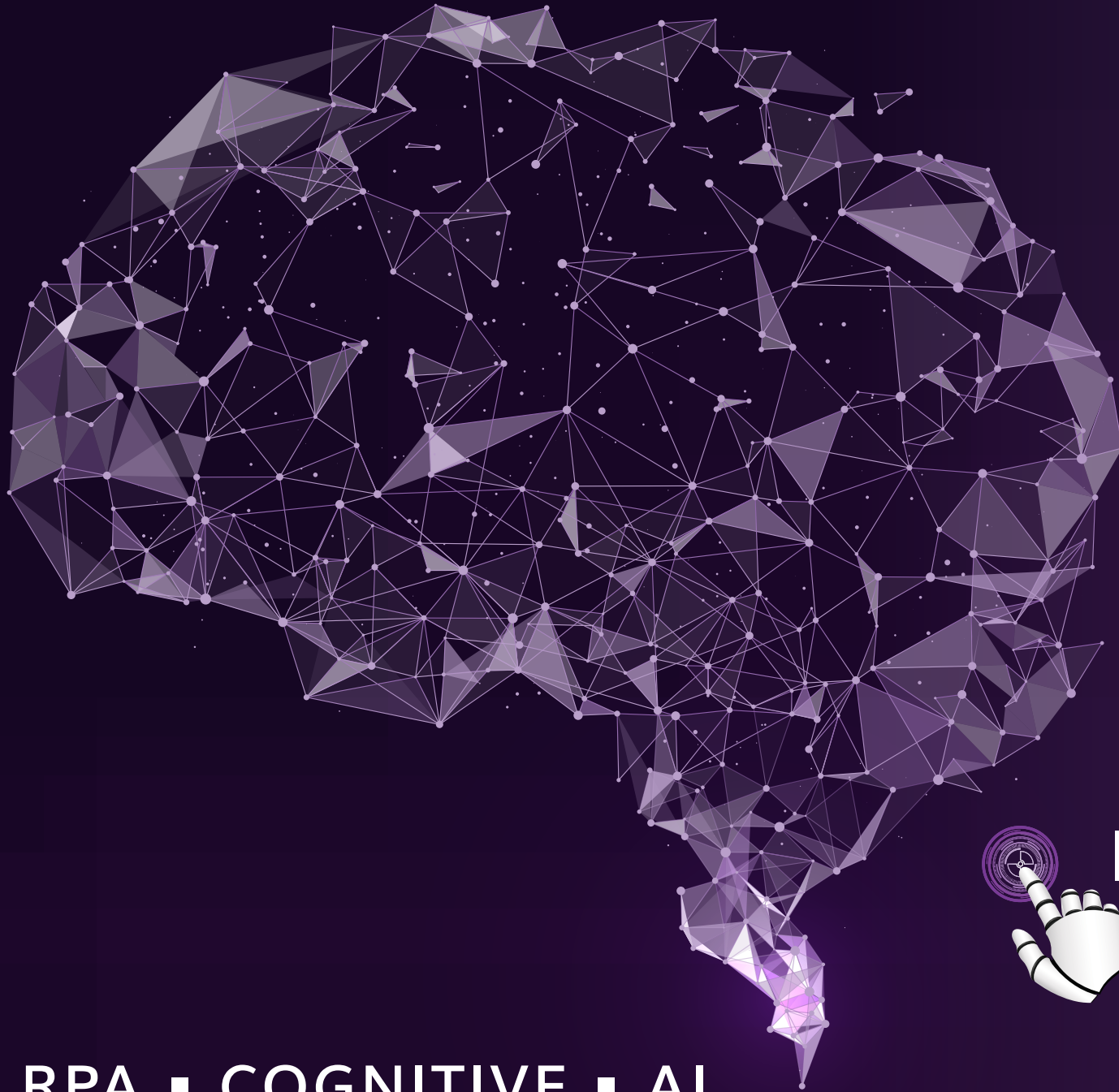


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Join with a colleague
with our 2-for-1 Passes!



INTELLIGENT AUTOMATION WEEK AUSTIN

RPA ■ COGNITIVE ■ AI
F&A, HR, CALL CENTERS & MORE

December 3 – 6, 2018
AT&T Hotel & Conference Center, Austin, TX
intelligentautomationevent.iqpc.com

ALWAYS EVOLVING TO MEET THE NEEDS OF THE GROWING IA SPACE

As a follow up to our record-breaking IA Week Chicago program this past July, we are very excited to continue the conversation at IA Week Austin this December. There is so much going on that it just can't be contained in one event! We've put together a unique program that will meet your very diverse and evolving IA needs, as it relates to planning, implementing, and expanding those initiatives.

Once again, the conference will bring together a speaker faculty of 100 new faces with new insights, ideas, and content to share. From IT to contact centers, from organizations with advanced IA strategies in play, to those that are just starting out, the customizable event program will allow you to create an unique experience you won't get at any other Intelligent Automation event.

We look forward to seeing you in Austin!

Sincerely,




Jules Miller
Senior Conference Producer, IA Series of
Conferences, U.S./Canada
IQPC/SSON




Heather King
Divisional Director
IQPC/SSON North America

EARN UP TO 20 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.

IA ATTENDEE BREAKDOWN

SENIORITY
LEVEL

22% C Suite

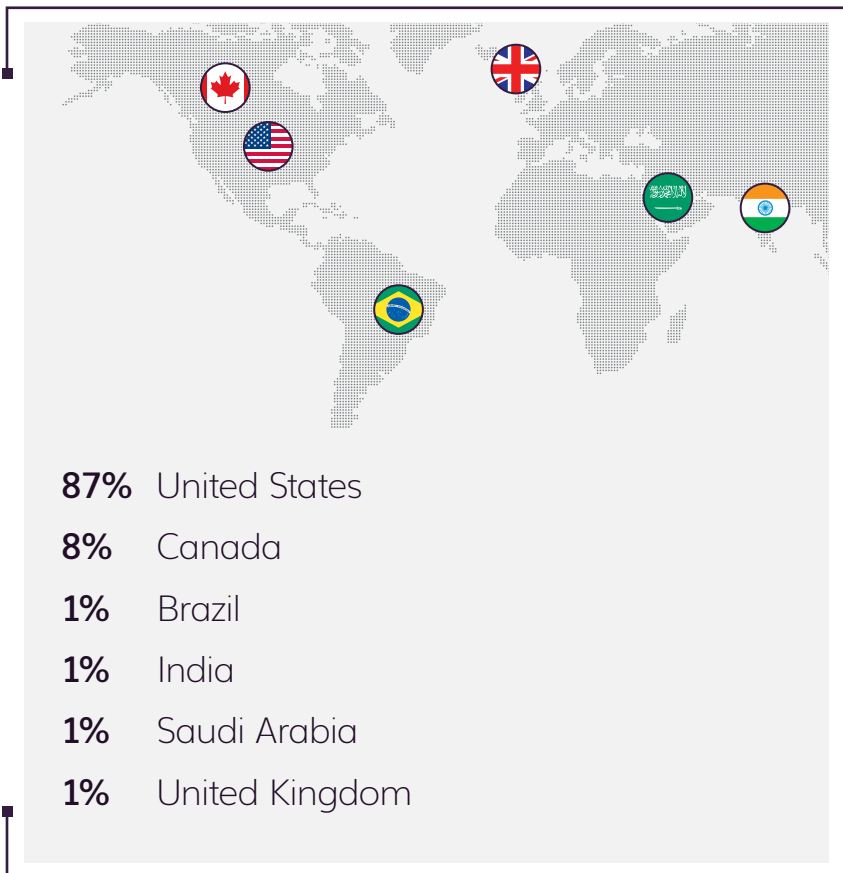
4% VP/SVP/AVP

19% Manager

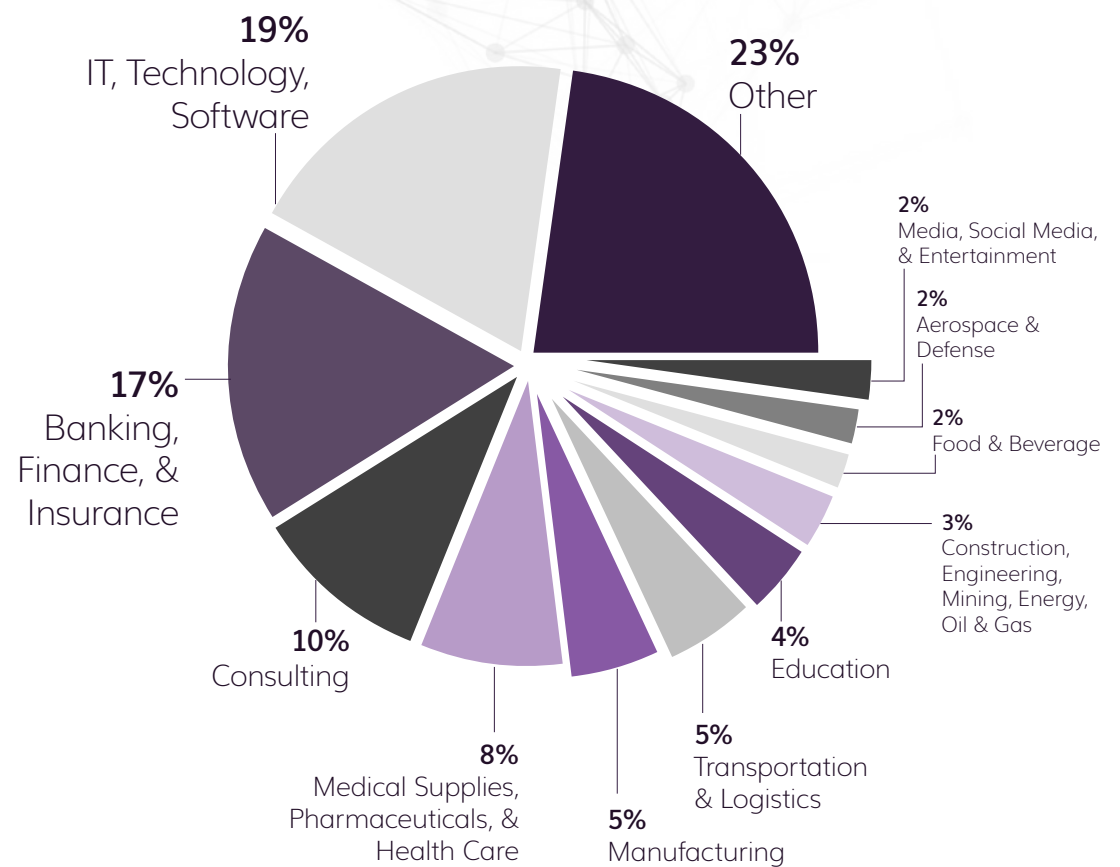
35% Director

20% Other

GLOBAL BREAKDOWN



INDUSTRY



WHAT OUR ATTENDEES THOUGHT

"Looking forward to next year's conference to see how everyone has progressed such as how people have conquered this year's challenges and the new challenges that have come up next year. Also new technologies or solutions that have come up next year."



