Advance Program

March 1-2, 2018

Marina Village Conference Center
Mission Bay, San Diego, CA

Selecting the Right System and Implementation Partner for Organization Success

Evaluating and selecting a new HCM solution is something you need to do right!

Please join us in the beautiful Mission Bay area of San Diego, California for 1 ½ days of education and open discussions around a topic that is key to your organization's success: the successful selection of HR systems and/or implemenation partners.   During this special, targetted event, you will:

- Hear lessons learned and best practices from those who have recently gone through a system selection or lead organizations through successful selections.
- Build your knowledge around selection strategies and methodologies.
- Interact with other HR systems professionals and industry leaders in discussions that will provide insights, answers and feedback to your selection challenges.

The networking events will further provide you with opportunities to discuss trends and exchange point of views.

Register now and take advantage of the low registration fees:

Registration Deadline	IHRIM Member Rate	Non-Member Rate
On or Before January 26, 2018	$595	$895
Between January 27 and February 21, 2018	$695	$995
After February 21, 2018	$795	$1,095

Included with your event registration is access to all sessions (general session, plenary sessions and breakout sessions), meal functions and refreshment breaks and Thursday's Networking Reception to be held at the Marina Village Conference Center.

Do you have a team of 3 or more people that would benefit from this event? A group discount of $300 per person (off the current registration rate) is available for groups of 3 or more registrants from the same company.

Register online at https://2018ihrimselect.exceedevents.com/.

Hotel and Travel Information

Select delivered by IHRIM in San Diego will be held at the Marina Village Conference Center, located at 1936 Quivira Way, San Diego, CA, US. Marina Village does not have on-site overnight accommodations. However, they have partnered with nearby hotels to provide attendees with a minimum 15% discount on their overnight services when you mention Marina Village. For more information go to http://marinavillage.net/accommodations/. Please note that the Hyatt Regency Mission Bay and the Dana Inn are the closest (and an easy walk) to the Conference Center.

The San Diego Airport, served by most major airlines, is approximately 10 minutes away. For those driving to the Event, parking is free at the Conference Center. For a map and directions, go to http://marinavillage.net/contact/directions/.

Event at a Glance

All program activities and sessions listed below will be at the Marina Village Conference Center, Mission Bay. The Event Program will be updated as additional information is provided.

Thursday, March 1	
8:00 AM – 8:30 AM	Continental Breakfast
8:30 AM – 9:30 AM	Opening General Session
9:45 AM – 10:15 AM	Break
10:15 AM – 11:15 AM	Plenary Session
11:30 AM – 12:30 PM	• Session 120: Caveat Emptor - Raising your HR Technology Market IQ • Session 130: Session to be announced
12:30 PM – 1:30 PM	Networking Lunch
1:30 PM – 2:30 PM	• Session 140: HR Technology Strategy: The Foundation for Your Selection Project • Session 150: Reinventing Customer Experience at American Airlines – Selecting Employee-Centric Tools
2:30 PM – 3:00 PM	Break
3:00 PM – 4:00 PM	• Session 160: Bright, Shiny Objects: Getting Past the Hype • Session 170 and 175: Understanding the Statement of Work from your Cloud Deployment Partner / Open Forum Discussion: Statements of Work (SOW)
4:15 PM – 5:15 PM	• Session 180: Hiring an HCM System Selection Consulting Firm – the Balance between Vendor-Neutrality and Partnerships • Session 190 and 195: 5 Things You Shouldn't Overlook During Vendor Selection / Open Forum Discussion: What not to overlook during a system selection
5:30 PM – 7:30 PM	Networking Reception
Friday, March 1	
8:00 AM – 8:30 AM	Continental Breakfast
8:30 AM – 9:30 AM	Plenary Session
9:30 AM – 10:00 AM	Break
10:00 AM – 11:00 AM	• Session 220: Where Tech and HR Meet: Evaluating and Selecting an Implementation Partner • Session 230 and 235: Did you check Glassdoor? Why culture matters in Vendor Selection / Open Forum Discussion:
11:15 AM – 12:15 PM	• Session 240: What I Wish I Knew Before: Lessons Learned and Shared from HR System Selections • Session 250: Get Executive Approval! Build Your Business Case!

