

The *Agile* Enterprise

Transform Global Uncertainty into Competitive Success

12-14 SEPTEMBER | WASHINGTON, D.C.

Summit Agenda



Agile enterprises outpace the growth of their peers by finding new sources of value and opportunity when others see risk. The summit provides a unique opportunity for senior executives to explore together how they can increase and nurture the agility of their enterprises to respond to and take advantage of the dizzying rate of change in today's markets. Distinguished guest and keynote speaker, Mr. Louis V. Gerstner, Jr., former Chairman and Chief Executive Officer of the IBM Corporation, will offer insights on leading change within an organization when the context has changed dramatically. In addition, through a series of keynote addresses, panels, and networking events, summit attendees will learn about the following:

Building a Customer-Centric Corporate Center

Gaining Risk Clarity by Evaluating Corporate Culture

Establishing Relevance in Emerging Markets

Join The Corporate Executive Board and other key thought leaders to learn how leading senior executives are responding to shocks you know—like emerging markets—and creating the agility to prepare for the ones you don't, all the while learning from a robust network of senior executives at leading companies pursuing these 21st century practices.

Schedule of Events

Monday, 12 September 2011

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|----------------------|--|
| 10:00 a.m. | Registration Opens |
| 11:30 a.m.–1:00 p.m. | Opening Session with Terry Lillis, CFO Principal Financial Group, and Networking Lunch
<i>Assigned tables by function—join your peers for lunch and conversation</i> |
| 1:00 p.m.–6:00 p.m. | Executive Roundtable Sessions
<i>These sessions are reserved for the senior-most contact of the various service programs at Corporate Executive Board, including:</i>
Chief Financial Officers
Chief Strategists
General Counsel
Heads of Research and Development |

The Agile Enterprise

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Selected Companies Already Scheduled to Attend

ANN TAYLOR 



 Bausch & Lomb

 Cargill

 CATERPILLAR®



 ConAgra Foods



 EASTMAN

 ERNST & YOUNG



 ExxonMobil

 Genworth®
Financial

 Kellogg's

 Marriott

 Microsoft

 pepsi



 WESTJET

Schedule of Events—Continued

Monday, 12 September 2011

Enterprise Controllers
Treasurers
Investor Relations Officers
Tax Directors
Chief Audit Executives
Heads of Enterprise Risk Management
Chief Procurement Officers
Heads of Shared Services
Operations Executives

The Corporate Executive Board's Executive Guidance

Reserved for non-CEB members and key deputies of CEB members

A unique cross-functional perspective into the pressing issues across the executive suite to help you drive corporate, and personal, performance. We will concentrate on:

- Talent: How the best executives generate as much as a 7% boost in revenue and profit performance over their less talent-focused peers.
- Risk: How the healthiest companies identify problems early, ultimately delivering 16% more shareholder value over a 10-year period.

6:00 p.m.–8:00 p.m. Opening Cocktail Reception

Tuesday, 13 September 2011

7:45 a.m.–9:00 a.m. Breakfast Roundtables

9:00 a.m.–10:30 a.m. **Keynote Session: Robyn Meredith interviewed by Brook Selassie**
India and China represent a great deal of companies' growth plans over the next 5-10 years. What must companies know about these economies to ensure their success?

10:30 a.m.–10:45 a.m. Break

Conference Panel Discussions

Over the three-day conference you will have an opportunity to join us for panel discussions focused around three key areas:

- **Track One: Building a Customer-Centric Corporate Center**
In an ongoing quest to find the next level of cost-efficiencies, 81% of organizations have undergone major redesign initiatives in the past 12 months. However, focusing on cost and process alone will not be sufficient to enable organizations to outperform their peers and successfully navigate the uncertainties of the future.
- **Track Two: Gaining Risk Clarity by Evaluating Corporate Culture**
Corporate leaders have long acknowledged the importance and value of corporate culture and its relation to a company's risk management, but until now there has been little historical focus on what exactly constitutes a healthy culture. CEB research reveals firms whose employees rate their firm's culture highly outperform peers by more than 16% in 10-year total shareholder return.

Schedule of Events—Continued

Tuesday, 13 September 2011

▪ **Track Three: Establishing Relevance in Emerging Markets**

While only 10% of companies source more than half of their revenue from emerging markets today, 41% of executives expect that level of revenue diversification by 2020. However, many companies expect to see diminishing profitability and higher local competitive risks as more challenges develop in these growing economies.

10:45 a.m.–Noon **Conference Panel Discussions**

▪ **Track One: Building a Customer-Centric Corporate Center**

Integrated Business Services: The next step towards agility?

Panelists: Steve Loehr, Vice President, Operations and Strategy, Value Services, IBM
Jim Schacht, Executive Director, Cummins Business Services

▪ **Track Two: Gaining Risk Clarity by Evaluating Corporate Culture**

The Foundation for Corporate Success and Risk Management?

