

IBF RECERTIFICATION: 10 POINTS

BUSINESS PLANNING FORECASTING & S&OP

BEST PRACTICES CONFERENCE

w/ LEADERSHIP FORUM & 1-DAY FORECASTING & PLANNING TUTORIAL

ORLANDO, FLORIDA USA | OCTOBER 16-19 2018



KEYNOTE SPEAKER

Tim Hotze

SVP Global Network
Planning and
Global Intelligence

Target



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Forecasting & Planning**

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IBF MEMBERS ONLY

TUESDAY | OCTOBER 16 | 9:00 AM - 4:30 PM | *IBF Members Only-FREE*

1 - DAY TUTORIAL

FREE 1-DAY TUTORIAL
w/ Gold or Diamond Package that includes IBF Membership

IBF will provide expert instruction on the Fundamentals of Demand Planning & Forecasting, based on IBF's body of knowledge used by 1000's of global companies. You'll hear about what works and what successful companies are doing today to improve business performance.

If you get the forecast right, you will be able to optimize inventory, improve customer service, foster more collaboration and energize your S&OP process, while increasing profitability and market-share.

The hands-on and interactive nature of the program will foster discussion and idea sharing with participants to ensure knowledge shared is fully absorbed.

Also, with the limited supply of qualified demand planning & forecasting professionals in the marketplace, a global phenomenon, you have a chance to supercharge your career in this profession. The IBF has the salary benchmarking reports to prove it.

Key Learning's:

- How to measure forecasting performance, a key to continuous improvement
- Learn next level forecasting analytics used by best-in-class companies
- How to analyze and treat data before using your ERP System
- How to prepare baseline forecasts using Time Series methods, the most widely used method for forecasting
- How to use Regression/ Causal analytical methods to explain, forecast, and drive demand
- How to forecast and plan new products, where limited or no data may be available
- And much more

Plus, this workshop is an excellent step in preparing and becoming a Certified Professional Forecaster (CPF)! Exams will be offered on October 20, 2018.

MORNING | 9:00 AM-12:10 PM

ROLE OF FORECASTING IN THE ORGANIZATION

- Benefits and its impact on supply chain, management decisions, financial plans
- Responsibilities/Accountability
- Consensus development and management support
- Relationship to other decision and planning processes
- Cross-function participation and involvement

S&OP & FORECASTING PROCESS

- Process design and interfaces
- Cross-functional involvement and consensus building
- Forecaster competencies & skills
- Forecast user Information needs
- Risk and error tolerances

FORECAST ERROR MEASUREMENT

- Importance of error measurement and analysis
- Sources and remediation of error
- Interpretation and application of error metrics
- Mean Absolute % Error (MAPE)
- Weighted Mean Absolute % Error (WMAPE)
- Error analysis and cost of error

DATA MANAGEMENT AND DATA CLEANING

- Data identification and definition
- Structure of time series data
- Data collection and analysis
- Identifying and adjusting for anomalies

12:15 PM-1:15 PM | LUNCH

AFTERNOON | 1:20 PM-4:30 PM

HOW TO FORECAST WITH TIMES SERIES MODELS- THE MOST WIDELY USED METHOD OF FORECASTING

- Importance of pattern identification
- Time series model development
- When to use time series models
- Advantages and disadvantages of time series
- Event adjustments and when to use
- Underlying assumptions
- Widely used time series methods - averages, naïve model, exponential smoothing, decomposition, trend, seasonal, and other time series methods

HOW TO FORECAST WITH REGRESSION ANALYTICS- FORECASTING AND EVALUATING CAUSES OF VARIATION IN DEMAND

- When to use Regression
- Advantages and disadvantages
- How to build a regression model for demand
- Application in estimating effects of promotions, pricing, advertising, and other program actions
- Using regression methods in conjunction with time series forecasting

NEW PRODUCT FORECASTING-FORECASTING OVER LONGER TIME PERIODS WITH GREATER UNKNOWNNS

- Challenges of New Product Forecasting
- Opportunity identification and evaluation
- Product lifecycle structure and estimation
- Qualitative forecasting methods
- Diffusion models
- Quantitative forecasting methods
- Expected error and accuracy

MS-EXCEL will be Used for Demonstration Exercises. Bring Along Your Laptop (Optional)

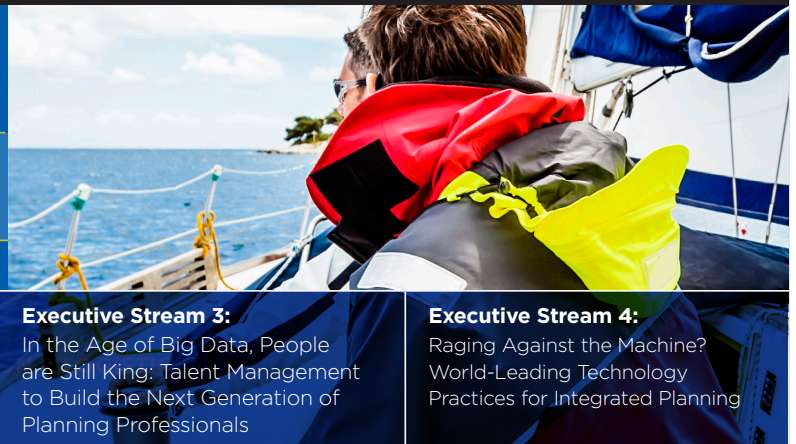
Jeff Baker, CPF, Education Advisor
INSITUTE OF BUSINESS FORECASTING & PLANNING (IBF)

WEDNESDAY | OCTOBER 17 | 8:00AM - 8:00PM (INCLUDES VIP DINNER)

LEADERSHIP

BUSINESS PLANNING FORECASTING & S&OP

FORUM



Executive Stream 1:

Building A Data Driven Organization: Organizational Design for Demand Planning in the Big Data Age

Executive Stream 2:

The Competitive Advantage of the Future is S&OP: Becoming the Powerful Minority Who Successfully Implement S&OP

Executive Stream 3:

In the Age of Big Data, People are Still King: Talent Management to Build the Next Generation of Planning Professionals

Executive Stream 4:

Raging Against the Machine? World-Leading Technology Practices for Integrated Planning

PANELISTS (partial list):

Tim Hotze, SVP Global Network Planning and Global Intelligence | **TARGET**
 Grant Hoffman, CPF, Corporate Vice President of Business Operations | **LENOVO**
 Patrick Bower, Senior Director, Global Supply Chain Planning | **COMBE INCORPORATED**
 Jeff Marthins, CPF, Director of Supply Chain Operations | **TASTY BAKING COMPANY / FLOWERS FOODS**
 Todd Gallant, ACPF, Vice President, Planning & Allocation | **COLE HAAN**
 Eric Wilson, CPF, Director of Planning | **ESCALADE SPORTS**

Todd Dunn, CPF, Director of Supply Chain | **CATALENT**
 Alan Rozendaal, Director, Demand Planning, Emerging Markets | **NIKE**
 Joseph Eschenbrenner, ACPF, Director of Demand & Supply Planning | **PUMA**
 B. C. Silver, VP, General Manager - National Brands | **GREEN DOT CORPORATION**
 Berenice Bortoni, Director of Demand Planning | **HEINEKEN USA**
 Jennifer Wang, Former VP, Global Planning | **ALLERGAN**



ESSENTIAL

The building blocks for successful S&OP, Demand Planning and Forecasting in your organization



NEXT-LEVEL

Getting more from your S&OP processes, reaching maturity and utilizing resources more efficiently



VANGUARD

Staying ahead of the curve to future-proof your S&OP, Demand Planning, and Forecasting processes

AWARDS PRESENTATION



EXCELLENCE IN BUSINESS FORECASTING & PLANNING AWARD

LIFETIME ACHIEVEMENT IN BUSINESS FORECASTING & PLANNING

1 Back to Basics: Demand Planning Fundamentals In the Technology Age



It's easy to be enticed by cutting edge forecasting software, new methodologies and advanced statistical modeling when looking to improve the quality of your Demand Planning. After all, Predictive Analytics, Big Data and Machine Learning are the hottest buzzwords at the moment. But are these innovations always necessary? Are they worth the (often considerable) time and expense? In this interactive presentation, you will be reacquainted with some of the tried-and-true fundamentals of Demand Planning that are often thrown by the wayside in favor of more impressive techniques. We will look at real, proven and effective ways to improve forecast accuracy, and identify what is driving forecast accuracy in your organization and what isn't. Examples will be provided through the real-life experiences of Demand Planning in the aviation aftermarket industry, which are sure to be applicable to your industry. I will leave you with a solid grounding in the basics that no new software can function without.