Select Event Sessions - Thursday, March 1, 11:30 AM – 12:30 PM

Caveat Emptor - Raising your HR Technology Market IQ
Session 120

The HR technology market is vast and very dynamic. As you plan your solution evaluation, it's important to understand what is new, what has been modified, and the "gotchas" to look out for. Join Freddye Silverman, widely recognized for her in-depth knowledge of the HR tech marketplace, as she focuses on the 4-5 most active market sectors to help buyers get past the sales pitch and understand key product differentiators and market trends to enable an informed selection.
Learning Objectives:
1. Understand key sectors of the HR software market and how they are related.
2. Identify product differentiators in order to focus the selection process effectively.
3. Gain knowledge about what questions to ask and how to interpret responses during the selection process.

Presenter: Freddye Silverman, HRIP, Principal, Silver Bullet Solutions is an independent consultant and principal of Silver Bullet Solutions who has been in the HRIS field since 1986. As a practitioner, she was responsible for strategic planning and oversight of global HR systems and the North American payroll. Ms Silverman is recognized for her in-depth knowledge of the HR tech marketplace. Freddye is a Certified Professional of Human Resource Information (HRIP).

Session to be Announced
Session 130

Select Event Sessions - Thursday, March 1, 1:30 PM – 2:30 PM

HR Technology Strategy: The Foundation for Your Selection Project
Session 140

Selecting an HR technology system without an HR technology strategy in place is like building a house without a blueprint. This session will review the essential components of an HR technology strategy and how each component translates into actionable items in your selection process. Jacqueline Kuhn will discuss the essential components every organization must include when constructing an HR technology strategy and, if a strategy exists, key indicators that the existing strategy may need a replacement or a refresh before moving forward to system selection. She will also share:
- How to determine whether you need a full suite solution, or several best-in-breed solutions
- Discerning future state system requirements that you should consider in the selection process
- Considerations of what you should and should not include in your RFP to vendors
- Tips for scoring vendor demo responses and demo scripts

Attendees will leave this session with the ability to translate their HR technology strategy into a plan for an effective HR technology selection process.

Learning Objectives:
1. Learn what the essential components of an HR technology strategy are.
2. Learn how the HR technology strategy in place influences the evaluation and selection process.
3. Understand how to create actionable items from your HR technology strategy to set position your organization for a successful HR technology selection process.

Presenter: Jacqueline Kuhn, HRIP, EVP of HCM Strategic Consulting Services, HRchitect is an HR professional with 25 years experience in Strategic Planning, Systems Management, Project Management, Services Delivery and General HR. At HRchitect, Jacqueline oversees the HCM strategic consulting group encompassing HCM systems strategic planning and evaluation and selection practices. Jacqueline is a Certified Professional of Human Resource Information (HRIP).

Reinventing Customer Experience at American Airlines – Selecting Employee-Centric Tools
Session 150

On April 15, 1926, Charles Lindbergh flew the first American Airlines flight – carrying U.S. mail from St. Louis, Missouri, to Chicago, Illinois. After 8 years of mail routes, the airline began to form into what it is today: the 2017 Airline of the Year according to Air Transport World. This presentation will focus on how American also transformed upwards of 5 million people's experience interacting with their Human Resource organization. You will hear how an unrelenting focus on customer experience shaped the selection, configuration, and deployment of the key enabling technologies for their new Team Member Services organization. The shared services technologies focus on portal, case management, knowledge management, intake channel management, reader-boards and data analytics.

Learning Objectives:
1. Learn how to infuse design thinking and customer experience into a shared service center package selection.
2. Discover the top 5 toughest decisions and the implication of those decisions on the technology selection.
3. Hear about lessons learned from interacting with vendors and service providers during contracting.