RPA Program Lead
Citi

"Overall, this was an amazing conference! I'll be thinking about many of the topics and presentations for years to come! Keep doing what you're doing: the Automation space needs conferences like this as an opportunity to come together and share insights."



Senior Staff Accountant
FULLBEAUTY Brands

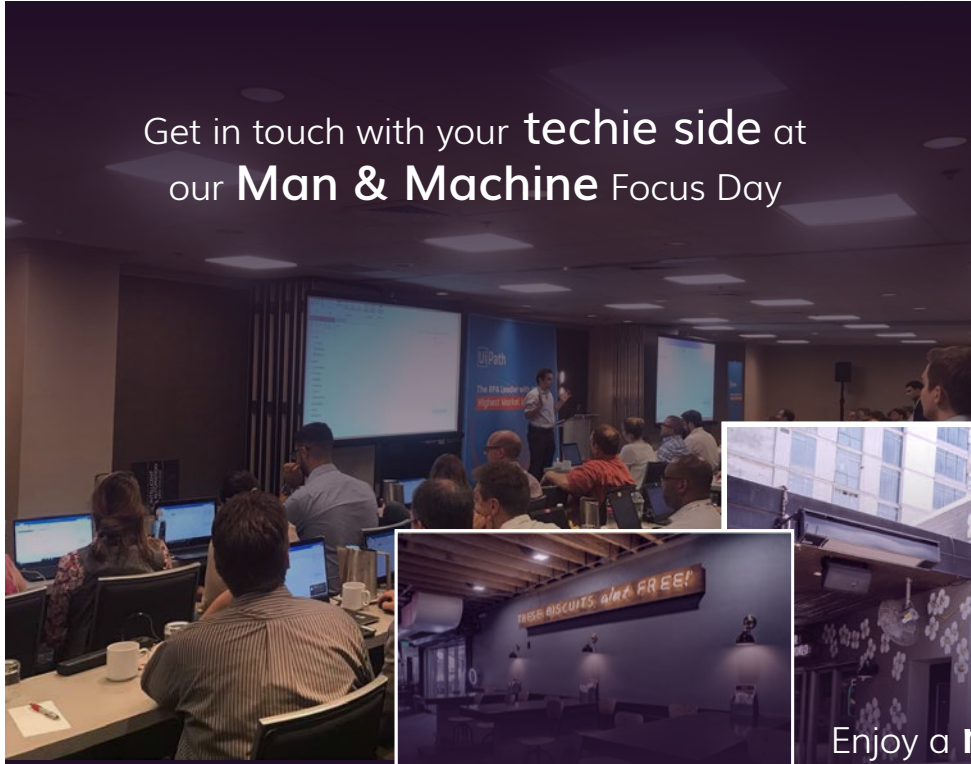
"This was my first IA conference and it provided a wealth of information and a great platform to network with your peers."



Systems Architect
Fannie Mae

YOUR IA EXPERIENCES

Get in touch with your **techie side** at our **Man & Machine** Focus Day



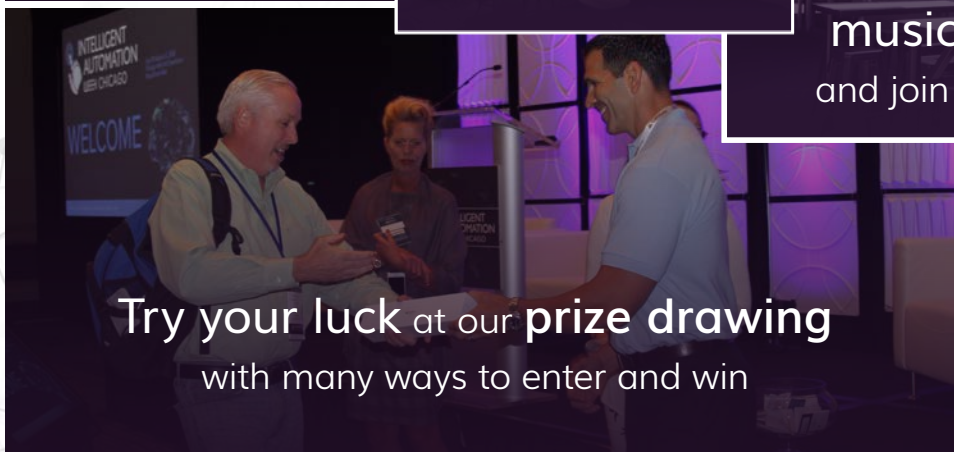
Something for everyone...
RPA 101 and **IA 501** sessions
for professionals at various maturity
levels of their IA journey



Enjoy a **night** out in the **live music capital** of the world
and join us at the **Dogwood!**



Try your luck at our **prize drawing**
with many ways to enter and win



Kick off the **event** with a
champagne toast



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REGISTRATION



Henry Lyles
Director, Business Transformation Operational Excellence, Robotic Process Automation
McDonald's Corporation



Mona Kahn
Director of Technology - Head of Intelligent Automation
Fannie Mae



Ryan Davis
Senior Vice President, Procurement Management
Bank of America



AJ Bernstein
Director, Finance Transformation and Compliance
Facebook Inc.



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



Krishnan Krishnaiyer
Director, Enterprise Business Improvement
Marathon Petroleum Corporation

NEW



Delphine Bernard
Global Head of Finance Operations
Uber

NEW



Curt Burghardt
Vice President, HR Shared Services & HR Systems
Walgreens



Arindam Mukhopadhyay
Managing Director, Global Head of Strategy, Reporting and Information Security Ops
Citi



John Cottongim
CFA Automation Director
Mars

KEYNOTE SPEAKER



Michael Rogers

*MSNBC's "The Practical Futurist"
and Technology Expert*

Michael Rogers is one of the nation's leading experts on the impact of technology on business and society, he is Futurist-in-Residence for The New York Times Company, as well an interactive media pioneer, novelist and journalist. He also writes the popular Practical Futurist column for MSNBC.

Previously he was Vice President of The Washington Post Company's new media division, helping guide both the newspaper and its sister publication Newsweek in the new century, as well as Editor and General Manager of Newsweek.com. Mr. Rogers is also a best-selling novelist whose fiction explores the human impact of technology.

His new Amazon e-booklet, Finding Henrietta Lacks, recounts the 1976 article he wrote for Rolling Stones that broke the Henrietta Lacks story and revealed the woman behind the cells used to develop the polio vaccine. Rogers' article gained prominence in the international best-seller The Immortal Life of Henrietta Lacks, by Rebecca Skloot, which tells Lacks' story.

At Newsweek he created the magazine's Technology section, covering topics ranging from Chernobyl and genetic engineering to computers and the Internet, earning numerous journalism awards for his work. He then produced the world's first CD-ROM newsmagazine, described by the press as a prototype for the future of interactive television, as well as interactive areas on Prodigy, America Online and the Internet. In 1999 he received a patent for the bimodal spine, a multimedia storytelling technique.

SPEAKER FACULTY

Over **50% New** End User Speakers on the Program



Brad DeMent
Partner, Finance &
Accounting Shared Services
Practice

ScottMadden

CHAIRMAN



Michael Machado
Delivery Lead - Smart
Process Automation &
Robotics Center
Fannie Mae

NEW



Curt Burghardt
Vice President, HR Shared
Services & HR Systems
Walgreens



Andrew Jones
Intelligent Automation
& Sustainable Process
Solutions
U.S. Bank

NEW



Ryan Davis
Senior Vice President,
Procurement Management
Bank of America



Nick Hoppenjans
Vice President & Intelligent
Automation Program
Manager
Fifth Third Bank

NEW



Jim Maastricht
Personal Lines Data and
Technology Director
**American Family
Insurance**

NEW



Arindam Mukhopadhyay
Managing Director, Global
Head of Strategy, Reporting
and Information, Security
Ops
Citi



Iris Gregoriou
Assistant Vice President,
Head of Continuous
Improvement, Investment
Division
Manulife

NEW



Lia Williams Johnson
MBA, Director, Program
Management Data &
Analytics
**Baker Hughes, a General
Electric company**

NEW



John Cottongim
CFA, Automation Director
Mars



Sameer Naik
Lead SAP Systems Engineer
& Applications Architect
ConAgra Foods



Henry Lyles
Director, Business
Transformation Operational
Excellence, Robotic Process
Automation
McDonald's Corporation



Chris Colwell
Intelligent Process
Automation CoE Lead,
Assistant Vice President,
MBA, PMP
Capital Group

NEW



Michael Farough
Robotic Process
Automation Developer
Lead
UiPath

NEW



Manik Patil
MISM, PMP, ITIL, CTBME,
Global Senior Director
AIG

NEW



Kenneth Newton
Director, Service Delivery,
NASA Shared Services
Center
NASA

NEW



Krishnan Krishnaiyer
PHD, Director, Enterprise
Business Improvement
**Marathon Petroleum
Corporation**

NEW



Jon Theuerkauf
Advisor, **The Improve and
Innovate Company** &
Former Managing Director/
Group Head of Performance
Excellence **BNY Mellon**



Lee Coulter
Senior Vice President,
Ascension & Chief
Executive Officer,
**Ascension Shared
Services** & Chair,
**IEEE Working Group on
Standards in Intelligent
Process Automation**



Brad Shaink
Director of Innovation &
Engagement Technologies
Houston Methodist

NEW

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Michael Edmonds
Robotics Process
Automation Manager
**Farmers New World Life
Insurance Company**

NEW



Gary Page
Senior Vice President,
Vendor Management
Bank of America

NEW



Brandon Fritze
Senior Staff Accountant
FULLBEAUTY Brands

NEW



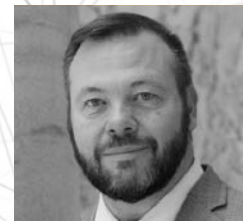
Robert Kennedy
Enterprise Architect, Server
Systems SME, Enterprise
Architecture
Ryder System, Inc.

