

THE MAGAZINE DRIVEN BY & FOR THE OUTSOURCING PROFESSIONAL

PULSE

Fast Company

Future Gazing at
Outsourcing p10-13

Site Tracker

A Look at the U.S. p26-27

View from the C-Suite

Meet the New IAOP Leadership
Hall of Fame Inductees p32-38

20TH
ANNIVERSARY
EDITION OF THE
SUMMIT

OWS17

HARNESSING THE POWER OF DISRUPTION

p20-25



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IT SERVICES ROCK STAR.

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THE MAGAZINE DRIVEN BY & FOR THE OUTSOURCING PROFESSIONAL

PULSE

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**20TH ANNIVERSARY
EDITION OF THE SUMMIT**

OW\$17

10 MOST WANTED P20-25



SITE TRACKER:

A Look at the
U.S. p26-27



DYLAN TAYLOR

Visionary Leader Joins
Hall of Fame p32-34



BEN TROWBRIDGE

Entrepreneur and Advisor
Honored p36-38

EXPERT INSIGHTS

Knowledge Center: Corporate Real Estate and IT Marriage p14-15
Tech Topic: Intelligent Automation p16-18

FUTURE GAZING

What do the Stars
Say for Outsourcing?
pg 10-13



INSIDE

Message from the CEO	p5
PULSE Contributors	p6
Taking the PULSE	p7
The Beat: News & Commentary	p8
"O" Book Club	p9
PULSE Professional: The Upside	p28
New! Research Corner	p29
Chapter Spotlight: Sales & Marketing	p40
Joining IAOP: New Members & Benefits	p42-43
PULSE Buyers Guide.....	p44-48



Message from the CEO:



WELCOME TO SAN ANTONIO, TEXAS,

for the 20th edition of the Outsourcing World Summit – the largest and longest-running industry event in the world with hundreds of delegates from over 40 countries in all parts of the industry here in attendance.

The Summit is your opportunity to gather with our closely connected community of customers, advisors, providers and academia. You're a very important part of our network and we're so happy to have you join us for three and a half days of non-stop networking, learning and fun at the JW Marriott Hill Country.

A lot has changed since OWS16 in Orlando, Florida. In this era of unprecedented change, new and emerging technologies, cyber risks, and global political and societal changes are coming at us faster than ever before. That's why this year's Summit, themed "Harnessing the Power of Disruption," is so vitally important to our industry and to you as professionals working in it.

With so much disruption around us, you're looking for a clearer vision. And OWS17 will provide it. Our keynote sessions have been designed to help you grasp what the future will look like and your role in it. Don't miss Outthink the Competition by best-selling author Kaihan Krippendorff; The Evolution of Outsourcing: Or What is it Going to Look Like Tomorrow? featuring a panel of our industry's best thought leaders; and The Future Game by Jared Weiner, Executive Vice President & Chief Strategy Officer, The Future Hunters.

While robotics, artificial intelligence, digitization, crowdsourcing and other technology trends will be examined in depth throughout the Summit, core

topics such as governance, contracts, negotiations, innovation and creating value will be as important as ever to the program lineup. We have more than 40 sessions in five tracks on today's key topics to meet your needs.

Other OWS17 must attends include the return of our interactive game show, IAOP's Got Talent, a special focus on



women empowerment and impact sourcing, our new Chapter Headquarters on the exhibit floor, and so much more.

I hope you'll also take advantage of the pre-Summit networking and learning opportunities by joining us for the 5th annual IAOP/PULSE Publisher's Cup Golf Tournament (what a beautiful location for a round with breathtaking Texas Hill Country views) and our 3rd annual Academic Workshop. For a preview of all the speakers and events at OWS17, see our cover story.

This issue also features interviews with our two inductees into the IAOP Leadership Hall of Fame – Ben Trowbridge and Dylan Taylor in the View from the C-Suite; intelligent automation in our

Tech Topic; a look at the U.S. region in the Regional Site Tracker; a spotlight on our Sales & Marketing Chapter; and our popular regular features covering the latest news in The Beat, books in the O Book Club and our social communities in Taking the PULSE.

As always, we are so grateful to our Strategic Advisory Board, regional advisory boards, chapter chairs and chapters, committees, speakers, sponsors, delegates and IAOP members who make producing the Summit possible. It truly is a gathering of outsourcing professionals like no other. We couldn't do it without you. A big shout out to our Texas chapter for showing their hometown hospitality and for planning some special events with local drinks and a memorable photo opportunity at the Chapter Headquarters in the Exhibitor Pavilion!

IAOP's education, training and certification, recognition, best practices and connections can help you navigate through the changes you and your organization face. So take the time to really listen at OWS17, open yourself to new ideas, and lend your voice to the dialogue. Get involved in a geographic or topical chapter to continue the conversations you start at the Summit. Together we can find answers to our industry's challenges. Now, more than ever, our IAOP collaborative knowledge-based community is essential to our industry's and your own success.

P.S.

Be sure to follow us and also share your live photos, speaker quotes, updates and highlights on social media (#IAOP #OWS17 #GO100), and check out the next issue of PULSE for exclusive event coverage.

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TAKING THE PULSE

FEEDBACK AND COMMENTARY FROM THE PULSE COMMUNITY

GROWTH THROUGH NEARSHORE DELIVERY — DELIVERY THROUGH SCALABLE TALENT

By guest blogger **Patrick Corcoran**

"Because of the need to satisfy business units in a shorter time frame and provide a faster return on investment, nearshore has become quite important for the overall delivery of resources. Areas like this include less travel time between client and delivery locations and less time zone differentiation between client and delivery locations. Depending on the geographic region, there are cultural and historic similarities between both buyers and providers, which aid in areas from requirements elicitation to flexible delivery coordination. Most importantly, there are very strong Tier-1 and Tier-2/3 cities with a history of university education within relevant fields (computer science, mathematics, linguistics, etc.) that have created and continue to create very talented IT professionals who are ready to contribute to leading-edge technology work."

Corcoran is the Global Director of Analyst and Advisor Relations at Luxoft and also one of the Co-Chairman of the IAOP NY Chapter.

Read the entire blog at www.iaoppulseblog.blogspot.com

DISCUSSIONS ON CONNECTIAOP

How has the U.S. Election Affected your Organization?



"We have all heard the rumblings as it relates to immigration reform, taxing those companies that

outsource and visa limitations or restrictions. While nothing is concrete, at my organization we have begun to have conversations and have even triggered a project to identify all business stakeholders who may be affected by any changes. Once we understand the potential impact, we can then start to engage in the right level of conversation and take action. I am confident we will be ahead of the change curve to limit disruption."

— **Israel Rodriguez**, Vendor Relationship Management, Allianz Life, Minneapolis MN

DEFYNITION BY JAG



CONFIDENTIALITY
CLAUSE



BUSINESS
CONTINUITY

in LINKEDIN TRENDING TOPICS

Death of Globalization ...?

GOING, GOING, GONE!
Yes, You CAN Auction Services!

Nine Digital Trends
Improving Business Processes

A Solid Testament to Jamaica's
Strengths

NEXT ISSUE

ANNUAL STATE OF THE INDUSTRY REPORT.

Complete OWS17 Coverage.
Cloud computing. APAC Region
and More.

TO CONTRIBUTE TO THESE STORIES,
suggest other stories or comment, contact: pulse@iaop.org



Political and social shifts can create new opportunities in different parts of the world while potentially negatively impacting others. IAOP's Chief Advisor of Thought Leadership, Jag Dalal, COP, takes an analytical look at news stories about how future moves made by the new U.S. president may impact offshore outsourcing and an emerging destination for tech talent.

THE NEWS HEADLINES

CHANGES TO COME FROM U.S. PRESIDENT



NOV. 30, 2016 TRUMP PRESIDENCY COULD SOUND DEATH KNEEL FOR OFFSHORE OUTSOURCING, CIO.

This article looks at potential changes to offshore outsourcing under a Donald Trump presidency. The

biggest hit would come in the form of increased restrictions on temporary work visas, such as the H-1B, which Indian and U.S.-based IT services firms use to bring offshore workers on-site stateside, the story says. "Any Trump-inspired reform of the U.S. immigration laws will likely make it harder to move employees into the U.S. market," says Peter Bendor-Samuel, CEO of outsourcing research firm Everest Group. "This will likely take the form of fewer H-1Bs, higher costs for visas."

THE IAOP DISH

ALL TECH COMPANIES COULD BE IMPACTED

There is a lot of speculation about what policies President Donald Trump will advocate and endorse as they relate to outsourcing and offshoring in particular. He has expressed some strong opinions about "punishing" companies that outsource offshore and has indicated that a 35 percent tax would be imposed on imported services. He has also expressed a strong opinion about restricting (or eliminating) temporary work visas. If enacted, it will have a tremendous impact on technology companies – not just outsourcing service providers. As this article points out, it will have a definite impact on outsourcing service models where temporary FTEs are utilized to provide services. A deeper question is: How will international commerce be impacted if these regulations are imposed? (For more viewpoints on the U.S. Presidency, see Taking the Pulse.)

TECH TALENT FOUND IN AFRICA



SEPT. 30, 2016 TECH TALENT WAR MOVES TO AFRICA, CIO JOURNAL

A shortage of software developers in the U.S. has prompted some companies to seek talent in Africa, home to a young and increasingly-tech savvy

workforce, according to this story. Among the companies who are employing and training workers in this emerging innovation hub are IBM, Barclays, Facebook and tech startups. The combination of an educated population and the proliferation of mobile technology on the continent makes Africa a good incubator of technology talent.

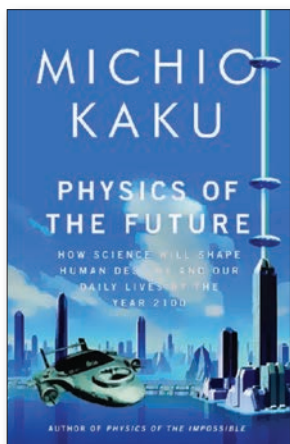
DESTINATION TO WATCH

Many have speculated as to when the African continent will become a chosen destination for IT and IT-enabled services. In the past, arguments have been made about a lack of infrastructure, education and government support as reasons why African nations have not participated in the growing area of these types of services. It appears that the continent has woken up and now must be looked at as a serious destination for selection. As major companies begin to explore their options, it will encourage others to follow suit. It also will accelerate talent development and further attract both investments and services business. (For more, see our Hot Spot story on Africa from Issue 25.)

THE PULSE

LATEST RESEARCH,
REPORTS AND READS
FOR OUTSOURCING
PROFESSIONALS

BOOK CLUB



Title: Physics of the Future: How Science Will Shape Human Destiny and Our Daily Lives by the Year 2100

Author: Michio Kaku

Overview: As this year's Outsourcing World Summit (OWS17) is focused on what lies ahead for outsourcing (see our cover story and World Future Society meeting recap), it is fitting to look at this book that stretches our imagination way out in the future. The author, a renowned theoretical physicist, discusses technology, human transformation and the new work environment in a very lucid and yet entertaining way. The result is the most authoritative and scientifically accurate (rather than a fictional projection) description of the revolutionary development taking place in medicine, computers, artificial intelligence, nanotechnology, energy production and astronautics.

Reviews:

"When we think about future far out, our mind goes back to fictional settings of 1984, 2001: A Space Odyssey and books by Jules Verne. Yet, those books had some foundation and vision of the future. Here is a book that is not just based on speculations or fantasy but on projections of technological advances already being done. That is why this book is different. It gives an insider's perspective on what miraculous discoveries await us and provides the most authentic, authoritative look into the world of 2100."

