

Domestic Sourcing – It’s For Real & Coming to Your Area Soon!

A Joint Meeting of IAOP’s Midwest Chapter, Domestic Sourcing Chapter & Guests

The **IAOP’s Midwest Chapter and IAOP Domestic Sourcing Chapter** are hosting a joint Chapter Meeting in Kansas City, MO on Wednesday, November 12, 2014 at the University of Missouri – Kansas City Campus where leading outsourcing customers, providers, advisors, government agencies and academics will share their insights, experiences and best practices in Domestic Sourcing. What started as a way to get good people back to work in small rural towns in the USA has evolved into a global industry in its own right...one that leverages the motivation of a previously passed-over workforce to help "Domestic" companies better compete in a global marketplace. Domestic Outsourcing is now a key component of not just America, but every regions on-shoring or "in-sourcing" efforts to bring jobs back or retain jobs for its domestic workforce.

Join us for an insightful discussion about the economic, social, and practical business impacts of Domestic Outsourcing that are occurring right here in the USA and also around the world! You'll learn how outsourcing customers are implementing Domestic Sourcing Programs and achieving new levels of innovation in business services through domestic sourcing. Service Providers will share how they're tailoring their service offerings, delivery models and terms and conditions to address the Domestic Sourcing movement. You'll also gain insights on incentives typically offered to both customers and service providers from economic development agencies promoting Domestic Sourcing in their regions/communities.

Who should attend?

Attendees at this event will be sourcing professionals across the Midwest who are responsible for building, implementing, advising and/or managing all types of sourcing, outsourcing (ITO, BPO and KPO) and/or shared service center contracts/relationships. The meeting materials will be positioned to address the interests of a wide range of professionals interested in the topic of Domestic Sourcing:

- CIOs, COOs and CAOs
- VPs, directors and managers of procurement & user departments involved in outsourcing/shared services
- Customers, service providers and advisors focused on SaaS, BPaaS, and other cloud-based providers
- ITO, BPO, KPO and shared service center professionals
- Policymakers and government officials interested in attracting higher-skilled jobs to their communities through a domestic-sourcing strategy
- Sourcing advisors and consultants
- Investors and analysts interested in the rapidly emerging field of domestic sourcing

Key Benefits

Whether you're a buyer, provider or advisor involved in sourcing information technology and/or contemporary business processes, you're increasingly asked to deliver improved business outcomes as global economic, political and social instability accelerates. Join us for an insightful discussion about the economic, social, and practical business impacts of Domestic Outsourcing that are occurring right here in the USA and also around the world! You'll learn how outsourcing customers are implementing Domestic Sourcing Programs and achieving new levels of innovation in business services through domestic sourcing. Service Providers will share how they're tailoring their service offerings, delivery models and terms and conditions to address the Domestic Sourcing movement. You'll also gain insights on incentives typically offered to both customers and service providers from economic development agencies promoting Domestic Sourcing in their regions/communities.

Facts and Figures

- Location: University of Missouri – Kansas City Campus
- Complimentary networking reception including food & beverages immediately following the meeting

Chapter Leadership



Program: Wednesday, November 12, 2014

Location: University of Missouri – Kansas City, MO Campus located at:
5108 Cherry Street
Kansas City, MO 64110

IAOP Meeting – Bloch Executive Hall #414
IAOP Networking Reception – Bloch Executive Hall #331

3:00 pm – 3:10 pm	On-Site Registration
3:10 pm – 3:15 pm	Welcome & IAOP Chapter Introductions <i>Hosts: University of Missouri – Kansas City</i> <i>Welcome by David Donnelly, Ph.D., Dean Bloch Business School</i> <i>IAOP Midwest Chapter, Domestic Sourcing Chapter & Sprint, Inc.</i>
3:15 pm – 4:00 pm	Domestic Sourcing – Making a Difference – Sprint Case Study <i>Eugene Agee, Vice President of Procurement & Real Estate – Sprint, Inc.</i>
4:00 pm – 4:50 pm	Panel Discussion: Best Practices In Domestic Sourcing – Customer, Provider & Government Perspectives <i>Panel Moderator: Rich Etzkorn, Executive Managing Director – Cassidy Turley</i> Panelists: Monty Hamilton, President & CEO – Rural Sourcing Inc. Christopher Chung, CEO – The Missouri Partnership Dr. Mary Lacity, Curators' Professor of Information Systems – University of Missouri – St. Louis Prem Shanker, Senior Manager, Sourcing & Vendor Management Organization - Walmart
4:50 pm – 5:00 pm	“Domestic Sourcing – A Global Update & Industry Perspective” <i>by Matt Shocklee, IAOP Global Ambassador and President & CEO of GSOS, LLC</i>
5:00 pm – 5:10 pm	Closing Comments & Future IAOP Chapter Meeting Information <i>Hosts: Midwest Chapter & Domestic Sourcing Chapter</i>
5:10 pm – 6:30 pm	Networking Reception

Registration open to IAOP Members & Non-Members at no-charge

Register at: <http://www.iaop.org/content/23/162/1947/>

Event is not available via webinar – on-site attendance only.