Presenters: Gary Gerstner, D.SC, Specialist Leader, Deloitte Consulting specializes in advising global organizations on how to transform their HR function, design new operating models, identify created value, and design global processes enabled with technology. Gary has 30 years of professional experience spanning HR transformation strategy, service center design and operation, program and process design, technology enablement. **Chris Sydloski, Senior Project Manager, American Airlines** is a Senior Project Manager for American Airlines focused on deploying innovate, customer-centric solutions within American's HR organization. Chris was the overall American project manager accountable for the on-time, within budget, on-quality deliver of American's new Team Member Services organization. Prior to his current role, Chris occupied a leadership position in American's Reservation Center.

Bright, Shiny Objects: Getting Past the Hype
Session 160

Technology continues to develop at an extremely rapid pace and it can be overwhelming. Technology vendors continue to offer robust but familiar core functionalities while the buzzwords have shifted from Cloud and Mobile to Predictive Analytics, Artificial Intelligence, Collaboration, Pulsing, and Enablement, to name a few. Making sense of what your organization needs today while ensuring that you plan for the future is a challenge which needs to be addressed as you consider new technology. Before you get dazzled by bright, shiny objects in the market, you need to get grounded and make clear decisions about the approach you wish to take to evaluate and select your technology (to RFP or not to RFP); ensure that you have effective governance throughout the process; and clarify and align your decision criteria. Michael Martin and Andrew Pack will talk about these issues and share client case studies of how these principles can be put into action.
Learning Objectives:
1. Understand the factors which drive the appropriate approach for evaluating and selecting technology.
2. Review best practice decision criteria and governance for the selection of new technology.
3. Learn from client organization examples on how to build an agile – yet effective – selection process.

Presenters: Michael Martin, Partner, Aon Hewitt leads Aon Hewitt's HR Effectiveness consulting service line. With over 20 years experience, Michael helps clients improve the effectiveness of their HR functions by addressing HR function strategy and transformation, HR operating and service delivery model, HR technology strategy, evaluation, implementation, and optimization, and change management. **Andrew Pack, Director, Aon Hewitt** is a Director within Aon Hewitt's HR Effectiveness consulting practice with over 18 years of experience helping clients across a wide range of industries and geographies transform HR through strategic alignment, organization design, process optimization, and technology strategy and selection.

Understanding the Statement of Work from your Cloud Deployment Partner
Session 170

You have developed a strong HRIS strategy. You understand the full HR Transformation impacts for the organization. You have worked hard to develop the business case and obtain executive support and approval. You have completed a strong solution selection effort and made the best choice for your organization - a cloud based solution. You have negotiated a great deal with the software vendor and have chosen your deployment partner. The most important step for a successful deployment of your new cloud solution, to ensure the delivery of the promises made to the C-Suite and completing the project on time and on budget, is the Statement of Work (SOW). Even if the SOW was developed based on the interviews and surveys the deployment partner made with you and your team, without a full understanding of your organization, the terms used, and estimated level of effort for your own internal team, the SOW may not be close to the work effort required. James Lehman will provide a list of questions and issues to consider before you sign your

SOW. Hear real world stories of companies who ended up with multiple change orders, including one case with a 50% increase in the original estimate.

Learning Objectives:

1. Understand the key points in a Statement of Work.
2. Learn how to carefully review the work areas assigned to your internal team.
3. Leave with a list of key questions to ask when reviewing your Statement of Work.

Presenter: James Lehman, CPA, SPHR, SHRM-SCP, CPC, Partner, Results Driven Consulting, LLC is a HR Transformation Consultant and Client-Side Workday Advisor. He is the author of "Maneuvering Your Workday Deployment – 15 Strategies to Deliver the Promises Made to the C-Suite." He also is a past Board Member for IHRIM. Learn more about James at www.Maneuvering.com.

Open Forum Discussion: Statements of Work (SOW)
Session 175

Immediately following James Lehman's presentation, attendees will engage in a moderated discussion on the ins and outs of Statements of Work and what to look for in a well constructed SOW. This is your opportunity to ask questions, exchange ideas, or just listen and learn.