— Jag Dalal, COP, Chief Advisor, Thought Leadership, IAOP

"With his lucid and wry style, his knack for bringing the most ethereal ideas down to earth, and his willingness to indulge in a little scientifically informed futurology now and then ... Michio Kaku has written one of the best popular accounts of higher physics."

— *The Wall Street Journal*

"An erudite, compelling, insider's look into the most mind-bending potential of science research." — *Chicago Tribune*

Book Topics:

The eight chapters of the book look at the future of: the computer, Artificial Intelligence, medicine, nanotechnology, energy, space travel, wealth and humanity. The final chapter brings it all together and creates a view of "a day in the life in 2100." The book also provides a long list of recommended reading where each of these topics can be explored further.

Available formats: Print and digital versions.

Space elevators. Internet-enabled contact lenses. Cars that fly by floating on magnetic fields. These could all be part of daily life by 2100!

Tell us what you think: PULSE wants to hear what you think of this book. Share your review with us at pulse@iaop.org



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FUTURE GAZING

What do the Stars Say for Outsourcing?

IAOP's Chief Advisor of Thought Leadership shares his views on futuristic predictions from the World Future Society's annual conference in Washington, D.C. that he attended.

Speakers projected the direction we are headed on technology, health, politics and society. With an aging workforce, robotics becoming reality and moon missions on the horizon, what does it all mean to the outsourcing profession?

BY: JAG DALAL, COP

CHANGING DEMOGRAPHICS

(AS PREDICTED BY WFS)

1. AGING WORKFORCE

- ▶ By 2025 the Western world will have a large shortage of workers (due to the aging of the population)
- ▶ Africa and Asia will have the largest available pool while Europe will have the least. That will mean a shifting of business focus.
- ▶ With advances in medicine, life expectancy will increase dramatically. Unseen/unplanned social and economic pressures will also create additional pressure for the working age people

2. POLITICAL/SOCIAL UNREST

- ▶ One-third of the world's nations in political or social or economic turmoil
- ▶ 65.3 million forcibly displaced people
- ▶ 21.3 million refugees
- ▶ 10.1 million stateless

3. INTERNET ACCESSIBILITY


- ▶ In 2001, 400 million people had access to the Internet. In 2016, 3.2 billion (out of 7 billion) will have Internet access
- ▶ Changing age-based demographics has created a different way of communicating. Today, 50 percent of workers prefer instant messaging, 33 percent emails and the remainder voice messaging. By 2025, emails and voice messaging, as we know it, will be the least preferred method of communication

4. ROBOTICS AND AUTOMATION

- ▶ Robotics and learned-machine capabilities will be widely prevalent by 2025, and machines will be considered a team member in providing services.
- ▶ Virtual and augmented realities will become mainstream in business solutions (and not just gaming). That means there will be no separation between technology and humanity

5. NEW WORKPLACES AND TRAINING

- ▶ Altered life style and automation will create "flexwork" as a requirement for most workers
- ▶ By 2025, 85 percent of skills required for jobs will be significantly different than current level or platforms for education. This will demand revisiting higher education curricula and optional methods of learning such as online knowledge stores, micro-credentialing, open learning ecosystems and the rise of "practical" skills learning



So, here we are less than a decade away from these projections. It is going to have a tremendous impact on business models and will definitely alter the landscape of the outsourcing profession. Here are the changes as I see them:

- Political, social (displaced people) and economic pressures will force businesses to redefine their strategy for growth as well as survival. Global focus will no longer be driven by actions of North American businesses. On the other hand, displaced people may offer opportunity for employment in manufacturing and other lower skill level positions. Germany is already doing this.
- With the aging of population in the Western world, there will be a shortage of skilled workers as well as management staff. This means that businesses will have to depend on providers to address the shortfall.
- At the same time, outsourcing providers will also face this challenge and will have to address it in one of two ways: move operations to the new population centers of Africa and Asia or use automation and robotics to increase the delivery capacity.
- Use of the Internet (and associated technologies) will alter how transactions are conducted. Manual labor will no longer be a viable option for lower level transaction processing. We have already seen a rapid reduction in “call center” based service requirements.
- Improvement in robotics and automation will need to be exploited as a part of outsourcing delivery solution. In order to do that, providers will have to assess the needs for skills and have a long term strategy for not just employee acquisition but more importantly training. Since the trajectory of today's education system will not meet the needs, providers will have to make investments in creating their own education infrastructure.
- These projected changes will require that organizations (providers) become facile and have an inherent ability to change the shape of their business.
- Last but not least, providers will have to make investments in new technologies and approaches for delivering solution. These solutions will require embedding tools such as “virtual and augmented realities,” data mining and manipulation, and single-thread transaction processing. And these investments will have to be made now in order for them to be ready for delivering solutions by 2020 and beyond. That is only three to five years away!

IT IS EXCITING NEW WORLD.

Businesses will expand their boundaries beyond earth.

There was an excellent presentation at the WFS conference from the founder – CEO of Moon Express, who is embarking on

exploiting the moon for rare material. And it is not way out there. Their first mission will be launched in 2017. Will outsourcing providers be ready to support such a world? What will be different?

How will today's outsourcing thought leaders provide guidance and lead the new profession? What will IAOP look like in a changed world? I just can't wait to experience it.

WHAT ABOUT YOU?

The New Marriage of Corporate Real Estate and IT Outsourcing

Technology and Real Estate Outsourcing are Embracing a Permanent Partnership for the Benefit of Corporations

By Edward Wagoner, Global CIO, JLL Corporate Solutions

Data governance, the Internet of Things (IoT) integration, predictive analytics and wearable tech in the workplace. Call any technology consultant, and they will be buzzing about the new technologies that are shaping the employee experience and corporate performance. That's nothing new. But check their business card. That technology consultant is now just as likely to work for a global real estate services provider.

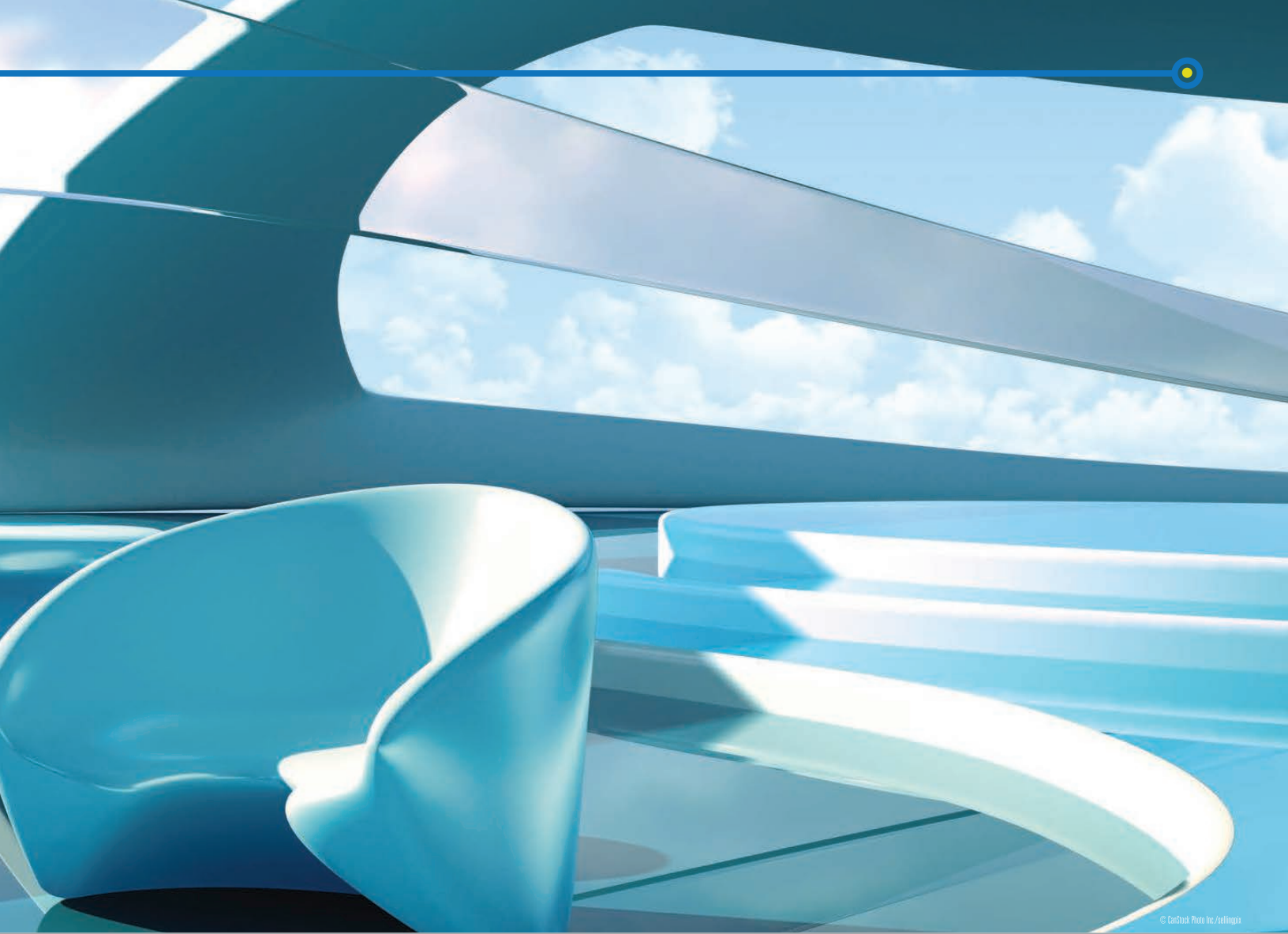
To say the commercial real estate industry has come from behind in technology is an understatement. Once known as a slow technology adopter, today commercial real estate (CRE) tech has become a hot and new specialized sector. Buildings and the technology that lies within them have become symbiotic, requiring that real estate executives (clients and service providers alike) become technology experts, as well as leaders in property strategies. In fact, today's forward-leaning real estate organizations are making information management and technology a core part of their culture and mission with strategic new investments, partnerships and acquisitions.

The line between real estate and technology outsourcing has become so blurred, it may be time to admit there is no longer a line at all. And it's no mystery why. Among the largest CRE service providers, the use of data and technology is delivering significant operating advantages to corporations. Highly efficient building operations, advanced amenities and

workplace services, data-driven workplace and portfolio strategies and greater business agility are among the many benefits being realized.

Technology is changing corporate real estate outsourcing in a variety of ways, including:

- Investments in CRE tech are coming from service providers as well as from the investment bankers. One provider, for example, recently acquired BRG, a leading force in workplace technology implementation, and space and move management; Corrigo, a pioneer in cloud-based facility management solutions; and CoR Advisors, a smart building consulting company.
- Some providers are forging partnering agreements with key technology innovators including, most recently, a five-year technology and services partnership with Enlighted, a leading provider of advanced sensor technology, and Web-enabled visualization and analytic applications for commercial buildings.
- More than a few commercial real estate companies, and capital sources are investing in promising technologies that could be the industry's "next big thing." Real estate service providers, meanwhile, are pursuing the more nuanced approach of adopting technologies that will help companies become more efficient, nimble and productive through their real estate and facilities.



startups raised \$428M across 56 transactions in the first quarter of 2016, representing a record quarter for investment activity in the real estate technology sector.

Conversely, real estate is transforming the technology industry as well. In addition to the established real estate technology companies gaining force in the marketplace, sizzling startups raised \$428M across 56 transactions in the first quarter of 2016, representing a record quarter for investment activity in the real estate technology sector. By the end of June 2016, a number of startups had secured financing exceeding \$50 million. Of course, some of these deals involved technology for residential, rather than commercial, real estate – but the overall volume shows the dramatic growth of the sector.