You will learn:

- How to use tracking signals to mitigate forecast bias
- How to analyze demand volatility to provide realistic forecast accuracy targets
- How to use Forecast Value Add (FVA) to drive organizational accountability for forecasting information

Erin Marchant
Global Demand Planning -
Landing Systems



UTC AEROSPACE SYSTEMS

2 Engaging Senior Leadership in S&OP



B. C. Silver
VP, General Manager-National Brands
GREEN DOT CORPORATION



3 Mission Critical: Making The Strategic Shift From Integrated to Omni-Channel Planning



The shift to Omni-channel isn't happening, it has already happened. But the forecasting and planning processes and methodologies in many



companies haven't kept pace. If you or your customers sell via different channels, including eCommerce, your world has likely been turned around. Omni-channel means forecasting for multiples sales channels and understanding the unique demand quirks, managing different data sets and figuring how to allocate stock to different locations. You don't need me to tell you how hard this can be. In this hands-on session, you will learn the key change elements to consider in planning when migrating to Omni-channel processes and structure so you can exploit all the advantages it brings - and gain an edge on your competitors who are slow to react. I will share our RACI approach and reveal how to integrate and manage the most appropriate ERP systems to support new processes. When it comes to Omni-channel, the implications of a misstep can be dire - join this session and I'll show you how to turn this risk into opportunity.

You will learn:

- How to ensure your change management approach gives staff the support they need
- How to RACI and ensure people know their role in highly interconnected processes
- How to select and approach your ERP system and the benefits of cloud and hyper flexibility

Todd Gallant, ACPF

Vice President of Planning and Allocation

COLE HAAN

COLE HAAN

4 You Can't Improve What You Don't Measure: Defining and Measuring Forecasting & Planning Best Practices



Not wanting to stand still and be hit by the oncoming train of anticipated double digit growth in BioPharma, we joined together with other companies to develop a path so we would be best able to jump on the train instead of being hit by it. In our discussion, we will explain our journey of identifying gaps & opportunities, the publication of our Best Practice Guide and the accompanying Maturity Assessment both of which can be applied to any industry. While the Best Practice Guide provides a detailed account of our work stream's journey and outcomes, the Maturity Assessment is an incredibly valuable tool by which you can zero in on weaknesses while utilizing it for continuous improvement. Best of all, we will be providing free access to the Best Practice Guide and Maturity Assessment so that your company can take part in the benchmark.

You will learn:

- The hurdles and drivers to consider when looking to improve your forecasting process
- What we identified as the three best practice categories relevant to forecasting and planning
- Our maturity assessment which is our means to identify gaps and a way to employ continuous improvement

Elizabeth Knox, CPF, CPA

Senior Demand Planning Manager

BASF



Gail Berch

Global Manager of Demand Planning

SARTORIUS-STEDIM



5 Here Today, Gone Tomorrow: Demand Management and Software Solutions for Short Life Cycle Product



Our basic goal as a Demand Planning organization is to develop a forecast that will best predict our customers' needs. With this goal in mind, our challenges differ greatly based on our unique businesses. I have worked with products that have a life cycle of multiple decades, and also with products that are around for just a few months. Longer life cycle products are suitable for direct statistical algorithmic forecasting and trend management. That's relatively straightforward, but how do you handle demand management for short term products that have a lifespan of less than a year? During this session we will discuss these challenges that many companies are experiencing when dealing with consumers who want ever newer products. We will talk about demand planning techniques capable of supporting multiple life cycle models, discuss how each function is impacted by this fast-paced environment, and identify which areas need to shine to be successful! We will hit on the challenges and opportunities with software solutions and how to overcome linear process thinking. We will also touch on the evolving topics of demand sensing and predictive analytics.

You will learn:

- The challenges in forecasting for shorter life cycle products vs. longer life cycle products
- The best techniques and models to handle multiple life cycles including products with lifespans of less than 1 year
- How demand sensing and predictive analytics enable better understanding of consumer demand

Joe Eschenbrenner, ACPF

Director Demand Planning

PUMA NORTH AMERICA





6 Synchronize To Optimize: Connecting Demand and Supply Chain Planning With Business & Operations Strategy



Amid increasing digitization and consumerization, business and operational strategies must constantly adapt to keep organizations competitive. It's common now to see companies responding to changes by reshaping supply chain networks and introducing flexibility to their supply chain designs, but there's a crucial need that often goes unnoticed - the need to also adapt supply chain planning capabilities. When this all-important area is ignored, companies suffer from poor inventory management, poor order fulfillment and poor visibility into future demand - and no amount of flexibility in the supply chain can fix this. What's more, if the planning function is not tuned into the latest strategic and operational strategy, things can go very wrong. In this session, you will learn how to structure supply chain planning capabilities to better serve your firm's changing business and operational priorities. There is no one-size-fits-all solution, but I'll provide a useful framework that will help make you decisions around regarding different business and operations scenarios. The businesses of today must be integrated to succeed - I'll show you how.

You will learn:

- To identify your business and operational strategic priorities
- Different set-ups for demand and supply planning
- How to formulate a sound supply chain planning strategy to support both business and operations' needs

Raul Pantoja
Global Planning Director
MERCK KGAA



7 New Product, New Risk Opportunity: What You Need to Know About New Product Forecasting



In 2018, a survey was conducted by SAS and the Virginia Commonwealth University School of Business to determine the current state of New Product Forecasting (NPF) practices during the commercialization stage. The results provide an in-depth view of the current state of new product forecasting (NPF) practices across all industries for launch and pre-launch. The findings paint a fascinating picture of the NPF landscape and we will share them

with you in this interactive session. With a focus on departmental responsibility and involvement in the NPF process, technique usage, technology usage, forecast accuracy, and forecast time horizon, you'll get an understanding of the challenges, opportunities and best practices that will help in your own forecasting and planning. We'll also discuss how Artificial Intelligence and Machine Learning are enhancing the predictability of new product launches, filling the gap left by time series models and in the process turning the risk of new product launches into opportunity.

You will learn:

- Learn what satisfied customers are doing to improve new product forecasting (NPF) launches
- The biases companies must overcome when generating NPFs and which departments should be involved in the NPF process
- Key findings comparing NPF in manufacturing versus non-manufacturing companies

Dr. Kenneth Kahn
Senior Associate Dean - School of Business
VIRGINIA COMMONWEALTH UNIVERSITY



Charles Chase, CPF
Executive Industry Consultant/Advisor
SAS INSTITUTE



8 Building a Truly 21st Century Business: How to Develop A Data Driven Culture with Better Data Management



We're at a point where data can be harnessed to improve visibility into demand, spot commercial opportunities' and make operations more efficient. The only thing stopping you from achieving this is support from the leadership and a viable plan of action. Your company must embrace a data culture, from the top down. This interactive presentation will discuss the role that data plays in business decision making, the difference between relevant and irrelevant data and how to structure your metrics to remove noise. We will also discuss aligning your data collection and analysis with your business goals and how this helps drive collaboration and consensus within an organization. Crucially, I will present how to create a data driven culture that permeates all functions and becomes the fabric of the company itself. This session is not one to miss because you'll be left with the bigger picture of what a data driven culture can do, and the specific knowledge to make it happen.



You will learn:

- How to create a top down data driven culture with management buy-in
- How to align metrics to business goals
- Dynamic data presentation to support DDM

Angela Stratton, CPF

Director of Scheduling & Operational Planning

ERWIN HYMER GROUP
NORTH AMERICA
the leisure experience

ERWIN HYMER GROUP NORTH AMERICA, INC

9 Safety Dance: Managing Safety Stock For New Products & Improved Cashflow



You don't need me to tell you that there are often several problems when new products go to market. And these problems are only multiplying because we are launching more new products like never before to keep up with consumer demand and maintain market share. We often tend to over-forecast new products which limits their success and places financial and supply chain strains on a company. We all know the difficulties involved but tackling them is a different matter – just how can supply chains stay ahead of the curve to limit excess stock and improve cashflow? In this presentation you will learn how to improve cashflow via effective safety stock management that ensures sufficient inventory to fulfill all orders whilst avoiding the expense of holding excess stock. I will also reveal the technical aspect of forecast error distribution to understand likely demand for a product and incorporate the range of error into safety stock management. What's more we'll discuss Finance's perspective to help you understand how to make a compelling business case.