NEW



Anton Groom
Senior Director,
Automation, Data Science
& Emerging Technology
Walmart

NEW



Reggie Twigg
Director of Product
Marketing, Data Capture
ABBYY

NEW



Barry Spigel
PMP, Lean Six Sigma Black
Belt, IT Project Manager
Frost Bank

NEW



Mark Davison
Global Partner, Robotic
Process Automation &
Cognitive
**Information Services
Group (ISG)**



Sujan Reddy Jillela
Systems Lead
Fannie Mae

NEW



Dylan Bowman
RPA Engineer Lead
UiPath

NEW



Alicia Meadows
Senior Solutions Engineer
Blue Prism

NEW



Brad Filbert
Senior Vice President - RPA
The Results Companies

NEW



Jamie Carabetta
Director
Freddie Mac

NEW

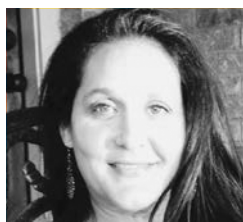


Christoph Grossbaier
Senior Director of Demand
Generation
Celonis



Adel Alaeddini
PhD, Associate Professor of
Mechanical Engineering
**University of Texas at San
Antonio**

NEW



Carmel Smith
South Central Sales Leader
UiPath

NEW



Pankaj Chowdhry
CEO & Founder
FortressIQ



Marc Morrison
Head of Automation
Enablement Center
U.S. Bank

NEW



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



Bala Kalavala
Director of Enterprise
Architecture and
Automation
**Wyndham Hotels &
Resorts**

NEW



David H Friedman
Head of Intelligent
Automation CoE
Ryder System, Inc. –
tentative

NEW

KEYNOTE &
SPEAKERS

EXPERIENCES

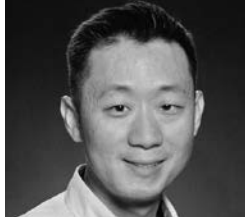
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Isaac Jung
CPA, CISA, Director of
Internal Audit
Pernod Ricard

NEW



Michael Marchuk
Chief Technology
Evangelist, North America
Blue Prism

NEW



Ryan Moss
Customer Success
Manager
Kryon Systems

NEW



Anoop Prasanna
Director, Enterprise,
Automation Services
Walmart

NEW



Aabhas Zaveri
Director of Sales
Automation Anywhere

NEW



Vince DiMascio
Chief Information Officer
**Berry Appleman & Leiden
LLP**

NEW



Bernard Lawes
RPA Engineer
UiPath

NEW



Jamie Thomas
Senior Robotics Solution
Specialist
Redwood

NEW



Seth Goldberg
Senior Account Manager
Softomotive



Brian Albertelli
Solutions Engineer
Blue Prism

NEW



Timur Kalimov
Senior Vice President
HyperScience

NEW



Ian Barkin
Co-Founder & Chief
Strategy Officer
Symphony



Edward Brooks
Founder/President
The RPA Academy



Craig Ackerman
Global Head, RPA
Chazey Partners



Chieng Moua
Manager of Solution
Engineering - RPA &
Cognitive Systems
Blue Prism

NEW



Ritesh Jain
Assistant Vice President &
Head of Automation,
HCL Business Services



Chris Huff
Chief Strategy Officer
Kofax

NEW



Kent Andrews
Principal, Automation
Academy
Agilify



Brandon Nott
Vice President of Customer
Success - Robotic Process
Automation
UiPath



Lonnie Johnston
Vice President of Sales
NICE Systems



Chris Hayes
Senior Solutions Engineer
Blue Prism

NEW

SPEAKER FACULTY



Florian Erlach
President
Digital –AI

NEW



Scott Furlong
Partner, Head of Business
Advisory Services
Information Services
Group (ISG)



Rochelle A. Hood
PMP, Global Head of
Customer Analytics and
Research
SSON



Ryan DeWaele
Solutions Engineer
Blue Prism

NEW



Phil Searle
Founder & CEO
Chazey Partners



Barbara Hodge
Global Online & Digital
Content Editor
SSON



Darin Munn
Automation
Implementation Lead
Agilify



Nadia Malik
RPA Engineer
UiPath

NEW



Roman Levchenko
Ph.D., Director
Digital –AI

NEW



Corey Donohue
Solutions Engineer
Blue Prism

NEW



MAN & MACHINE FOCUS DAY

Care to take an even deeper dive of all things IA on a technical level? Then be sure to stick around for the last day of the conference, which will focus on all the hottest IA topics on a technical level, as well as allow you to have a hands-on learning experience of how IA platforms run in real world terms.

All are welcome, including those on the business & IT side of the IA story. This day is NOT just for techies, it's open to all!

The day will unfold like so....

First Part of Day...

Several sessions that will explore the greatest pain points felt by your business and IT departments and how to trouble-shoot said obstacles.

Second Part of the Day

Join us for this very special part of the day, otherwise known as our User Groups session, which is designed for techies and NON-techies alike. You will be able to participate in an interactive demonstrative session focused on how to best utilize an IA platform for a wide variety of functional purposes. Topics of discussion, analysis, and on-site problem solving tasks will include, yet will not be limited to: the nuts & bolts of how to best use said IA software platform, exploring a variety of tech problems that may arise and the instructions and solutions to x.

11:00am - 1:30pm Session, Hosted by: **UiPath**

2:00pm – 4:30pm Session, Hosted by: **BluePrism**

IA TECHNOLOGY LOUNGE

Crave sessions that are more technical in nature than the other fabulous sessions throughout Main Conference Day One & Two? Then be sure to attend the IT Technology Lounge track sessions, which are more technical in design and will peak your interest, may you be on the business or IT side of the IA story. Attend them all or mix them up with the other track sessions you end up attending.

All are welcome. These sessions are NOT just for techies, they are open to all!

Topics of discussion will include:

- Ensuring Cybersecurity Integrity As IA Technologies Evolve
- In-House Customized IA Software Development & Managing Your Own IA Initiatives
- Best Practices to Ensure Data Integrity & Security
- Delivering on the Promises of RPA & the Internet of Things (IoT)
- Utilizing AI Technologies to Develop a Best In Class Chatbot
- Developing & Managing a Powerful IA Emergency Go Bag!
- Developing & Managing the Best of IA Technologies to Meet the Needs of Your Customers

INTERACTIVE DISCUSSION GROUPS (IDGS)

During this part of the conference, delegates will be sorted into groups of 20 to take part in Interactive Discussions Groups (IDGs) around the below topics. Upon registering, you must choose your top two IDG topics (11:20am & 12:10pm IDGs) and everyone will rotate between their two choices, in back-to-back 40 minute intervals. There will be a ten minute transitional break between the 11:20am & 12:10pm sessions.

1 CAPITALIZING ON IA AS A REVENUE STREAM FOR X BUSINESS OPERATIONS	2 EVERYDAY & NOT SO EVERYDAY USES OF AI, COGNITIVE, MACHINE LEARNING AND MORE	3 ENSURING YOUR IA TECHNOLOGIES & PROCESSES ARE GDPR COMPLIANT	4 ENSURING IA PROGRAM SUCCESS THAT ARE MINDFUL OF THE VARIOUS DATA SECURITY BARRIERS	5 WHAT WE WISH WE KNEW BEFORE OUR IA ROLL OUT
6 CHANGE MANAGEMENT INITIATIVES TO ENSURE IA PROGRAM SUCCESS	7 RISK MANAGEMENT TO INCREASE EFFICIENCY AND EFFECTIVENESS	8 INTELLIGENT OCR - COGNITIVE AUTOMATION TO ENHANCE YOUR RPA STRATEGY	9 EFFECTIVE IA MARKETING STRATEGIES	10 THE GOLDBLOCKS PRINCIPLE
11 TOP REASONS WHY IA PILOT PROGRAMS FAIL	 A photograph of a large audience seated in a conference hall, facing a stage. The text "CHOOSE TWO TO ATTEND!" is overlaid in white, bold, sans-serif font across the center of the image.			12 BOOST IA PROGRAM SUCCESS WITH AN INTELLIGENT AUTOMATION CoE

BUSINESS PROCESSES WILL NEVER BE THE SAME

AGENDA

PRE-CONFERENCE WORKSHOPS

MONDAY, DECEMBER 3, 2018

8:00am

REGISTRATION FOR WORKSHOP A & B AND MORNING NETWORKING BREAKFAST

All conference attendees must pre-register for one of the two concurrent Workshops. Workshop registrations will be on a first come first serve basis. If you do not pre-register for your Workshops, we'll have to assign seating based upon demand and availability.

RPA 101 WORKSHOPS

WORKSHOP A: IA NEWBIE & REFRESHER BOOTCAMP

If you're new to IA, or need a refresher course, then this IA Boot Camp is a must attend session for you!

In this IA Boot Camp, we will examine the vital questions that need to be answered with respect to what's involved in establishing an intelligent automation program, including: the benefits it can provide to a variety of industries and corporate functional departments, the roadblocks to its success and its potential to add value to your business.

By attending this workshop, you will:

- Learn about intelligent automation's current and ever-evolving capabilities and what it can offer in the years to come
- Better understand which processes can utilize these technologies and how are they different from other automation management tools

Brad DeMent, Partner, Finance & Accounting Shared Services Practice, **ScottMadden**

IA 501 WORKSHOPS

WORKSHOP B: ESTABLISHING & MAINTAINING A BEST IN CLASS INTELLIGENT AUTOMATION COE

Is your organization evaluating the need to establish a CoE for your IA program, and/or would like to increase its effectiveness? If so, then this deep dive CoE session is a perfect way to learn more about how to do just that.

We will discuss:

- Various CoE models, such as: hybrid, functional, etc.
- How to establish (or enhance) an effective governance and centralized structure to support your organization's intelligent automation CoE initiatives
- Effective CoE and governance process models
- Risk, Controls & Audits
- Chargeback models and would they work for your CoE
- Methods to successfully develop and manage effective change management initiatives - and effective PR, marketing, and communication plans

Craig Ackerman, Global Head, RPA, **Chazey Partners**

Phil Searle, Founder & CEO, **Chazey Partners**

8:30am

10:15am

REGISTRATION FOR WORKSHOP C & D AND MORNING NETWORKING BREAK

"Learned a lot since we are just starting down this path."