Panelists: Stasia Kelley, Partner, DLA Piper
Stephanie Hill, Vice President, Corporate Audit, Lockheed Martin

▪ **Track Three: Establishing Relevance in Emerging Markets**

Session 1: Market Entry in Emerging Markets: Forging Strong and Sustainable JV Partnerships

Noon–1:15 p.m. Networking Lunch

1:15 p.m.–2:15 p.m. Insight Sessions with Our Sponsors

▪ **Track One: IBM**

▪ **Track Two: MetLife**

Pension plan sponsors face a myriad of risks, including investment, interest rate and participant behavior risks. MetLife's third annual U.S. Pension Risk Behavior IndexSM reveals how sponsors among the 1,000 largest U.S. pension plans are prioritizing those risks and how effective they believe they are at managing them. In this session we also will discuss dynamic de-risking strategies and approaches for quantifying contribution risk.

▪ **Track Three: Chatham Financial**

Market Risk Management: Effectively Managing Currency & Commodity Risks

This session will walk through the ideal way to:

- Understand Exposures – Are they offset and/or correlated?
- Evaluate Exposures – Which should be hedged if any?
- Develop an Ongoing Strategy to Manage Exposures

2:15 p.m.–2:30 p.m. Break

2:30 p.m.–3:45 p.m. Panel Discussions

▪ **Track One: Building a Customer—Centric Corporate Center**

Session 2: Cost Savings and Customization—Can the Two Go Together?

Panelists: Jennifer Halliday, Principal and Controller, Vanguard
John Stott, Vice President and Controller, Archer-Daniels-Midland Co.
Richard Zuza, Vice President Supply Chain, Kiewit Corporation

▪ **Track Two: Gaining Risk Clarity by Evaluating Corporate Culture**

Session 2: Risk Clarity in Emerging Markets

Panelists: Patrick Gnazzo, Principal, Better Business Solutions, LLC

Schedule of Events—Continued

Tuesday, 13 September 2011

Allan Misner, Vice President, Audit, Murphy Oil Company
Nancy Snowden, Director of the Office of Business Practices, Caterpillar, Inc.

- **Track Three: Establishing Relevance in Emerging Markets**

Session 2: Protecting Profitability and Crafting Long-Term Strategy in Emerging Markets

3:45 p.m.–4:00 p.m. Break

4:00 p.m.–5:30 p.m. **Keynote Session:**

Leading Organizational Transformation: An Interview with Lou Gerstner interviewed by Dan Currell

5:30 p.m.–7:00 p.m. Wine and Cheese Reception

Sponsored by IBM

Wednesday, 14 September 2011

7:45 a.m.–9:00 a.m. Breakfast and CEB-hosted Roundtables

9:00 a.m.–10:00 a.m. **Insight Sessions with our Sponsors**

[Learn More About the Available Tracks](#)

- **Track One: Ariba**

This session will discuss the collaborative technology referenced in a recent McKenzie study that demonstrates how leading companies that connect internal employee efforts to customers, suppliers, and partners are 50 percent more likely to be market leaders, achieve higher margins, and increase sales. Savings levers and key performance indicators (KPIs) that leading finance professionals are adopting to benchmark procure-to-pay processes, set targets for success, and measure results against stated objectives will also be covered. In addition, you will learn how leading companies are leveraging cloud technology to achieve financial performance breakthroughs.

- **Track Two: Longview**

- **Track Three: Host Analytics**

The Cloud, CPM and the CFO

Spreadsheets have failed. On-premise applications have failed. Finance executives need solutions that will finally help them achieve their highest priority goals: driving fact-based decision-making throughout the organization and putting rigor into financial planning, reporting, and consolidation. Delegates will learn how SaaS corporate performance management can help finance achieve these top priority goals. In addition, the evolution of financial roles and applications, the impact of “The Cloud,” metrics-driven corporate performance management, and the value of a SaaS model will be discussed. Delegates will understand how a SaaS model can make a difference in their organizations and how corporate and functional metrics can help finance executives gain valuable insight into key business drivers and help them make fact-based decisions.

10:00 a.m.–10:15 a.m. Break

10:15 a.m.–11:00 a.m. General Session and Closing

Schedule of Events—Continued

Monday, 12 September 2011

10:45 a.m.–Noon **Post-Conference Workshop**

This session is open to all Summit attendees interested in the topic and will be available for CPE credits. Lunch will be provided at noon 11:30 a.m. for members of this session.

Multifunctional Shared Services:

Is Integrated Business Services the End-state?

Despite media and pundit buzz, the end-state of Integrated Business Services across Human Resources, Finance, Information Technology, and other corporate functions remains elusive. Companies are making a lot of progress in this space while top challenges in creating an Integrated Business Services organization include redefining functional processes as Integrated Business Services, establishing effective governance to drive integration and improving business unit customer engagement.

We will present and facilitate a conversation of what companies such as Merck, Statoil, Siemens, Air Products and Chemicals and others are doing to advance the breadth of functions and processes included in shared services, and the degree of synergy achieved by advancing through the various “maturity stages” of the shared services.