You will learn:

- New product forecasting benchmarks and what you should aim to achieve for your forecast accuracy
- Safety Stock Management techniques with a focus on new products
- How to make a compelling business case to present to Finance

Ruttika Joshi

Strategic Pricing Manager

MONDELÉZ INTERNATIONAL



10 State of Employment in Demand Planning



Companies often seek demand planners that have the right mix of analytical skills and an outgoing personality to collaborate and help drive business decisions. Making sense of large data sets has been in the demand planner DNA for some time. The ever-increasing focus on big data has other

parts of the organization looking for a similar skill set. Companies and universities are rushing to train people for the next evolution, but it will be a few years until the talent level catches up. Come learn how the focus on big data is altering the landscape of what the demand planning organization will look like a few years down the road.

You will learn:

- Why you are going to start losing some of your demand planners to others parts of the company
- How the skills of today's demand planner will differ from those of tomorrow
- Why demand planning will remain an attractive place to be for high-performers

Jason Breault

Managing Director

LIFEWORX SEARCH



11 Razor Sharp Forecasts: How Harry's.com Tailored Their S&OP Process To Direct-To-Consumer Forecasting



Over the past decade, online has completely disrupted the classic brick-and-mortar retail environment. And in so doing, it has thrown into chaos the traditional forecasting approach. In this online world, many companies are exploring e-commerce channels and selling directly to consumers. With this shift, companies are looking to build direct-to-consumer (DTC) forecasting into their primarily retail-based S&OP process. At Harry's, we are unique because we actually started as a DTC-only business and have built a robust cross-functional S&OP process focusing on this channel specifically. Join this session if you want to understand key web-specific metrics and KPIs and how to effectively gather inputs from the marketing and web experience teams. We will also review the nuances of our DTC meetings vs. the traditional retail process and the interactions to take into account at the Omni-channel level. This is the direction of travel for retail S&OP – this is your chance to get ahead of the curve and learn from a leader in Omni-channel planning.

You will learn:

- The key web-specific inputs in the direct-to-consumer world and which teams are key stakeholders in the process for better forecasting
- The differences and similarities between direct-to-consumer and retail S&OP processes
- Importance of tracking KPIs and sharing with key stakeholders to ensure accountability

Sandra Janus

Head of Global Demand Planning

HARRY'S





12 A Picture Is Worth a Thousand Data Points: Graphical Analogy Forecasting



In the weeks and months after introducing new items, how do you determine when additional inventory is required? Too soon, and you tie up capital and may end up with too much stock. Too late, and you risk missed sales opportunities. To help with my responsibilities in planning inventory for Willow Tree figurines, I developed a graphical model that shows the demand growth curve over recent weeks in sync with a curve from a similar item launched a year earlier. It automatically adjusts to the prior year's curve to scale with the new item sales in order to provide a predictive curve. The result? You can quickly see on the timeline where supply is needed in order to accommodate predicted demand. I will discuss how this approach provides great visibility into difficult to forecast items, how you identify similar products for comparison, and how to create your own demand curves. This model has worked wonders for us, and I'll show you how it can work for you too.

You will learn:

- The value of seeing the shape of the demand curve
- How to assess the fit of analogy items for best comparison
- How to leverage basic software tools to see the data picture

Madison Smart, CPF
Supply Chain Supervisor
DEMDACO



13 Leveraging the Demand Review Process for a Successful S&OP Meeting



This session will provide an overview of the first formal meeting within the monthly S&OP cycle, namely the Demand Review meeting, presenting the latest demand for the organization. A strong Demand Review meeting is critical for a successful Executive S&OP meeting. The overall aim of the S&OP process is to arrive at a game plan to manage and allocate the firm's resources to meet the needs of customers and grow the business. A key driver for effective S&OP is demand planning and forecasting, which many companies find extremely challenging. Demand Planning and Forecasting drives the Demand Review meeting. Forecasts must therefore be assessed to ensure that they are realistic and unbiased. Gaps between supply and demand, and between forecasts and plans, must be closed to maximize revenue and profit, whilst risks and opportunities need to be visible to develop corporate strategy. In this session, we will explore these issues through practical examples,

enabling you to assess the gaps in your own organization. If your team struggles to achieve an effective demand review process driven by accurate forecasts, this session is for you.

You will learn:

- Optimize the success at Executive S&OP
- with a stronger Demand Review process
- Understanding the key elements of the monthly Demand Review meeting including roles, responsibilities, inputs and outputs
- Gaining alignment with participants and stakeholders to work towards achieving the objectives of S&OP

Todd Dunn, CPF
Director of Supply Chain
CATALENT



14 Just Do It: How Nike Successfully Centralized Demand Planning



In 2015, Nike Emerging Markets went through a reorganization of the demand planning function, moving from a decentralized to a centralized model. Significant change had to be made in how market insights were collected and integrated into the forecast. After a bumpy ride, the first phase of centralization was completed but significant questions remained. We had to figure out how to gather global market insights when everyone in demand planning was located in the same headquarters, how to input market insight into our forecasts, how to establish cross-functional collaboration, and what the future role of demand planners was going to be within the organization. In this hands-on session, you will learn Nike's unique game plan, be a participant on its journey of demand planning centralization and see the costs and benefits of centralizing your own demand planning function. You will also have a chance to understand some of the issues of the 'science' of FVA vs. the art of forecast alignment. We will end with a robust debate about what the role of demand planning should be in the face of massive technological change - are we forecasters or are we business managers?

You will learn:

- Nike's journey to demand planning centralization and the challenges faced
- The benefits and costs of moving from a decentralized to a centralized model
- How Nike views the role of demand planner in terms of forecasters vs. business managers

Alan Rozendaal
Director, Demand Planning, Emerging Markets
NIKE





15 How Citrix Uses Salesforce.Com Data to Forecast and Determine Production Builds



At Citrix, our Sales team uses Salesforce.com data religiously for every deal. Why? Because it provides fantastic insight into demand. It's a great a plug and play solution - but it needs tweaking to match the realities of your market, operations and unique customer base. In this interactive session I'll reveal how we use historical snapshots to arrive at average closure rates for leads at any given time in the quarter, broken down by forecast category, product line and region. This was hugely valuable for the planning team at Citrix because before this analysis, we had been planning a general percentage that was leaving excess inventory at the end of the quarter. I'll discuss how this easy to use and maintain software can increase inventory turns and save your company a lot of money whilst holding sufficient stock to meet customer needs.

You will learn:

- Why Salesforce.com is very useful in developing forecasts
- How to calculate average close rates
- How to include this rate into your Demand Planning process

Tina Burke
S&OP Manager

CITRIX SYSTEMS, INC.



16 United We Stand, Divided We Fall: How Demand Planning, Supply Chain and S&OP Work Together to Drive Growth



Balancing supply and demand is the foundation of all manufacturing companies - if we meet demand with the right amount of supply we maximize commercial opportunities whilst controlling costs. But this requires careful coordination and we must have a framework that allows all functions to work as a cohesive unit. After all, what good is a robust forecast if Supply Chain doesn't use it? What 's the point of a demand plan if Sales and Marketing don't share their promotional plans? When departments don't communicate, at best you'll experience missed opportunities and inefficiencies; at worst, you'll suffer absolute chaos. In this interactive session I will show you how to be an architect of successful S&OP, building the connective tissue between departments. You'll learn what information is required, and how to use it to build confidence, structure, and value into the Supply Chain. Demand planners will see the complexities and constraints in Supply Chain and how to manage them, and how Sales

can assist the supply plan. Supply planners will learn how to take the demand plan and use it to build a supply plan, identify production capacities, shift demand, and work with Finance to make sure that all fiscal expectations are met. Join me to become an architect of integration and be a key driver in a truly effective supply chain.

You will learn:

- How to sell the demand plan to Supply Chain to build confidence in forecasts
- What to bring to S&OP from the demand plan and Supply Chain side to add value to the S&OP meeting (including KPIs)
- Real life example of a demand plan and a supply plan generated from a forecast and presented at S&OP, and the outcomes.