Angie Rausch, SR BA, **Honda North America**

PRE-CONFERENCE WORKSHOPS

MONDAY, DECEMBER 3, 2018

All conference attendees must pre-register for one of the two concurrent Workshops. Workshop registrations will be on a first come first serve basis. If you do not pre-register for your Workshops, we'll have to assign seating based upon demand and availability.

RPA 101 WORKSHOPS

WORKSHOP C: FAST & EFFECTIVE IA PROOF OF CONCEPTS

There has been a lot of chatter in the IA space concerning what should be included in an IA PoC and how long it should take to develop.

As you may have heard, developing an effective IA PoC isn't as painful as it may seem at first and you can realistically complete the project in just a few short weeks versus months.

Increase your odds of stakeholder buy-in by attending this session and learning how to develop an effective PoC that warrants your stakeholders' attention and approval.

In this workshop, we will discuss:

- Realistic project objectives and timelines
- IA rollout infrastructure, cost, and licensing details that must be considered and included in your PoC
- How to develop a clear-cut presentation of your IA goals, objectives, scope, and success criteria/KPIs so to speak in a language that can be easily understood by a variety of stakeholders

Mark Davison, *Global Partner, Robotic Process Automation & Cognitive, Information Services Group (ISG)*

Scott Furlong, *Partner, Head of Business Advisory Services, Information Services Group (ISG)*

IA 501 WORKSHOPS

WORKSHOP D: RPA & COGNITIVE HYBRID MODELS – EXAMINE THE OPPORTUNITIES & FEASIBILITY

- How to scale up your IA program to utilize RPA and cognitive technologies in conjunction with each other and obtain maximum benefit by doing so
- Examine infrastructure requirements and which tasks are best suited for a hybrid IA program
- Powerful business insights that can be derived from real-time analytics with a RPA/cognitive hybrid
- How to best utilize cognitive with RPA on a functional and logistical level

Ritesh Jain, *Assistant Vice President & Head of Automation, HCL Business Services*

10:30am

12:15pm

REGISTRATION FOR WORKSHOP E & F AND AFTERNOON NETWORKING BREAK

PRE-CONFERENCE WORKSHOPS

MONDAY, DECEMBER 3, 2018

All conference attendees must pre-register for one of the two concurrent Workshops. Workshop registrations will be on a first come first serve basis. If you do not pre-register for your Workshops, we'll have to assign seating based upon demand and availability.

RPA 101 WORKSHOPS

WORKSHOP E: TRIED & TESTED: IA PILOT PROGRAMS TO KNOCK THEIR SOCKS OFF!

The potential of RPA and IA to unlock efficiencies and drive productivity into an organization are undeniable. However, before you run you need to learn to walk. An IA pilot program provides a way forward for decision-makers with a significant ROI for a modest investment, short time frames, and minimal operational exposure. But you have to get it right – so you can prove to the bosses it can and should be done elsewhere within your organization and quite successful.

In this Workshop, we will cover such topics as:

- What you need to know to launch and complete a successful IA pilot program
- Identify the opportunities and challenges of your automation candidates for your IA pilot program
- Develop a roadmap with a supporting business case showcasing the value of your pilot program
- Identify and prioritize processes beyond the pilot program that are ripe for intelligent automation to ensure maximum success
- Measuring your automation program beyond the typical program measurements. Total Automation Program Yield

Kent Andrews, Principal, Automation Academy, **Agilify**

Darin Munn, Automation Implementation Lead, **Agilify**

* Lunch will be provided to all Workshop E attendees.

IA 501 WORKSHOPS

WORKSHOP F: PROCESS MINING TO INCREASE SPEED, SMARTS & EFFICIENCY

Process mining is a family of techniques in the field of process management that support the analysis of business processes based on event logs. Process mining aims to improve process efficiency and understanding of processes. Process mining is also known as Automated Business Process Discovery (ABPD).

In this deep-dive Workshop, we will discuss:

- How to utilize process mining as a first step on the path to Automation
- Leveraging the transparency process mining offers
- Principles to analyze a wide variety of process landscapes to help build more complete bots and change the mix of skills in their Shared Services Centers
- Functional areas that can benefit from Process Mining, such as: Order-to-Cash, Purchase-to-Pay, and alike – enabling said processes to be faster, smarter and more efficient

Christoph Grossbaier, Senior Director of Demand Generation, **Celonis**

* Lunch will be provided to all Workshop F attendees.

REGISTRATION FOR WORKSHOP G & AFTERNOON NETWORKING BREAK

12:30pm

2:15pm

PRE-CONFERENCE WORKSHOPS

MONDAY, DECEMBER 3, 2018

KEYNOTE &
SPEAKERS

EXPERIENCES

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WORKSHOP G: TRANSFORMING FINANCE OPERATIONS WITH IA TECHNOLOGIES

Accountants wear many hats. They are responsible not only for financial reporting but also for data validation, controls monitoring and analytics. As new disruptive technologies evolve and the focus shifts towards data analytics and better risk management, it is imperative that finance organizations transform themselves to meet the growing challenges.

In this session, we will explore:

- How do "Finance Focused" bots help organizations not only eliminate manual efforts but also enhance controls, transparency and governance?
- What is the way forward? How are organizations accelerating bot deployment while addressing governance and control issues related to intelligent automation – and what roles does IT play in the digital transformation?
- And much more!

Jamie Thomas, Senior Robotics Solution Specialist, Redwood

WORKSHOP H: HOW TO ENSURE FAIR COMPROMISES BETWEEN IA BUSINESS & IT LEADERS CONSIDERING THEIR VARYING AGENDAS & PERSPECTIVES

Topics of discussion will include, yet will not be limited to:

- Forming strategic alliances with your various IT departments (and business 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
- Ensuring they will indeed remain an integral player in your organization's small & big picture future

Robert Kennedy, Enterprise Architect, Server Systems SME, Enterprise Architecture Ryder System, Inc

David H Friedman, Head of Intelligent Automation CoE, Ryder System, Inc. - tentative

CLOSE OF PRE-CONFERENCE WORKSHOP DAY

EXHIBIT HALL PREVIEW & CHAMPAGNE TOAST

Join us in the Expo Hall for a sneak peak of the IA solution providers' booths and toast to a great event!

EVENING SOCIAL GATHERING

Enjoy a night out in the live music capital of the world and join us at the Dogwood!

MAIN CONFERENCE: DAY ONE

TUESDAY, DECEMBER 4, 2018

KEYNOTE &
SPEAKERS

EXPERIENCES

AGENDA

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REGISTRATION

8:00am REGISTRATION FOR MAIN CONFERENCE DAY ONE & NETWORKING BREAKFAST

8:40am **SSON WELCOME ADDRESS**
Jules Miller, Senior Conference Producer, SSON/IQPC

8:50am **CHAIRPERSON'S DAY ONE OPENING REMARKS**
Brad DeMent, Partner, Finance & Accounting Shared Services Practice, ScottMadden

9:00am **KEYNOTE ADDRESS: TAKING THE FEAR OUT OF "MAN & MACHINE"**
 After several years of when IA technologies first hit the mainstream, many are still living in fear as it relates to how IA technologies will affect them and their job security. That said, it's imperative to develop thorough and compassionate employee change management initiatives so to avoid any unnecessary or valid fear your workforce may have as it relates to integrating IA technologies into your organization.
 Attend this session to learn more about:

- People aspects you should take into consideration when starting an IA program
- Successful approaches for building trust and cooperation with stakeholders
- Communicating your success stories to win ongoing support

Michael Rogers, MSNBC's "The Practical Futurist" and Technology Expert

9:40am **CLIENT CASE STUDY**
Abstract soon to come!
Michael Marchuk, Chief Technology Evangelist, North America, Blue Prism
 Hosted by: **Blue Prism**

10:20am **MORNING NETWORKING BREAK & DEMO DRIVE**
 Join us in the Expo Hall for our 1st Round of the exhibitors' IA solutions demonstrations & conversation. Grab a Demo Card and head to the booths!

MAIN CONFERENCE: DAY ONE

TUESDAY, DECEMBER 4, 2018

KEYNOTE &
SPEAKERS

EXPERIENCES

AGENDA

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EXHIBITORS

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REGISTRATION

INTERACTIVE DISCUSSION GROUPS (IDGs)

During this part of the conference, delegates will be sorted into groups of 20 to take part in Interactive Discussion Groups (IDGs) around the below topics. Upon registering, you must choose your top two IDG topics (11:20am & 12:10pm IDGs) and everyone will rotate between their two choices, in back-to-back 40-minute intervals. There will be a ten minute transitional break between the 11:20am & 12:10pm sessions.

All conference attendees **MUST** pre-register for their two IDGs upon registering for the event. IDGs registrations will be on a first come first serve basis. If you do not pre-register for your IDGs, we'll unfortunately have to assign seating based upon demand and availability.