Hiring an HCM System Selection Consulting Firm – the Balance between Vendor-Neutrality and Partnerships
Session 180

As an HR systems professional, you have experience using an HCM application, and may have had some prior experience selecting a solution. Thus, your organization may decide to form a selection team comprised solely of internal resources, or your organization may hire a consultant who is familiar with the HCM solutions and vendors to help in the selection process. The question then becomes – how vendor-neutral is the consultant and/or the consulting firm? Is the consulting firm a partner with any specific vendor(s)? If so, what does that mean, and does it matter? Join our panelists as they discuss the ability to remain and importance of being vendor-neutral during the selection process, and why a firm with many partnerships may not be a detriment to you selecting the best product for your organization.

Panelists to be announced.

5 Things You Shouldn't Overlook During Vendor Selection
Session 190

Once you have decided to shop for a new HR technology solution, you want to make sure you are identifying and evaluating vendors on the things that matter. It's easy to get caught up in feature and functionality comparisons among vendors. In addition to those things—are there other areas

you should make sure you have a full understanding before signing any contracts? Join Stacey Kervin as she covers five critical things you shouldn't overlook throughout the selection process including:

- The configurability of the solution. Are the vendors able to adopt to your critical processes and workflows or do you have to adapt yours to their system? When is okay to flex your workflows and when is it not?
- The ongoing product support model post implementation. If you have an issue, can you pick up the phone or email someone and expect a reasonable turnaround time? Is it better to have a designated account manager or a team of representatives ready to address your issues real time?
- Underlying dependencies around integration and technology partnerships. These may not be represented during the demo and could add cost and complexity to the implementation. What is the process for data transfer from existing systems?
- Different approaches to pricing models and what to ask to ensure you fully understand what you are receiving from your contract.
- Types of end-user training, remote or on-site services available to train end users of all types to drive adoption. It's also critical to understand the release schedule and the product road map—are there on-going knowledge paths to support new users and new features and functionalities when released?

Learning Objectives:
1. Understand what questions to ask your vendor during the product demo.
2. Gain a stronger understanding of the different pricing models you will encounter during the selection process and how to truly understand what you're getting for your money.
3. Learn what are other ways beyond the product that vendors should be able to support you in meeting your goals and objectives.

Presenter: Stacey Kervin, SHRM-CP, Market Development Manager, Kronos Incorporated specializes in identifying opportunities for the deployment of human capital management solutions. She has spent her career marketing and positioning solutions for leadership development, career management, outplacement, recruiting, performance management, and strategic workforce consulting. She is passionate about enabling employees to enjoy the best employment experience possible so they may reach their full potential.

Open Forum Discussion: What not to overlook during a system selection
Session 195

Following Stacey's 30 minute presentation, she will shift the focus to the audience as she continues the discussion on what not to overlook during a system selection. This is your opportunity to respond to what you have learned and share your own experiences and tips on how to navigate through a successful HR system selection.

Select Event Sessions - Friday, March 2, 10:00 AM – 11:00 AM

Where Tech and HR Meet: Evaluating and Selecting an Implementation Partner
Session 220

In the HR sector, a variety of multi-functional software solutions are available to improve workflows and boost efficiency which renders the vendor selection process complicated and daunting. A successful systems deployment hinges upon finding the right implementation partner who can provide insight and guidance from project inception through go-live and sustained support. Partner selection begins when expectations and requirements of a desired solution are clarified to meet those solution needs. This presentation will involve an active simulation - digging into questions to help identify your true desired solutions, breaking those solutions into requirements, and evaluating the software solutions and business partners to find the best vendor fit possible. Attendees will leave with templates and questions to turn over every stone when finding the best implementation partner.

Learning Objectives:
1. Understand how to build a sound list of software solution requirements using several methods and tools prior to evaluating a solution.
2. Gain insight into the evaluation processes and understand how to interpret results.
3. Learn what questions to ask in vendor selection processes to insure the best vendor fit possible.

Presenters: Melissa Donahue, M.Ed, Senior Instructional Designer, Sikich LLP is responsible for custom content design and delivery for Sikich University, the internal training extension for Sikich LLP in Naperville, Illinois. She has more than eighteen years of training experience serving a variety of industries, and background in learning technology, information technology management, and systems implementation. **Emily Young, CPLP, is Director of Learning & Development for Sikich University,** the internal training extension for Sikich LLP in Naperville, Illinois. She has worked exclusively in the learning space for over twelve years specializing in training operations, Learning Management Systems, learning technology, and content design for adult learners.

