

S&OP AND IBP BOOT CAMP

AS PART OF THE IBF'S BOOT CAMP SERIES

FEBRUARY 12-13, 2018 | SCOTTSDALE, ARIZONA USA

WHAT OTHERS HAVE SAID ABOUT OUR BOOT CAMP LEADERS

“Excellent engagement and instruction”

J. Piechule, CPF
Senior Manager, Supply Chain
SARTOMER

“The tutorial was great. Examples were very relevant and able to use concepts immediately”

W. Valiant
Director Supply Chain Management
KENT

“Topics were well laid-out, in manageable and digestible sizes to cover the info without getting bogged down. Enjoyed hearing real-life examples of companies or situations”

H. Snoek
Demand Planning
CANADA BREAD



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S&OP AND IBP BOOT CAMP

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IBF'S S&OP AND IBP BOOT CAMP is an interactive, immersive, hands-on program that will offer attendees the opportunity to roll up their sleeves and learn from IBF thought leaders in the field. It will help you to learn how to successfully implement S&OP and advance the process with Integrated Business Planning (IBP). You will also learn how to improve your forecasting and demand planning process from the ground up which is the critical initial step of the overall S&OP process. This will help you maximize the value from your planning software investments, as well as reach S&OP and IBP excellence.

CASE STUDIES will feature actual demand and supply scenarios that organizations will face working towards an aligned path forward within the process.

FURTHERMORE, AT THE EVENT, YOU WILL INTERACT AND LEARN FROM LIKE-MINDED PROFESSIONALS dealing with the same challenges as yourself in S&OP, Demand Planning, Forecasting, and predictive business analytics. There will be group exercises to maximize the learning and increase your professional network.

Plus, add to your credentials! This program will support preparation for the IBF Certification exams.

This event is part of the **IBF'S BOOT CAMP SERIES. SEE IBF'S DEMAND PLANNING & FORECASTING BOOT CAMP** taking place March and December 2018.



S&OP AND IBP BOOT CAMP

DAY 1 | MONDAY | FEBRUARY 12, 2018

8:30 am – 11:55 am | MORNING SESSION

S&OP & IBP OVERVIEW (WHAT, WHY)

An introduction to Integrated Business Planning (IBP) & S&OP and why its important

- IBP/S&OP Process Overview
- Maturity model & barriers to advancement
- Cross-functional involvement
- External collaborative processes

DATA GATHERING

How to select, clean, and manage data for greater IBP & S&OP performance

- The nature and characteristics of data
- Selecting data hierarchies that facilitate collaboration
- How to account for structural changes in your data
- How to handle outliers and adjust for missing data
- How to adjust for market anomalies, natural disasters and unplanned events

DEMAND REVIEW – DEMAND PLANNING FUNDAMENTALS

Fundamentals of Demand Planning in the IBP & S&OP process

- Role of Demand Planning and Forecasting in the Organization
- Responsibilities/Accountability
- Benefits and its impact on supply chain, management decisions, financial plans
- Forecast versus the Financial Plan
- How and When to Override the forecast



DAY 1 | MONDAY | FEBRUARY 12, 2018

DEMAND REVIEW - FORECASTING FUNDAMENTALS

Fundamentals of Forecasting in the IBP & S&OP process

- Forecastability analysis
- Forecasting techniques – qualitative, time series, and regression
- Translating brand/family forecasts to SKU level through disaggregation

12:00 PM – 1:00 PM | LUNCH

1:00 PM – 4:30 PM | AFTERNOON SESSION

DEMAND REVIEW - PRODUCT PORTFOLIO & LIFE-CYCLE MANAGEMENT

Fundamentals of Product Portfolio Management, New Product & End of Life Planning in the S&OP & IBP process

- Reducing complexity through portfolio management
- New product introduction forecasting
- End of Life management

DEMAND REVIEW - FORECAST ERROR MEASUREMENT

Metrics for assessing forecasting & planning performance

- Importance of error measurement and analysis
- Monitoring, reducing, and cost of error
- Measuring accuracy, bias, and value add
- Introduction to Scenario Planning: Upsides and Downsides

SUPPLY REVIEW

Fundamentals of the Supply Review in the IBP & S&OP process

- Capacity Management
- Bill of Resources and Resource Planning
- Inventory planning
- Additional constraints to consider

Q&A



DAY 2 | TUESDAY | FEBRUARY 13, 2018

8:30 am – 11:55 am | MORNING SESSION

PRE-S&OP MEETING

Preparing in Advance for the S&OP Meeting

- Inputs from Demand and Supply Review meetings
- Meeting objectives, role of facilitator and participants
- Facilitation skills to gain alignment with Pre-S&OP stakeholders
- Addressing the inherent bias that exists within areas of the business
- Development of key actions and recommendations for the Executive S&OP meeting

IBP & EXECUTIVE S&OP MEETING

How the meeting drives decision making and is the Top-handle on the business

- Meeting overview, agenda and outcomes
- S&OP process horizon and timelines
- New Product Planning visibility within IBP & S&OP
- Financial Planning & Analysis (FP&A) / Annual Operating Plan
- The decision-making process within the meeting
- Risk management and mitigation
- Scenario planning
- Strategic management and direction recommendations

12:00 PM – 1:00 PM | LUNCH

DAY 2 | TUESDAY | FEBRUARY 13, 2018

1:00 PM – 4:30 PM | AFTERNOON SESSION

S&OP PROCESS MEETING BARRIERS TO SUCCESS & CREATING PARTICIPANT ACCOUNTABILITY

Highlights and challenges with the S&OP process and options to mitigate

- Gaining Buy-in to the process from key stakeholders
- Maintaining the S&OP process with Management organizational changes
- Tools to measure and improve for more effective S&OP process meetings
- Building the bench for a sustainable process in the future

STAKEHOLDER ALIGNMENT – KEEPING PARTICIPANTS ACTIVELY ENGAGED IN THE PROCESS

An on-going method for continuous improvement to keep IBP & S&OP alive and meaningful.

