The Conference Board of Canada

Council of Chief Information Officers

Agenda

Wednesday, February 8, 2023

Virtual
11:00 a.m. – 4:00 p.m. EST

Theme: On-shore and Off-shore Operating Models/Service Provider Lock-in

Please complete our online registration form. Confirmation to follow.

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Session Overview

On-shore and Off-shore Operating Models

CIOs are constantly reviewing their sourcing and operating models to effectively and efficiently meet growing and rapid changes in business demands. All CIOs question what is the right balance of on-shore and off-shore staffing. At this meeting we'll explore the journey of market trends, business drivers, typical models and standard contractual terms and conditions for on-shore and off-shore staffing.

Learning Objectives:

- **Explore** the full cycle, from strategy, change journey, implement and benefits
- **Identify** best outsourcing practices
- **Learn** conditions for success and pitfalls to avoid

Service Provider Lock-in

CIOs entering and negotiating product, or IT managed services contracts are concerned by the potential for vendor lock-in and may not be aware of the provisions and strategies to mitigate the risk. We'll explore the realities and risks of vendor lock-in and how to minimize the impact.

Learning Objectives:

- **Explore** how to negotiate an agreement, test provisions and remediate
- **Learn** how organizations are mitigating their risks
- **Share** best practices on what and what cannot be addressed

Schedule

11:00 a.m. **Welcome and Opening Remarks**

Deborah Fleck, Senior Council Manager, The Conference Board of Canada
Sean Terriah, Strategic Council Advisor

11:10 a.m. **Facilitated Discussion: Member Give-Get**

Facilitated by Sean Terriah, Strategic Council Advisor

12:00 p.m. **Presentation and Discussion: On-shoring/Off-shoring Thought Leader**

CIOs are constantly reviewing their sourcing and operating models to effectively and efficiently meet growing and rapid changes in business demands. All CIOs question what they

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should externalize, what their retained organization should be composed of and what is the right balance of on-shore and off-shore staffing. The reality is, there is no “one-size fits all” approach, and the model you choose depends on many factors. Get an outside perspective on market trends, expected benefits, conditions for success and pitfalls to avoid.

Sharad Maheshwari, HCL Technologies

12:45 p.m. Lunch Break

1:30 p.m. **Case Study and Discussion: On-shoring/Off-shoring**

Case study from a CIO on their strategic objectives impacting their sourcing and operating model, including their change adoption and journey, implementation successes and challenges, governance required to achieve expected benefits and lessons learned throughout the journey.

Craig Brice, Chief Information Officer, PwC Management Services LP

2:15 p.m. Break

2:20 p.m. **Presentation and Discussion: Managing Vendor Lock-In**

CIOs entering and negotiating product, or IT managed services contracts are all concerned by the potential for vendor lock-in and may not be aware of the provisions and strategies to mitigate the risk. This session will provide an outside perspective on the realities and proven strategies to address.

Charles Morgan, McCarthy Tétrault LP

3:05 p.m. **Case Study and Discussion: Managing Vendor Lock-In**

Case study from a CIO on the full cycle of negotiating an agreement, testing lock-in provisions, transitioning out and lessons learned.

Sarah Shortreed, Executive Vice-President and Chief Technology Officer, ATCO Ltd.

3:50 p.m. **Meeting Wrap-Up**

4:00 p.m. **Adjournment**

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