Wednesday, November 12, 2014

On-Site Registration & Pre-Event Networking

3:00 pm – 3:10 pm

Meeting Kick-off & Chapter Introductions

3:10 pm – 3:15 pm

Welcome

Dr. David Donnelly, Ph.D., Dean Bloch Business School



IAOP Midwest Chapter - Chair

Rich Etzkorn, Executive Managing Director – Cassidy Turley

Rich Etzkorn is responsible for the overall management of Cassidy Turley's Retail High Volume Occupier Services operations. In his current capacity, Rich oversees the account teams which comprise more than 300 associates. These teams are responsible for managing more than 28,000 locations for Cassidy Turley's clients in the United States and across the globe. These companies include: Procter & Gamble, Edward Jones, H&R Block, UPS Stores, Manpower, America's Best Contacts & Eyeglasses, Aaron's, Chick-fil-A and others.



Prior to his overall leadership role, Rich was the Account Executive for Edward Jones Investments (Jones) and growing their 12,000 branch portfolio. Rich's responsibilities included overseeing the 75 person team that manages Jones' 1.8 million square foot corporate headquarters, procuring 50 to 70 new branches monthly, renewing 100 to 130 leases per month and coordinating design, construction, furniture, equipment and signage. This also included overall responsibility for Jones' global branch office expansion program in the United Kingdom and Canada.

Rich is experienced in the development, implementation and execution of sophisticated property operation cost/quality control as well as marketing programs, lease negotiations and tenant retention efforts. Rich's direct management experience includes managing a 36-story, 600,000 square foot, Class A high-rise building in downtown St. Louis and numerous low-rise office and industrial properties in St. Louis County. Rich joined Cassidy Turley in 1986 as a Property Manager, was named Vice President and a Principal of the firm in 1990. In 1992, he was elected to the Board of Directors and in 1994 was named Senior Vice President.



IAOP Domestic Sourcing Chapter

Monty Hamilton, CEO - Rural Sourcing Inc.

Monty Hamilton leads the executive team and drives the overall strategy for Rural Sourcing, Inc. Mr. Hamilton is responsible for leading the strategic direction and the growth of RSI to launch 10 new high-tech hubs with 200 colleagues in each of our low cost of living, high quality of life locations. He is a sought after speaker on the outsourcing and domestic sourcing topic having recently been featured on CNBC, BBC, NPR radio and at various industry conferences including IAOP, Gartner, Digital Georgia and others. In addition, recent articles depicting RSI's innovative outsourcing model have appeared in Business Week, CNN Money magazine, CFO magazine, and CIO magazine.



This is Hamilton's second entrepreneurial startup venture having left Accenture in 1995 to join four other colleagues to build their own consulting firm – Clarkston Consulting. He was instrumental in growing Clarkston into a global strategic and systems integration firm with offices across the US and Europe. After Clarkston's acquisition of RSI he became the CEO in 2009.

Mr. Hamilton is active in the community and civic circles as well. He is on the Advisory Boards for Mobile Chamber of Commerce, The Bond Group and Metro Atlanta Chamber of Commerce. Monty believes in giving back to the community and specifically to special needs programs. He is currently involved with the Special Olympics and is former Board Chair for the Adaptive Learning Center. Mr. Hamilton holds an M.B.A. from the Cox School of Business at Southern Methodist University and a B.B.A. in business from Millsaps College.

Keynote Session

3:15 pm – 4:00 pm

Domestic Sourcing – Making a Difference – A Sprint Case Study

During this session, Mr. Agee will share Sprint's experience in developing and delivering a programmatic approach to encouraging its sourcing supplier base to source domestically. Sprint's program experiences will be shared as well as challenges, benefits and key lessons learned in implementing a program across a global supplier base.



Eugene Agee, Vice President of Procurement & Real Estate – Sprint, Inc.

Eugene Agee is the Vice President of Procurement & Real Estate, responsible for Procurement, Strategic Sourcing, Real Estate, and Environmental, Health and Safety. The organization has approximately 160 associates. In this capacity, he manages \$17B in spend and 20 million square feet of commercial, retail and technical space. In addition, he manages Sprint's supplier diversity initiatives. Eugene has been employed with Sprint for 24 years. Throughout his tenure at Sprint, he has served in several key roles including; Chief Audit Executive of Corporate Audit Services, Corporate Security, Assistant Vice President of Strategic Sourcing and NIS Finance, Revenue Director for Minnesota, Nebraska, and Wyoming local telephone companies, and Manager of Regulatory Planning for Missouri and Minnesota local telephone companies. Eugene earned his MBA from the University of Missouri at Kansas City, Missouri and has a BS in Accounting from Southern Illinois University at Carbondale, Illinois. He is a Certified Public Accountant and winner of the 2009 National Eagle Leadership Institute (NELI) award for leadership, and a member of the Executive Leadership Council (ELC). He serves as a board member on the Mountain Plains Supplier Development Council (vice chair), 100 Black Men of Greater Kansas City and Kansas City Procurement Roundtable. He serves as an advisory board member of Kansas University – School of Supply Chain Management and the International Association of Outsourcing Professionals (IAOP). Eugene is married, and has 4 children. He resides in Leawood, Kansas.



