



Everest Group Engage 2025 – Dallas Attendee Prospectus

September 8 - 10, 2025
Dallas, TX





Everest Group Engage 2025 – Dallas is a premium-experience educational and networking event for **executives in global business services (GBS), global sourcing, vendor management, procurement, and shared services.**

Everest Group Engage is the number one event focused on tech & business services from the number one tech & business services research firm.

Learn more at <https://events.everestgrp.com/engage-dallas2025>

2025 Theme
**The Connected Advantage:
Innovating for Enduring
Growth**

Conference Dates
September 8 – 10, 2025

Pricing
**\$1,999 for Enterprise
Attendees***; \$4,999 for Service
Provider Attendees

*Everest Group clients receive preferred pricing

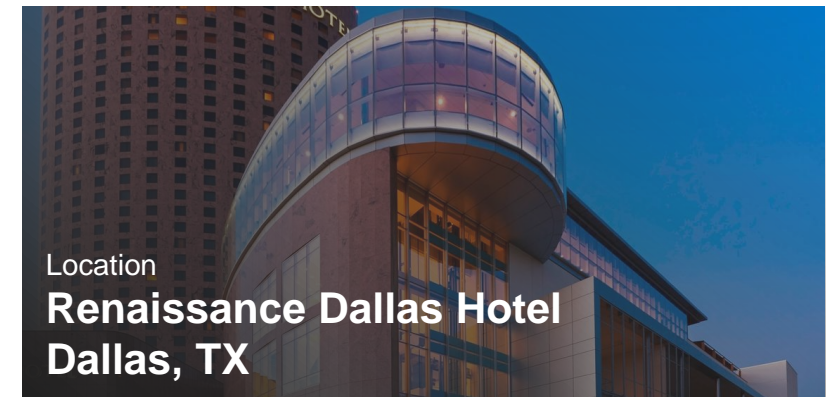
Demographics
**Senior executives from
relevant business functions**

450+ attendees

from global business services, sourcing, vendor management, cx, and other shared services functions

40+

Everest Group Analysts



Conference Theme – The Connected Advantage: Innovating for Enduring Growth

In a business environment defined by disruption, **success isn't just about resilience—it's about connection.** Enterprises that thrive don't operate in silos; they rethink strategies and action plans to drive growth, agility, and stability across their global operations.

At Everest Group Engage 2025, we bring together senior leaders in global business services, strategic sourcing, vendor management, customer experience, and IT services from Global 1000 enterprises to explore **how interconnected strategies fuel enduring success.**

With 72% of enterprises reevaluating their operating models to balance cost efficiency with transformational growth—and 68% of GBS leaders prioritizing innovation as a key driver of business value (Everest Group Research)—it's clear that **companies need more than agility to compete.** They need the connected advantage.

This year's Engage will help you:

- Rethink strategy and execution—bridge the gaps between enterprise functions, service providers, and technology partners to drive greater business impact.
- Unlock innovation that drives value—practical insights on AI, digital transformation, and next-gen service delivery.
- Future-proof operations—navigate cost pressures, workforce shifts, and geopolitical uncertainties with confidence.
- Network with the leaders shaping the enterprise landscape—engage in peer-driven discussions and hands-on learning.

Engage 2025 is where enterprise leaders **rethink, innovate, and turn disruption into long-term advantage.**

Advisory Board

The Engage agenda and experiences are shaped by a panel of global industry leaders



Tony Abate
Global Procurement &
Third Party Management



CardinalHealth
Shane Abeyratne
Senior Vice President,
Global Business Services



Kimberly-Clark
Rob Bradford
Vice President of Global
Business Services



unum
Trent Causey
Vice President, Strategic
Sourcing



Verizon
Jane Connell
Head of Strategy &
Transformation Global Services
& CIO Enterprise Systems



MassMutual
Jodi Dudley
Head of Global Business
Services



MetLife
Paul Enruse
Senior Vice President,
Business Controls – Global
Technology & Operations



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Joe Heynoski
Chief Procurement Officer



TRUIST
Shelly Hoover
Senior Vice President



TRAVELERS
Sarah Pascual
AVP, Corporate Procurement



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Mitul Rustagi
Global Vice President,
Finance Centre of
Excellence



Microsoft
Kent Scott
Executive General Manager,
Customer Experience &
Success, Business
Operations & Programs



McCormick
Tanuja Singi
Vice President, Head of
Global Business Services



First Citizens Bank
Ranjan Wadhwa
Global Business Services
Executive



BlueCross BlueShield
Denise Williams
Executive Director Supplier
Ops & Services, Operations
Enablement

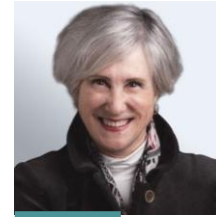
Conference chairs and key topics



Rohitashwa Aggarwal
Partner, Global Business Services
Everest Group



Amy Fong
Partner, Sourcing &
Vendor Management
Everest Group



Deborah Kops
Principal, Sourcing Change
and Executive Advisor,
Everest Group

Key topics will include:

- Geopolitical and economic factors impacting GBS & outsourcing - tariffs and regulations
- Onshoring vs offshoring: Balancing location strategy
- Evolving the GBS operating model
- Improving stakeholder satisfaction with providers
- Best Practices for Partner Management
- Security & risk in partner and provider ecosystem
- Vendor management: Next gen commercials
- Hybrid work models and workforce planning
- Talent strategy: Acquiring, developing & retaining the right skills

Agenda at-a-glance

The comprehensive agenda mixes visionary keynotes, action-oriented breakouts, enlightening case studies, and useful networking sessions to ensure a balanced and complete learning experience.

