



INTELLIGENT AUTOMATION CANADA 2018

May 30 – 31, 2018 | Toronto, Canada

www.intelligentautomationcanada.iqpc.com



DON'T WANT TO GO ALONE?
**TAKE ADVANTAGE OF OUR
BUY ONE, GET ONE OFFER!**

**limited time, end-users only*

TRANSFORMING BUSINESS PROCESSES - ONE BOT AT A TIME

Dear Colleague:

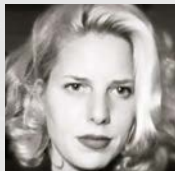
There's no doubt about it, Intelligent Automation is the hottest topic around and SSON's/IQPC's series of IA events in the U.S. have reflected the market's demand for further information on IA technologies by growing exponentially year-on-year. 400+ attendees filled the conference rooms to full capacity at the July 2017 Chicago event, and the buzz over the topic was palpable.

As more companies within every industry look to RPA and other Intelligent Automation technologies as powerful tools to ensure process improvement, we must bring the conversation to you.

That's where Intelligent Automation Canada comes in. Here we continue the conversation with new IA stories and ideas, from leading Canadian organizations as well as global companies, from every industry sector using RPA, cognitive, artificial intelligence, and machine learning technologies. Whether you are involved in your organization's F&A, HR, contact center or any other functional department, this event will help you on your Intelligent Automation journey.

We look forward to seeing you in Toronto May 30-31st!