Panel Discussion

4:00 pm – 4:50 pm

Best Practices in Domestic Sourcing – Customer, Provider & Government Perspective

Join us for a lively debate and learn how outsourcing customers are implementing Domestic Sourcing Programs and achieving new levels of innovation in business services through domestic sourcing. Service Providers will share how they're tailoring their service offerings, delivery models and terms and conditions to address the Domestic Sourcing movement. You'll also gain insights on incentives typically offered to both customers and service providers from economic development agencies promoting Domestic Sourcing in their regions/communities.



Panel Moderator: Rich Etkorn, Executive Managing Director – Cassidy Turley

Panelists:

Monty Hamilton, CEO – Rural Sourcing Inc.



Christopher Chung, CEO – The Missouri Partnership

In 2007, Christopher Chung joined the Missouri Partnership as the public-private, non-profit corporation's first Chief Executive Officer. In addition to having led the organization through its initial start-up phase, Chris directs the Partnership's efforts to market Missouri for new business investment and recruit new corporate operations to the state. The Missouri Partnership, with an annual budget of \$3 million, spearheads Missouri's global investment-promotion and business-attraction program, working closely with public- and private-sector Partners from around the state. Since 2010, the Partnership has helped recruit more than 8,000 new jobs, \$400 million in new annual payroll, and \$1 billion in capital investment to the state.



Dr. Mary Lacity, Curators' Professor of Information Systems – University of Missouri – St. Louis

Dr. Mary Lacity is Curators' Professor of Information Systems and an International Business Fellow at the University of Missouri-St. Louis. She is also Visiting Professor at the London School of Economics, a Certified Outsourcing Professional®, Co-Chair of the IAOP Midwest Chapter, Industry Advisor for the Outsourcing Angels and the Everest Group, Co-editor of the Palgrave Series: Work, Technology, and Globalization, and on the Editorial Boards for *Journal of Information Technology*, *MIS Quarterly Executive*, *Journal of Strategic Information Systems*, and *Strategic Outsourcing: An International Journal*. She was inducted into the IAOP's Outsourcing Hall of Fame in 2014, one of only three academics to ever be inducted. She has published 18 books, most recently *The Rise of Legal Services Outsourcing* (Bloomsbury Publishing, London, 2014; co-authors Leslie Willcocks and Andrew Burgess) and *Outsourcing: All You Need to Know* (White Plume Publishing, Melbourne, 2014; coauthors Sara Cullen and Leslie Willcocks).





4:50 pm – 5:00 pm

Domestic Sourcing – A Global Update & Future Outlook

During this session, you'll get a peek into the drivers and implications of domestic sourcing around the globe. As IAOP's Global Ambassador, Mr. Shocklee will share his insights to how Domestic Sourcing is affecting every region of the world and the underlying economic and social implications of this global reality.



Matt Shocklee, IAOP Global Ambassador & President/CEO of Global Sourcing Optimization Services (GSOS)

As IAOP's Global Ambassador, Mr. Shocklee works with the outsourcing industry's leading buyers, service providers, advisors, government agencies and academics to improve the overall performance and business value obtainable through outsourcing relationships. Mr. Shocklee has held leadership and senior management positions in outsourcing sales, marketing, consulting and service delivery with global leaders such as IBM, CSC, Capgemini, and PricewaterhouseCoopers (PwC). Currently Mr. Shocklee is the President and CEO of his own advisory firm, Global Sourcing Optimization Services (GSOS). He's an Editorial Director for IAOP's digital Pulse Magazine and a Certified Outsourcing Professional (COP). Mr. Shocklee is the author of the Outsourcing Relationship Health-Check Process™, the Outsourcing Relationship Value Framework™ and the popular outsourcing Value Health Check Survey™ (VHCS). He's a frequent speaker at outsourcing industry symposiums and conferences in North America, Europe, China, India and emerging markets worldwide. Matt is a graduate of Washington University in St. Louis and has 2 children. He resides in Agoura Hills, CA.

5:00 pm – 5:10 pm

Closing Comments & Future IAOP Chapter Meeting Information

5:10 pm – 6:30 pm

Networking Reception

Event is not available via webinar – on-site attendance only.