Jeffrey Marthins, CPF

Director of Supply Chain

TASTY BAKING COMPANY / FLOWERS FOODS



17 Season With S&OP: How Tyson Foods Serves Up Great Tasting Foods with Demand Planning



AdvancePierre Foods, now part of Tyson Foods, Inc., is a nationally recognized supplier to both foodservice and retail partners, selling more than 3000 SKUs of proteins and sandwiches across the United States and Canada. In this hands-on presentation, I will reveal how we deployed S&OP across a complex network of 10 plants, 3 national distribution centers, and myriad overflow DC's while allowing key customers to direct-ship selected products from manufacturing plants. I will present some examples of innovative solutions that were implemented by my team to solve specific problems uncovered during the implementation of our S&OP. As S&OP implementation goes, this was tougher than most, but it provided us with tangible benefits including improved forecast accuracy, reduced stock inventory and increased bottom line. I'll run you through the scope of our implementation, the problems encountered and provide practical tips and lessons learned to help you with your own S&OP initiatives.

You will learn:

- The scope our S&OP implementation and solutions to problems encountered along the way
- How AdvancePierre Foods leveraged an advanced S&OP process to Improve forecast accuracy and reduce safety stock inventory
- How we used objective KPI measurements to track project savings that exceeded ROI objectives.

Adrian R. Vickery

Senior Manager, Demand Planning

TYSON FOODS





21 Striking It Rich With Demand Modeling: Scenario Planning For Better Supply Chains



With volatile demand and increasing supply chain complexity, do you have a good understanding of the key drivers of your demand? What about the ability to accurately predict and test future demand scenarios? You should, because scenario planning is critical to managing demand in the current business environment. Attend this hand-on session to learn more about how you can use demand modeling to visually explore demand and demand sensitivities, easily model alternate forecasts and quickly access external time series influencers such as weather and economic factors that will help improve your demand prediction. You'll also hear a case study of how a global engine manufacturer has leveraged demand modeling to better understand key demand drivers of engine demand in the oil and gas sector. I'll leave you with a clear understanding of the benefits of demand modeling to your company, and practical tips to get started.

You will learn:

- How demand modeling provides a holistic understanding of your demand, what drives it and why the ability to test and predict short, medium and long-term demand is more critical than ever
- How to leverage external time series influencers to improve your demand prediction
- Examples of how demand modeling is being used to enhance strategic supply chain decision-making

Jeff Metersky

Vice President of Solutions Strategy

Vikram Srinivasan

Product Group Manager Data & Analytics

LLAMASOFT

LLamasoft
Supply Chain By Design

19 Orchestrating Consensus: Leading An Effective Demand Planning Consensus Meeting



Demand Planning Consensus meetings are the pivot point of supply chain success because key stakeholders need to agree on a plan for all functions to work towards order fulfilment in synchronicity. That means getting the consensus meetings right, and that requires some careful orchestration. This session will review who should attend, what the agenda should look like, what pre-work needs to be done, how to manage new product

launches, and more. This interactive session is a primer for those unfamiliar with the process, as well as being a thought provoking session to help experienced demand planners and managers tune up their processes with best practices. You'll come away with the knowledge to integrate Finance, Sales and Marketing insight into the demand plan, as well as POS data, econometrics and weather - and crucially build a framework to pass the information to the relevant parts of the business so all functions are singing from the same hymn sheet. This is the cornerstone of S&OP - come to this session and I'll show you how to get it right.

You will learn:

- The basic logistics of a consensus meeting - who should attend, facilitate, as well as what the content should look like, including the necessary preparation steps beforehand
- How to integrate different internal points of influence over the demand plan (Sales, Marketing and Finance)
- What a typical consensus output looks like and how to pass information to supply planning/S&OP

Patrick Bower

Senior Director,

Global Supply Chain Planning & Customer Service

COMBE INC.

COMBE

20 High Hopes For a New Industry: Managing Supply Chain & S&OP in the Cannabis Industry



The cannabis supply chain is currently a \$5 billion industry, and by 2025 it will grow into a \$15 billion industry. As with all new industries, supply chains in the cannabis space are less than efficient, and there are major opportunities to streamline operations and cut costs by employing S&OP and supply chain management best practices. In this session I'll reveal how one of the major issues impacting profitability in cannabis right now is the lack of transparency and communication, both internally and externally with suppliers. By introducing simple planning and forecasting techniques, a company in this field can create an efficient and predictable supply line. And that is absolutely critical because with the current commoditization of wholesale prices, any interruption in output can have devastatingly expensive consequences. In this nascent industry, companies will proliferate - inevitably some will stick around whilst others will disappear. What will differentiate winners and losers over the next five years is branding, lowest cost production and, crucially, those who run the best supply chain. This talk is also geared for those that have



young supply chains, regardless of industry. Come to this session to learn about a fascinating new industry, its unique dynamics, and how you can use S&OP to drive profitability.


You will learn:

- The unique characteristics of the cannabis market, including key supply chain related issues
- The major opportunities for supply chain professionals in this space
- To demonstrate how S&OP and other supply chain processes will add value by increasing transparency, reducing risks, lowering costs and maximizing profits.

Beau Whitney
Business Operations Expert, Economist
WHITNEY ECONOMICS



21 Conquering Inventory Blindness: Understanding Channel Inventory For Better Forecasting & Planning

 Once your product leaves your dock, truck or salesperson's hands, it is out for delivery and on its way to the customer. At this point, it enters the realm of channel inventory. Channel inventory causes problems for many functions in the business including Sales, Finance, Demand Planning and Supply Chain. Why? Because it is difficult and time consuming to accurately oversee the continuous flow of units in and out of the channel - in short, we have little idea what happens to stock once it's out of our hands. In an ideal world, we would know exactly what retailers are doing with our products so we can better forecast and plan but we don't always have access to this information. Inevitably, this poses risks to the business, both operationally and financially. In this interactive session, you'll be introduced to different approaches to channel inventory management, and learn how the information you gain from channel inventory can be used to strengthen forecasting and decision-making.


You will learn:

- The problems caused by lack of insight into channel inventory
- How each function in the business is affected by lack of visibility into channel inventory
- Different approaches to inventory channel management to allow for better forecasting and planning

Charity Lopez
Forecasting Manager
MONDELÉZ INTERNATIONAL



22 Have Faith in the Forecast: Knowing When to Override Baseline Forecasts

 Forecasters and demand planners work towards a one number forecast, whereby all viewpoints are considered and a consensus is reached. Collaboration is key to this process and sometimes, in an effort to be truly collaborative, forecasters will often override a baseline statistical forecast based on judgemental insight. Sometimes this is the right thing to do, assuming the judgemental insight is valid. Most of the time, however, it does not add value to the forecast. In fact, it can be highly dangerous and can cause the company to operate on a completely false set of assumptions. Machine learning can be used to identify non value added overrides, maximizing the value that experts add to the process, making sure valuable knowledge is incorporated whilst protecting the forecast against erroneous assumptions. In this session we'll discuss forecast variability when overriding and how to gauge the impact, as well as avoiding common pitfalls when deciding to override a forecast. Assessing the value of qualitative information is highly effective - both in terms of leveraging knowledge from other departments, and giving forecasters the confidence to insist on sticking to the baseline when necessary.


You will learn:

- How machine learning can guide users when to override a forecast, and when not to
- How the magnitude and direction of an override impact Forecast Value Add
- Common errors in creating overrides and how to avoid them

Jeff Baker, CPF
Education Advisor
INSITUTE OF BUSINESS FORECASTING & PLANNING (IBF)



23 Watch Out Millennials, Generation PI Is Coming: Future of Data Science & Demand Planning Roles

 Move over Millennials, you have some competition coming. I'm talking about the next generation who are growing up with Siri and Alexa as their parents. The future of Data Science and Predictive Analytics will depend not only on technological advancements but also the people that adapt or use them. In this hands-on session we will take an honest look at the next generation of Data Scientists and Demand Planners and what it will take



to succeed in these fields, and what this evolving role may look like when Generation PI comes of age. I will discuss the current skills gap that holds back the forecasting, demand planning and business analytics disciplines, one that is only set to get worse unless we act. I will reveal what skills and competencies are needed for companies to fully leverage the next stage of technology which includes including Machine Learning, AI and Blockchain.

You will learn:

- The core competencies companies will be looking for in the future and what gaps we currently see.

- Key technology advancements such as Machine Learning, AI, Blockchain and others, and what they mean specifically to us as Demand Planners.
- Options and opinions of the centralized or decentralized role of Data Science and Predictive analytics in the future.

