



TPI's AMERICAS SOURCING INDUSTRY CONFERENCE 2008
April 21 – 22: The Drake Hotel, Chicago
Tipping Points: Critical Moments in the Sourcing Life Cycle

MONDAY, APRIL 21, 2008 Pre-Conference Workshops	
Introductory Training: 2:00 to 5:00 p.m.	
2:00 – 2:45 p.m. Huron Room	Welcome, Agenda Overview, Introduction to the TPI Transaction Methodology <i>Presenters: Karen Ikeda, Partner, TPI, and Brian Smith, Partner, TPI</i> <ul style="list-style-type: none"> ▪ Overview of the sourcing process used by TPI in serving clients ▪ How service providers are selected to participate in TPI-assisted transactions
2:45 to 3:00 p.m. Break	
3:00 – 3:45 p.m. Huron Room	TPI's RFP and Non-RFP Approaches <ul style="list-style-type: none"> ▪ RFP structure and how to respond ▪ Executive alignment and mutual value discovery sessions ▪ Overview of TPI's suggested pricing approach
3:45 to 4:00 p.m. Break — Foyer	
4:00 – 5:00 p.m. Huron Room	Course Review and Questions and Answers <ul style="list-style-type: none"> ▪ Putting your best foot forward ▪ Questions and answers
Advanced Training: 2:00 to 5:00 p.m.	
2:00 – 2:45 p.m. Parkside Room	Welcome, Agenda Overview, Financial Methodology <i>Presenter: Chris Kalnik, Partner & Managing Director, Financial Analysis, TPI</i> <ul style="list-style-type: none"> ▪ Overview of the financial methodology ▪ What service providers should know
2:45 to 3:00 p.m. Break	
3:00 – 3:45 p.m. Parkside Room	Assets and Resource Units <ul style="list-style-type: none"> ▪ TPI's advice on assets ▪ TPI's recommended pricing units
3:45 to 4:00 p.m. Break — Foyer	
4:00 – 5:00 p.m. Parkside Room	Key Contentious Negotiations Items <ul style="list-style-type: none"> ▪ Adjustments for inflation/deflation ▪ Minimum commitments ▪ Currency exchange ▪ Taxes
6:30 to 9:00 p.m. Welcome Reception - The French Room	



TUESDAY, APRIL 22, 2008
SIC Conference

7:30 to 8:30 a.m. Breakfast — The Drake Room

General Session: 8:30 to 10:00 a.m.

8:30 – 9:00 a.m. Grand Ballroom	<p>Welcome, Introduction, TPI Update <i>Presenter: Scott Gildner, Partner & President, North America, TPI</i></p> <p>Scott will introduce the conference agenda and the TPI executives in attendance. In addition to addressing the marketplace motivations for conference topics, he will also provide a brief update on TPI's marketplace position and associated strategies for facilitating successful outsourcing and offshoring relationships. Attendees will be invited to comment on the summary trends that characterize the current state of outsourcing adoption across industries.</p>
9:00 – 10:00 a.m. Grand Ballroom	<p>Tippling Points: Critical Moments in the Sourcing Life Cycle <i>Presenter: Peter Allen, Partner & Managing Director, TPI</i></p> <p>Peter will review the sequence of decision criteria commonly encountered in the source deliberation, with focus on the issues that impact those decisions. Taking a life-cycle approach, we will engage in discussion around how the industry might best address these issues to the satisfaction of client concerns.</p>

10:00 to 10:30 a.m. Break — Foyer

Concurrent Sessions A: 10:30 to 11:30 a.m.

Parkside Room	<p>Track 1: Winning: Improving Your Probability with Compelling Bids <i>Presenters: Tony Herron, Partner, TPI and Bhavneet Bajaj, Partner, TPI</i></p> <p>Tony and Bhavneet will lead a discussion on how to improve the quality of service provider bids along with reviewing winning attributes of successful bids.</p>
Erie Room	<p>Track 2: Streamlining: Engagement Process Efficiency and Cost Reduction <i>Presenter: Chris Kalnik, Partner & Managing Director, Financial Analysis, TPI</i> <i>Panelists: Nicole Zaghikian, Director, Global Business Development, IBM</i> <i>Arun Kumar, AVP and Head – Worldwide Sales, Infosys</i> <i>Bill Hutton, Vice President, CSC</i></p> <p>Chris will lead a service provider panel in discussing how to streamline the sourcing process and reduce costs for all involved.</p>
Ontario Room	<p>Track 3: Getting to Signing: Keeping Your Engagement on Track <i>Presenter: Melany Williams, Partner and Managing Director, TPI Innovation Center, TPI</i></p> <p>The presenter will lead a discussion on how to better engage the client team during the procurement process, including techniques for more effective executive alignment, solution sessions, due diligence, proposal walkthroughs, negotiations and handling challenges during the sales process.</p>