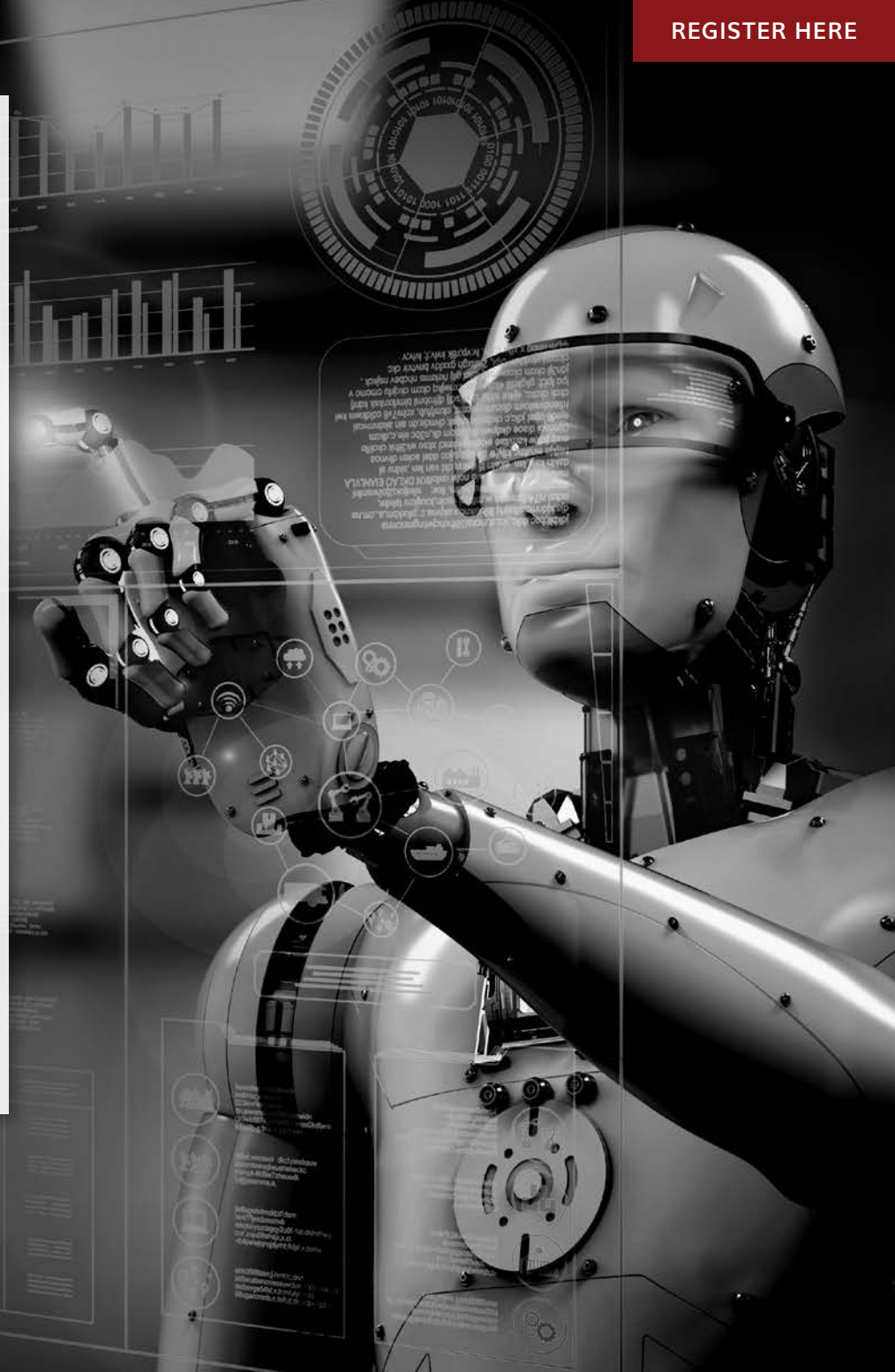
Sincerely,

Jules Miller
Senior Conference
Producer
SSON North America




Heather King
Divisional Director
SSON Americas



WHO ATTENDS

- Finance
- Operations
- Shared Services
- Performance Excellence
- Center of Excellence (CoE)
- Continuous Improvement
- Call/Contact Centers
- Enterprise Business Improvement
- Global Business Services
- Business Process Improvement
- Customer Delivery/Loyalty
- Operational Excellence/Process Optimization
- RPA, Artificial Intelligence, Digital & IT
- Procurement
- Business Process Innovation/Transformation
- HR Operations
- Corporate Strategy
- Global Process Owners/Solutions (P2P, R2R, O2C, T&E)

EARN UP TO 12 CPE CREDITS

Penton Learning Systems LLC/IQPC is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.nasbaregistry.org. Reference to the new www.nasbaregistry.org website should be included the first time your promotional materials are updated following the launch of the site September 1, 2016.

A FEW OF OUR PAST ATTENDEES INCLUDE



FROM ALL AROUND THE WORLD, INCLUDING



- | | | | |
|--------------|-------------|----------------|------------------|
| ▪ Australia | ▪ Estonia | ▪ New Zealand | ▪ United Kingdom |
| ▪ Brazil | ▪ Guatemala | ▪ Poland | ▪ United States |
| ▪ Canada | ▪ India | ▪ South Africa | ▪ Germany |
| ▪ Colombia | ▪ Japan | ▪ Sri Lanka | |
| ▪ Costa Rica | ▪ Mexico | ▪ Turkey | |

A FEW TESTIMONIALS

"People should attend to learn how industry leaders are leveraging best practices and the latest technologies to automate their business."

*Senior Director,
Financial Shared Services,
LinkedIn*



"The conference was extremely informative and I appreciated being able to hear from the software providers and companies that are currently using RPA. I'm excited about exploring RPA further to determine applicability for our organization."

*Corporate Vice President,
New York Life Insurance Company*



"Best conference I have ever attended! Comprehensive, hands on, collaborative and sustainable information."

*Vice President of Finance Lead and
Global Operations, AIG*



SPEAKER FACULTY



Ryan De Borger
Senior Vice President, Strategic
Partnership Program and Enterprise
Supply Chain Canada Head
Citi



Amir Issaei
Operations Research &
Advanced Analytics
American Airlines



Mythili Vellanki
CoE Lead, Intelligent
Automation
LinkedIn



Rachel Harris
Vice President, Human
Resources
Macy's, Inc.



Nadia de Villa
Assistant Vice President,
Business Optimization,
Investment Division
Manulife



Karen Mesoletta
Business Transformation
Leader
Paychex



Richard Effirim
Senior Director, Performance
Excellence
TXU Energy



Jasmine Tehara
Vice President, Business
Optimization, Investment Division
Manulife



Manish Jain
Senior Director, Strategic
Program Delivery
Royal Bank of Canada



Christiano Santiago
Manager, Business
Applications
Toyota Canada, Inc.