Eric Wilson, CPF

Director of Planning

ESCALADE SPORTS

Director of Thought Leadership

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TOPICS:

- *S&OP and CPFR: Internal and External Collaboration*
- *Talent Management, Future and Core Competencies For a Successful Demand Planning Professional*
- *eCommerce/ Omni-Channel Forecasting, Planning and S&OP*
- *Selling the Value of S&OP and Forecasting to Management*
- *Worst Practices in S&OP & Forecasting*



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KEYNOTE PRESENTER

Tim Hotze, *SVP Global Network Planning and Global Intelligence* | **TARGET**

Tim Hotze is Senior Vice President, Network Planning and Global Intelligence for Target. He oversees Target's future Supply Chain intelligence products as well as end-to-end operational functions for Network and Topology Planning, S&OP, and Guest Order and Availability Management. Before joining Target in November 2017, Tim held a number of leadership roles at Amazon covering Supply Chain Execution, Capacity Planning and Management, Inventory Placement and Labor Planning. He also spent more than a decade at Panalpina World Transport where he had responsibility for worldwide logistics and Supply Chain solutions as well as innovation management. He sat on the board of The Warehouse Education and Research Council and currently sits on the Advisory Board for the Institute of Business Forecasting and Planning (IBF). Tim holds a joint Master's degree in Industrial Engineering, Logistics and Supply Chain from the University of Technology in Darmstadt (Germany).



Jeff Baker, CPF, *Education Advisor* | **INSITUTE OF BUSINESS FORECASTING & PLANNING (IBF)**

Jeff is a Supply Chain Thought Leader, and serves IBF as a Senior Business Advisor, Training Facilitator, and is a frequent IBF conference presenter. He has extensive experience in Demand Management, Sales & Operations Planning, Advanced Planning & Scheduling, and Lean Six Sigma process improvement. He has worked internationally for Fortune 500 companies in the consumer products, agricultural sciences, retail, and process industries. Throughout his consulting career, Jeff has helped clients to improve their demand management, supply/demand balance, and S&OP processes, from strategy through the implementation of the supporting technical systems. He has experience at all levels of the organization, from guiding C-Suite executives to trouble shooting operations. Prior to starting his consulting practice in 2000, Jeff worked in the chemical process industry, and after completing his MBA, spent 3 years with Coopers & Lybrand as a Senior Manager in supply chain optimization. He later worked two and a half years as a senior business solution architect for a leading S&OP systems provider. Jeff has a BS in Chemical Engineering from the University of Illinois, an MBA from the University of Michigan-Flint, and a Master of Engineering in Supply Chain Management from MIT. He is an APICS Master Instructor, and serves as the Past President of the APICS Fox River Chapter in Chicago. Jeff is an IBF Certified Professional Forecaster (CPF).



Gail Berch, *Global Manager of Demand Planning* | **SARTORIUS-STEDIM**

Gail Berch has over 15 years of S&OP, IBP and Demand Planning experience spanning the CPG, Electronics and Pharmaceuticals industries. In her current role, Gail manages the Global Demand Planning and S&OP team for Sartorius-Stedim, covering Europe, North America, and Asia. Her previous experience includes working as S&OP Manager for Twin Laboratories, 10 years as Director of Customer Demand for Revlon, and VP Demand and Inventory Planning at Frederick Gol



Patrick Bower, *Senior Director, Global Supply Chain Planning & Customer Service* | **COMBE INCORPORATED**

Patrick Bower has a wide area of expertise, including S&OP, Demand Planning, Inventory, Network Optimization, and Production Scheduling. A recognized expert on demand planning and S&OP, and a self-professed "S&OP geek" - Patrick was previously Practice Manager of Supply Chain Planning at the consulting firm, Plan4Demand where his client list included Diageo, Bayer, GlaxoSmithKline, Pfizer, Foster Farms, Cabot Industries and American Girl. Patrick's experience encompasses tenures with Cadbury, Kraft Foods, Unisys, and Snapple. Patrick also worked for the supply chain software company - Numetrix, and was Vice President of R&D at Atrion International. He was also the recipient of IBF's 2012 award for Excellence in Business Forecasting & Planning.



Tina Burke, *S&OP Manager* | **CITRIX SYSTEMS, INC.**

Tina is currently the S&OP Manager at Citrix Systems Inc. Her professional experience is interwoven among operations & supply chain, as well as information technology. Her career has seen her work for a range of global multinationals including Boston Scientific, Nestlé and Google, covering a variety of roles including master scheduler, demand planner and S&OP manager and assuming responsibility for the monthly S&OP process, statistical forecasting, production scheduling and more. A data aficionado, she taught herself SQL to pull reports and build analytics to improve decision making. Tina is an APICS Certified Supply Chain Professional, holds an undergrad degree in Finance and Operations, and a Master's in Business Management.



Charles W. Chase, Jr., CPF, *Advisory Industry Consultant* | **SAS INSTITUTE, INC.**

Mr. Chase is an author, thought leader and trusted advisor delivering demand planning and forecasting solutions to improve consumer packaged goods companies supply chain efficiencies. Prior to that, he worked for various companies, including the Mennen Company, Johnson & Johnson, Consumer Products Inc., Reckitt Benckiser PLC, Polaroid Corporation, Coca Cola, Wyeth-Ayerst Pharmaceuticals, and Heineken USA. He has more than 20 years of experience in the consumer packaged goods industry, and is an expert in sales forecasting, market response modeling, econometrics, and supply chain management. He is the author of several books, including Next Generation Demand Management: People, Process, Analytics, and Technology and Demand-Driven Forecasting: A Structured Approach to Forecasting. In addition, he is co-author of Bricks Matter: The Role of Supply Chains in Building Market-Driven Differentiation. He is also the second recipient of the IBF Lifetime Achievement Award as well as a Certified Professional Forecaster (CPF).



Todd Dunn, CPF, Director of Supply Chain | CATALENT

Todd Dunn is currently the Director of Supply Chain for a major pharmaceutical company. He has held several management positions within Supply Chain and Production during his 29 years working for manufacturing and Supply Chain-focused companies. As project manager, Todd had successfully lead organizations to Class A MRPII certification and has facilitated the pre-S&OP and executive S&OP meetings for over 16 years. He holds a BSC degree in Business Management and holds the Michigan Certificate from the Ross School of Business at the University of Michigan. He has been a trainer and speaker at several Supply Chain & Demand Planning events across North America over the past 10 years and is also an IBF Certified Professional Forecaster (CPF) and CPIM certified.



Joe Eschenbrenner, ACPF, Director of Demand and Supply Planning | PUMA NORTH AMERICA

Joe Eschenbrenner serves as Director of Demand and Supply Planning for Puma North America. Joe's current responsibilities are focused in multiple areas, driving "Speed to Market" and "Holistic Operational Efficiency". He manages Demand and Supply Planning, Merchandising, Operations, and Marketing and Sales. Prior to joining Puma North American, Joe was the Global Manager of Demand Planning for the Timken Company which serves diverse industries including Automotive, Heavy Truck, Off Highway, Rail, Wind Energy, Heavy Industries, Power Transmission, Industrial Distribution and Automotive Aftermarket. Joe holds an MBA and Master's Degree in Finance from Rensselaer Polytechnic Institute (RPI) as well as a B.A. in Mathematics and Statistics from the University of Connecticut. Joe is a past President of the Automotive Market Research Council and is ACPF certified through IBF. Joe's Demand Planning systems expertise includes both Logility Voyager and SAP APO.



André Estrella, Regional Asset Planning Manager-LATAM | JOHNSON & JOHNSON

Andre Estrella is a demand planning professional with extensive experience across different industries (Oil, Tobacco, FMCG, Automotive, E-Commerce and Healthcare), and in many different countries across Latin America, Europe, Africa and the Middle East. He has worked in a variety of roles, primarily in marketing and supply chain planning, and currently works as Regional Assets Planning Manager for Johnson & Johnson where he is tasked with optimizing the usage of assets by improving customer service level, improving ROI and decreasing CAPEX and OPEX needs. He started his professional life in marketing strategy and market intelligence, working for British American Tobacco and Repsol, but it was supply and demand planning that captured his imagination, making the transition to a Market Demand Planner role for SC Johnson Wax in 2008. André holds a degree in Business Administration from the Catholic University in Rio de Janeiro, and an MBA from IE in Madrid.