The full agenda will be published in April 2025.

Monday, September 8, 2025

1 p.m.	Badge pickup opens
2:30 – 5:30 p.m.	Workshops
5:30 p.m.	Welcome reception

Tuesday, September 9, 2025

8 – 9 a.m.	Badge pickup and breakfast
9 – 10:30 a.m.	Welcome address and opening keynotes
10:30 a.m.	Coffee and networking break
11 a.m. – 12:30 p.m.	Breakout sessions, case studies, and ask me anything sessions
12:30 p.m.	Lunch
1:30 – 3 p.m.	Breakout sessions, case studies, and industry round tables
3 p.m.	Coffee and networking break
3:30 – 4:50 p.m.	Keynotes
5 – 6:30 p.m.	PEAK happy hour
7 p.m.	VIP dinner (invitation only)
8 – 10 p.m.	Hospitality suites

Wednesday, September 10, 2025

8 – 9 a.m.	Badge pickup and breakfast
9 a.m.	Keynote
9:30 a.m.	Facilitated topic and industry round tables
10:30 a.m.	Breakout sessions
11 a.m.	Coffee and networking break
11:30 a.m. – 12:30 p.m.	Breakout sessions and case studies
12:30 p.m. – 1:50 p.m.	Keynotes
2 p.m.	Main agenda concludes

Note: Agenda times are subject to change. Please bookmark events.everestgrp.com/engage-dallas2025 for updated information



Networking sessions will be featured prominently on the agenda



Breakout session

Short-form sessions led by Everest Group analysts or practitioner peers that include an action item that should be done following the session.



Workshop

Long-form, interactive session guided by Everest Group experts designed to produce a deliverable that your team can act upon when you get back to the office.*



Ask me anything

During these open-mic sessions, ask our analysts real-time questions on the pain points, opportunities, and priorities of most significant interest to you.



Team problem-solving

Designed for collaboration among your team in attendance, pick from three problem-solving workshop topics, do the pre-work (no more than 30 mins), and show up to whiteboard on it with Everest Group experts.



Industry and hot topic round tables

Industry and hot topic-focused round tables facilitated by experts and centered on topics picked by attendees of the conferences.



Dedicated social times

PEAK happy hour, industry meetups, and dedicated mealtimes reserved for casual networking and connecting with new contacts at your leisure.

There will be a variety of keynotes, case studies, and in-person and digital presentations to go along with the great variety of networking sessions offered at Engage. Sponsors can optimize their strategic networking at these sessions.

Who will attend

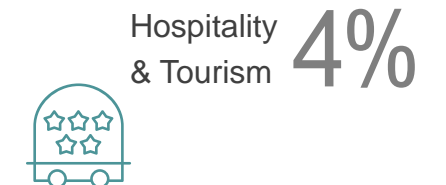
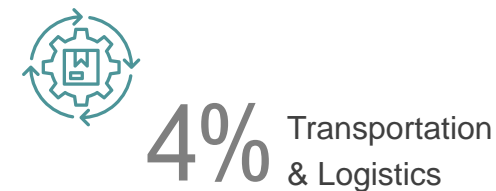
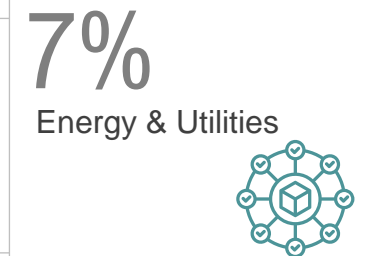
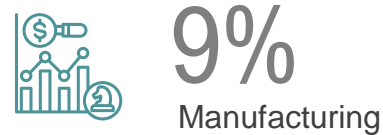
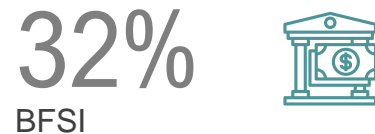
Engage Dallas 2024 attracted global, senior-level decision-makers across all key functions in business services and sourcing. Attendees from Global 1,000 enterprises will attend with teams of 2-3 leaders from GBS, sourcing, vendor management and tech services functions represented.