Kelly Wibbenmeyer
PhD, IT Application
Development Supervisor
Ameren – advisor



Shana Poirier
Senior Advisor - Automation
& Innovation
Rio Tinto – advisor



Gary Rebeiro
Director Process Improvement &
Robotics Process Automation
FCT - advisor



Shelly Laine
Director in the Robotics
Process Automation
**Information Services Group
(ISG)**



James Jones
Principal Consultant,
Robotic Process Automation
**Information Services Group
(ISG)**



Matthew Carnali
Head of Enterprise
Automation CoE
Capital One



Roderick Kaleho
CISSP, CISM, CISA, CGEIT, Head of
Information Security Engineering,
IAM & Automation,
MoneyGram International



Vargha Moayed
Chief Strategy Officer
UiPath



Jerry Wagner
Senior Product Manager,
Intelligent Automation
Capital One

INTERACTIVE DISCUSSION GROUPS

In these small breakout sessions, you will have the opportunity to learn more about the challenges and possible solutions that may come up along your IA journey, depending on which maturity stage your organization may be with its IA journey – and with your own area of functional responsibility.

Choose from one of the below IDGs and obtain valuable insight from our distinguished speakers and your industry peers.



MATURITY CURVE IDGs (Interactive Discussion Groups)

PRE-PLANNING & EARLY IMPLEMENTATION

- How to develop an effective RPA & Intelligent Automation PoC and Business Case
- Vendor solutions' options, sourcing, and contracting
- How to determine which functions would be most ideal for your operations on a RPA, cognitive, and/or AI level
- A – Z project management roadmap for effective IA roll out
- Tracking your program's success and failures - what to track and how to determine success or failure

EVOLVING & MATURE

- How to repeat your past program roll out victories and ensure continued success
- Are your programs ready for a global footprint
- Various IA charge-back models that may offer a new revenue stream for your organization

FUNCTIONALITY FOCUS IDGs (Interactive Discussion Groups)

IT

- Form strategic alliances with your various IT departments
- Better understand what your IT departments need from you and what you need from them – and how to best communicate said information in a manner all parties can understand, appreciate, and deliver on

SHARED SERVICES

- Developing an IA strategy that meets the needs of your various SS customer-base
- Governance
- Change Management

PROCESS IMPROVEMENT

- Effective project management strategies to apply towards the program initiatives set forth by your organization
- How to determine and develop realistic timelines & KPIs to be met - and performance measurements to ensure program success
- Metric analysis strategies that provide impactful data collection and improved service expectations and deliverables

* See pages 11 & 15 for more information.

EXPERIENCES



Pre-Conference Exhibit Hall
Preview & Champagne Toast



"Beat the Bot" Game Show



Networking Cocktail Party



Demo Drive



TRANSFORMING BUSINESS PROCESSES - ONE BOT AT A TIME

AGENDA

MAIN CONFERENCE: DAY ONE | WEDNESDAY, MAY 30, 2018

7:00am REGISTRATION FOR PRE-CONFERENCE WORKSHOP A & NETWORKING COFFEE

WORKSHOP 101: HOW TO PLAN & ROLL OUT A SUCCESSFUL RPA & IA PILOT PROGRAM

Although RPA and IA (collectively called Intelligent Automation or IA) are indeed very valuable tools for a wide variety of departments and industry functionalities, before you can go full-throttle, you must test out the waters on a smaller scale to ensure success in other departments.

That said, IA lends itself very well to a pilot program approach, providing a way forward for decision-makers with a significant ROI supported by a modest investment, short time frames, and minimal operational exposure. Join this workshop to understand the definitions, context and evolution of RPA and IA that leaders need to understand before embarking on an IA initiative.

In this workshop, we will discuss:

- How to determine which department functionalities would be best suited for RPA and IA pilot programs based upon its transactional volume stats, regulations and transparency standards x department must adhere to, etc.
- Tools to prioritize and plan for opportunities, so that you can gain the support of management and move to implementation
- Developing the IA road map with a supporting business case, including how IA pilot programs can be standalone initiatives or incorporated within a larger transformation program

Shelly Laine, *Director in the Robotics Process Automation, Information Services Group (ISG)*

James Jones, *Principal Consultant, Robotic Process Automation, Information Services Group (ISG)*

9:00am REGISTRATION FOR MAIN CONFERENCE DAY ONE & NETWORKING BREAKFAST

9:30am CHAIRPERSON'S WELCOME

INTELLIGENT AUTOMATION IS DRASTICALLY CHANGING BUSINESS – ARE YOU READY?