Todd Gallant, ACPF, Vice President of Planning and Allocation | COLE HAAN

Todd Gallant has over 25 years of experience across demand, inventory/supply, service and financial planning. He is currently Vice President of Planning and Allocation for Cole Haan, a brand primarily involved in the footwear industry with an omnichannel distribution approach across internal and external channels. Prior to his current role, Todd was Vice President of Integrated Planning at Deckers Outdoor Group, and spent over 10 years at Timberland/VF Corporation in various VP and Director roles across the planning functions. He is also experienced in the CPG industry, having spent over 10 years at Gillette/Proctor & Gamble. Todd is a member of the Institute of Business Forecasting & Planning (IBF) Board of Advisors, and has served as a keynote speaker & panelist for IBF Executive Forums and conferences. He has also published in the IBF's Journal of Business Forecasting. Todd is an ACPF and holds an MBA from the University of New Hampshire and a Bachelor's in Accounting from Boston College.



Grant Hoffman, CPF, Corporate Vice President of Business Operations | LENOVO

Grant Hoffman is a veteran of Supply Chain with over 17 years of experience in consumer packaged goods (CPG), automotive, and consumer electronics. He currently is the VP of Business Operations at Lenovo. His responsibilities include demand planning, purchasing, materials management, Sales & Operations Planning (S&OP), CPFR, inventory, & supply planning. Prior to joining Lenovo he worked at Motorola Mobility, Continental AG and Del Monte Foods. He holds an undergraduate degree in business and an MBA from Northern Illinois University. He is a member of the Institute of Business Forecasting (IBF) Board of Advisors, and has served as a keynote speaker & panelist for IBF Executive Forums and conferences. Grant is a Certified Professional Forecaster (CPF).



Sandra Janus, Head of Global Demand Planning | HARRY'S

Sandra is the Head of Global Demand Planning for Harry's, a global multi-channel grooming brand. She joined Harry's in 2015 as Senior Associate in Operations, responsible for the planning of their e-commerce business. She made the transition to demand planning at Harry's from a career in investment banking - prior to joining Harry's, she worked at Morgan Stanley as an Investment Banking Analyst, having worked in both New York and Toronto. She received a BA in Business Administration and a BHSc in Health Sciences from the University of Western Ontario in Canada. Trilingual, Sandra speaks English, French and Polish.



Ruttika Joshi, Strategic Pricing Manager | MONDELÉZ INTERNATIONAL

Ruttika Joshi is a Strategic Pricing Manager at Mondelez International. She has over 10 years of experience in pricing, demand planning, and supply chain optimization. She holds a Master's degree in Business Administration from the University of Illinois at Chicago and is a Certified Professional Forecaster (CPF).



Dr. Kenneth Kahn, Senior Associate Dean-School of Business | VIRGINIA COMMONWEALTH UNIVERSITY

Kenneth B. Kahn, Ph.D. is a Professor of Marketing and Senior Associate Dean of the School of Business at Virginia Commonwealth University. His teaching and research interests address product innovation, product management, and demand forecasting of current and new products. He has been published in numerous journals including the Journal of Product Innovation Management, Journal of Business Research, and Business Horizons. He also authored the books Product Planning Essentials and New Product Forecasting: An Applied Approach, and served as editor of the PDMA Handbook on New Product Development. Prior to joining Virginia Commonwealth University, Kenneth was a Professor at Purdue University and Assistant Professor at the University of Tennessee. He holds both a bachelor's and master's in Industrial and Systems Engineering, and a PhD in Marketing.



Elizabeth Knox, CPF, CPA, Senior Demand Planning Manager | BASF

Elizabeth Knox has 17 years of demand planning experience that spans various industries including chemical (BASF), OTC (Bayer) and luxury fragrances (Unilever Cosmetics Co). In her current role, Liz manages the demand planning for BASF's North America Health & Nutrition division, leads a global demand planning community that drives best practices and is an active member of BPOG's Forecasting work stream within its Supply Partner Phorum. Liz has held key player roles on various project teams including system upgrades and development of forecasting software. Prior to moving into the demand planning arena, Liz earned her accounting degree and worked as a public and private accountant. She holds IBF Certified Professional Forecaster certification and a Certified Public Accountants license. She holds a Bachelor of Science in Management, Accounting and Finance.



Carlos Londono, Head of Supply Chain | CHIPOTLE MEXICAN GRILL

Carlos currently leads supply chain on a global level based in Newport Beach, California USA. In the past, he was Director of Value Chain Planning for Starbucks. And prior to that he was Director of Integrated Supply Chain with HJ Heinz where he implemented the next generation of S&OP. Carlos is fluent in German, Spanish and Mandarin. He holds an MBA from the Babcock School of Business at Wake Forest University and an Industrial Engineering degree from EAFIT University in Colombia, South America.



Charity Lopez, Forecasting Manager | MONDELÉZ INTERNATIONAL

Charity is currently the Forecasting Manager of US Cookies and Crackers at Mondelēz International. She has spent the first 6 years of her career in forecasting and Planning where she has enjoyed the opportunity to work with numbers, people, and products. She oversees a team of Forecasters who manage the inputs and forecast for iconic brands such as Oreo, Chips Ahoy!, and Ritz. Prior to Mondelēz, Charity was the Demand Planner and S&OP Lead for Southern Tide, an American apparel company headquartered in her home town of Greenville, SC. She is a Certified Professional Forecaster and holds a degree in Actuarial Science from Bob Jones University and a Masters of Statistics from Clemson University.



Erin Marchant, Global Demand Planning-Landing Systems | UTC AEROSPACE SYSTEMS

Erin Marchant has nearly fifteen years of experience in supply chain - her first love being Demand Planning. After over a decade in consumer goods, Erin has trained her eyes on the skies and is currently serving as the Global Demand Planning Manager for the Landing Systems division of UTC Aerospace Systems. She has implemented APO-DP twice, overseen the creation of Demand Planning and Customer Service Centers of Excellence, and revamped/re-imagined performance metrics and analytics for Demand Planning. Erin is CPIM certified through APICS, and has gone through extensive change management and six sigma (Green Belt) training throughout her career. Erin earned her B.S. in Economics/Political Science from Heidelberg University, an MBA from Ashland University, and an M.S. in Information Architecture and Knowledge Management from Kent State University.



Jeff Marthins, CPF, Director of Supply Chain | TASTY BAKING COMPANY/FLOWERS FOODS

Jeff Marthins is no stranger to the Institute of Business Forecasting & Planning (IBF) as he is a regular workshop leader at conferences and IBF training programs. Jeff is an IBF Certified Professional Forecaster (CPF) since 2006. He joined Tastykake in 1985 and has worked in all facets of manufacturing and planning. His current role is Director of Supply Chain Operations and oversees the Demand Planning Department. Jeff led the production module of a SAP and other software implementations at the company. His background includes many years of manufacturing, which has provided him with a solid platform for the creation and development of the Demand Planning Department. Even though Jeff oversees many facets of the Supply Chain Operation, he still has a passion for Demand Planning and Forecasting. He was also the recipient of IBF's 2016 award for Excellence in Business Forecasting & Planning.



Jeff Metersky, Vice President of Solutions Strategy | LLAMASOFT

As Vice President of Solutions Strategy, Jeff Metersky has global responsibility for designing comprehensive supply chain design solutions comprised of technology, services, support, education and training for future and existing LLamasoft customers. Throughout his career he has consulted in over 100 supply chain design and inventory optimization engagements across a variety of industries and geographies. Prior to joining LLamasoft, Jeff co-founded CHAINalytics and was part of the team that brought i2 Supply Chain Strategist to market. Jeff holds a BS degree in industrial engineering from The University of Illinois and an MBA in materials and logistics management from Michigan State University.



Raul Pantoja, Global Planning Director | MERCK KGAA

Raul Pantoja is Global Planning Director for the Consumer Health Division at Merck KGaA. He is a supply chain professional with 15 years of experience in supply chain management including: supply and demand planning, Integrated Business Planning (IBP/S&OP), network design, inventory and cost optimization, process excellence, project management, supply chain analytics, strategy and talent development. He has led teams in domestic and international operations for consumer goods and pharmaceuticals companies. Prior to joining Merck, Raul held different supply chain roles in companies like Baxter Wyeth and Kraft Foods. He holds a master's degree in Supply Chain Management from Pennsylvania State University and a bachelors in Industrial Engineering from University ICESI in Colombia. He is an APICS Certified Supply Chain Professional (CSCP) and a Lean Six-Sigma Green Belt.