Round 1
11:20am

**10-Minute
Transition
Break**
12:00pm

Round 2
12:10pm

Round 1
11:20am

**10-Minute
Transition
Break**
12:00pm

Round 2
12:10pm

1 CAPITALIZING ON IA AS A REVENUE STREAM FOR X BUSINESS OPERATIONS

- Developing a business model whereas your IA capabilities are bookable services for x department/s (IT, Shared Services, or TBD)
- Determining the business opportunities, scope, and feasibility of your intended market

Barry Spigel, PMP, Lean Six Sigma Black Belt, IT Project Manager, Frost Bank

2 EVERYDAY & NOT SO EVERYDAY USES OF AI, COGNITIVE, MACHINE LEARNING AND MORE

- What are the various forms of IA and how are they currently being utilized in back office operations - and what does the future hold with respect to the above?
- Which IA technologies go together like two peas in a pod? Or not!
- Best steps to get from a simple RPA stage to a more robust IA level, utilizing a wide variety of IA technologies
- AI Process Automation for Enterprise Business Communication

Florian Erlach, President, Digital –AI
Roman Levchenko, Ph.D., Director, Digital –AI

Hosted by: **Digital –AI**

3 ENSURING YOUR IA TECHNOLOGIES & PROCESSES ARE GDPR COMPLIANT

- Ensuring data collection and distribution by your bots are in line with regulations
- Steps to avoid website third-party "tag piggybacking"
- Establishing and maintaining your customer-centric artificial intelligence and cognitive technologies are data secure and GDPR process-compliant

4 ENSURING IA PROGRAM SUCCESS THAT ARE MINDFUL OF THE VARIOUS DATA SECURITY BARRIERS

- Data cleansing
- Ensuring safe havens for data - and processing of said data
- Human-to-Bot and Bot-to-Bot password rebooting

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

5 WHAT WE WISH WE KNEW BEFORE OUR IA ROLL OUT

- How to avoid the "could have, would have, should have" post IA roll out blues
- Discussion of lessons learned and what could be done differently if you had a second pass at x project

Seth Goldberg, Senior Account Manager, Softomotive

Hosted by: **Softomotive**

6 CHANGE MANAGEMENT INITIATIVES TO ENSURE IA PROGRAM SUCCESS

- Establishing multi-departmental partnerships that encourage communication and understanding between departments, staff, and stakeholders
- Pro-active & continuous PR, marketing, and HR messaging to avoid change management miscommunications, mishaps, and/or disasters
- A variety of messaging options and how they might be best delivered to specific departments, individuals, teams, and perhaps even the masses/general public

7 RISK MANAGEMENT TO INCREASE EFFICIENCY AND EFFECTIVENESS

- What are the risks and how can you minimize them when implementing IA into your organization?
- Integrating IA into existing processes to ensure quality assurance
- How to apply IA technologies into your internal control system to increase efficiency and effectiveness

8 INTELLIGENT OCR - COGNITIVE AUTOMATION TO ENHANCE YOUR RPA STRATEGY

- Types of document processes intelligent OCR and machine learning can automate
- What can you expect when adding content intelligence to a robotic process
- Understanding where Artificial Intelligence (AI) fits into the RPA journey
- Reggie Twigg, Director of Product Marketing, Data Capture, ABBYY

Reggie Twigg, Director of Product Marketing, Data Capture, ABBYY

Hosted by: **ABBYY**

MAIN CONFERENCE: DAY ONE

TUESDAY, DECEMBER 4, 2018

KEYNOTE &
SPEAKERS

EXPERIENCES

AGENDA

SPONSORS &
EXHIBITORS

VENUE

PRICING &
REGISTRATION**9** EFFECTIVE IA
MARKETING
STRATEGIES

- Marketing messaging designed for a variety of departments, individuals, and teams so to avoid miscommunications mishaps and/or disasters
- Realistic timelines to set up and maintain a variety of IA communications programs to ensure IA roll out success
- Communication platforms that may be best for IA marketing strategies, such as: social media sites, internal customer support portals/ contact centers, website, etc.

10 THE GOLDILOCKS
PRINCIPLE

- What types of processes (not too hot not too cold) are great candidates for automation, and where to get started

Pankaj Chowdhry, CEO & Founder,
FortressIQHosted by: **FortressIQ****11** TOP REASONS
WHY IA PILOT
PROGRAMS FAIL

- Top reasons IA pilot programs fail and how to avoid them from the get go and throughout your strategic planning and launching phases

Ian Barkin, Co-Founder & Chief
Strategy Officer, **Symphony**Hosted by: **Symphony****12** BOOST IA PROGRAM
SUCCESS WITH AN
INTELLIGENT
AUTOMATION COE

- The core functions you need inside your CoE
- How to use the CoE to drive acceptance of IA initiatives
- Best practices for gaining CoE program cohesiveness and success

Chris Huff, Chief Strategy Officer,
KofaxHosted by: **Kofax****NETWORKING LUNCH BREAK**

Dig deeper into the IA matters that interest you most by sitting down with new and old friends over a lovely lunch.

Round 1
11:20am**10-Minute
Transition
Break**
12:00pm**Round 2**
12:10pm

1:00pm



MAIN CONFERENCE: DAY ONE

TUESDAY, DECEMBER 4, 2018

2:00pm

5-MINUTE TRANSITION

MATURITY CURVE TRACKS

Choose from one of the below four tracks.

PLANNING & LAUNCHING

CASE STUDY: AGILE FROM THE GATE & THROUGHOUT = A RECIPE FOR SUCCESS

- Getting started in an Agile environment
- Bot building with a continued focus on Agile maturity
- Leveraging Agile beyond bot building, incorporating throughout your RPA organization
- Roadmap to eliminate false starts and wasteful efforts

Michael Machado, *Delivery Lead - Smart Process Automation & Robotics Center*, **Fannie Mae**
Sujan Reddy Jillela, *Systems Lead*, **Fannie Mae**

EVOLVING

RESEARCH FINDINGS: KEEP HUMANS SAFE? - PREDICTING SAFETY INCIDENTS

"Go back home the same way you came into work"- Can safety conscious organizations use the practical data analytics tools to predict safety incidents.

Objectives:

- Understand the science of prediction
- Learn simple algorithms
- Uncover the future

Adel Alaeddini, *Ph.D. Associate Professor of Mechanical Engineering*, **University of Texas at San Antonio**

Krishnan Krishnaiyer, *Ph.D. Director, Enterprise Business Improvement*, **Marathon Petroleum Corporation**

MATURING

HOW TO PLAN & ROLL OUT A SUCCESSFUL ARTIFICIAL INTELLIGENCE & MACHINE LEARNING PROGRAM

- What is an AI/ML program
- What to think about prior to implementing an AI/ ML program
- Once AI/ML is funded what are the next steps
- Things to consider to implement a successful AI program, including social-technical considerations prior to implementing an AI/ML program

John Cottongim, *CFA, Automation Director*, **Mars**

IA TECHNOLOGY LOUNGE

Open to all on the business & IT side of the IA story.

FIRESIDE CHAT: ENSURING CYBERSECURITY INTEGRITY AS IA TECHNOLOGIES EVOLVE

With an increase in cyber attacks over the years and the heightened awareness of the severe harm it can cause an organization, how to protect your organization's information when utilizing IA technologies has been of utmost concern to all.

In this session, we will explore:

- Technological safeguards specifically designed to protect an organizations' data infrastructure
- Access fulfillment, provision/de-provisioning, access certification, access analytics, privileged access management
- Security scanning tools as part of the bot creation process to scan code created in the back end for security vulnerabilities
- How to enforce passwords consistently across bot sessions and centralize bot identity and

2:05pm

MAIN CONFERENCE: DAY ONE

TUESDAY, DECEMBER 4, 2018

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PRICING &
REGISTRATION

Session Continued

- How to plan, implement, and integrate RDA into your existing IT infrastructure, on an IT and human level

Session Continued

access management processes to leverage encrypted credential managers to prevent leakage of credentials

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

Vince DiMascio, Chief Information Officer, **Berry Appleman & Leiden LLP**

2:45pm

5-MINUTE TRANSITION BREAK

FOCUS TRACKS

Choose from one of the below four tracks.

SHARED SERVICES

CASE STUDY: NASA'S SHARED SERVICES CENTER (NSSC) IA JOURNEY

The NASA Shared Services Center (NSSC) deployed the first RPA bot in the Federal government in May of 2017. It has been a little over a year and the NSSC has started to make the shift from bot building to sustainment and scalability. The Intelligent Automation Services office has been experimenting with the right government model, day to day operations, relationship building with the CIO and IT, process selection, service offering and a myriad of other issues.

BFSI

FIRESIDE CHAT: MAXIMIZING IA TECHNOLOGIES IN A PAPER-HEAVY WORLD

Although the BFSI (banking, financial services & insurance) industries have been the leading early adopters of RPA due to their need to increase transactional productivity, transparency, and accuracy, the industry has nevertheless experience a few glitches along the way with respect to RPA and OCR integration. However, fear not, as it is indeed possible to have an RPA program work in harmony with your internal or external OCR systems!

HR

EASY PEASY 1 - 2 - 3... ONBOARDING WITH IA AS YOUR HR FRIEND

New employees that go through well-planned, concise, and good intended onboarding programs have much higher retention rates than those who do not. However, the challenge for HR is that onboarding is an extremely paperwork-centric, various touch point process, and new hires often require a lot more time and attention than HR Managers have time to spare = new hires and HR executives feeling overwhelmed and undervalued.

IA TECHNOLOGY LOUNGE

Open to all on the business & IT side of the IA story.

IN-HOUSE CUSTOMIZED IA SOFTWARE DEVELOPMENT & MANAGING YOUR OWN IA INITIATIVES

With intelligent automation going mainstream in the past 1 – 2 years, some organizations, most especially those with very robust IT departments have asked themselves...."Why do we need to go outside our organization for IA software and implementation when we could design our own customized IA software in-house and manage our IA programs internally?"

2:50pm

MAIN CONFERENCE: DAY ONE

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Attend this session to learn more about NASA's IA story.

Kenneth Newton, *Director, Service Delivery, NASA Shared Services Center, NASA*

In the session, our panelist will reveal:

- Tools, systems, and methods they've found to be the most effective with RPA and OCR integration

Michael Edmonds, *Robotics Process Automation Manager, Farmers New World Life Insurance Company*

Manik Patil, *MISM, PMP, ITIL, CTBME, Global Senior Director, AIG*

Gary Page, *Senior Vice President, Vendor Management, Bank of America*

Moderator: **Timur Kalimov**, *Senior Vice President, HyperScience*

However, by having a powerful IA program in your HR tool belt, your organization's can enjoy an employee onboarding process that can be as easy peasy as 1, 2, 3.

In this session, we will discuss how IA technologies can:

- Take on repetitive manual tasks and reduce chances for error
- Provide new hires the information they need when they need it
- Reduce onboarding time dramatically, keeping new hires engaged and empowered

Curt Burghardt, *Vice President, HR Shared Services & HR Systems, Walgreens*

Agreed, there are indeed some organizations that do in fact have the capabilities to do so, but if that's the route you wish to go, it's probably best to learn more about how to actually go about it so to maximize your success in spearheading your own IA programs in-house.