<p>Michigan Room</p>	<p>Track 4: Delivering on Expectations: Why Relationships Get in Trouble, and Mitigating the Risks of Failure <i>Presenter: Rich Fogel, Partner, TPI</i> <i>Panelists: Rebecca Eisner, Partner, Mayer Brown and Paul Abel, Partner, Accenture's Resources Operating Group, Accenture</i> Rich will lead a discussion on early warning signs of troublesome engagements; common failures to realize expected value; and how the service provider and client can collaborate and communicate to mitigate the risks of failure.</p>
<p>Huron Room</p>	<p>Track 5: Innovation: Fact or Fiction <i>Presenter: Harvey Gluckman, Partner & Managing Director, Technology, Retail, Hospitality and Travel Services, TPI</i> Harvey will lead a discussion on client perceptions of innovative offerings. Topics will include how innovation is ascribed business case value, and client experience with innovation expectations and the reality of service delivery.</p>
<p>11:30 a.m. to 1:00 p.m. Lunch — The Drake Room</p>	
<p>Concurrent Sessions B: 1:00 to 2:00 p.m.</p>	
<p>Parkside Room</p>	<p>Track 1: CIO Services: Navigating Changes in Buying Patterns <i>Presenter: Mike Slavin, Partner & Managing Director, CIO Services North America, TPI</i> Mike will present TPI's view and experience with the changing scope of sourced infrastructure engagements, with a focus on remote infrastructure management and offshoring.</p>
<p>Erie Room</p>	<p>Track 2: CHRO Services: Realities in the Maturing HRO Market <i>Presenters: Rosemary Collins, Partner & Managing Director, CHRO Services North America, TPI; and Jeff Croyle, Partner, TPI</i> Rosemary will lead a discussion on the ever-evolving human resources outsourcing (HRO) market and how clients and providers are reacting to the challenges of the previous few years. We will discuss how TPI is seeing both clients and providers moving away from the highly customized multiprocess global transactions to more standardized and scalable solutions, the impact this is having on pricing and transformation, and the key ingredients of a successful relationship.</p>
<p>Ontario Room</p>	<p>Track 3: CFO Services: Helping Clients Move Their Organizations Forward <i>Presenter: Bill Frech, Partner & Managing Director, CFO Services North America, TPI</i> Bill will talk about the changing landscape of finance & accounting and procurement engagements as clients move from larger transactions to smaller, process-specific projects, looking for more than just cost savings.</p>
<p>Michigan Room</p>	<p>Track 4: Global Service Delivery: Changing Dynamics in the Global Markets <i>Presenter: Paul Schmidt, Partner & Managing Director, Global Service Delivery, TPI</i> Paul will discuss changing trends in offshore markets, with a focus on emerging buyer themes for successful service provider relationships.</p>



Huron Room	<p>Track 5: Financial Services Operational Offshoring: Moving from Tactical to Strategic</p> <p><i>Presenter: Brian Smith, Partner & Managing Director, FSO Services North America, TPI</i></p> <p>Financial services offshoring often starts small and grows. What are the issues that clients face, and what are their expectations of service providers? How can service providers position themselves to take advantage of these opportunities?</p>
Lakeshore Board Room	<p>Track 6: Financial Analysis: Global Macro-Economic Factors and Their Impact on Sourcing Relationships</p> <p><i>Presenter: Chris Kalnik, Partner & Managing Director, Financial Analysis, TPI</i></p> <p>Chris will lead a discussion on how global economic factors — including inflation, currency fluctuations and taxes — are impacting today's sourcing relationships.</p>
2:00 to 2:15 p.m. Break	
General Session: 2:15 to 3:15 p.m.	
Grand Ballroom	<p>Innovation Agenda</p> <p><i>Presenters: Peter Allen, Partner & Managing Director; Mike Slavin, Partner & Managing Director, CIO Services North America; Harvey Gluckman, Partner & Managing Director, Technology, Retail, Hospitality and Travel Services; Stuart Harris, Partner; Chris Kalnik, Partner & Managing Director, Financial Analysis; and Shawn McCray, Partner, TPI</i></p> <p>Each presenter will provide a summary on a pillar of TPI's Innovation Agenda: multisourcing, innovation in outsourcing, benchmarking, terms and conditions center points, apples-to-oranges comparisons and change management.</p>
3:15 to 3:45 p.m. Break — Foyer	
General Session: 3:45 to 5:00 p.m.	
3:45 – 4:45 p.m. Grand Ballroom	<p>Client Case Study</p> <p><i>Presenters: Lee Coulter, Senior Vice President, Kraft and Tom Lang, Partner & Managing Director, Industry Verticals, TPI</i></p> <p>There will be a review of case studies relevant to the theme.</p>
4:45 – 5:00 p.m. Grand Ballroom	<p>Closing Remarks</p> <p><i>Presenter: Peter Allen, Partner and Managing Director, TPI</i></p>

2008-03-21v1 crc