Attendee role level



Source: Everest Group Engage 2024 Attendee database

Attendee industry



Who will attend

Enterprise GBS, sourcing, procurement, vendor management and shared services leaders with the following titles will benefit from attending:



C-suite leadership

- COO
- CPO
- CFO
- CIO
- CDO
- Chief Customer Experience Officer



Global business services

- Head of Global Business Services
- Sr Director GBS Strategy & Bus. Development
- Director & COO
- Executive Vice President, General Counsel, Corporate & Legal Affairs
- VP GBS Control and Planning
- Head of Workforce Strategy



Sourcing & vendor management

- Chief Procurement Officers
- IT sourcing leaders
- VPs of indirect procurement
- Heads of outsourcing CoEs
- VMO and supplier management leaders
- Category leaders for professional services, BPO, and technology



Customer service & delivery

- Chief Customer Officer
- Head of Customer Experience
- Head of Customer Service
- Head of Service Delivery
- Head of Customer Operations

2025 Engage London advisory board

The Engage agenda and experiences are shaped by a panel of global industry leaders

VOIS

Gary Adey
Chief Executive Officer

AstraZeneca

Jackie Crockford
Vice President - Global
Business Services

KraftHeinz

Serge De Vos
Global Head for GBS &
Enterprise Data

JTI

Jay Desai
Vice President, Head – IT
Infrastructure & Operations

Takeda

Vanessa Gleason
Global Head Takeda
Business Solutions

astellas

Kamila Grembowicz
Head of Global Business
Solutions Division

Meta

Tommaso Iadicicco
Outsourcing Manager

BT

Johnny McQuoid
Managing Director, Group
Business Services

ABN·AMRO

Marcel Mertens
Head Strategic Sourcing &
Partner Management

adidas

Saskia Poelman
SVP Global Business
Services

SIEMENS

Alexander Riedel
Head of Strategy and
Business Development

sanofi

Madeleine Roach
Executive Vice President,
Head of Business Operations

dexcom

Jessica Shields
Vice President - Global
Business Services

Selection of Engage London Advisory Board members as of December 2024



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Everest Group Engage 2024 – Dallas

Highlights



2024 Engage advisory board

The Engage agenda and experiences are shaped by a panel of global industry leaders



Suzanne Dreyer
Global Head / VP Shell
Business Operations



Shelly Hoover
SVP, Global Service
Delivery



Karen Koch
Head of GBS



Sarah Pascual
AVP, Strategic Sourcing



Doris Raimundi
SVP, Global Support
Services



Rodrigo Reygadas
Head of Global Service
Center, Mexico



Mitul Rustagi
VP, Global Finance
Center Of Excellence



Kent Scott
GM Business Operations
& Programs, Customer
Experience & Success

Selection of Advisory Board members as of January 2024



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Engage 2024 – Dallas delivered actionable solutions for senior leaders, driving innovation and transformation across global enterprises

Event Highlights:

- **Attendance:** Over 300 senior leaders from global business services (GBS), sourcing, and vendor management sectors.
- **Sponsors:** Supported by 16 sponsors, showcasing innovative solutions and services.
- **Expert Insights:** 20+ Everest Group Analysts provided actionable guidance, industry insights, and cutting-edge research.

Engagement & Networking:

- Facilitated networking opportunities enabled attendees to collaborate and share best practices.
- Roundtable discussions and analyst-led sessions provided deep dives into challenges and solutions.

Key Themes & Discussions



Practical AI & Emerging Technologies

Real-world applications of AI for operational efficiency and transformation.



Cost Optimization Strategies

Approaches to drive cost savings amid macroeconomic challenges.



Future Operating Models

Breakthroughs in GBS and sourcing models to align with evolving enterprise goals.



CEO Priorities & Stakeholder Alignment

Strategies to align GBS, sourcing, and vendor management with leadership priorities.

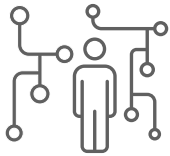


Change Management Best Practices

Tools and frameworks for seamless transitions and stakeholder engagement.

We came together to talk about the Pragmatic Edge in global services and tech

Here are the actions heard throughout the sessions:



It's about the people – Beyond the tech and the AI and the data – it's the humans that will get us to the edge



Redefine value

- In GBS, by thinking about value like a CEO
- In sourcing and vendor management, by making relationship management a high ROI activity



Those with a **growth mindset** see something different and know it will be difficult, and **they know they can learn** to overcome it



In sourcing **it's about the partnerships we build**

- Engage more, use your internal resources and partners to speed up the process
- Contracts will have uncertainty, embrace the humanness to lay the foundation to weather the challenges in complex partnerships
- We're not doing a procurement process it's a formation process



Spend time on the uncertainties

Impact of Engage 2024 – Dallas



The event provided great insights and content with a good pace and was very engaging. I've been to other large-scale conferences, but this one provided a more engaging forum to interact with other participants and presenters on relevant topics.

- VP, Supplier Management, HCSC



The way the sessions are being held and the content that is covered, is so engaging! Getting to connect with peers from other companies – Google, Meta, Microsoft – is something I am not able to do in any other forum. It's nice to see that the problems we are facing at LinkedIn are the same problems they are facing as well.

- Vendor Strategy, LinkedIn

2025 DALLAS
engage 

Contact your account representative or
events@everestgrp.com for more information

<https://events.everestgrp.com/engage-dallas2025>