It is no longer a debate whether Intelligent Automation and RPA technologies are here to stay. They are already drastically disrupting the work processes of companies around the globe and we are still at the beginning of the technological evolution. This session sets the stage for where we are now and likely will be in the not-too-distant future. Knowing how much is out there, what do you plan for? Will it be artificial intelligence (AI), machine learning, cognitive technologies, or a hybrid that will take your company to the next level?

In this session, we will explore:

- Intelligent Automation's current and ever-evolving capabilities and the technological barriers that need to be overcome before it makes the next leap
- How to prepare on a technical, operational, HR, customer delivery, and change management level

Matthew Carnali, *Head of Enterprise Automation CoE, Capital One*

CLIENT CASE STUDY: INTELLIGENT AUTOMATION 2018: DISCOVER THE CAPABILITIES, APPLICATIONS AND ROI OF AI-DRIVEN RPA

10:20am

By 2021, Gartner predicts that AI will create \$2.9 trillion in business value and recover 6.2B of worker hours. Are you positioned to catch this next wave of true digital capabilities? Learn how leading businesses are using Intelligent Automation as a lever to grow productivity and revenue without growing cost.

Hosted by: **WorkFusion**

MORNING NETWORKING BREAK & DEMO DRIVE

11:00am

Meet with some of the leading IA solution providers by way of this fun and informative speed-dating activity.

POWERFUL DATA ANALYTICS TO ENHANCE BUSINESS DECISIONS UTILIZING IA TECHNOLOGIES

11:40pm

Obtaining clear-cut data analytics that can be analyzed to guide your organization toward continued process improvement and enhanced customer delivery is paramount on a corporate strategy, finance, operations, HR, and customer delivery level.

In this session, we will explore:

- How AI and cognitive technologies can be programmed into your IT infrastructure to provide powerful data analytics that relate to: customer buying trends, policyholder claims' history, patient medical profiling, financial and sales reporting, red flags that alert you of fraudulent activity, procurement, contracting, supply chain management, logistics' business decisions, and much more

Roderick Kaleho, *CISSP, CISM, CISA, CGEIT, Head of Information Security Engineering, IAM & Automation, MoneyGram International*

PARLEZ-VOUS FRANCAIS?

12:20pm

If your organization has gone through the process of IA planning and implementation, then you are very aware of the technical glitches associated with IA technologies switching back and forth between French to English and vice versa. By attending this session, you will learn from our eclectic group of speakers the hurdles they have come across with the above and methods they have implemented to reduce IA technical "lost in translation".

In this session, topics of discussion will include, yet will not be limited to:

- Why you must consider the French & English IT equation when planning out your IA strategy
- IA systems and technologies designed to address the above said issues

Christiano Santiago, *Manager, Business Applications, Toyota Canada, Inc.*

NETWORKING LUNCH BREAK

1:00pm

MATURITY CURVE IDGs (INTERACTIVE DISCUSSION GROUPS)

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- Tracking your program's success and failures - what to track and how to determine success or failure

*Rachel Harris, Vice President, Human Resources, **Macy's, Inc.***

*Jerry Wagner, Senior Product Manager, Intelligent Automation, **Capital One***

EVOLVING & MATURE

- How to repeat your past program roll out victories and ensure continued success
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AFTERNOON NETWORKING BREAK

FROM PROOF OF CONCEPT TO REALIZATION: HOW TO BUILD THE EXCITEMENT & SUSTAIN MOMENTUM

Abstract soon to come!

*Jasmine Tehara, Vice President, Business Optimization, Investment Division, **Manulife***

HOW TO DEVELOP A BEST IN CLASS IA CENTER OF EXCELLENCE (CoE) & GOVERNANCE PROGRAM

Intelligent Automation technologies have hit center stage in the business world for many reasons, most notably for their technological ability to deliver increased process optimization, enhanced customer delivery, and powerful data analytics to drive sound business intelligence into an organization's corporate strategies.