In this session, we will examine:

- How to determine if you indeed have the workforce you'll require for the job
- IT systems and infrastructures necessary for an in-house IA roll out
- Cost of designing your own IA software versus going with an outside IA vendor

3:30pm

5-MINUTE TRANSITION BREAK

3:35pm

CLIENT CASE STUDY/FIRESIDE CHAT: EMPLOYING AI TO DRIVE OPERATIONAL EFFICIENCY

In this session, Baker Hughes will discuss how they optimized over-burdened FTE's as a result of a market downturn and M&A while focusing on eliminating redundancies and creating a better place for innovation and employee engagement by utilizing AI to drive operational efficiency.

Lia Johnson, *Director, Program Management Data & Analytics, Baker Hughes - a General Electric company*

Moderator: **Carmel Smith**, *South Central Sales Leader, UiPath*

Hosted by: **UiPath**

4:15pm

AFTERNOON NETWORKING BREAK & DEMO DRIVE CONTINUED

Grab your Demo Drive Cards & head to the Expo Hall to get those final signatures you need to enter our Demo Drive Raffle tomorrow!

MAIN CONFERENCE: DAY ONE

TUESDAY, DECEMBER 4, 2018

MATURITY CURVE TRACKS

Choose from one of the below four tracks.

PLANNING & LAUNCHING

CASE STUDY: WE WOULD DO IT AGAIN, BUT DIFFERENTLY

A rosy picture is often painted of how easy it is to implement a RPA bot. Companies are urged to automate processes that are repetitive, routine & involve structured data.

That said, Frost Bank recently completed its first RPA implementation to deal with a 64% increase in report requests over the last 2 years. Turnaround time was 3 - 5 days for priority requests & up to 5 weeks for low priority requests.

However, upon implementation of the RPA bot, Frost realized an immediate improvement time to complete requests – multiple requests were completed before close of business. In addition, the internal and external customers were happier, and the business was optimistic about the innovation and wanted more.

Barry Spigel, PMP, Lean Six Sigma Black Belt, IT Project Manager, **Frost Bank**

EVOLVING

FIRESIDE TRACK: METRIC & KPI TRACKERS TO ENSURE IA PROGRAM SUCCESS

As part of your organization's overall process improvement efforts, it's imperative to access and reassess your IA goals, strategies, and performance measurements so to ensure continued program success.

In this session, we will discuss:

- Impactful program management strategies to apply toward your evolving IA initiatives
- Realistic timelines and KPIs to be met - and performance measurements to ensure continued program success

Jim Maastricht, Personal Lines Data and Technology Director, **American Family Insurance**

Jon Theuerkauf, Advisor, **The Improve and Innovate Company** & Former Managing Director/Group Head of Performance Excellence, **BNY Mellon**

MATURING

PANEL DISCUSSION: AUDITORS' & CONTROLLERS' FRIENDLY IA: WHAT THEY NEED & WANT FROM YOUR IA TEAM

- Best practices in audit requests
- How to best document your IA initiatives and activities
- Your Controllers'/Auditors' role in ensuring you're on top of data security that may be affected by IA programs
- IA auditing controls/assessment

Arindam Mukhopadhyay, Managing Director, Global Head of Strategy, Reporting and Information Security Ops, **Citi**

Isaac Jung, CPA, CISA, Director of Internal Audit, **Pernod Ricard**

Ryan Davis, Senior Vice President, Procurement Management, **Bank of America**

Henry Lyles, Director, Business Transformation Operational Excellence, Robotic Process Automation, **McDonald's Corporation**

IA TECHNOLOGY LOUNGE

Open to all on the business & IT side of the IA story.

PANEL DISCUSSION: BEST PRACTICES TO ENSURE DATA INTEGRITY & SECURITY

- How to ensure your customer and employee data is secure
- Locking in system weakness
- Regression testing
- Best practice authentication
- Data auto reporting
- Cybersecurity

Vince DiMascio, Chief Information Officer, **Berry Appleman & Leiden LLP**

Chris Colwell, Intelligent Process Automation CoE Lead, Assistant Vice President, MBA, PMP, **Capital Group**

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

5-MINUTE TRANSITION BREAK

5:15pm

5:55pm

MAIN CONFERENCE: DAY ONE

TUESDAY, DECEMBER 4, 2018

CUSTOMER DELIVERY TRACKS

Choose from one of the below four tracks.

OPPORTUNITIES

**FIRESIDE CHAT:
DETERMINING YOUR IA
OPPORTUNITIES AND
WHICH PROVIDE THE
GREATEST CUSTOMER
DELIVERY & OVERALL ROI**

In this session will discuss the necessary steps to properly evaluate your IA opportunities based upon transactional volume, reach, processing feasibility, technical and workforce capabilities, rewards, and more – and how x opportunities would in turn have a positive affect on your customer delivery, as well as discuss how to ensure they do.

Andrew Jones, *Intelligent Automation & Sustainable Process Solutions, U.S. Bank*

Iris Gregoriou, *Assistant Vice President, Head of Continuous Improvement, Investment Division, Manulife*

CUSTOMER ENGAGEMENT

**ARTIFICIAL
INTELLIGENCE TO
ENHANCE CUSTOMER
ENGAGEMENT AND
DELIVERY**

Let's be honest, you simply don't know your customers as well as you want or think you do. Keeping up with all your customers all the time, let alone understanding what's going to drive that next positive interaction – and acting on it – is really difficult.

Topics of discussion will include:

- How AI can free your workforce from daunting repetitive tasks so they can spend more time on higher-value work, and in turn, focus on enhancing their customer engagement and delivery
- Powerful data analytics that provide a wealth of information regarding your customer base – delivering enhanced business intelligence

CUSTOMER DELIVERY

**CLIENT CASE STUDY:
ACCELERATING TO
ENTERPRISE-WIDE IA
WITH AUTOMATED
PROCESS DISCOVERY**

Wyndham Hotels and Resorts started their Intelligent Automation initiative at the check-in counter: they wanted bots to help assist guests' reliably and quickly. Now with significant success in customer service, they're bringing process automation forward as an enterprise initiative. Doing so often requires a massive investment in process documentation, prioritization, and optimization from multiple stakeholders – so they automated it. Wyndham started discovering automation-friendly processes right away, finding over 20 good processes in two days. Every process was documented and formatted ready to be inserted into a powerful platform, cutting their discovery time in half.

Join this session to learn:

- Wyndham's successes and challenges in IA
- Strategy on expanding process automation enterprise-wide
- Results from using automated process discovery, like increasing 5x throughput on automation

Bala Kalavala, *Director of Enterprise Architecture and Automation, Wyndham Hotels & Resorts*

Moderator: **Ryan Moss**, *Customer Success Manager, Kryon Systems*

Hosted by: **Kryon Systems**

IA TECHNOLOGY LOUNGE

Open to all on the business & IT side of the IA story.

**DELIVERING ON THE
PROMISES OF RPA & THE
INTERNET OF THINGS (IOT)**

The Internet of Things (IoT) is the concept of basically connecting any device with an on & off switch to the Internet - and/or to each other. The IoT is gaining mainstream popularity in our personal and business worlds as the number of connected devices grows and the amount of machine-to-machine communication increase.

It's being adopted by many industries across numerous verticals and can include, for example, wearable devices, mobile devices, industrial equipment, intelligent businesses, and even smart homes. However, how can your back office operations utilize such technologies now and into the near future, whereas doing so is a value-add for the business – and most especially, what are the technological requirements, obstacles, and benefits associated with such.

6:00pm

6:30pm

6:35pm

CLOSE OF MAIN CONFERENCE DAY ONE

NETWORKING COCKTAIL PARTY

MAIN CONFERENCE: DAY TWO

WEDNESDAY, DECEMBER 5, 2018

KEYNOTE &
SPEAKERS

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VENUE

PRICING &
REGISTRATION

8:00am REGISTRATION FOR MAIN CONFERENCE DAY TWO & NETWORKING BREAKFAST

8:50am CHAIRPERSON'S DAY ONE RECAP & DAY TWO OPENING REMARKS

Brad DeMent, Partner, Finance & Accounting Shared Services Practice, **ScottMadden**

9:00am CLIENT CASE STUDY: DEVELOPING AN INTELLIGENT AUTOMATION STRATEGY THAT DELIVERS REAL ROI

Developing an Intelligent Automation strategy that produces true ROI, it's not just about RPA tool selection but an automation strategy, optimizes processes, and change & program management. MFS will discuss their approach to developing a multi-year automation strategy that resulted in transformation process innovation beyond task automation.

Justin Donohue, Vice President, Intelligent Automation Lead, **Massachusetts Financial Service (MFS)**Moderator: Aabhas Zaveri, Director of Sales, **Automation Anywhere**Hosted by: **Automation Anywhere**

9:40am CLIENT CASE STUDY: BOTS OR PEOPLE - WHO WILL TAKE THE LEAD ON PROCESSES?

The Results Companies wanted to make their Back Office client reporting process as efficient and accurate as possible and they did so by bringing in unattended bots to handle it end-to-end. But when it came to automate a real-time customer facing process, they decided to take the attended, desktop assistant approach.

In this session, you will better understand:

- The thinking process and benefits to be had with each automation approach

Brad Filbert, Senior Vice President - RPA, **The Results Companies**Moderator: Lonnie Johnston, Vice President of Sales, **NICE**Hosted by: **NICE**

10:20am MORNING NETWORKING BREAK & DEMO DRIVE RAFFLE PRIZE WINNERS ANNOUNCED

11:00am CLIENT CASE STUDY: INTELLIGENT AUTOMATION IN HEALTHCARE: HOW AI-DRIVEN AUTOMATION IMPROVES PATIENT EXPERIENCE

While the stakes are high for every business making the leap from analog operations to digital operations, the stakes are highest in healthcare. A hospital system's ability to provide superior patient care is linked to the speed and efficiency of its operations. Houston Methodist has been ranked as a nationwide leader in patient care, and it's leading the way in its commitment to digital operations.

In this session, you will learn how Houston Methodist is utilizing AI to transform its programs, as well as:

- Operational challenges faced by hospital systems
- Their vision for digital operations
- Critical capabilities for effective operations transformation
- High-impact use cases
- Differences between AI-driven automation vs. "RPA 1.0"

Brad Shaink, Director of Innovation & Engagement Technologies, **Houston Methodist**Hosted by: **WorkFusion**

MAIN CONFERENCE: DAY TWO

WEDNESDAY, DECEMBER 5, 2018

GLOBAL RELEASE & PANEL DISCUSSION: GLOBAL INTELLIGENT AUTOMATION MARKET REPORT H2 2018

Panel Discussion regarding the information listed in the Global Intelligent Automation Market Report H2 2018 – which is a report that summarizes some of the most pressing issues to take into account when launching an IA program.

