

○ **Connections**
that advance your career.

○ **Training**
that propels you forward.



APP2PSpring
CONFERENCE & EXPO

May 20–22, 2018

Disney's Contemporary Resort*
Lake Buena Vista, FL

SPRING 2018

Gold Sponsors:



Silver Sponsors:



iofm.com/conference-spring ○ 207-842-5557 ○ customerservice@iofm.com

KEYNOTE

Sunday, May 20 | 5:15pm – 6:15pm

20+ Ways to Boost AP Efficiency



Jess Scheer, IOFM

In this fast-paced and interactive keynote, IOFM Executive Editor Jess Scheer will share more than 20 AP efficiency hacks – approaches IOFM members are using to process invoices faster. This opening talk will serve as a launching point for the conference, empowering attendees to build on these ideas through subsequent presentations.



CONFERENCE AGENDA

SUNDAY, MAY 20	
PRE-CONFERENCE *Workshops and Certifications require a separate registration and fee.	
8:00AM - 4:00PM	FULL DAY CERTIFICATIONS & WORKSHOPS
9:00AM - 12:00PM	HALF DAY MORNING WORKSHOP
1:00PM - 4:00PM	HALF DAY AFTERNOON WORKSHOPS
CONFERENCE KICK-OFF	
4:15PM - 5:15PM	PEER-TO-PEER ROUNDTABLES
5:15PM - 6:15PM	WELCOME & KEYNOTE: 20+ Ways to Boost AP Efficiency - Jess Scheer, IOFM Executive Editor
6:15PM - 7:30PM	OPENING RECEPTION IN THE EXHIBIT HALL
7:30PM - 9:00PM	ATTENDEE PARTY

MONDAY, MAY 21

7:15AM - 8:00AM: BREAKFAST

SESSION TRACKS

TRACK A: AP FUNDAMENTALS & BEST PRACTICES	TRACK B: LEADERSHIP	TRACK C: OPERATIONS & COMPLIANCE	TRACK D: P2P FOR BEGINNERS	TRACK E: P2P ADVANCED: SHARED SERVICES & GBS	TRACK F: AUTOMATION CASE STUDIES I	TRACK G: AUTOMATION CASE STUDIES II
---	---------------------	----------------------------------	----------------------------	--	------------------------------------	-------------------------------------

8:10AM - 9:10AM						
How to Clean the Vendor Master File - Steve Iannarone, Arthur J. Gallagher & Co.	Train to Lead and Overcome Change Resistance - Judy Bicking, IOFM	Fraud Prevention Techniques Among Vendors - Rocco Lueck, Hilbert College	Why Are Majority of Shared Service Centers Adopting Robotic Process Automation? Should You? - Pam Rhoads, Accenture	Increasing Electronic Payments - A Southern California Edison Case Study - Lloyd Briggs, Southern California Edison	The Payable to Payments Revolution - Dan Andrew, Corcentric	AP Automation Case Study

9:20AM - 10:20AM						
Accounts Payable Done Right: Supplier Engagement & Payments Optimization - Ernie Humphrey, 360 Thought Leadership Consulting	AP Benchmarking Study - Jess Scheer, IOFM	Form 1099 and 1042-S Reporting: Rules and Compliance Tips for 2018 - Marianne Couch, Cokala Tax Information Reporting Solutions, LLC	Who Really Owns the Master Vendor File? Tips For Resolving AP-Purchasing Tug of War - Pam Miller, IOFM	The What, Why, and Wow of Early Pay Programs and Supply Chain Finance - Tom Glassanos, The Bavelos Group	Session Sponsored by: Basware	Session Sponsored by: Nvoicepay

10:20AM - 11:00AM: NETWORKING BREAK IN EXHIBIT HALL

11:00AM - 12:00PM: PEER-TO-PEER ROUNDTABLES

12:00PM - 1:15PM: LUNCH

1:30PM - 2:30PM						
Aligning Payments - Jack Reynaert, Meritor, Inc.	The 4-R's of Leading a World Class Post Audit Function - Nicole Caley, Ace Hardware Corp.	Unclaimed Property: Beyond Compliance Requirements - Jim Sadik, True Partners Consulting LLC and Robert M. Tucci, True Partners Consulting LLC	Impact of Metrics on Automation - Tina McGlasson, Dover Business Services	Unleashing the Real Value of P2P - Pam Miller, IOFM	Reducing Friction in your Supply Chain Through Accounts Payable Automation Session Sponsored by: Tungsten Network	Session Sponsored by: DataServ, LLC