However, in order to effectively leverage Intelligent Automation into an organization, it's important to establish a centralized organization that provides oversight and sets the direction for these technological solutions.

By attending this session, you will better understand:

- How to establish a successful roadmap and prioritization process
- Effective CoE and governance process models
- Best in class change management and communication plans

Karen Mesoellea, *Business Transformation Leader*, **Paychex**

4:10pm

4:50pm

END OF MAIN CONFERENCE DAY ONE

5:00pm

EVENING SOCIAL GATHERING



MAIN CONFERENCE: DAY TWO | THURSDAY, MAY 31, 2018

7:00am **REGISTRATION FOR PRE-CONFERENCE WORKSHOP B & NETWORKING COFFEE**

WORKSHOP 501: ADVANCED INTELLIGENT AUTOMATION BOOT CAMP

This 501 intensive session will discuss vital questions that need to be answered with respect to what is involved in establishing an Intelligent Automation program that doesn't necessarily include RPA, but instead consists of such IA technologies as cognitive, artificial intelligence, and machine learning – and the benefits they can provide your organization.

By attending this workshop, you will:

- Understand which processes can best utilize the above forms of IA technologies
- Roadblocks you may face along your journey – and solutions to overcome said obstacles
- Effective stakeholder and customer buy-in strategies and change management

9:00am **REGISTRATION FOR MAIN CONFERENCE DAY TWO & NETWORKING BREAKFAST**

9:30am **CHAIRPERSON RECAP**

PANEL DISCUSSION: WHAT TO WATCH OUT FOR BEFORE & DURING YOUR IA JOURNEY

Anticipating the challenges that may arise when introducing and implementing IA technologies into your organization are key to whether your process yields successful results. In this session, we will discuss some key considerations for developing your Proof of Concept, strategy, and actual implementation process.

In this session we will discuss

- What to look for when identifying and choosing the processes for IA implementing
- Managing employees and stakeholders who view "bots" as a threat and educating and communicating with them to show them how IA their work life easier and more productive
- Setting realistic goals and expectations regarding IA adoption so to ensure the process stays on track, does not lose momentum, and buy-in and the support of all parties concerned
- Selecting the proper IA tools for your business that are capable of full-integration and connectivity with your existing and future systems

Matthew Carnali, Head of Enterprise Automation CoE, **Capital One**

Richard Effirim, Senior Director, Performance Excellence, **TXU Energy**

Moderator: **Vargha Moayed**, Chief Strategy Officer, **UiPath**

Hosted by: **UiPath**

WHERE DOES RPA FIT WITHIN ESTABLISHED & EXISTING LARGE-SCALE TRANSFORMATION INITIATIVES

Abstract soon to come!

Jasmine Tehara, Vice President, Business Optimization, Investment Division, **Manulife**

Nadia de Villa, Assistant Vice President, Business Optimization, Investment Division, **Manulife**

MORNING NETWORKING BREAK & DEMO DRIVE RAFFLE PRIZES ANNOUNCED

FIRESIDE CHAT: IDENTITY MANAGEMENT FOR YOUR ROBOTIC WORKFORCE

RPA programs require creating a new virtual workforce from an Identity and Access Management perspective. Managing identities is a challenge for many organizations without RPA, but additional challenges arise when ID management diverges from traditional human credential management. Questions like, who 'owns' the IDs, how are they stored, how are the passwords transferred and rotated, what are the security and compliance requirements for ID management?

In this session we'll address the following:

- Secure privileged credential management
- Storage and retrieval
- Service accounts lessons learned
- Entitlement and performance reviews

Roderick Kaleho, CISSP, CISM, CISA, CGEIT, Head of Information Security Engineering, IAM & Automation, **MoneyGram International**

Manish Jain, Senior Director, Strategic Program Delivery, **Royal Bank of Canada**

FIRESIDE CHAT: UNION-FRIENDLY INTELLIGENT AUTOMATION PRACTICES

Anyone who does business in or with Canada certainly knows getting x done in Canada can be very challenging with respect to the red tape and pushback associated with most industries being unionized in Canada. Add to the mix a technology that "some" might have misconceptions about, and rolling out an IA program can feel like an impossible endeavor. However, that doesn't have to be the case, as many Canada organizations and companies with a global footprint have already & currently successfully work with the unions within x industry to indeed develop and roll out a variety of IA programs.