Alan Rozendaal, Director, Demand Planning, Emerging Markets | NIKE

Alan is currently the Asia Pacific Latin America Demand Planning Director for Running and Training categories at Nike. He has been at the company 10 years, spending the last 5 years in Demand Planning. He currently oversees Demand Planning and Inventory activities for 17 countries, 20 distribution centers and over \$1 billion in product sales across Latin America and Southeast Asia. He has also implemented S&OP processes for several product categories. Prior to Nike, Alan's experience was concentrated in 'couch potato' industries, holding Finance and Planning positions with Coors Brewing Company, Dryer's Ice Cream and Hollywood Video. He holds a degree in Business and Accounting from Washington University and an MBA from London Business School.



B. C. Silver, VP, General Manager - National Brands | GREEN DOT CORPORATION

B.C. Silver currently serves as Vice President, General Manager - National Brands for Green Dot Corporation where he oversees all branded consumer products carried nationally in retail and online (over \$1 billion in customer revenue). He also leads end-to-end operational S&OP planning, design and implementation. B.C. has 16 years of S&OP /IBP experience and has implemented S&OP processes in several unique product categories across 6 countries. His subject level expertise ranges from AI and advanced analytics to S&OP initiation. Prior to joining Green Dot, B.C. held a number of senior leadership roles in Marketing, Demand Planning and Sales Planning at Procter & Gamble, Clorox and Mars. He has championed large scale corporate S&OP integration and served as an S&OP consultant to a range of medium and large companies. He holds an MBA from the University of Tennessee.



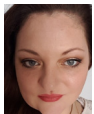
Madison Smart, CPF, Supply Chain Supervisor | DEMDACO

With a passion for process strategy, Madison enjoys challenging the status quo and collaborating with colleagues to develop better tools, processes, and operational paradigms. Since 2003, Madison has worked in roles within the distribution center and on the Supply Chain planning team for DEMDACO, an established wholesale gift company with a growing online retail presence. In his current role, Madison manages the team responsible for forecasting and supply planning across DEMDACO's product categories. Madison graduated from Bradley University with a Bachelor of Science in Industrial Engineering. He is a Lean Six Sigma Green Belt (IASSC) and a Certified Professional Forecaster (IBF).



Vikram Srinivasan, Product Group Manager Data & Analytics | LLAMASOFT

Vikram Srinivasan is Product Group Manager for Data & Analytics Llamasoft and is primarily responsible for managing the data analytics and demand modeling product offerings and defining and prioritizing market requirements. Vikram's expertise spans network and inventory optimization and demand modeling. Prior to his Product Management role, Vikram worked as a Senior Consultant at LLamasoft on multiple projects solving various supply chain design problems. He received his M.S in Industrial Engineering (Major: Operations Research) at The Ohio State University.



Angela Stratton, CPF, Director of Scheduling & Operational Planning | ERWIN HYMER GROUP NORTH AMERICA, INC.



Jennifer Wang, Vice President, Global Planning | ALLERGAN

Jen Wang is a senior supply chain executive with experience in biopharmaceutical, consumer product and medical device businesses. She has implemented S&OP processes for a variety of companies and built sustainable relationships with executive leadership teams, manufacturing sites, and other stakeholders throughout her career. Most recently, as Vice President, Global Planning at Allergan, Jen led a global team of 100 people located across five regional hubs. In this role, she created a supply chain transformation roadmap including the design and implementation of a global planning system and global planning process, reporting and analytics tools. Prior to this, she was Executive Director, Planning for Watson/Actavis Global Generics, and before this, Director, Supply Chain Planning for Johnson & Johnson's \$200M prescription dermatology business. Jen earned an MBA from Harvard Business School and holds a BS in Civil Engineering and Operations Research from Princeton University.



Beau Whitney, Business Operations Expert, Economist | WHITNEY ECONOMICS

Beau Whitney is the senior economist at New Frontier Data, an analytics company specializing in the cannabis industry. Beau brings operations skills and cannabis industry experience to help companies in this nascent field develop their operations. He has extensive experience in supply chain, having worked as Supply Demand Manager at Intel and as Operations Manager at TriQuint. It was at these companies he increased production capacity, a skill he is now applying to companies in the cannabis industry, also drawing on his experience as Chief Operations Officer and Compliance Officer at a large vertically integrated, publicly traded cannabis company. His expertise in cannabis includes growing, extraction, edible manufacturing and wholesale, and retail distribution operations. Beau is also professor of Economics at the University of Phoenix. As an economic and policy analyst, his Whitney Economics and New Frontier Data white papers analyzing the cannabis market have been referenced in Forbes Magazine, USA Today and The Washington Post.



**Eric Wilson, CPF, Director of Demand Planning | ESCALADE SPORTS
Director of Thought Leadership | INSTITUTE OF BUSINESS FORECASTING & PLANNING**

Eric is the Director of Demand Forecasting at Escalade Sports. He has over 20 years' experience in supply chain, analytics, and business forecasting. He is a Certified Professional Forecaster (CPF) and a Board of Advisor member for the Institute of Business Forecasting & Forecasting. Eric has an established record in implementing and managing successful demand planning teams and is considered a visionary in his field. He featured in the Top 20 Pro's to Know by Supply + Demand Chain Executives in 2015, and was given the Excellence in Business Forecasting & Planning award by the IBF in 2016. He is also a frequent speaker and panelist for many executive forums and supply chain conferences, and has written numerous articles in publications such as Journal of Business Forecasting, and APICS Magazine.

TUESDAY | OCTOBER 16, 2018

8:00 am - 9:00 am	TUTORIAL REGISTRATION
9:00 am - 5:00 pm	1-DAY FUNDAMENTALS OF DEMAND PLANNING & FORECASTING TUTORIAL (IBF MEMBERS ONLY-FREE)
5:00 pm - 7:00 pm	EARLY LEADERSHIP FORUM REGISTRATION

WEDNESDAY | OCTOBER 17, 2018

8:00 am - 8:00 pm	IBF'S LEADERSHIP BUSINESS PLANNING & FORECASTING FORUM W/ VIP DINNER & RECEPTION
5:00 pm - 7:00 pm	EARLY CONFERENCE REGISTRATION