Significant time and resources are required to research, select and test new technologies, establish new relationships with providers and analyze potential acquisitions. With CRE technology innovation at an all-time high, it is no wonder a few of the larger real estate companies have full-time technology researchers and innovation teams.

Commitment to Innovation Takes Many Forms

Making the right technology decisions – and finding the talent to use it – requires a level of investment and resources that not every CRE organization is willing or able to make. Serious resources are required to, for example, track 60 to 70 tech start-ups; make direct investments in some and acquire others; confirm enterprise-level services agreements; mentor tech leaders and much more.

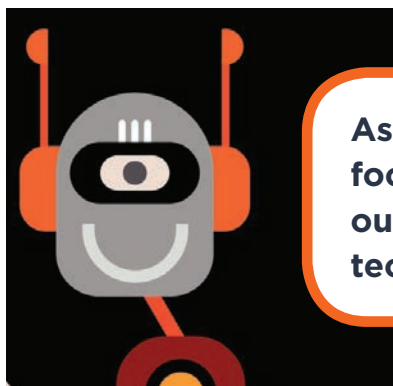
This commitment to innovation isn't altruistic; clients benefit when a service provider is at the forefront of technological advances. For instance, the intersection of smart building technologies, mobile apps and automated facility management tools is making it possible to offer advanced workplace amenities and services to employees at a level not previously possible.

The explosion of real estate technologies, combined with the increased need for agility, is contributing to the growth of what we call "Outsourcing 4.0," in which "thin" in-house corporate real estate teams are augmented by a very small group of service providers, or even just one. These partnerships, based on shared risks and rewards, often include a mandate for innovation in service delivery and that innovation is often driven by technology.

Intelligent Automation Underpins the Pyramid of Work in the Operations As-a-Service Model



BY MANISH SHARMA, GROUP CHIEF OPERATING OFFICER, ACCENTURE OPERATIONS



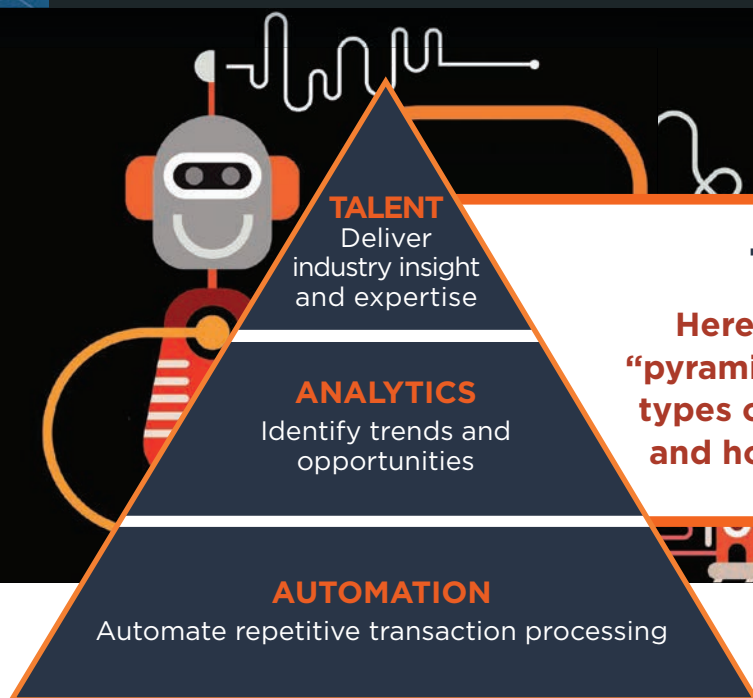
As operations and business process services evolve from focusing on commodity and transactions to a business outcomes-based approach, intelligent automation technologies are playing an increasingly pivotal role.

By eliminating manual and repetitive processes and bringing increased intelligence to operations delivery, automation is fueling the move to delivering real time business operations as-a-Service where value is provided via on-demand, highly scalable plug-and-play services. With a consumption-based approach, enterprises pay only for what they use and can scale up or down based on need. This focus on value over volume represents a significant leap forward in the evolution of the industry. And it's automation that is enabling the delivery of services in this model, with increased speed and efficiency.

By automating repetitive processes, exponential amounts of data can be captured to provide actionable insights at scale. Automation generates far more accurate, reliable operational data today than service providers or enterprises have previously been able to capture from human-driven processes. This operational data allows a much deeper quantity and quality of data that can be unlocked with advanced analytics to deliver more impactful insights and actions. Ultimately, over time, all forms of automation – ranging from robotic process automation (RPA) to cognitive computing and artificial intelligence — will continue to enable people to move to more complex and advisory-focused roles to support higher-value analysis, decision making and innovation, delivering better and more inspiring career experiences.

By automating repetitive processes, exponential amounts of data can be captured to provide actionable insights at scale. Automation generates far more accurate, reliable operational data today than service providers or enterprises have previously been able to capture from human-driven processes.





The Pyramid of Work

Here's a deeper look at what we call the "pyramid of work," which is a depiction of the types of work found in an operations setting and how its most effectively accomplished.

- **Automation:** At the bottom of the pyramid are repetitive transaction processing tasks that occur in every domain from procurement, to finance and HR. Here, intelligent automation technologies can eliminate rules-based, repetitive work, which can improve data accuracy by eliminating errors that occur in re-keying data. Automation can also drive the standardization of processes that can then be designed for data capture, structuring and extraction making it more valuable to the organization.

- **Analytics:** At the next layer, intelligent automation employs analytics to identify trends and opportunities within data, and to generate insights that can drive continuous improvement as well as service innovation. Intelligent technologies can enable companies to expand and contract services automatically – as needed, on demand – and even to move business processes across platforms, in and out of the cloud. Intelligent services can also be self-healing, taking independent steps to correct errors or fix problems. The essential point here is to embed intelligent automation in service delivery processes and make such intelligence available within the as-a-service model rather than seeing analytics as a function or capability outside of the workflow.

- **Talent:** At the top of the pyramid are the unique industry insights and expertise provided by people. For all its sophistication, intelligent automation relies on business domain knowledge to comprehend and act. Because no system for general problem solving exists, intelligent automation and artificial intelligence solutions need specific business domain expertise to be able to reason and deliver tangible business results.

Beyond eliminating repetitive tasks, automation can augment human capabilities by enabling people to accomplish more through new modes of human and machine collaboration, and by supporting humans in complex and creative problem solving. These new technology-aided capabilities will require companies to take a fresh look at their workforce: what tasks should people perform, what skills do they need now and how are they going to work with machines?

The pyramid of work illustrates that the key to effective operations-as-a-Service is not just capturing data, but using automation, analytics and deep industry expertise to generate insights and foresight – which then enable companies to make better business decisions and increase revenues.

Plugging into a robust platform that monitors and drives productivity, optimizes the use of automation technology, and draws on talent and industry expertise to drive outcomes is also important. Platforms are essentially the glue of enterprise operations; they bring all of the aspects of the pyramid together. A platform takes raw data and processes from across a range of technologies and allocates resources accordingly. It allows for agility, frees talent for innovation and provides visibility into the strategic investment. Finally, a platform is flexible and can accommodate legacy ERP and emerging applications to streamline workflow and achieve business objectives.

The time to focus on intelligent automation is now.

Getting a sufficient return on those investments, however, requires looking beyond the potential of automation to simply cut costs and improve efficiencies. The companies that will grow and dominate their industries will be those that systematically embrace automation across operations, using it to drive changes to services, delivery approaches and operating models.

More than 30 years of Exceptional Results in Outsourcing

Kirkland & Ellis is an international law firm with 12 offices and 1,900 attorneys worldwide who form one team with a primary goal of helping you successfully achieve your objectives. Kirkland stresses — and clients rightfully expect — great results.

IAOP has named Kirkland to the World's Best Outsourcing Advisors list each year since the list's inception.



**THE TEXAS HILL COUNTRY BECKONS TO NEW FRONTIERS
TO EXPLORE FOR PROFESSIONALS AT OWS17.**

In this sometimes wild west of outsourcing, you want a new clear path to blaze your way into the future. With powerful keynotes, 40-plus sessions on today's most important industry topics and continuous networking opportunities, you'll find it at this year's Summit.

FOLLOW THIS PULSE GUIDE TO THE HAPPENINGS YOU DON'T WANT TO MISS.

HARNESSE THE POWER OF DISRUPTION AT OWS17



OWS17

10 MOST WANTED

#1. THE FUTURE

Our keynotes are focused on delivering strategies, techniques and tools to help you move boldly into uncharted lands:

★ Outthink the Competition

by Kaihan Krippendorff, Business Strategist, Consultant and Best-Selling Author.
Feb. 20, 12:45 p.m. to 1:30 p.m.

★ The Evolution of Outsourcing: Or What is it Going to Look Like Tomorrow?

Featuring a panel of outsourcing thought leaders with Dave Brown, Global Lead, Shared Services and Global Advisory, KPMG; Peter Ankerstjerne, Chief Marketing Officer of ISS World Services; and Calvin Crowder, Senior Director of Global Real Estate, GoDaddy.
Feb. 21, 9 a.m. to 10 a.m.

★ The Future Game

by Jared Weiner, Executive Vice President & Chief Strategy Officer, The Future Hunters.
Feb. 22, 11:30 a.m. to 12:15 p.m.



#2. NEW! CHAPTER HEADQUARTERS

IAOP's Chapters are thriving and you can find out about our current and potential new ones at our Chapter Headquarters in the Global Services Mall. Open to all during exhibit hall hours, a 50 foot section will be dedicated to all things chapters. Sponsored by the Texas chapter, stop by for some samples of specialty Texas brewed craft beers as well as the opportunity to have your picture taken with a real live longhorn steer.

Have your picture taken with a real live longhorn steer.



OWS17

10 MOST WANTED

#3. WOMEN EMPOWERMENT KEYNOTE PANEL

Empowered women are not only key to breaking the cycle of poverty for families around the world but also strengthening the global economy. Be the first to hear the preliminary findings from IAOP and Avasant's collaborated survey "Women Empowerment and Opportunity in Outsourcing."

This keynote session on Feb. 21 from 10 a.m. to 11 a.m. will be an open forum panel encouraging delegates to engage in the conversation surrounding women empowerment, initiatives being created or successfully executed, challenges, etc. Panelists include Chitra Rajeshwari, aCOP, Avasant Foundation; Janet Gosche, Avasant; Bobby Varanasi, COP-GOV, Matryzel Consulting; Astrid Uka, Microsoft and experts from Business for Social Responsibility (BSR) and Accenture.

The conversation from this session will continue at the Chapter Headquarters during the reception following at 5:30 p.m. in the exhibit hall, where the first steps will be taken to create a new IAOP chapter focusing on these matters, as well as engaging all delegates in this important conversation.



Engage in the conversation surrounding women empowerment, initiatives being created or successfully executed, challenges, etc.

#4. IMPACT SOURCING

Impact sourcing is an inclusive employment practice through which companies in global supply chains intentionally hire and provide career development opportunities to people who would otherwise have limited prospects for formal employment. By providing jobs and training to youth, impact sourcing constitutes the beginning of a meaningful career path leading to a lifetime of employment.