Lee Coulter, *Senior Vice President, Ascension & Chief Executive Officer, Ascension Shared Services & Chair, IEEE Working Group on Standards in Intelligent Process Automation*

Rochelle A. Hood, *PMP, Global Head of Customer Analytics and Research, SSON*

Barbara Hodge, *Global Online & Digital Content Editor, SSON*

11:40am

12:20pm

5-MINUTE TRANSITION BREAK

12:25pm

NETWORKING LUNCH BREAK

Dig deeper into the IA matters that interest you most by sitting down with new and old friends over a lovely lunch.

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

Global Manager, Global Business Services, **General Motors**



MAIN CONFERENCE: DAY TWO

WEDNESDAY, DECEMBER 5, 2018

MATURITY CURVE TRACKS

Choose from one of the below four tracks.

PLANNING & LAUNCHING

FROM FACTORY SETTING TO RE-BOOTING YOUR IA BOTS - SETTING UP & MAINTAINING REALISTIC IA PROGRAM EXPECTATIONS

The time it takes to achieve bot ROI is one of the greatest challenges in an intelligent journey/adoption.

The time to reach break-even could range from six months for standard processes, to up to two years for complex programs. The cost savings also range between 10 – 50% depending on the complexity.

That said, it's crucial to establish realistic IA program expectations from the get-go and throughout an IA program roll out, and/or further down the line, as all parties involved must possess an agile approach and mindset as to what their IA initiatives can indeed deliver on.

Chris Colwell, Intelligent Process Automation CoE Lead, Assistant Vice President, MBA, PMP, **Capital Group**

EVOLVING

EVOLVING IA PROGRAMS & THEIR NEED FOR A ROBUST GOVERNANCE FRAMEWORK

The success of your IA efforts depends in no small part on the strength of your governance. In order to effectively leverage Intelligent automation technologies into an organization, it's imperative to establish a centralized organization that provides oversight and sets the direction for your intelligent automation strategies and roll outs. In this session, we will discuss:

- Why it's essential to develop and maintain a robust IA governance framework
- Questions you will need to ask before and while you develop your IA governance framework
- The importance of building in a roadmap for more advanced IA initiatives for the near and distant future

Jamie Carabetta, Director, **Freddie Mac**

Brandon Fritze, Senior Staff Accountant, **FULLBEAUTY Brands**

MATURING

LOOK MOM, I CAN DO IT ALL BY MYSELF NOW! – STANDING IA TALL & STRONG

It's been quite sometime since you first put on your IA training wheels. Sure you fell down a few times, but your IA wounds have healed and now you're ready to stand tall and learn how to be 100% self-sufficient, or at least as much as possible.

In this session, we will discuss:

- How to move from needing a long-term (or short-term) Consultant to hold your IA hand on a daily basis and instead develop your own in-house IA Dream Team
- Going for IA box products to the next level, whatever that may mean to your organization on a software level
- And much more!

Andrew Jones, Intelligent Automation & Sustainable Process Solutions, **U.S. Bank**

Marc Morrison, Head of Automation Enablement Center, **U.S. Bank**

IA TECHNOLOGY LOUNGE

Open to all on the business & IT side of the IA story.

PRACTICAL USE CASES OF INTEGRATING AI INTO AUTOMATION - CONSIDERATIONS & CALLOUTS

Abstract soon to come!

Anton Groom, Senior Director, Automation, Data Science & Emerging Technology, **Walmart**

Anoop Prasanna, Director, Enterprise Automation Services **Walmart**

1:25pm

MAIN CONFERENCE: DAY TWO

WEDNESDAY, DECEMBER 5, 2018

2:05pm

5-MINUTE TRANSITION BREAK

MATURITY CURVE TRACKS

Choose from one of the below four tracks.

PLANNING & LAUNCHING

**FIRESIDE CHAT:
EFFECTIVELY MOVING
PAST THE POC STAGE
TO... "GO TIME!"**

Congratulations, you successful went through your IA PoC phase and came out victorious – and in turn have been given the "green light" to go into "Go Time!" mode with your IA program initiatives.

Okay, but now what? What should you do next, and/or right after you've completed your PoC phase so to enable your IA roll out and management to be a huge success, as you obviously hope it will be?

Attend this session to hear what others have done as their next steps after their PoC and what their war stories may have been, as well as successes along the way.

John Cottongim, CFA, Automation Director, **Mars**

Curt Burghardt, Vice President, HR Shared Services & HR Systems, **Walgreens**

EVOLVING

**CASE STUDY: HOW
DOES AN RPA
PRACTICE CO-EXIST
WITH A CONTINUOUS
IMPROVEMENT CENTRE
OF EXCELLENCE?**

Does your organization have a Continuous Improvement, Lean Six Sigma, or process design capability? If so, are they part of your RPA practice or rollout team? How do they engage in the design and rollout of a bot?

In this session, we will explore:

- Structure of the RPA team: what role does the Process Designer or LSS practitioner play, versus other team members?
- "BA" or "BB": is your process designer a Business Analyst or a Black Belt?
- How does LSS experience contribute to the strength of the team?

Iris Gregoriou, Assistant Vice President, Head of Continuous Improvement, Investment Division, **Manulife**

MATURING

**TAKING A BITE OUT
OF THE ENTIRE IA
PIE: BLOCKCHAIN
IMPLICATIONS & BENEFITS**

Business blockchains are being used today to help reinvent how transactions are managed. They can take time and cost out of almost any process, enabling near real-time operations. They deliver a high degree of accuracy and control, with significantly less risk than many alternatives. So, how can your organization start to integrate blockchain capabilities into your operations? Learning about blockchain technology basics, assessing how blockchain is a business opportunity, and outlining the first steps towards blockchain implementation are a good starting points.

Ryan Davis, Senior Vice President, Procurement Management, **Bank of America**

IA TECHNOLOGY LOUNGE

Open to all on the business & IT side of the IA story.

**DEVELOPING &
MANAGING A POWERFUL
IA EMERGENCY GO BAG!**

Certainly no one likes to dwell on any type of business or life worse case scenario. However, it's a must, especially in the IA space as it relates to your organization's data protection, IT infrastructure, business processes that are run throw and are dependent on IA technologies, and much more. With so much at stake, it's absolutely necessary to have a IA contingency emergency go-bag easily available and your IA technical 911 systems ready to rock n' roll should an unforeseen IA tech emergency comes your way.

Robert Kennedy, Enterprise Architect, Server Systems SME, Enterprise Architecture, **Ryder System, Inc.**

2:10pm

2:50pm

5-MINUTE TRANSITION BREAK

MAIN CONFERENCE: DAY TWO

WEDNESDAY, DECEMBER 5, 2018

ORGANIZATIONAL SIZE & SCOPE TRACKS

Choose from one of the below four tracks.

MODEST & PROUD!

PLANNING, IMPLEMENTING & MAINTAINING SMALL-SCALE & MID-CAP IA PROGRAMS

As the business leader of x area of your organization, you've certainly had your share of "sales pitches" coming from all ends speaking about IA technologies. More often than not, you're pitched a big IA roll out plan that quite frankly maybe too grand for your organization's needs, now and into the near future. Yet at the same time, you're torn, as you're very well aware of the many benefits of IA, but you're afraid to take on more than you can stomach, creating a similar outcome to when you were a child and really wanted that super-sized rainbow lollipop only to find your eyes were bigger than your stomach, and....

In this session, we will examine:

- How to be practical with your IA options – and knowing how and when you should say "no" to the super-sized rainbow lollipop
- Small-scale and mid-cap IA programs that offer the biggest bang for your buck and similar to the bang of a mid to large-scale IA program roll out

BIG DADDY OPERATIONS

FIRESIDE CHAT: GOING FROM BIG TO HUGE: SUCCESSFUL IA ENTERPRISE STRATEGIES & IMPLEMENTATIONS

Enterprise strategy, scalability, evolution, and sustainability

- Technical and logistical roadmap to the next steps of advance IA programs, on multi-location, and/or enterprise-level
- Integrating legacy with IA technologies and how to maximize ROI
- Engaging IT & Auditors
- Examine Waterfall & Agile IA program initiatives and environments
- Pacing Bot productivity increase to match attrition

Anoop Prasanna, Director,
Enterprise, Automation Services,
Walmart

Krishnan Krishnaiyer, Director,
Enterprise Business Improvement,
Marathon Petroleum Corporation

IA TECHNOLOGY LOUNGE

Open to all on the business & IT side of the IA story.

DEVELOPING & MANAGING THE BEST OF THE BEST IA TECHNOLOGIES TO MEET THE NEEDS OF YOUR CUSTOMERS

- Determining which IA technologies would provide the greatest ROI for a variety of customer types, i.e.- Modest & Proud, Mid-Cap, or Big Daddy Operations - and how to develop said programs to meet their most pressing business needs
- Program options and scenarios that ranging from a shoestring budget to big daddy budget - and the pros & cons of each
- Ensuring IA job order customer fulfillment/satisfaction

Sameer Naik, Lead SAP Systems Engineer & Applications Architect,
ConAgra Foods

2:55pm

MAIN CONFERENCE: DAY TWO

WEDNESDAY, DECEMBER 5, 2018

3:35pm

AFTERNOON NETWORKING BREAK

CASE STUDY: FUND & SUSTAIN YOUR IA INNOVATION USING TBM

While companies plow ahead in IA, they may ultimately have less to show for their investments. Pioneers prioritize their revenue-generating IA programs over cost-saving ones. Learn on Technology Business Management (TBM) techniques to have a value-discussion over cost-discussion along with cost transparency. Learn special tactics such as Core-Satellite portfolio management.

In this session, the below will be discussed:

- How a Technology Business Management framework can assist with C-suite buy-in?
- How to prioritize your IA program goals and which path to choose, a Run the Business (RtB) vs the Grow the Business (GtB)
- Why C-suite's leadership is essential for success of IA in your organization
- How to sustain success and which functional areas have the greatest success in leading IA progress and how to govern value
- Methods to blitz-scale your IA program and why technology shouldn't be the key focus of your IA transformation effort
- 'Retirement Plans' for your bots

Manik Patil, *MISM, PMP, ITIL, CTBME, Global Senior Director, AIG*

3:50pm

TOWN HALL: HOW TO SUCCESSFULLY PLAN & IMPLEMENT A SUCCESSFUL IA INITIATIVE

In this final yet very important session, we will look back on what we've learned over the course of the past 3-days as it relates to how to plan and implement a wide variety of IA program roll outs.