THURSDAY | OCTOBER 18, 2018

7:00 am - 8:00 am	REGISTRATION & VISIT WITH EXHIBITORS BREAKFAST SPONSORED BY 		
8:00 am - 8:15 am	WELCOME ADDRESS Anish Jain, <i>Managing Director</i> INSTITUTE OF BUSINESS FORECASTING & PLANNING (IBF)		
8:15 am - 8:55 am	IBF'S BUSINESS FORECASTING & PLANNING AWARDS RECOGNITION CEREMONY		
	ESSENTIAL	NEXT-LEVEL	VANGUARD
9:00 am - 9:55 am	1 Back to Basics: Demand Planning Fundamentals in the Technology Age Erin Marchant <i>Global Demand Planning - Landing Systems</i> UTC AEROSPACE SYSTEMS	2 Engaging Senior Leadership in S&OP B. C. Silver <i>VP, General Manager - National Brands</i> GREEN DOT CORPORATION	3 Mission Critical: Making The Strategic Shift From Integrated to Omni-Channel Planning Todd Gallant, ACPF <i>Vice President of Planning and Allocation</i> COLE HAAN
10:00 am - 10:55 am	4 You Can't Improve What You Don't Measure: Defining and Measuring Forecasting & Planning Best Practices Elizabeth Knox, CPF, CPA <i>Senior Demand Planning Manager</i> BASF Gail Berch, <i>Global Manager of Demand Planning</i> SARTORIUS-STEDIM	5 Here Today, Gone Tomorrow: Demand Management and Software Solutions for Short Life Cycle Product Joe Eschenbrenner, ACPF <i>Director Demand Planning</i> PUMA NORTH AMERICA	6 Synchronize To Optimize: Connecting Demand and Supply Chain Planning With Business & Operations Strategy Raul Pantoja <i>Global Planning Director</i> KGAA
10:55 am - 11:10 am	MORNING BREAK VISIT WITH EXHIBITORS		
11:10 am - 12:05 pm	7 New Product, New Risk Opportunity: What You Need to Know About New Product Forecasting Dr. Kenneth Kahn <i>Senior Associate Dean - School of Business</i> VIRGINIA COMMONWEALTH UNIVERSITY Charles Chase, CPF <i>Executive Industry Consultant/Advisor</i> SAS INSTITUTE	8 Building a Truly 21st Century Business: How to Develop A Data Driven Culture with Better Data Management Angela Stratton, CPF <i>Director of Scheduling & Operational Planning</i> ERWIN HYMER GROUP NORTH AMERICA, INC	9 Safety Dance: Managing Safety Stock For New Products & Improved Cashflow Ruttika Joshi <i>Strategic Pricing Manager</i> MONDELÉZ INTERNATIONAL
12:05 pm - 12:45 pm	LUNCH SPONSORED BY 		
12:45 pm - 1:25 pm	KEYNOTE PRESENTATION How Target is Winning the eCommerce & Retail Battle With Demand Planning and Data Science Tim Hotze, <i>SVP Global Network Planning and Global Intelligence</i> TARGET		
1:25 pm - 1:55 pm	VISIT WITH EXHIBITORS		
1:55 pm - 2:50 pm	10 Big Data Needs Big Skillsets: Evolving Employee Requirements in Demand Planning Jason Breault <i>Managing Director</i> LIFEWORXSEARCH	11 Razor Sharp Forecasts: How Harry's.com Tailored Their S&OP Process To Direct-To-Consumer Forecasting Sandra Janus <i>Head of Global Demand Planning</i> HARRY'S	12 A Picture Is Worth a Thousand Data Points: Graphical Analogy Forecasting Madison Smart, CPF <i>Supply Chain Supervisor</i> DEMDACO
2:55 pm - 3:50 pm	13 State of Employment in Demand Planning Todd Dunn <i>Director of Supply Chain</i> CATALENT	14 Just Do It: How Nike Successfully Centralized Demand Planning Alan Rozendaal <i>Director, Demand Planning, Emerging Markets</i> NIKE	15 How Citrix Uses Salesforce.Com Data to Forecast and Determine Production Builds Tina Burke <i>S&OP Manager</i> CITRIX SYSTEMS, INC
3:50 pm - 4:05 pm	AFTERNOON BREAK VISIT WITH EXHIBITORS		
4:05 pm - 5:05 pm	ROUND ROBIN ROUNDTABLE DISCUSSIONS		
5:15 pm - 6:15 pm	IBF COCKTAIL RECEPTION SPONSORED BY 		

FRIDAY | OCTOBER 19, 2018

7:00 am - 8:00 am	MORNING REFRESHMENTS VISIT WITH EXHIBITORS		
8:00 am - 8:55 am	16 United We Stand, Divided We Fall: How Demand Planning, Supply Chain and S&OP Work Together to Drive Growth Jeffrey Marthins, CPF <i>Director of Supply Chain</i> TASTY BAKING COMPANY / FLOWERS FOODS	17 Season With S&OP: How Tyson Foods Serves Up Great Tasting Foods with Demand Planning Adrian R. Vickery <i>Senior Manager, Demand Planning</i> TYSON FOODS	18 Striking It Rich With Demand Modeling: Scenario Planning For Better Supply Chains Jeff Metersky <i>Vice President of Solutions Strategy</i> Vikram Srinivasan <i>Product Group Manager Data & Analytics</i> LLAMASOFT
9:00 am - 9:55 am	19 Orchestrating Consensus: Leading An Effective Demand Planning Consensus Meeting Patrick Bower <i>Senior Director, Global Supply Chain Planning & Customer Service</i> COMBE INC.	20 High Hopes For a New Industry: Managing Supply Chain & S&OP in the Cannabis Industry Beau Whitney <i>Business Operations Expert, Economist</i> WHITNEY ECONOMICS	
9:55 am - 10:10 am	MORNING BREAK VISIT WITH EXHIBITORS		
10:10 am - 11:05 am	21 Conquering Inventory Blindness: Understanding Channel Inventory For Better Forecasting & Planning Charity Lopez <i>Forecasting Manager</i> MONDELÉZ INTERNATIONAL	22 Have Faith in the Forecast: Knowing When to Override Baseline Forecasts Jeff Baker, CPF <i>Education Advisor</i> INSITUTE OF BUSINESS FORECASTING & PLANNING (IBF)	
11:10 am - 12:05 pm	23 Watch Out Millennials, Generation PI Is Coming: Future of Data Science & Demand Planning Roles Eric Wilson, CPF, <i>Director of Planning</i> ESCALADE SPORTS <i>Director of Thought Leadership</i> INSTITUTE OF BUSINESS FORECASTING & PLANNING		
12:10 pm - 12:25 pm	CLOSING REMARKS		

CONFERENCE CONCLUDES

SATURDAY | OCTOBER 20, 2018 | EXAM DAY 8:30AM - 4:30PM | IBF CERTIFICATION EXAMS | CPF & ACPF GOOD LUCK!

BUSINESS PLANNING FORECASTING & S&OP

BEST PRACTICES CONFERENCE

w/ LEADERSHIP FORUM & 1-DAY FORECASTING & PLANNING TUTORIAL

ORLANDO, FLORIDA USA | OCTOBER 16-19 2018

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EARLY BIRD PRICING Expires September 25, 2018	\$1,499(USD)	\$1,649(USD)	\$2,099(USD)	\$4,098(USD)	\$2,249(USD)	\$4,398(USD)	\$6,747(USD)	\$1,199(USD)	\$2,298(USD)	\$3,424(USD)
REGULAR PRICING Expires OCTOBER 15, 2018	\$1,599(USD)	\$1,749(USD)	\$2,199(USD)	\$4,298(USD)	\$2,349(USD)	\$4,598(USD)	\$7,047(USD)	\$1,299(USD)	\$2,498(USD)	\$3,528(USD)
ONSITE PRICING	\$1,699(USD)	\$1,849(USD)	\$2,299(USD)	\$4,498(USD)	\$2,449(USD)	\$4,798(USD)	\$7,347(USD)	\$1,399(USD)	\$2,698(USD)	\$3,624(USD)
IBF MEMBERSHIP DISCOUNT \$100 USD OFF	Eligible	Included	Eligible	N/A	Included	Included+	Included+	Eligible	N/A	Included
LEADERSHIP FORUM OCTOBER 17, 2018			✓	✓	✓	✓	✓	✓	✓	✓
VIP LEADERSHIP DINNER & ENTERTAINMENT OCTOBER 17, 2018			✓	✓	✓	✓	✓	✓	✓	✓
BEST PRACTICES CONFERENCE OCTOBER 18-19, 2018	✓	✓	✓	✓	✓	✓	✓			✓
BREAKFAST & LUNCH	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
COCKTAIL RECEPTION OCTOBER 18, 2018	✓	✓	✓	✓	✓	✓	✓			✓
1-DAY FORECASTING & PLANNING TUTORIAL OCTOBER 16, 2018 (Active IBF Members ONLY)		✓			✓	✓	✓			✓
IBF MEMBERSHIP (1 YEAR)		✓			✓	✓	✓			✓
IBF CPF CERTIFICATION EXAMS										✓
FUNDAMENTALS OF DEMAND PLANNING & FORECASTING BOOK										✓

CERTIFICATION FEE (OPTIONAL)

Non-Members: \$425 (USD) per exam

IBF Members: \$375 (USD) per exam

CPF/ ACPF Exams will take place OCT 20, 2018

Please circle which Exam(s) you are interested in taking 1 2 3 4 5

PLEASE REGISTER THE FOLLOWING: (Photocopy if more than 1 Registrant)

Become an IBF Member \$250 (USD) within USA \$300 (USD) outside USA

First Name _____ Last Name/Surname _____

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Payment: Payment in full is required 15 days prior to scheduled date of conference. Unless payment is received by that day, your registration will be canceled.

Cancellations: Registrant may cancel without penalty up to 15 days prior to the date of scheduled conference and receive a full refund. All cancellations must be submitted in writing. Cancellations received less than 15 days prior to scheduled conference are subject to a \$195(USD) service charge. No refunds will be given for cancellations made on the date and thereafter of scheduled conference.

The Institute of Business Forecasting & Planning - IBF, reserves the right to substitute, eliminate, and/or reschedule sessions and speakers if necessary. Plus, as a registrant, you agree that you may be included in group pictures or videos taken at the event that could be used for IBF marketing purposes in the future.



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