Learn more about The Role of Impact Sourcing in Global Site Strategy in a session on Feb. 20, from 2:35 p.m. to 3:20 p.m., led by Jon Browning, President of Global BPO Solutions in partnership with the Rockefeller Foundation. An overview of the major BPO locations will be provided and impact sourcing will be discussed in detail with specific examples for how contact center and back office BPO companies can apply it to their location strategy. Hear about recent success stories from major BPO buyers and providers. *(For more on impact sourcing, see our next issue of PULSE).*



#5. STATE OF THE INDUSTRY

What do your colleagues, peers and competitors have to say about the state of the outsourcing industry globally as well as in Europe? IAOP's Annual Member Survey, produced with the support of ISG, will be unveiled on Feb. 20 from 1:30 to 2 p.m. by Jagdish R. Dalal, COP-GOV, Chief Advisor, Thought Leadership, IAOP and Todd Lavieri, Partner and President, ISG Americas. *(For more on research news, see our Research Corner).*



#6. IAOP'S GOT TALENT & INTERACTIVE SESSIONS

IAOP'S Got Talent, our interactive session, will put the spotlight on you on Feb. 22, from 9:30 to 11 a.m. with a pre-game show networking breakfast from 7:30 a.m. to 8:30 a.m. Master of Ceremonies Atul Vashistha, COP, Chairman, NeoGroup, Sourcing Board will emcee the session featuring IAOP's best talent – our Certified Outsourcing Professionals – in a Jeopardy style game against the audience on hot topics.

The Evolution of Outsourcing: Or What is it Going to Look Like Tomorrow?

is also designed as an interactive discussion with audience participation. Join in the lively discussion on the impact automation is having on the workforce, structuring companies for success, managing organizations in a technology-rich environment and the need for outsourcing in this new world.



#7. TRENDING TOPICS & TRACKS *Leading experts share their knowledge*

Real-life examples of best practices and lessons learned will be shared with delegates in educational sessions in these five tracks:

Track 1 - Robotics, AI & Technology: Revolutionizing Work and Changing the Face of Outsourcing

Track 3 - Ins and Outs of Innovation

Track 2 - Creating Value: Business Models, ROI and Best Practices

Track 4 - The Art of Negotiations, Contracts & Relationships

Track 5 - Winning at Outsourcing Governance & Management

#8. NETWORKING & SOCIAL EVENTS

The networking starts on the greens Feb. 19 at the 5th Annual IAOP/PULSE Publisher's Cup Golf Tournament. For those delegates leaving colder winter environments, the sunny temperatures and Texas Hill Country views will be a welcome escape. The Texas Scramble event kicks off with a 12:30 p.m. shotgun start at the championship AT&T Canyon Golf Course for 18 holes with some fun competitions along the way and tournament prizes awarded at the end.

Delegates are invited to the Welcome Saloon, from 5 to 8 p.m. on Feb. 19 for the Summit's unofficial kick-off and early networking over drinks.

The Exhibitor Pavilion will open Feb. 20 with a welcome reception hosted by IAOP Founding Member, Accenture from 5:30 to 7 p.m. An After Hours Networking Event, hosted by ISS, will follow for all delegates from 7 to 8 p.m. with a tasting of regional wines and signature cocktails. The closing cocktail reception on Feb. 21 from 5:30 to 7 p.m. is hosted by WGroup.

Other opportunities to meet new colleagues and connect with friends are the separate Customer Only and Provider/Advisor Only Key Issues Workshops on Feb. 20; Summit Kickoff Luncheon (Feb. 20), IAOP Awards Luncheon (Feb. 21) and Food For Thought Networking Luncheon (Feb. 21); and two networking breakfasts on Feb. 21-22, hosted by Infosys.



24 PULSE Jan/Feb 2017

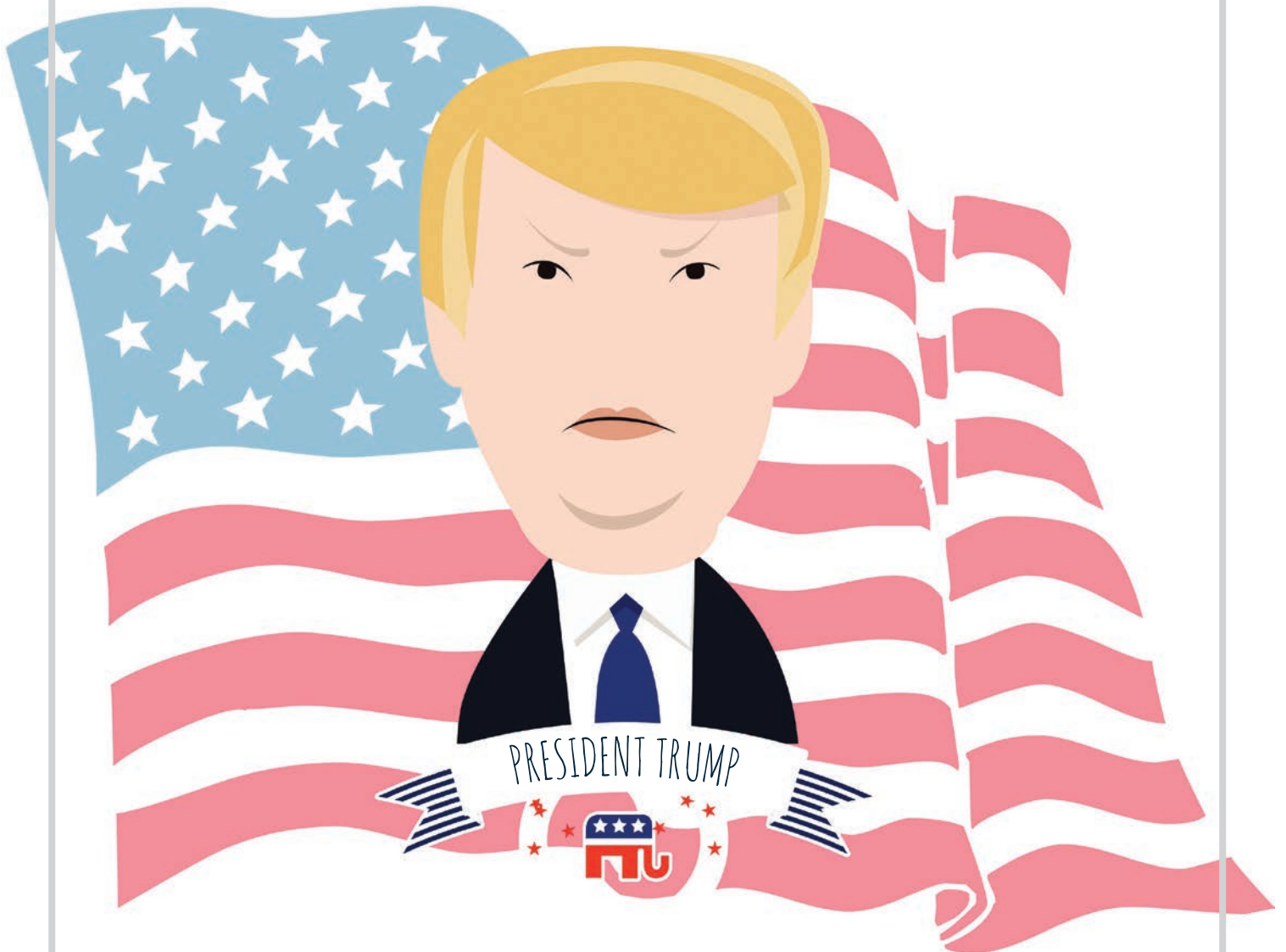
A silhouette of a cowboy wearing a hat, sitting on a horse. They are positioned in the center-left of the frame, facing right. The background is a dramatic sunset over a body of water, with a bright orange and yellow glow on the horizon and dark, silhouetted clouds above. The water reflects the sky and the silhouette of the horse and rider.

SEE Y'ALL AGAIN REAL SOON!

Save the Date for OWS18.
Renaissance Orlando
Orlando, Florida
Feb. 18 -21, 2018

PULSE's Hot Spot gets a makeover! Welcome to the new Regional Site Tracker. Going beyond focusing on an up-and-coming "hot spot" destination, this new feature will take an in-depth look at a larger region, and highlight potential opportunities as well as challenges and risks in specific areas around the world. Our goal is to better inform IAOP members in their site decision making. **In this first installation, we look at the United States.**

THE GOOD, THE BAD, THE U.S. PRESIDENT



Outsourcing has always been a hot topic; this was particularly true during the 2016 United States elections.

NOW, WITH PRESIDENT TRUMP AT THE HELM, THE INDUSTRY, GLOBALLY, IS IN A CONTINUOUS STATE OF DISRUPTION.

Worldwide, organizations are privately worried about the future state of the outsourcing industry; some are fearful, with this new U.S. administration, they will have to redo their entire business models. The possibility of impending penalties from Trump's administration has many concerned about offshore contracts. Since President Trump signed an executive order withdrawing from the Trans-Pacific Partnership (TPP), he has said there are plans to negotiate individual trade deals with these countries.

In the Americas, the new president's intentions on liquidating NAFTA – the two-decade-old treaty with Canada and Mexico – have some companies on guard. Many fear getting rid of NAFTA and imposing Trump's possible 20 percent tax on Mexican products may cause new tariff barriers with both Mexico and Canada. Consumer confidence has hit a record low, fearful that Trump's intentions to act quickly on renegotiating the treaty – another mention of the border tax – are deteriorating their economic outlook, as the U.S. represents 79 percent of growth for Canadian companies. (Source: PwC)

However, business leaders around the globe are more focused on Trump's growing protectionism, cautioning there will be economic and political

consequences. Since President Donald Trump took office, his protectionist rhetoric has emerging economies – those dependent on capital from the United States – feeling anxious. While some analysts do believe a Trump presidency may be positive for U.S. growth, which will be positive for emerging market economies and



SINCE PRESIDENT DONALD TRUMP TOOK OFFICE, HIS PROTECTIONIST RHETORIC HAS EMERGING ECONOMIES, THOSE DEPENDENT ON CAPITAL FROM THE UNITED STATES, FEELING ANXIOUS.

their equity markets, many also think the protectionist side of his agenda could have harmful effects on emerging economies.

On the bright side, many Americans feel bringing manufacturing back to the U.S. will allow for more negotiations, stronger and better deals, resulting in cheaper products that are more attractive to large retailers.

TECH VS. TRADE

According to Information Services Group (ISG), traditional IT and Business Process Outsourcing declined almost 25 percent in 2016 from the year before. However, cloud computing deals, steadily on the rise for the past few years, were up 9 percent, hitting \$374 billion. On that note, as-a-service contracts, now represent nearly 40 percent of annual contract value in IT services, globally – a gain of 38 percent for the year.

Does this mean the future of American jobs could lie within the tech industry? If history is any indication of the future, increased automation will result in an infusion of jobs across existing industries. Simply put, automation increases productivity, lowering prices and increasing demand. The tech industry can streamline and automate processes, cutting costs.

Looking to the future, while automation and as-a-service are attractive options, traditional IT and BPO will have their place. Service providers will need to adapt their delivery models and invest in digital platforms.

BY: KATE TULLOCH-HAMMOND, IAOP

COP TRAINING AT THE SUMMIT

Two complimentary workshops for professionals interested in certification and for COPs only will be offered at OWS17. Registration is required.

Outsourcing Certification Primer & Application Overview: Led by Dana Corbett, Director, Training, Certification & Research, IAOP. New This Year! This introductory workshop will be offered both pre and post event. The first part will answer questions about types of experience needed to earn certification, the process for certification and the benefits of becoming a COP. Part two will delve deeper into the application process.

COP Advanced Intensive: Led by Jagdish R. Dalal, COP, COP-GOV, Chief Advisor, Thought Leadership, IAOP. This complimentary in-depth annual update is offered exclusively for COP designation holders attending OWS17. This elite group will discuss the field's most challenging and critical issues, build their top-notch professional network, earn points needed to maintain certification in full, and best of all, hear how this coveted certification is already leading to greater opportunities and outcomes for outsourcing professionals and firms.