In this session, learn more about:

- Special considerations that must be addressed when planning an IA roll out in the Canadian marketplace, such as a variety of union regulations that must be met/managed

Karen Mesolella, Business Transformation Leader, **Paychex**

Christiano Santiago, Manager, Business Applications, **Toyota Canada, Inc.**

"I was looking for an overview, introduction and applicability of RPA. I got that."

Senior Vice President, Global Client Relations, NASDAQ

1:00pm

NETWORKING LUNCH BREAK

2:00pm

INTELLIGENT AUTOMATION TO ENHANCE SHARED SERVICES' SUPPLY CHAIN MANAGEMENT

Exploration of emerging technologies disrupting the Citi Shared Services Supply Chain, such as:

- Smart Automation (Robotic Processing Automation)
- Contract Discovery & Analytics
- Virtual Chat Agents
- Cognitive Fraud Detection, Mobile & Supplier Intelligence Portal
- Blockchain

Ryan De Borger, Senior Vice President, Strategic Partnership Program and Enterprise Supply Chain Canada Head, **Citi**

2:40pm

FUNCTIONALITY FOCUSED IDGs (INTERACTIVE DISCUSSION GROUPS)

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- Better understand what your IT departments need from you and what you need from them – and how to best communicate said information in a manner all parties can understand, appreciate, and deliver on

Jerry Wagner, Senior Product Manager, Intelligent Automation, **Capital One**

SHARED SERVICES

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PROCESS IMPROVEMENT

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- Metric analysis strategies that provide impactful data collection and improved service expectations and deliverables

Richard Effrim, Senior Director, Performance Excellence, **TXU Energy**

3:40pm AFTERNOON NETWORKING BREAK

4:00pm "BEAT THE BOT": THE ISG IA TRIVIA GAME

Join us for this fun and informative final session and try your best at stumping the ISG Bot by posing any/all questions you may have regarding Intelligent Automation technologies and strategies.

Shelly Laine, *Director in the Robotics Process Automation, Information Services Group (ISG)*

James Jones, *Principal Consultant, Robotic Process Automation, Information Services Group (ISG)*

4:30pm END OF MAIN CONFERENCE: DAY TWO – SEE YOU NEXT YEAR!

THANK YOU TO OUR MEDIA PARTNERS



"Good content and great opportunities to meet colleagues who are on the same journey as us."

Global Manager, Global Business Services, General Motors

"Highly educational. It has been a fantastic opportunity to learn how others in our industry are leveraging RPA."

Senior Vice President, Process Optimization Director, Citi

SPONSORS



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Event sponsorship is an excellent opportunity for your company to showcase its products and services to senior-level, targeted decision makers attending the Intelligent Automation Canada conference. SSON help companies like yours achieve important sales, marketing and branding objectives by setting aside a limited number of event sponsorships – all of which are tailored to assist your organization in creating a platform to maximize its exposure at the event. For more information on sponsoring or exhibiting at this year's conference, contact Vinny Rama at 212- 885-2770 or email him at Vinny.Rama@ssonetwork.com



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Here's How to Download It:

- Search for 'SSON Events' in your app store
- Create a profile & sign up
- Complete your profile & hit 'join'
- Click on 'Intelligent Automation' event and join the fun!

JOIN THE CONVERSATION! [in](#) [t](#) [f](#)

WHO IS SSON...And how can we help you?

The **Shared Services & Outsourcing Network (SSON)** is the largest and most established community of shared services and outsourcing professionals in the world, with over 120,000 members. Established in 1999, SSON recognized the revolution in business support services as it was happening, and realized that a forum was needed through which practitioners could connect with each other on a regional and global basis. SSON operates under three distinct brands, each offering shared services professionals the information, tools and connections they need to do their jobs



THE WORLD'S LARGEST SHARED SERVICES & OUTSOURCING NETWORK

SSON is a one-stop shop for shared services professionals, offering unrivalled learning and networking opportunities both face-to-face and online through:

- 40+ industry leading events across the world
- SSON Excellence Awards Program
- Cutting edge editorial and industry news
- Exclusive interviews with industry leaders
- Surveys, reports and white papers
- Online events and webinars
- Vendor directory
- Jobs board

www.ssonetwork.com



ANALYTICS

SSON Analytics is SSON's global data analytics centre, offering visual data insights that are simple, accurate, and digestible to the global shared services and outsourcing community, through a variety of tools and reports:

- Visual Analytics Workbooks focus on specific countries or regions to give you a 50,000ft view of the shared services landscape
- The City Cube compares shared services locations around the world across a variety of metrics
- The Shared Services Atlas locates shared services hotspots around the world from a global database of 7000+ centres

www.sson-analytics.com



SHARED INTELLIGENCE

Shared Intelligence is a private online community for shared services practitioners to facilitate networking and peer-to-peer resource sharing and learning.

Members benefit from a range of resources including practitioner-led web casts, event presentations from all SSON events around the world, member-to-member messaging, and more.

Membership of Shared Intelligence is completely free for all practitioner attendees of SSON events. Simply attend an SSON event as a shared services practitioner and you will automatically qualify for a 1 year license for Shared Intelligence.

www.sharedintelligence.com

TORONTO

A black and white photograph of the Toronto skyline at night, featuring the CN Tower and various city lights reflected in the water.

VENUE

Radisson Admiral Toronto Harbour Front

249 Queen's Quay West
Toronto, ON, M5J 2N5
Canada
1 (800) 967-9033

Reserve your stay at the Radisson in Toronto and enjoy breathtaking views of Lake Ontario. Experience a delicious taste of local cuisine without leaving the hotel at Watermark Restaurant, which features beautiful views of the harbor. The seasonal SPLASH Pool Patio and Terrace provides a fun spot for cocktails and city views, while Watermark Lounge is a year-round favorite for drinks. Room service is available when you're craving a quiet, private meal.

A special Group Discount Rate has been established for our conference attendees, which is \$190.46 USD per night. Simply call 1 (800) 967-9033 and give the group of name **"IQPC"**. **You must make your reservation no later than May 8th, 2018 to receive this discount.** For your convenience, the special rate has been extended two days before the conference.

PRICING & REGISTRATION

**3 EASY WAYS
TO REGISTER**



Call
1-800-882-8684



Email
enquiryiqpc@iqpc.com



Register Online
intelligentautomationcanada.iqpc.com

PRIMARY PRICING	Register & Pay By 18-May-18	Onsite
Main Conference	CA \$1,795 + 13% HST Save CA \$200	CA \$1,995 + 13% HST
All Access: Main Conference + All 2 Workshops	CA \$2,395 + 13% HST Save CA \$200	CA \$2,595+ 13% HST
One Workshop (a la carte)	CA \$569 + 13% HST	

VENDOR PRICING	Register & Pay By 18-May-18	Onsite
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All Access: Main Conference + All 2 Workshops	CA \$4095 + 13% HST Save CA \$200	CA \$4295 + 13% HST
One Workshop (a la carte)	CA \$569 + 13% HST	

TEAM DISCOUNTS	SAVE
Teams 3-4	15%
Teams 5+	20%

DON'T WANT TO GO ALONE?

Take Advantage Of Our BOGO Offer!
Buy One, Get One

*Promotion available for the first 5 end-user accounts that register. Prices are off all-access standard rates.

CONTACT US TO REGISTER

For a limited time only, we're offering a **BUY ONE PASS, GET ONE HALF OFF**

Deal for you to attend the Intelligent Automation Canada conference and for a colleague to receive a half price pass to attend our other Canadian event, the **5th Canadian Shared Services & Outsourcing Summit** in Toronto July 23 – 25.



CONTACT US TO REGISTER

*IQPC reserves the right to determine who is considered an End-User or a Vendor upon registration for an event. Those who are determined a vendor will be denied access to End-User pricing. These prices are featured as a limited time only promotion. IQPC reserves the right to increase these prices at its discretion.

Please note multiple discounts cannot be combined. A \$99 processing charge will be assessed to all registrations not accompanied by credit card payment at the time of registration.

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*CT residents or people employed in the state of CT must add 6.35% sales tax.

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