friday, December 2, 2011**

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

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

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

## **UA Building a High-Impact Indirect Sourcing Function**

**TDEREK EVERITT, CPSM**  
Global Sourcing Director  
**Terex Corporation**

The focus is on building an indirect sourcing function from the ground up. We cover building a team, assessing opportunities, picking categories, setting targets, identifying stakeholders, avoiding pitfalls and communicating success. Attend this session to ensure your indirect spend contributes to your organization's aspirations.

**9:15 - 10:15 a.m. Concurrent Sessions**

### **UB Temporary Labor Sourcing: What You Need to Know to Successfully Source This Category**

**ROSANNA YANG**

Director

A.T. Kearney's Procurement & Analytic Solutions Group

**TOM O'NEILL, B.C.E., MBA**

Managing Director

CoVest Services, LP

Get the types and definitions of contingent labor and an overview of the current market. Hear about alternative temporary labor models and supplier management systems, and learn about cost-reduction strategies, the sourcing process and group purchasing opportunities. Join us and get crucial case studies and examples to give you the applied knowledge you need to be successful in labor sourcing for your company.

### **UC Navigating Uncharted Sourcing Territory: How to Gain and Maintain Access to the Relationship Categories**

**WHITNEY A. TAYLOR**

Senior Sourcing Manager

Advanced Micro Devices, Inc.

Procurement organizations have long had successful sourcing efforts with the more commoditized areas such as information technology and office supplies; however, they have garnered less success with the

legal profession. Join us as we explore this and the nature of other relationship-based spend areas, their inherent challenges and critical steps you can take to get the procurement relationship going and reduce the large spend consumed in these crucial areas.

**10:30 - 11:30 a.m. General Session**

### **UD Out Front Supplier Diversity Goes Global and Green**

**JOAN N. KERR, J.D., M.S.W.**

Director, Supplier Diversity/Development

Pacific Gas & Electric Company

Global supplier diversity initiatives continue to grow in importance. Learn why global diversity is paramount to supporting your company's business objectives. Diverse suppliers know they must proactively be a part of green business initiatives, which give them a competitive advantage. Attend this session and get an inside track for moving forward in these developing areas.

**11:30 - 11:45 a.m. Closing Remarks**

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

**Early-Bird Discount** – Take US\$100 off the conference registration fee by registering no later than October 20, 2011.

**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," #4455, and save US\$200 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 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/2843](http://www.ism.ws/2843) 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 7, 2011 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  
November 30  
4:00 - 6:00 p.m.

Thursday  
December 1  
6:30 a.m. - 4:30 p.m.

# Sponsors



## 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!



**Connolly** works with more than 130 of the world's best run companies to unlock value from payments to sourcing. Connolly reviews in excess of US\$700 billion in spend annually to assist our clients in recovering cost, preventing value leakage, managing risk and improving compliance. To learn more, visit [www.connolly.com](http://www.connolly.com) or call 800/530-1013.



**IQNavigator** is the leading provider of services spend management software and managed services that enable global companies to gain visibility and control over a significant and strategic corporate spend category. With proven domain expertise and innovative technology solutions, IQNavigator helps turn complex services spend into a new source of value, competitive advantage and continuous bottom-line improvement. For more information, 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 1, 2011**

7:00 – 7:50 a.m.

10:30 – 11:00 a.m.

2:30 – 3:00 p.m.

5:00 – 7:00 p.m.

9:15 – 9:30 a.m.

12:00 – 1:15 p.m.

4:00 – 4:15 p.m.



# Registration

Innovative Supply Relationships: Creating Value for Services Procurement

## 12TH ANNUAL ISM SERVICES CONFERENCE

<b>MEMBER FEE</b>	<b>NONMEMBER FEE</b>	<b>STUDENT MEMBER FEE</b>
<b>US\$845</b>	<b>US\$1,045</b>	<b>US\$250</b>

### PRE-CONFERENCE SEMINAR #4455

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

November 29-30, 2011 **US\$1,395 Members\*/US\$1,695 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 #4455**, on November 29-30, 2011.

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

Dr.  Mr.  Mrs.  Ms.  Miss

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

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

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

MAILING ADDRESS:  HOME  BUSINESS

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

E-Mail 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 1, 2011

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

\_\_\_\_\_ **TC** Enlightened Marketing Procurement: Maximizing Investment. Minimizing Waste

\_\_\_\_\_ **TD** TCO and Relo: Reducing Costs and Driving Value Within Your Corporate Mobility Spend

### Friday, December 2, 2011

#### Concurrent Sessions – 9:15 – 10:15 a.m.

\_\_\_\_\_ **UB** Temporary Labor Sourcing: What You Need to Know to Successfully Source This Category

\_\_\_\_\_ **UC** Navigating Uncharted Sourcing Territory: How to Gain and Maintain Access to the Relationship Categories

**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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12th Annual ISM Services Conference

December 1-2, 2011

The Pointe Hilton Tapatio Cliffs 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 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).

### 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 #4455

November 29-30, 2011

Phoenix, Arizona