Pankaj Sharma, COP, PMP, ITIL Expert, has joined Phronesis Partners as an advisor to the board. He believes in continuous learning and was recently certified as an Independent Corporate Director by the Institute of Directors. Sharma offers advisory and consulting around outsourcing and service management to international organizations. He enjoys mentoring and guiding aspiring candidates on obtaining the COP certification as well in project management. He is a great believer in the lethal effectiveness of combining these skills in building and managing practices, enabling business growth and transforming under-performing operations. He writes and shares his thoughts regularly to promote this belief.

"Being a part of the COP family provides you always with a sense of support and guidance from other members who play a great part in realizing your passion," he says.



Atul Vashistha, COP, Chairman of Neo Group has launched a new company, SourcingBoard.org, a curated peer-to-peer organization focused exclusively on leaders who source technology and technology-enabled services. The group exceeds 32 members. He also is a founding member of IAOP and serves on the strategic advisory board. Vashistha will emcee IAOP's Got Talent at OWS17.

Welcome to the COP Family

aCOPS

Justice Assamany, aCOP, Performance Manager, BMS
Aleks Bogdanovski, aCOP, President, Acquire BPO
Caroline Carter, aCOP, Sourcing Governance Coordinator, Allstate
Somanath Chilukuri, aCOP, Relationships Manager, DST IT services
Shane Hansen, aCOP, Director, Lincoln Financial Group
Kevin McAdams, aCOP, Migration Manager, USAA
Justin Staffel, aCOP, Advisory Manager, Ernst & Young
Alexey Syrotyuk, aCOP, Senior Project Manager, Sigma Software, LLC

COPs

Clare Black, COP, Governance Manager, Zurich Insurance
Danelle Crow, COP, Senior Manager, Governance, Abbvie
Shannon Flynt, COP, Business Consultant, Allstate
Anders Gantzhorn, COP, Business Development, ISS
Thomas Haegley, COP, Associate Director, Bristol-Myers Squibb
Gaurav Jit Singh, COP, Director-Vendor Management, MetLife
Joe Tague, COP, Senior Manager Business Applications, Canon BPM, Director, PWC

Research Corner

News About IAOP Surveys and Research

IAOP's Research Needs Your Input

Recognizing how rapidly the world is changing and the potential impacts of disruptive technologies to the sourcing market, IAOP is taking a new approach to its State of the Industry (SOTI) survey process, and how often and to whom the surveys will be distributed. Your input is more important than ever to us!

IAOP has distributed one survey during the October to December time period as an impetus to the State of the Industry keynote delivered during the Outsourcing World Summit. (Be sure to attend the keynote Feb. 20 from 1:30 to 2 p.m at OWS17). The full results are later published with their survey partner.

Together with ISG, IAOP will now move forward with a series of smaller, discreet surveys targeted to enterprise clients, services providers and vendors or third party advisors. The results of these discreet surveys will be published for the IAOP membership and the data will be made available throughout the year.

IAOP and ISG will continue to distribute a SOTI survey each Fall/Winter and will

combine the data collected with the various survey outputs from the four discreet surveys that have been conducted throughout the year. In 2016, we conducted surveys on: State of the Industry - Global, Digital Transition, New Business Models, State of the Industry - Europe and Disruptive Technologies.

Why this is Relevant

A number of benefits will result from these changes:

- The yearly SOTI survey will be shorter and can be focused on the core sourcing issues that have been historically tracked by IAOP
- The four discreet surveys can be leveraged to focus on emerging trends and disruptive technologies. These surveys will be more timely and relevant to market changes and influences
- Survey data will be published throughout the year and not just once, as part of the annual SOTI output
- The discreet surveys will be short and most often only directed to one of the three IAOP constituents (clients, service providers or advisors)

What Action is Needed for Our IAOP Members

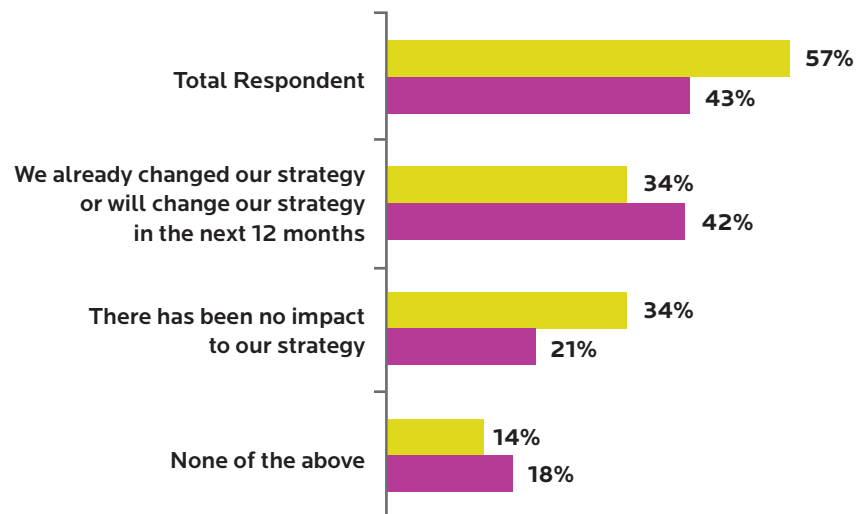
Invest the time to participate in the survey process. Currently, we have several hundred members participating in the yearly survey but we are looking to increase the total participation to be well over 1,000 participants. As we each share our opinions and experiences, we have an amazing opportunity to learn from each other and influence changes in our various industries and in the overall sourcing market. Survey responses are anonymous and usually take five to 10 minutes to complete. Data output files and various views of the data will be posted on Firmbuilder.com and communicated through numerous IAOP social media channels.

For information about IAOP Surveys or for suggestions of questions or focus areas, contact: Dana Corbett at dana.corbett@iaop.com or Jan Erik Aase at jan-erik.aase@isg-one.com.

IMPACT OF BREXIT ON SOURCING

Nearly half of the respondents have revised or may revise their strategy to mitigate the impact of BREXIT

■ Non-UK Based Respondents
■ UK Respondents



For more results from Europe and the global findings, attend the State of the Industry presentation by IAOP and ISG.

Jan Erik Aase, COP, ISG • Mohammed A. Abdullatif, COP, Saudi Arabian Oil Company (Saudi Aramco) • Sunil G. Acharya, COP, Intel Technology India • Lynn C. Acheson, COP, The Boeing Company • Maria Agcaoli, COP, Pfizer Inc • Mohrit Aggarwal, COP, PYMO • Vishal Agnihotri, COP, KPMG LLP • George Agyei, aCOP, e.Services Africa Limited • Mohammed A. Services Company • Shyamunder Alagandula, COP, T-Systems International GmbH • Bekah Alexander, aCOP, PepsiCo • Jeffrey J. Allen, PMP, COP, Walgreen Company • Kathy S. Allen, COP, ISS World Services A/S • Kim M. Anthony, COP, Capgemini • Praveen Anthony, COP, Sutherland Global Services • JoJo Aquino, COP, Deutsche Bank Knowledge Services • Gina A. Intelligent Lighting Network Team, LLC • Tan Sri Amirsham A. Aziz, COP, National Economic Advisory • Ron Babin, COP, Ryerson University • Vipul Bajjal, COP, IGT • Jennifer Bailey, COP, Avasant • Allan C. Barbee, COP, GlaxoSmithKline • Tor Peter Barfod, aCOP, ISS • Matthew C. 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Cosby, Alsbridge Branch • Prabhakar Curnitchi, COP, HCL America Inc (Comnet Div) • Raquel Cruz, aCOP, ISS Facility Service • James H. Curley, COP, State Street Corporation • Chance Curtiss, COP, Facility Services • Bruce D'Amico, COP, Assurant Inc. • Anthony D'Angelo, aCOP, USAA • Brooke Daniels, COP, Pillsbury Winthrop Shaw Pittman • Jennie T. Darrow, COP, Kelly Services • M. Day, COP, CBRE • Ricardo de Aquino Silva, COP, Mazars • Renato Augusto A. Ayer de Azevedo, COP, Kelly OCG • Maria de Huelbes, COP, PricewaterhouseCoopers • Karine De Sch • Kirill Degtiarenko, COP, IBA Group • Stefan Deiss, COP, Deiss Consulting Group • Hans J. Dekker, COP, Quint Wellington Redwood • Kevin DeLury, COP, Clearturn • Laura J. Dennis, Pvt. Ltd. • Hector R. Diaz, COP, CBRE • Chris Disher, COP, Chris Disher & Associates • Michael J. Dobberty, COP, Kelly Services, Inc. • Gary L. Dobbins, COP, Covidien • Dan Dods • Dube, COP • Parul Dubey, COP, Merck • Elizabeth Dudley, COP, Allstate • Diane A. 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Herge Jr., COP, Independent • Jurian Hermeler, COP, NautaDutilh • Catherine Hinchliffe, aCOP, ISS • Neil S. Hirshman, COP, Kirkland & Ellis LLP • Joseph E. Hogan, COP, HCL Technologies • Roy Hoh, COP, IHS • Alain Hoin, aCOP, ISS Facility Services SA • Robert Maura Hudson, COP, JLL • Kevin C. Hughes, COP, Cushman & Wakefield • Marian Husar, aCOP, ISS Facility Services • Guilherme Dias Iannotti, COP, America Pro • Arno IJmker, COP, anaraman J, COP, Ad Astra Consultants • Manish Jain, COP, Bupa Australia Pty Ltd • Nasser Khan Jamalkhan, COP, Open Source Development Ltd • Skanda Janakiram, COP, Avasant • David & Young • Bo Jørgensen, aCOP, ISS • Sherry Jost, COP, Zurich Insurance • Monica Juan, COP, CBRE • Jonas Juenger, COP, EY • Parikshit Kalra, COP, Hinduja Global Solutions • Scott L. LLC (ICL Services) • Igor Katkyov, COP, GDC Services LLC (ICL Services) • Darshan P. Kaur, COP, Equifax • Martin F. Keaney, COP, WellPoint, Inc. • Cynthia J. 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Lee, COP, DaimlerChrysler Financial Services • Siao Yen Lee, COP, Ix nology International Ltd. • Serge Librot, COP, Livit • Mark Liebenthal, COP, HCMWorks • Anton Likhachev, aCOP, Maykor • Jose O. Limardo, COP, PricewaterhouseCoopers • Millie Lip • Christopher A. Long, COP, ClearTurn Consulting, Inc. • Ralf G. Lorenzen, COP, Telamon • Dmitry A. Loschinin, COP, LUXOFT • Romek Lubaczewski, COP, PwC Polska Sp. Z.O.O. • Tre • COP, CBRE • Johnny Makhija, COP, Ernst & Young • Samara K. Makinski, COP, United Services Automobile Assoc. (USAA) • Steve Maloney, COP, Nielsen • Anthony Mampilly, COP, Procter • da Blue (BCBSFL) • Simon Masterton, aCOP, Allianz Insurance • Robert E. Matthews, COP, Siemens IT Solutions and Services • Sarah K. Matthews, aCOP, Ernst & Young • Natalia M Solutions USA, LLC • Kevin McAdams, aCOP, USAA • Amanda S. McCaul, COP, KPMG • John A. McCrory, COP, Clevercoms • Kevin McDonald, COP, The E. W. Scripps Company • The Partners International • Mike H. 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Nilekani, COP, Tetsuto Nishiyama, COP, OMRON Corporation • Mary B. Nolder, COP, • Jefferson K. Ong, COP, Seven Seven Softwares, Inc. • Paulinus Onumajuru, aCOP, System Facilitators LLC • Robert Oosting, COP, ISS • Diego M. Ossa, COP, Carvajal IT & Services, Limited • Rick Page, COP, TROOPS Consulting Inc. • Kevin Parikh, COP, Avasant • TuckWeng Park, aCOP, ISS Facility Services • Sue Pascoe, COP, Deliver Ventures Ltd. • Jeremy • Group • Rakesh Patro, COP, Avasant • Jason L. Patterson, COP, Kraft • Rafael Pavon, COP, Visa • Lynne Peckham, COP, Northern Trust • Helle N. Pedersen, COP, ISS • Matthew Pen • COP, Aramark • Vu Q. Pham, COP, Avasant • Godfrey J. Pinto, COP, Independent • Aayaz Amin Pira, COP, PricewaterhouseCoopers LLP • Jean-Francois J. Poisson, COP, Fiera Axiom I • Sanjeev Puri, COP, Cognizant • Paul Quaglia, COP, Scientific Games • Adrian Quayle, COP, Avasant LLC • Palle Queck, aCOP, ISS • Zia Qureshi, COP, Business Catalyst International • Alok Ranjan, COP, Avasant • Pavel Rastopshin, COP, MAYKOR • Chirag Rawat, COP, Avasant • Walead A. Refai, COP, CSC • P. Renganathan, COP, MindWave Solutions Pte Ltd • Fran • J. Robison, COP, Kelly OCG • Allison Roelen, COP, Offshore Insights • Julie Rømsing, aCOP, ISS • Darlene Ross, COP, DJR Consulting • Raman Roy, COP, Quattro • Eric Rozemeijer, Sahai, COP, American Express • Michael J. Salvino, COP, Accenture • Rejo Sam, COP, Avasant • Rob Sanders, COP, Ordina Application Outsourcing • Jack M. Sanderson, COP, Boston Spansion, Inc. • Sabyasachi Satpathy, COP, Mindplex Consulting • Igor Savcic, aCOP, Nordea Bank AB • Julija Savicka, aCOP, ISS • Kelly K. Sawyer, COP, Liberty Healthcare Management • Schroeder, aCOP, ISS • Jeff Schultz, COP, Kelly Services • Cheryl L. Seely, COP, Thomson Reuters • Cindy Seiler, COP, Brown-Forman Corporation • Gad Selig, COP, GPS Group, Inc. • Redwood • Prem Shanker, COP, Southwest Airlines Co. • Santosh Sharma, COP, Sourcing Auditors • Abhishek Sharma, COP • Ken Sharma, COP, BeyondCore • Pankaj Sharma, COP • COP, TMNG Global • Andriy Sheychenko, COP, FrieslandCampina • Jeanette A. Shire, COP, Accretive Solutions • Matthew P. Shocklee, COP, Global Sourcing Optimization Services • A • Patrick Simons, aCOP, ISS • Scott L. Singer, COP, Rio Tinto • Gaurav Jit Singh, COP, MetLife • Shuchita Singh, COP, AbbVie.com • Manpreet Singh, COP, MetLife Global Operations Support • Skelak, aCOP, USAA • Zita Slade, COP, CB Richard Ellis • Graeme Smith, aCOP, ISS • Kimberly Sokol, COP, Kelly Services • Steve Somnitz, aCOP, Symantec • Marco Sottovia, COP, COP, HCL America Inc • Vikas Srivastava, COP, WNS Global Services • Justin Staffel, aCOP, Ernst & Young • Michael Staisiunas, COP, Kraft Foods • Christopher Stancombe, COP, Cap • Inc. • Ryan Stevens, COP, Discover Financial Services • Perryn L. Stewart, COP, EY • Leslie Stoner, COP, Kelly Services • Diana Stoyanova, COP, Mallinckrodt Pharmaceuticals • Stephen • COP, Avasant • Hong Sern Tan, COP-BD, CSC Malaysia Sdn. Bhd. • Wanda Taylor, COP, CBBS, North Carolina • Sailesh Thakur, COP, CME • Maureen L. Theberge, COP, PG&E • Stephen • Richard (Rick) Townner, COP, Richard Dean & Associates • Ian D. 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Williams, COP, h • Tristi J. Wilson, COP • Jim Wilson, COP, CB Richard Ellis • Bruce Winterfeld, COP • Chuck J. Wright, COP, Kelly OCG • Jim J. Wright, aCOP, Advocate - The Cloud & Connectivity Ins. • HBC/APCCAL • Gary Yurkanin, COP, Kraft Foods • Mark Zammett, COP, CIGNA • Paul J. Zanker, COP, Bank of America Merrill Lynch • Scott Zaret, COP, Wells Fargo • Michael Zeigler,