2:40PM - 3:40PM						
New Developments in Excel Reporting - Jeff Lenning, Excel University	AP Leadership Working Group Moderated by: Jess Scheer, IOFM	How to Turn P Cards into a Profit Center - Pamela Buda, St. Luke's Health Network	Conquering the P2P Obstacles: An Aflac Case Study - Juli Knisley, Aflac and Angela Grier	Payments Optimization: Mastering the Dance with Your Suppliers - Ernie Humphrey, 360 Thought Leadership Consulting	The New World of Accounts Payable: When Invoices Process Themselves - Chris Rauen, SAP Ariba	Session Sponsored by: Canon Information & Imaging Solutions

3:40PM - 4:00PM: NETWORKING BREAK IN THE EXHIBIT HALL

4:15PM - 5:15PM						
The What, Why, and Wow of Early Pay Programs - Tom Glassanos, The Bavelos Group	Train to Lead and Overcome Change Resistance - Judy Bicking, IOFM	Ethics and the Motivations of the Fraudster - Allan Bachman, ACFE	Moving From a 35 year Old Legacy System as a Shared Service Center - Jackie Couch, FedEx Services	From Purchasing vs. AP to Procure to Pay: The Evolution - Mike Murphy, La Quinta Inns & Suites	Session Sponsored by: CSI globalVCard	AP Automation Case Study

5:15PM - 6:30PM: NETWORKING RECEPTION IN THE EXHIBIT HALL

TUESDAY, MAY 22

7:15AM - 8:10AM: BREAKFAST

SESSION TRACKS

TRACK A: AP FUNDAMENTALS & BEST PRACTICES	TRACK B: LEADERSHIP	TRACK C: OPERATIONS & COMPLIANCE	TRACK D: P2P FOR BEGINNERS	TRACK E: P2P ADVANCED: SHARED SERVICES & GBS	TRACK F: AUTOMATION CASE STUDIES I	TRACK G: AUTOMATION CASE STUDIES II
---	---------------------	----------------------------------	----------------------------	--	------------------------------------	-------------------------------------

8:10AM - 9:10AM						
How to Clean the Vendor Master File - Steve Iannarone, Arthur J. Gallagher & Co.	AP Benchmarking Study - Jess Scheer, IOFM	Update on Unclaimed Property Laws - Augusto Conde III, BDO	Successful Partnering with Key AP Internal Partners - Ryan McClintock, T-Mobile USA	The 3 Trends That Will Change Financial Shared Services as we Know It - Mark Brousseau, IOFM	AP Automation Case Study	AP Automation Case Study

9:20AM - 10:20AM						
Implementing a Global Vendor Portal for Self-Service Registration - Debra Richardson, Verizon	The 4-R's of Leading a World Class Post Audit Function - Nicole Caley, Ace Hardware Corp.	Ethics and the Motivations of the Fraudster - Allan Bachman, ACFE	Why Are Majority of Shared Service Centers Adopting Robotic Process Automation? Should You? - Pam Rhoads, Accenture	Seven Ways an AP Shared Service Center Can Improve Profitability - Judy Bicking, IOFM	AP Automation Case Study	AP Automation Case Study

10:20AM - 11:00AM: NETWORKING BREAK IN THE EXHIBIT HALL

11:00AM - 12:00PM						
Continuous Improvement: How to Make It Work for AP and P2P - Penny Weller, The Hackett Group	From Purchasing vs. AP to Procure to Pay: The Evolution - Mike Murphy, La Quinta Inns & Suites	Form 1099 and 1042-S Reporting: Rules and Compliance Tips for 2018 - Marianne Couch, COKALA Tax Information Reporting Solutions, LLC	Conquering the P2P Obstacles: An Aflac Case Study - Angela Grier, Aflac and Juli Knisley, Aflac	Shared Services Benchmarking - Jess Scheer, IOFM	AP Automation Case Study	Panel: Get the Biggest Bang for Your P2P Automation Buck Moderated by: Mark Brousseau

12:00PM - 1:15PM: LUNCH AND PEER-TO-PEER ROUNDTABLES

1:15PM - 2:15PM: CLOSING PANEL – NEXT STEPS: CONVERTING YOUR IDEAS INTO ACTION - MODERATOR: JESS SCHEER, IOFM

WEDNESDAY, MAY 23

POST-CONFERENCE *Workshops and Certifications require a separate registration and fee.