4:30pm

CLOSE OF MAIN CONFERENCE DAY TWO

See you tomorrow at the Man & Machine Focus Day!

5:10pm



MAN & MACHINE FOCUS DAY | THURSDAY, DECEMBER 6, 2018

Please note, we highly recommend everyone brings their own laptops to this full-day of interactive sessions.
We apologize but IQPC/SSON will not be providing laptops for attendees' usage.

8:15am REGISTRATION FOR MAN & MACHINE FOCUS DAY & NETWORKING BREAKFAST

9:00am

IA VENDOR COMPARISONS & CAPABILITY ANALYSIS

- Review of the various IA software available now and into the near future
- How x IA software vendors' tools would benefit a wide array of functionally needs, job scope, and budgets
- Compare the Technical Support provided by each vendor/how that may work with your own IA program project needs

John Cottongim CFA, Automation Director **Mars**

9:45am

IA MULTI-VENDOR SOURCING & TECHNOLOGICAL INTEGRATION

As your IA program evolves, your need to utilize various IA software and consultant services may increase, and usually do. However, sizing up and managing a variety of IA solution providers can be quite a daunting task, especially on a technical-level. In this session, we will discuss:

- Questions that must be asked of potential IA solution providers when you need to do x with your IA programs
- Examine of which IA software programs are compatible with each other and if a multi-vendor integration scenario is indeed right for your IA program on a workforces, scope, and budgetary-level
- How to effectively coordinate an IA program utilizing multiple vendors

Sameer Naik, Lead SAP Systems Engineer & Applications Architect, **ConAgra Foods**

10:30am MORNING NETWORKING BREAK



MAN & MACHINE FOCUS DAY | THURSDAY, DECEMBER 6, 2018

KEYNOTE &
SPEAKERS

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UIPATH USER GROUPS: HOW TO SUCCESSFULLY UIPATH'S IA PLATFORMS

Join us for this extended UiPath interactive demonstrative session focused on how to best utilize UiPath's platform for a wide variety of functional purposes. Topics of discussion, analysis, and on-site problem solving tasks will include, yet will not be limited to: Nuts & bolts of how to best use said IA software platform, exploring any tech problems that may arise and the instructions and solutions to x.

Brandon Nott, Vice President of Customer Success - Robotic Process Automation, **UiPath**

Dylan Bowman, RPA Engineer Lead, **UiPath**

Michael Farough, Robotic Process Automation Developer Lead, **UiPath**

Nadia Malik, RPA Engineer, **UiPath**

Bernard Lawes, RPA Engineer, **UiPath**

Hosted by: **UiPath**

* Lunches will be provided to all session attendees.

11:00am

1:30pm

AFTERNOON NETWORKING BREAK

2:00pm

THE ART OF POSSIBILITY - CREATING AN AUTOMATION MODEL WITH BLUE PRISM

Imagine the possibilities of intelligent automation. In this session you will see where man and machine is going. Robotic Process Automation (RPA) represents an opportunity to transform the back and front office and improve business performance across the entire organization.

Learn the fundamentals of what it takes to build a Blue Prism automated process and see first-hand use cases.

By attending this hands on session, you can expect to learn and experience:

- Automation Model Best Practice design principles
- How to build an Automation Model
- Integration of AI and RPA – And what if a Digital Worker can see?

Chieng Moua, Manager of Solution Engineering - RPA & Cognitive Systems, **Blue Prism**

Chris Hayes, Senior Solutions Engineer, **Blue Prism**

Alicia Meadows, Senior Solutions Engineer, **Blue Prism**

Ryan DeWaele, Solutions Engineer, **Blue Prism**

Brian Albertelli, Solutions Engineer, **Blue Prism**

Corey Donohue, Solutions Engineer, **Blue Prism**

Hosted by: **Blue Prism**

4:30pm

CLOSE OF THE MAN & MACHINE FOCUS DAY - SEE YOU NEXT YEAR!

OUR VIDEO LIBRARY



2018 SPONSORS

SPONSORSHIP & EXHIBITION OPPORTUNITIES

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 Week Austin 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 Chris Ritchie at 212-885-2799 or email him at Chris.Ritchie@iqpc.com

SPONSORSHIP OPPORTUNITIES

Networking

Ensure that you have the opportunity to engage with the key decision makers within your industry. We can create a platform for you to effectively interact with your top customers and prospects in the environment of your choice. This can range from formalized private meetings / workshops right through to less structured networking events such as sponsored drinks receptions, coffee breaks or lunches. Ultimately whatever you decide is the right forum; we will support you in your quest to advance relationships with the key people who can influence the future of your business.

Branding

Your company can be elevated to a position where they are seen as a market leader. In a fiercely competitive market you need to ensure that your brand is differentiated from the competition. Failure to create a clear identity will see your organization fade into the background. We ensure that we do everything we can to effectively lift your brand before, during and after the event. Not only do we create a fully integrated marketing campaign, which your company can be part of, but we also offer high impact premium branding opportunities for example on bags, water bottles, pens lanyards etc.

Thought Leadership

If you think that you should be viewed as a true industry leader then your need to demonstrate your market knowledge and expertise through a thought leadership opportunity, such as speaking or chairing. This is a highly unique opportunity for your company to educate the market, and as long as you are credible enough to fit into a high level event program, we can position your organization alongside top customers and prospects in our speaker faculty. As part of this speaker faculty your company will be set apart from other industry attendees giving you the competitive edge required to make further strides in the market.



To learn more about the opportunities available, contact:

Chris Ritchie

T: 212-885-2799

E: Chris.Ritchie@iqpc.com

JOIN US IN AUSTIN!

VENUE

AT&T Hotel & Conference Center

1900 University Avenue

Austin, TX 78705

www.meetattexas.com

512-404-3600

Stay at the center of it all at this contemporary, convenient and chic hotel, nestled between the **University of Texas Tower and the Texas State Capitol**. AT&T Executive Education & Conference Center features in room technology like complimentary high-speed Internet, in-room iPad, radio and alarm, fully digital voice-over Internet Protocol (VoIP) telephones and flat-panel HDTVs with AT&T U-verse and multiple HBO channels.

A **Discounted Room Rate of \$195** has been established for all conference attendees. To reserve a hotel room, simply call 512-404-3600 and give the **group name of "IQPC"** or book online via their website. To secure the Discounted Room Rate, your reservation must be made no later than November 11th, 2018. For your convenience, our Discounted Room Rate has been extended to three days before and after the conference.

SITES & ATTRACTIONS

Music & Nightlife....

Live music is the essence of Austin, but it isn't even close to the whole story. With spectacular entertainment districts, ubiquitous culture and top-notch restaurants, Austin allows you to create your own soundtrack. Austin boasts more than 250 music venues, the world's first James Beard award-winning barbeque pitmaster, an eclectic arts scene and the unique migration of 1.5 million Mexican free-tailed bats. Take a look around and put the Live Music Capital of the World on your playlist.

Also Check Out...

The Blanton Museum of Art

Located on the campus of the University of Texas, the Blanton Museum of Art is the primary art collection for the city of Austin. With nearly 18,000 works in the collection, the Blanton showcases art from across the ages, from ancient Greek pottery to abstract expressionism. With a year-round schedule of temporary exhibitions, art lovers are sure to discover new and old favorites at the Blanton.

Austin Zoo

Located on the southwest edge of Austin, Texas, Austin Zoo draws visitors from around the world to learn about our rescued animals and spend quality time outdoors in the Texas Hill Country.

Austin in a Nutshell Bike Tour

Discover Austin by bike on a 2-hour tour that goes through Zilker Park, Congress Avenue, and around Lady Bird Lake. See landmarks like the Texas State Capitol and Congress Avenue Bridge as your guide shares stories about the Texas capital's history.

IA EVENT APP

Purchase Your Pass



Download the mobile app to create your personalized conference schedule, stay current on any program scheduling changes, learn more about the exhibitors, schedule meetings with industry peers, and to share your experience live.

Stay Connected on the Go:

- Receive agenda updates and track when your favorite speakers are scheduled to present
- Connect with attendees on LinkedIn and Twitter directly through the app, exchange private messages, and manage your connections seamlessly
- Engage with solutions providers and schedule a time for a personalized consult
- Attend with your team to maximize your experience: share notes, plan meetups, and more with just a few swipes

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!

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PRIMARY

PACKAGE	REGISTER & PAY BY NOVEMBER 20TH, 2018	ON-SITE
Silver: Main Conference Only (2 days)	\$2,299 SAVE \$100	\$2,399
Gold: Main Conference Pass + 5 Workshops	\$3,099 SAVE \$300	\$3,399
Platinum: Main Conference Pass + 5 Workshops + Man & Machine Focus Day	\$3,899 SAVE \$300	\$4,199
One Workshop (a la carte)		\$569
Man & Machine Focus Day (a la carte)		\$999

VENDORS

PACKAGE	REGISTER & PAY BY NOVEMBER 20TH, 2018	ON-SITE
Main Conference	\$4,299 SAVE \$100	\$4,399
One Workshop (a la carte)		\$569

TEAM DISCOUNTS

SEND	DISCOUNT
3 to 4	15%
5 or more	20%

*Discounts apply to registrations submitted together, at the same time. Cannot be combined with any other discount.
Valid for both Primary and Vendor markets.

*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.

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MAKE CHECKS PAYABLE IN U.S. DOLLARS TO: IQPC

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

Team Discounts: For information on team discounts, please contact IQPC Customer Service at 1-800-882-8684. Only one discount may be applied per registrant.

Special Discounts Available:

A limited number of discounts are available for the non-profit sector, government organizations and academia. For more information, please contact customer service at 1-800-882-8684.

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Reference: 25220.007

Payment Policy: Payment is due in full at the time of registration and includes lunches and refreshment. Your registration will not be confirmed until payment is received and may be subject to cancellation. For IQPC's Cancellation, Postponement and Substitution Policy, please visit www.iqpc.com/cancellation

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