Did you check Glassdoor? Why culture matters in Vendor Selection
Session 230

Before you sign that contract – have you even looked at Glassdoor? The selection process of new or replacement HCM technology often starts with our "requirements" list – that functional list of software "must have" and "nice to have" that impact how we work with a system. An RFP will often ask about service and support, but typically more to analyze additional cost vs. actual value it provides. Yet when I ask "why" people are looking to move to a new system – something that is costly, time consuming and not always fun – it's usually the service and support vs. the product they are trying to get away from. After working with nearly 1,000 companies at various stages of the selection and evaluation process for Talent and HCM software over the last decade, one thing has consistently stood out - companies that didn't focus on a match between a vendor's culture and service levels up front were more likely to look for a new solution (quickly) and be unhappy. The employee satisfaction scores, turnover rates, service approach and commitment to quality of the vendor organizations have a direct correlation on how we are supported as a client – it is time we make that side of the selection process matter.

Select Event Sessions - Friday, March 2, 10:00 AM – 11:00 AM

Learning Objectives:
1. Understand why culture impacts software satisfaction long term.
2. Learn how a company can find quantifiable resources for free to assess culture.
3. Learn what questions to ask of a vendor to understand commitment to service beyond the basics.

Presenter: Sarah Brennan, Principal Consultant - Thought Leadership & Advisory Services, Cornerstone OnDemand HRTechBlog.com is an HCM strategist focused on improving the conversation around talent, technology & business outcomes working with numerous clients from startup to Fortune 10 on evaluation & selection of technology. She is currently Principal Consultant, Cornerstone OnDemand; most recently, she served as Founder, Accelir and Principal Analyst, Bersin.

Open Forum Discussion: Cultural fit and its impact on the bottom line
Session 235

Join Sarah in the discussion and add your thoughts and comments as to why it is not just the functional fit, but also the vendor company's core culture and true focus on customer success that matters during an HCM system selection.

Select Event Sessions - Friday, March 2, 11:15 AM – 12:15 PM

What I Wish I Knew Before: Lessons Learned and Shared from HR System Selections
Session 240

One of the best sources for help with an HR systems selection process is to hear what other organizations went through during their selection projects. Join our panelists as they share their insights on lessons learned to insure success and avoid failure in your system selection. Experience makes the best teacher!

Panelists to be announced.

Get Executive Approval! Build Your Business Case!
Session 250

It's easy to get excited when a business solution promises to relieve HR difficulties, improve operations, and provide strategic business data that will make HR a member of the Executive Team. But ensuring the right solution is chosen can be overwhelming – one client received 14 proposals in response to their HRIS RFP! In this session, the components of the business case will be deeply explored including the evaluation of the current state, future state, requirements, cost/benefit analysis, ROI, and positioning the project advantageously using tools and templates from other client engagements and filled with lessons learned. You gain credibility with objective data, research and assessment of your needs and the Executive Team can see the justification for the project and the way it supports the organization through adequate planning.

Select Event Sessions - Friday, March 2, 11:15 AM – 12:15 PM

Learning Objectives:
1. Gain insight into what's most important to you and your HR team.
2. Develop a total cost of ownership (TCO) budget based on what you can reasonably afford.
3. Define your business requirements to clarify your expectations and gain support from IT.
4. Gain executive sponsors by documenting how your new HR system will support the executive team and align with organizational goals.

Presenters: Kristie Evans, President, HRPMO Inc. has – since 2002 – supported clients with process engineering, strategy, software selection, technology implementation, and project management. In 2016, HRPMO was identified as a "disruptive business model" because of their lean, six sigma methodology, virtual corporate structure and guaranteed 100% quality client deliverables. **Annette Leazer, CMA, PMP, President, Leazer Business Consulting** is an accomplished transformation consultant working with senior executives to create more effective business operations. Specializing in Human Resources, Payroll and Finance transformation, she leads global projects for systems implementation, acquisition integration, and outsourcing/offshoring. Prior to starting her own consultancy, Annette was the global Director of HRIS at Hewlett Packard.