8:00AM - 4:00PM	FULL DAY CERTIFICATIONS
9:00AM - 12:00PM	HALF DAY MORNING WORKSHOP

CERTIFICATION

Add a full day certification or workshop to your conference experience with the **VALUE PASS** and **SAVE!**

FULL DAY CERTIFICATION CLASSES



Accounts Payable Certification Training
Pam Miller, Senior Trainer, IOFM
Sunday, May 20 -or- Wednesday, May 23
 8:00am – 4:00pm



Procure-to-Pay Certification Training
Judy Bicking, Senior Trainer, IOFM
Sunday, May 20
 8:00am – 4:00pm

For more information on Certification courses, visit
www.iofm.com/conference-spring/certifications

FULL DAY WORKSHOP

IRS Regulation Boot Camp includes CPRS (Certified Payment Reporting Specialist) Certification
Marianne Couch, Principal COKALA Tax Information Reporting Solutions, LLC
Sunday, May 20
 8:00am – 4:00pm

HALF DAY WORKSHOPS

Sunday, May 20

MORNING WORKSHOP
 9:00Am – 12:00pm

- **Benchmarking Current Performance: The First Step to Improving your AP Processes**
Jess Scheer, Executive Editor, IOFM

AFTERNOON WORKSHOPS
 1:00pm – 4:00pm

- **Strategies for Success: Building a Best in Class P2P Process**
Jess Scheer, Executive Editor, IOFM
- **An In-Depth Look into Fraud in Financial Statements**
Allan Bachman, Education Manager, ACFE

Wednesday, May 23

MORNING WORKSHOP
 9:00am – 12:00pm

- **Form 1099 Bootcamp**
Marianne Couch, Principal, COKALA Tax Information Reporting Solutions, LLC

For more information on workshops, visit
www.iofm.com/conference-spring/workshops

PRICING

	EARLY BIRD RATE <i>Expires 3/17/18</i>	STANDARD RATE <i>After 3/17/18</i>
Conference Pass <i>(includes all sessions, meals, and receptions from 4:00pm on Sunday, 5/20 – 2:30pm on Tuesday, 5/22)</i>		
AP & P2P Network Members	\$1,195 (SAVE \$200!)	\$1,395
Non-Members	\$1,495 (SAVE \$200!)	\$1,695
Value Pass <i>(includes all of the above PLUS one Certification class, two (1/2) Day Workshops or a Full Day Workshop)</i>		
AP & P2P Network Members	\$1,795 (SAVE \$300!)	\$2,095
Non-Members	\$2,095 (SAVE \$300!)	\$2,395

CERTIFICATIONS	DATE	TIME	PRICE
Accounts Payable Certification Training	May 20 -OR- May 23	8:00am – 4:00pm	\$795 (FREE WITH THE VALUE PASS!)
Procure-to-Pay Certification Training	May 20	8:00am – 4:00pm	\$795 (FREE WITH THE VALUE PASS!)

WORKSHOPS	DATE	TIME	PRICE
Full Day Workshop	May 20	8:00am – 4:00pm	\$795 (FREE WITH THE VALUE PASS!)
Half Day Workshop	May 20 -OR- May 23	9:00am – 12:00pm -OR- 1:00pm – 4:00pm	\$395

PEER-TO-PEER ROUNDTABLES



Connect with practitioners from across North America at one of the following roundtables:

- Centralized: Beginners & Advanced
- Shared Services: Beginners & Advanced
- Manufacturing
- Healthcare
- Education / Public Sector
- SAP
- Oracle
- PeopleSoft

MEMBERSHIP

Become a member of the AP & P2P Network when you register for the spring conference and save \$300 on the cost of registration.

APP2P Network



With a membership to the AP & P2P Network, the learning doesn't stop after the conference is over!

APP2P.com is available year-round to find tools, resources, and templates that will make it all stick!

Plus, you'll be able to connect with fellow members to find out how they're tackling the same challenges.

To learn more about saving \$300 off of the cost of registration by becoming a member, contact IOFM's Conference Representative Gail Robinson at 207-842-5627 or email her at grobinson@divcom.com.

AFTER HOURS



- Nightly networking receptions with exciting giveaways, raffles, & prizes
- Opportunities to meet leading innovators in AP & P2P technology and learn about their services
- Complimentary photo booth for you to update your professional head shot
- Special rates on attractions & shows



Venue

Disney's Contemporary Resort

4600 North World Drive
Lake Buena Vista, Florida 32830

Exclusive attendee rate:

\$235 per night + taxes
if reserved by April 27th

Book early for best
availability at:

[iofm.com/
conference-spring/venue](http://iofm.com/conference-spring/venue)