DYLAN TAYLOR:

Visionary Leader Impacts Outsourcing and Real Estate



Today, concepts like global account management and collaboration are commonplace in outsourcing engagements. But back in the 1990s, they were pioneering ideas that Dylan Taylor helped bring to the market in two different industries.

As he looks into the future, Taylor, the President and COO for Colliers International, sees the trends of coworking and freelance talent along with automation having a greater influence on how we work.

For this and his contributions to both outsourcing and society, Taylor will be honored by the industry at the IAOP Awards Luncheon at OWS17 when he is inducted into the IAOP Leadership Hall of Fame.

In his nomination, Dr. Michael Max Buehler, Head of Infrastructure & Urban Development at the World Economic Forum said Taylor was deserving of the honor for his “over 25 years of impact on the global outsourcing industry, his unique achievements in vanguard account management models that have proven both durable and transcending industries, his thought leadership and innovation that he has brought to the area of global commerce and global outsourcing, his impact on society through his efforts, and his commitment to IAOP and its goals and objectives.”

P: Tell me about some of your personal highlights related to outsourcing in your career.

Before my focus on real estate, I was in the electronics industry (at SAIA Burgess, Switzerland). In the early to mid 1990s, we wanted to come up with a way to service clients with respect to an outsourcing agreement that cut through the silos that existed. We helped pioneer the concept of global account management teams. Twenty years ago it was pretty revolutionary that you would take resources within a company and create an organization and P&L around a client, and manage them in a globally outsourced manner. I’m very proud of the fact that we were able to recognize the need and create a solution for the client that ended up applying to a lot of different industries, not only manufacturing, but also service businesses.

When I first entered the real estate industry, it was still the early days for outsourcing within the business. The challenge at that time was how do you create an integrated outsourcing

INTERVIEWS BY SANDY FRINTON

INTERVIEWS BY SANDY FRINTON



We're looking to invest in companies to supplement our abilities to service clients around the world, especially in the major markets.



relationship and provide an offering that delivered more value than just the sum of the parts with a focus on business needs and strategy. I was able to work with very talented professionals in the industry to tackle that problem.

P: What are some of the lessons you learned?

Most of my lessons, especially of late are about talent and talent management. At the end of the day, I believe that whoever has the best people has the best company. It's really that simple. It's all about the quality of your people and the extent you can train, and better yet, cross train your people. Having skill sets that can adapt to new roles is very important so you can create flexible, adaptable solutions for your clients.

P: Tell me how Colliers approaches outsourcing.

All organizations, in some way shape or form, use real estate. Colliers provides a whole suite of services from data administration (lease administration) to strategic planning to transaction management, project management and facility management. We take all those various services, customize them, integrate them and deliver that with a performance-based account model so the client has a single point of contact. Another thing we're very proud of – Colliers is probably the most global real estate firm, operating in 67 countries. We are very capable of delivering services across international markets. I think this is a key competitive advantage and differentiator for us.

P: What were some of your predictions in Corporate Real Estate 2010: The Strategic Role of Place, originally published in 2003 that are true of the outsourcing landscape today?

Some things seem pretty obvious now but weren't perhaps as obvious in 2003. We basically concluded there will be a huge trend toward offshoring. We said that if it's a task orientated effort, it will be offshored and if it's strategic it will be associated with a location that will house knowledge workers. In those days, it was actually a little bold to make those declarations. We also talked about how the workplace itself would evolve and offices would become more collaborative and more open plan because there would be a bigger need for cross functional collaboration to service clients.

P: What does the office of the future look like?

I think the coworking phenomenon is likely to continue to gain traction. I believe we will have more and more situations where we will have freelance talent co-located with full time talent.

I think it will be highly enabled by technology. Not too far out, you will have tools like virtual reality and augmented reality where you can better visualize what your office will look like. Hiring someone to do a particular task on a given day as opposed to having a full-time person to execute on that will be prevalent. I think where you locate will still matter because if it's a game of talent, you're going to want to attract and retain the best talent and therefore, you want to locate where top talent wants to be.

P: What impact will robotics and automation have on outsourcing?

I think it's real. I see it as more disruptive for labor-orientated professions with repeatable tasks like factory automation, food service, driving a car, etc. Things like that will be disrupted. At its highest level, when you talk about servicing one client with the outsourcing platform of another company, by definition, you need to have talented experienced professionals that can understand that clients business and industry, and design a strategic solution around it. Then you also need talent and experienced people to execute on that. At the base level, tasks will be automated and disrupted but I see the more strategic roles, like account management, being much more resistant to disruption say over the next five to 10 years. Further out than that, it is hard to say.

P: Having worked in outsourcing in over 40 countries in your career, what are some of the hot outsourcing destinations/regions to watch?

Asia is still the biggest growth region of the world. Between China and India there are massive opportunities for outsourcing not only servicing North American-based companies that are expanding there but also domestic companies that are growing in those regions and also expanding around the world. In addition to Asia, Latin America is also a large growth opportunity for outsourcing. Longer term, 10 years out, I see Africa being important. *(For more on Africa as a Hot Spot, see PULSE Issue 26).*

P: What is on the horizon for Colliers?

Our strategy is to achieve faster than industry organic growth rates and then supplement that growth with strategic acquisitions. We've been active on the acquisition front. We've already announced several acquisitions so far this year. We're looking to invest in companies to supplement our abilities to service clients around the world, especially in the major markets.

continued ...



Colliers is really an unbelievably unique company. The most meaningful part of this award is it gives me the ability to talk about how special the company is and how great our people are.

P: Tell me about your work on the World Economic Forum.

The first project I worked on was on future urbanization and we partnered with Tianjin, China. We were looking at what factors allow for urbanization to happen successfully. It was an interesting project. We ended up concluding among other things was mobility was one of the most important factors for success.

Later, I became vice chair of the Global Agenda Council on Real Estate and Urbanization and we asked how can we best impact real estate globally. We decided we wanted to have a clear voice on global sustainability principles because there were a lot of different organizations with views but there wasn't one master view that someone could point to and say these are the global sustainability principle we can all aspire to. Those principles were just recently released and seem to be getting traction.

P: Tell me about IAOP's influence on the industry.

In my mind it is hands down the most important organization in global outsourcing. It really has no peer in that regard. I love that the early outsourcing thought leaders saw the world the way IAOP saw it when it was first formed – that it's not a real estate issue, it's not a HR issue, it's not an IT issue, it's a global shared services issue. A lot of industries were tunnel vision for their industries. IAOP was really able to unlock for a lot of people this whole notion that it's a global outsourcing profession. All the training and certification programs, the Global Outsourcing 100, and other things they've created have been hugely beneficial to several industries.

P: What does this honor of being inducted into the IAOP Leadership Hall of Fame mean to you?

Well, this is truly a team award and it means a great deal to me to accept it on behalf of the team at Colliers. Colliers is really an unbelievably unique company. The term we use to describe Colliers is Enterprising. We're entrepreneurial and heavily innovative, can-do and pioneering. The most meaningful part of this award is it gives me the ability to talk about how special the company is and how great our people are.

For more on Taylor, see PULSE Issue 9.

AT A GLANCE: DYLAN TAYLOR



CURRENT ROLE & RESPONSIBILITIES: President and COO for Colliers International and executive in charge of global outsourcing. Has complete responsibility for over 18,000 employees in 66 countries and revenues well in excess of \$2.5 billion.

COMPANY AWARDS: Under his leadership, Colliers was recognized as the number one commercial real estate firm in the United States by Commercial Property Magazine, and was named the second most recognized real estate brand in the world, according to the Lipsey Survey.

RECOGNITIONS: In September 2016, Real Estate Forum acknowledged Taylor as one of the top 70 leaders in the real estate industry for the past 70 years due to his special contribution to global real estate services, global outsourcing and thought leadership.

CONTRIBUTIONS TO SOCIETY: Selected as a Delphi Fellow for Big Think, a digital knowledge forum that brings together top thinkers from around the globe to contribute important ideas from their respective fields. He is the only real estate industry professional to receive this designation. Taylor is also a Henry Crown Fellow of the Aspen Institute.

Taylor provided thought leadership for the World Economic Forum representing the Commercial Real Estate Industry in a multi-stakeholder context. He was a member of the Future of Urban Development & Services Steering Committee and served as the Vice Chair of the Global Agenda Council on Real Estate and Urbanization.

CHARITABLE CONTRIBUTIONS: Avid supporter for both the March of Dimes and the Kempe Foundation for the Prevention of Child Abuse and Neglect.

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BEN TROWBRIDGE:

Enterprising Entrepreneur, Trusted Advisor



Ben Trowbridge was being a ski bum on an extended getaway in Colorado when he got the call that would change his future trajectory and launch him into a highly successful career as an outsourcing advisor.

A CFO from a top five company who he had negotiated against in the past working for another firm wanted to hire him as a consultant for a big global project. Trowbridge's experience at EY in sourcing, shared services and benchmarking initiatives – combined with leadership prowess gained from his military career – made him the ideal fit.

Returning from his unexpected month-long ten-mountain jaunt on the slopes, what would become leading outsourcing consultancy Alsbridge was born.

That was the first big win for Trowbridge and he would go on to have many more as an enterprising entrepreneur and trusted advisor.

For his accomplishments, Trowbridge will be inducted into IAOP's Leadership Hall of Fame – joining 32 other men and women who have achieved this prestigious honor since its inception in 2006.

In nominating Trowbridge for the honor, Joe Hogan, COP, Vice President and Head of Global Advisory HCL, said: "His impressive professional track record created for Ben an understanding of the outsourcing market and how to change the approach and tools needed by advisors to establish outsourcing relationships that stand the test of time."

Indeed, a testament to the lasting positive customer satisfaction he provided at Alsbridge is his record of having no client-provider relationship end in a divorce prior to the contract term from the time he founded Alsbridge to even after he stepped down as CEO.

P: How did you start Alsbridge?

I sold a company in the dot.com era and at the end of the sale I decided to go skiing. It was supposed to be a one-week trip and then a friend asked me to come over to Breckenridge (Colorado) to ski. Multiple days of skiing took their toll on me but I decided I was going to ski 30 days straight and I stayed out there.

In the middle of all that, I had a call from an old client - a global CFO of a top five company

INTERVIEWS BY SANDY FRINTON

INTERVIEWS BY SANDY FRINTON

VIEW
FROM THE
C-SUITE

We worked really hard on building sustainable contracts and relationships between the client and the vendor that were fair, and designed to achieve the values the client was searching for.



in the world. I had negotiated against his teams in the past representing another company. He heard good things about my leadership and wanted to hire me as a consultant to work on a big global project. It's very gratifying to get that call and that kind of work. They wanted to have someone like me to engage with, but the teams working for him needed process, data and repeatable structure. Out of that first opportunity, we started to build the methodology, process and insight for what was then, Trowbridge Group. I founded Trowbridge Group at the end of 2002, which became Alsbridge in 2005 when I merged with my U.K. partners ALS consulting based in London. Alsbridge was named after myself and three other former EY partners.

P: Tell me about the experience of being an entrepreneur and starting a business with limited funding.

First you have to decide what business you want to be in. I looked at being in the events business and at starting a research firm but decided that my passion was in consulting so I decided to stay squarely on being an advisor/consultant.

I added it up – I had to make payroll 248 times and there's more than a few months when you say, “gee, I guess I'm not going to pay myself” but it's going to be great next month if we just invest now. And over time you move from boot strap financing to raising equity and taking bank debt to finance growth.

P: How did you grow Alsbridge?

Our vision of what we were going to provide to clients was a way to end up with a sustainable contract. That became our core rallying cry. Over the time I was CEO Alsbridge, we never had a client have a single adverse termination of a contract. A reasonable number of outsourcing contracts can struggle and clients can become unhappy and terminate. We worked really hard on building sustainable contracts and relationships between the client and the vendor that were fair, and designed to achieve the values the client was searching for. We hired a small team and used contractors in the early days and converted quickly to a W2 employee model with amazing retention of the best and brightest.

P: What were some of your big accomplishments?

The first win was really me getting our first client! We had some great early wins as a company. We were competing to build a global strategy for a big high tech company. When they engaged us, we realized it was me and a small handful of teammates going against two of the big four firms. And we beat them. We won that deal on the backs of sustainable relationships, and we had good data, a very consistent process and obviously, a great team.

Another accomplishment that I'm proud of is we came up with a way of driving client and provider relationship and solution alignment. We called it a strategic alignment session or SAS process. It was a way of bringing clients into sessions with the providers, and going through stages, having them collaboratively work together on the solution they were trying to buy, as opposed to the linear process of RFP or submitting in writing. There was a lot of hard work by the team that went into building that collaborative value-based solution using SAS, and it was a distinct differentiator for clients who realized they needed a collaborative relationship with their providers.

By using SAS, we were able to create solid alignment among the client team, the provider, and the advisor on business case, solution and result. It also cut the timeframe from business case to deal in half. In fact, most advisory firms have now changed their approach to Request for Solutions.

P: Tell me about the changes you've seen working in outsourcing over the years?

The changes in outsourcing are pretty breathtaking. The early contracts that we signed in the first half of the 1990s were with a limited number of providers who had credibility. And the contracts were really pretty short. I can remember the services to be provided on more than a couple of contracts I worked on were a paragraph that said something like – “for this price, we, the provider, will substantially provide IT systems like you have today.”

There was a lot of trust. There was a two-way problem with that. The provider doesn't know when they are successful and the client doesn't have good definition either. It worked sometimes but not all the time.

In the late 1990s, I led the innovation of the deal structure that was totally different that was a result of very innovative transformational sourcing deal structure that we developed at EY, which was JV outsourcing. From this innovation, there was a wave of providers using joint ventures with their clients to effectively provide a different kind of outsourcing that was more collaborative. That wave ran through the latter part of the 1990s. Then, in the 2000s, the Indian-centric provider came on the scene that tapped into the global labor pool.

As that era ends, there's more competition coming on the market. The provider set went from half a dozen credible providers in the middle 1990s to past the year 2000, there are literally hundreds of providers big and small. So there's lot of choice. The maturity changed yet again by the cost of cloud resources. And now, we are in the new era of cyber.

continued ...

P: Tell me about the work you are doing now with EY on cyber security?

EY's message and brand with clients is an emphasis around agility, analytics and intelligence. Building on the foundation of our global cyber consulting business, I've been building a cyber security managed services business. We have a different way of thinking about it. We call it Cyber as a Service (CaaS). We don't think of it as outsourcing. We think cyber is a very unique segment with the client needing to be heavily involved with what's going on. In cyber, context becomes very important and it's very hard to do that at arm's length. With the client being very involved, there are four main areas that we work with: (1) threat detection and response, (2) identity and access management, (3) data protection and (4) threat exposure management. We provide those services and have a very high touch way of doing it with a wonderful team on site with the client and center based resources. It's a one-stop shop for cyber security operations.

P: What are some of the lessons you've learned through your professional career?

I've learned optimism more than anything. After I raised a round of funding for Alsbridge in 2006 (from Morton Meyerson, former President EDS, and Chairman Perot Systems), we had three different growth strategies and they all seemed very logical. We started using the money we raised against the growth strategy. But then the market started having problems in 2008 and everything hit at one time. We ran out of money and the new ideas weren't working out. I went to Mort, who was on my board, for advice, and I said, 'this is really bad,' and he looked at me and said, 'well, it's just going to get worse.' So basically, you suck it up and hang in there. It's a sense of resilience. You have to be able to handle the problems and think it through because no one is going to do it for you. Being in the water, you're either going to swim or not.

P: Did your military background help you as a leader?

Absolutely. I owe everything to the privilege of becoming an Officer of Marines and Infantry Company Commander. It's a tremendous opportunity to lead. At the young age of 23, I had 220 Marines and Sailors and was deployed with a wife, a child and a mortgage. It's a great test. You learn a lot about people and getting things done in challenging situations. And once you taste this rare leadership environment, it's hard to find anything to match it.

P: Who are your role models?

I love to read about the various presidents over the years of both parties. I think that's one of the toughest jobs in the world. You inherit not just your agenda, but also the world's and whatever is going on. Watching those leaders adapt to what they have to deal with, the realities of leading our great country is fascinating in a very non-partisan way. I also have had military leaders over the years as role models to include Col Wes Fox (Congressional Medal of Honor Award) and one of my favorite bosses.

P: What does receiving this honor from IAOP mean to you?

This is a wonderful award. I've worked with a lot of great people to get here. It's a tribute to the teams I worked with who stuck with me, through thick and thin. Going back to many years ago to teams who might have worked through a holiday on a sales pursuit, and stayed away from their families in a war room set up in a hotel to get in a proposal on the Monday after Thanksgiving. On a personal level because I previously nominated Mort to be awarded into the IAOP Hall of Fame; to join Mort and others, is very rewarding for me. In the end, you're not an entrepreneur without a team. (For a video interview with Mort Meyerson, see <http://www.iaop.org/video/default.aspx?ID=25>)

AT A GLANCE: BEN TROWBRIDGE



Photo Credit: Rachael Wise

Left to right: Ben Trowbridge, David & Robyn Trowbridge, Maxine & Ben Trowbridge

CURRENT ROLE: EY Cyber Security Managed Services Leader


PRIOR ROLES: Founder, Chairman and Board Member Alsbridge (2013-14); Founder and CEO, Alsbridge (2003-2013); Chairman, CEO and Board Member, United Messaging (2001-2002); Ernst & Young, partner, COO and managing partner (1996-2000); Business Unit Sales and Marketing Leader, Electronic Data Systems (now HP) (1990-1996)

RECOGNITIONS: Ernst & Young Entrepreneur of the Year two-time finalist. Under his leadership, Alsbridge was recognized as an Inc-500 company and as one of the leading consulting firms by Consulting magazine in 2013.

ACCOMPLISHMENTS: Grew the company from start-up to industry leader, completed four successful acquisitions and achieved a five year CAGR of 38 percent, culminating in the sale of the company to a Private Equity firm in December of 2012.

CHARITABLE CONTRIBUTIONS: North Texas Food Bank, Stand Up to Cancer, business education and coaching to the Texas Prison Systems, and providing yearly bonus to each employee for donation to the charity of their choice

PERSONAL: Served in the U.S. Marine Corps Infantry Officer and as Company Commander on four separate occasions to include one of the Marine Corp's first Special Operations Capable Raid Companies.



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CHAPTER ROUND UP

CHAPTER CALENDAR

IAOP ended the year with meetings and webinars by the Global Human Capital, Florida & Digital Enterprise and Voice of the Customer Chapters in December. We kicked off 2017 with events held by our geographic chapters in Minnesota, Chicago, Charlotte and Atlanta. The IAOP Philadelphia Chapter, co-chaired by Merck and WGroup, Inc. held its launch meeting in January on Digital Transformation and the Effect on Sourcing.

UPCOMING EVENTS

MARCH 1
NORDIC
CHAPTER MEETING

EARLY 2017
UK & IRELAND
CHAPTER MEETING

MISSED A MEETING?

For more information on IAOP chapters, email memberservices@iaop.org.

Chapter Spotlight: Sales & Marketing

WHO IS LEADING THE CHAPTER?

Co-chairs: Kyle Andrews and Bill Hall, founding partners of Pretium Partners, Inc. Executive Advisory Committee members include Randy Vetter, Senior Director, Alsbridge; Tom Edwards, President, North America, Cyient; and Samara Makinsi, Program-Project Manager (Non-IT), USAA.

WHO'S INVOLVED?

This topical chapter is made up of sales and marketing professionals with a passion for helping outsourcing providers sell their services more effectively. It is open to anyone who is interested in tackling the ever evolving sales and marketing challenges that outsourcing providers face, whether they have expertise and insights to share, or just need to enhance their learning to keep up with the changes.

RECENT EVENTS:

Chapter meetings are conducted primarily as virtual panel discussions including Buyers, Providers and Advisors, so all sides of the story are represented. November's virtual meeting was a panel discussion that explored the topic of "Selling to Big Companies – What Works and What Doesn't." Paula Cabrera-Urena, Director, Bristol-Myers Squibb; Joelle Smith, Vice President, Mindtree Ltd.; and Randy Vetter, Senior Director, Alsbridge shared proven best practices and unique insights.

September's virtual meeting was a collaboration with the RPA Chapter that explored the topic of "Translating Intelligent Automation to Business Outcomes." Panelists were Shail Khiyara, CMO, Automation Anywhere; Dennis Winkler, Director, Alsbridge; and Samara K. Makinsi, Program-Project Manager (Non-IT), USAA. The panelists provided valuable wisdom and guidance to the attendees.

UPCOMING NOT TO BE MISSED

The chapter plans to assemble a series of discussions that explore the challenges of selling outsourcing services in different world geographies, including North and South America, Asia, Europe and Africa. The Chapter is actively seeking panelists for this series. Please contact memberservices@iaop.org if you are interested in participating. The next virtual meeting is targeted for May 2017.

WHY GET INVOLVED

Sales is likely the number one issue facing most companies. How should we market? What's our messaging? What sales skills are essential? What types of salespeople succeed in our market and how do we develop them? How do we create business outcomes our customers buy in to? IAOP's Sales & Marketing Chapter brings together the best minds in the industry, from all sides of the equation, where we explore answers these questions and more. Please join us!

Thank you for making a great day even better.

IAOP* has once again awarded us
among the world's best outsourcing
service providers – five stars!



ISS has for the fourth time in a row achieved the highest possible rating, by the International Association of Outsourcing Professionals (IAOP). This year, we particularly stand out in the CSR category, which is in line with our ambition of being a responsible employer and to become the world's greatest service organization.

THE POWER OF THE HUMAN TOUCH



**WELCOME
NEW**



MEMBERS

**IAOP is pleased to have new
and renewing corporate and
professional members joining
our association from:**

Accenture; Access; Acquire; Aerojet Rocketdyne; Ancestry.com; Arthur Lawrence; AT&T; Atos; Auriga; Avasant; Bayer; BCMS; Bird & Bird LLP; Blue Prism Limited; Boeing; BP; Canon Business Process Services; Capgemini; CBRE; CGI; CIGNA; Cognizant; ConAgra; Cushman & Wakefield; Deloitte; Digital Divide Data; DJV Associates, Inc.; Enquiss Consulting GmbH; Equifax; Ernst & Young; Facebook; Fasken Martineau DuMoulin LLP; Fey Pty Ltd; Freedom Mortgage Corp.; Freie Universitat Berlin; General Motors; Georgia State University; Glassdoor; Goodmans LLP; Gorrisen Federspiel Kierkegaard; Gray Maters Consulting; Greater Toronto Airports Authority; Haavind; HCSC; Highroad Global Services, Inc.; HSPI SpA; IBA Group; IBM; Infosys; Inogen, Inc; Intel; International Monetary Fund; iQS Engineering; JLL; KellyOCG; Kirkland & Ellis; Kromann Reumert; Manulife; MAYKOR; Microsoft; Miratech; MUFG Union Bank; National Bank of Canada; NetApp; Nexient; Pactera; Pfizer; PHH Corp.; PNC Bank; Procter & Gamble; PwC; QX Limited; Rio Tinto; RuralShores; Shell; SirionLabs; SPi CRM; Stefanini; SunTrust; Sutherland; SWBC; TeleTech; The Shelby Group; Think 180; Thomson Reuters; Time Warner; Torrens University; UMSL; Union Bank; Vee Technologies USA; Verizon; Vic Lawrence & Associates Limited; Washington Gas; Wells Fargo; Wiggin and Dana, LLP; XL Group; and Zurich.

For information on IAOP membership, [click here](#) or email sales@iaop.org

JOIN WITH THE INDUSTRY LEADERS

Membership in IAOP provides access to an extensive array of services, and just as importantly distinguishes organizations and professionals as leaders in the field of outsourcing.

• **Customer Corporate Membership**

– Organizations that are currently outsourcing or are considering one or more outsourcing initiatives should become Customer Corporate Members of IAOP. This membership provides organization-wide access to the association's research, training, certification, and networking programs - all designed to help companies achieve better business results through outsourcing.

• **Provider/Advisor Corporate Membership**

– Outsourcing service providers and advisory firms should join IAOP as Provider/Advisor Corporate Members. This membership provides the same organization-wide access to IAOP's research, training, certification, and networking programs as Customer Corporate Membership, but also includes member-only sponsorship opportunities that serve the marketing and business development needs of these companies.

• **Professional Membership**

– Professional Membership is available to individuals either as part of their company's corporate membership or on an individual basis. This membership serves the needs of practitioners working in the field of outsourcing whether as customers, providers, or advisors. In addition, it provides these professionals with direct, personal access to association services.

MEMBER SERVICES

Many of these services are included as part of IAOP's Professional or Corporate Membership, with discounts available for use beyond the level provided. Some services are also available individually at non-member rates. These include:

• **PULSE Magazine** – Available bi-monthly online, our e-zine features in-depth coverage of the industry, issues, trends, geographies and vertical sectors and functions; thought leadership and case studies, probing Q&As, C-level interviews and profiles; as well



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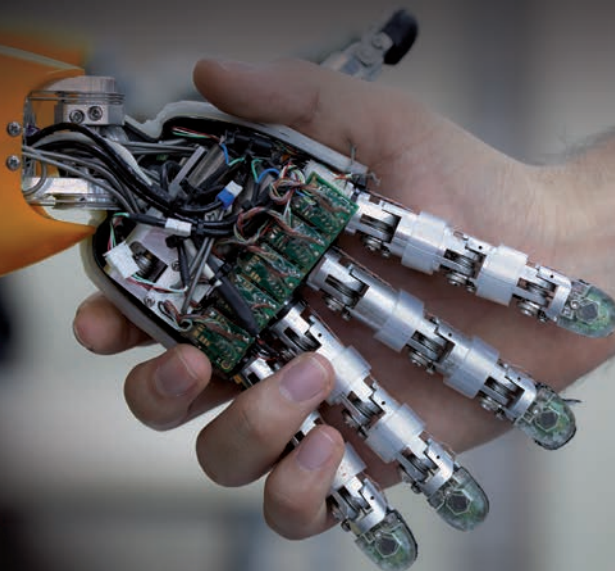
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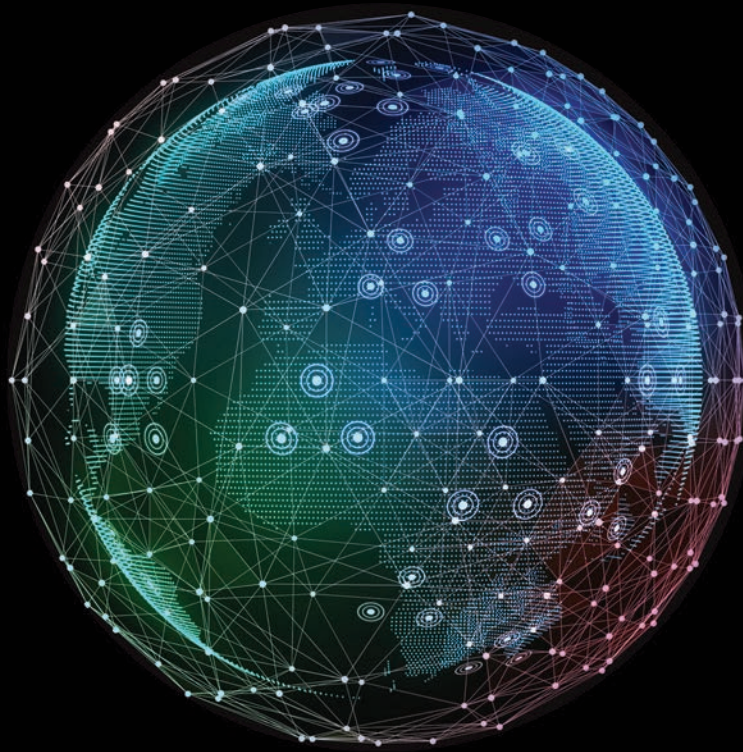
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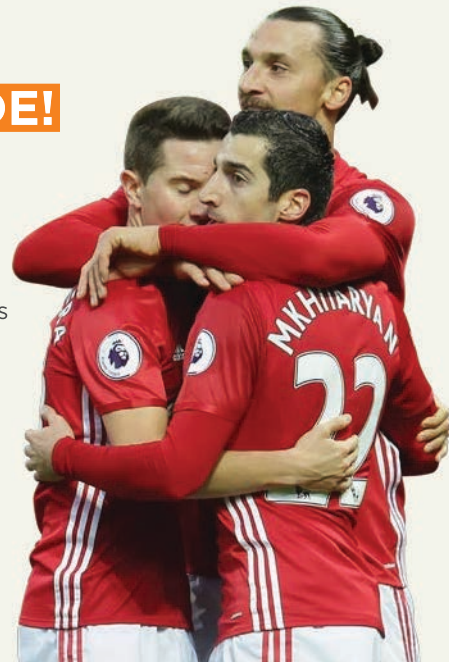
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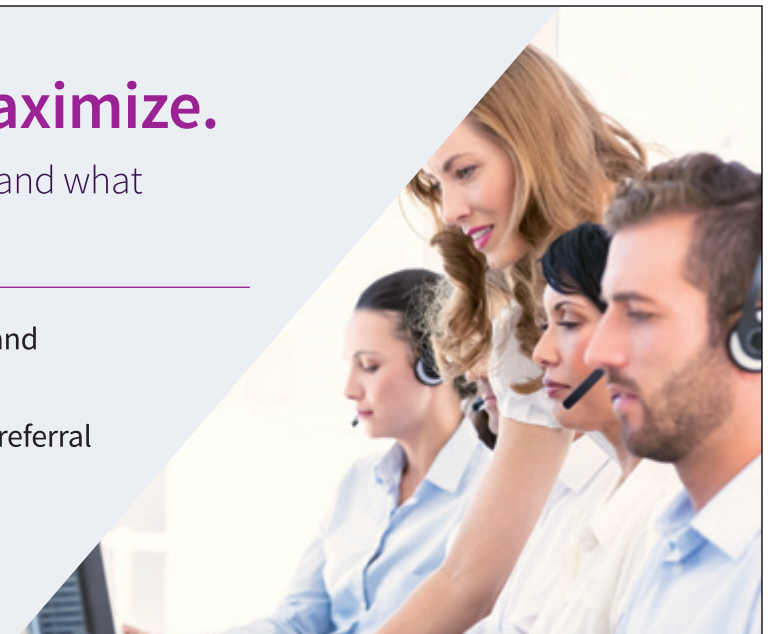


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