- Formalizing the process to create sustainability for the future
- Incorporating continuous improvement tools into IBP & S&OP
- Maintaining and improving participation in IBP & S&OP
- Participant feedback mechanism to strengthen the overall process

CASE STUDIES

- Team exercise to evaluate scenarios and develop a recommendation for decision
- Open group review and discussion on alternatives available
- Communicating the approved recommendation to the organization

Q&A

BOOT CAMP CONCLUDES



Jeff Baker, CPF
Consultant
Institute of Business Forecasting & Planning

Jeff Baker is the founder of Libra Consulting. Jeff has an extensive background in Demand Management, Sales & Operations Planning, Advanced Planning and Scheduling, and Lean Six Sigma process improvement. His past roles led him to work internationally for Fortune 500 companies in the consumer packaged goods, agricultural sciences, and chemical process industries. Throughout his consulting career, Jeff has assisted a myriad of clients to improve their supply chain processes, from strategy through implementation. Prior to starting his consulting practice in 2000, Jeff worked in the chemical process industry, and after completing his MBA was three years with Coopers & Lybrand as a Senior Manager in their supply chain optimization practice. Jeff has a BS in Chemical Engineering from the University of Illinois, and an MBA from the University of Michigan-Flint and he is an IBF Certified Professional Forecaster (CPF).



Todd Dunn, CPF
Director of Supply Chain
Accucaps

Todd Dunn is currently the Director of Supply Chain at Accucaps Industries Limited. He has held several management positions within supply chain and production within his 29 years of manufacturing experience. He was the project manager to successfully lead his organization to Class A MRPII certification. He has facilitated the pre-S&OP and executive S&OP meetings for over 15 years. He holds a BSc degree in Business Management and obtained the Michigan Certificate from the Ross School of Business at the University of Michigan. He has been a speaker at several Supply Chain & Demand Planning events across North America over the past 8 years covering topics related to Demand Management and S&OP. Todd is an IBF Certified Professional Forecaster (CPF).

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Benefits of IBF Certification

FOR EMPLOYEES:

- Accelerate your career growth, leadership opportunities, marketability, and job security
- Validate your professional experience, knowledge, and skill-sets in the field
- Build confidence knowing that you're prepared for today's rapidly changing marketplace
- Complement your supply chain education & certifications with IBF
- Become more recognized at your company, as well as in the field
- Master demand planning, forecasting and S&OP

GET CERTIFIED AFTER THE EVENT!

Please visit www.ibf.org for exam dates and locations.

Register on our website, www.ibf.org or call us

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FOR EMPLOYERS:

- Save time and resources as IBF certified individuals are pre-qualified, allowing you to quickly identify the right person for a forecasting/demand planning job
- Gain assurance that an IBF Certified individual has the background to help improve forecasting and S&OP/ IBP performance and hit the ground running
- Increase the value of your forecasting and demand planning staff, department, and company
- Save time and resources in training — CPF or ACPF professionals already have a verified body of knowledge

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Registration Type	Silver Package	Gold Package	Silver Group Package (2 Persons)	Gold Group Package (2 Persons)	Gold Group Package (4 persons for price of 3)	Gold Certify Package
SUPER EARLY BIRD PRICING EXPIRES DECEMBER 21, 2017	\$1,299 (USD)	\$1,449 (USD)	\$2,498 (USD)	\$2,798 (USD)	\$4,347 (USD)	\$2,549 (USD)
EARLY BIRD PRICING EXPIRES JANUARY 22, 2018	\$1,399 (USD)	\$1,549 (USD)	\$2,698 (USD)	\$2,998 (USD)	\$4,647 (USD)	\$2,649 (USD)
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IBF MEMBERSHIP DISCOUNT \$100 (USD) OFF	ELIGIBLE	INCLUDED	N/A	INCLUDED +	INCLUDED +	INCLUDED
IBP/ S&OP BOOT CAMP February 12-13, 2018	YES	YES		YES	YES	YES
1 YEAR SUBSCRIPTION TO JOURNAL OF BUSINESS FORECASTING (INCLUDED WITH IBF MEMBERSHIP)		YES		YES	YES	YES
ACCESS TO 30+ YEARS OF ARTICLES AND IBF RESEARCH (INCLUDED WITH IBF MEMBERSHIP)		YES		YES	YES	YES
ACCESS TO COST OF FORECAST ERROR TEMPLATE (INCLUDED WITH IBF MEMBERSHIP)		YES		YES	YES	YES
CONTINENTAL BREAKFAST & LUNCH	YES	YES	YES	YES	YES	YES
SIGNIFICANT DISCOUNTS AT FUTURE IBF EVENTS (INCLUDED WITH IBF MEMBERSHIP)		YES		YES	YES	YES
FREE FORECASTING TUTORIAL AT SELECT IBF EVENTS (INCLUDED WITH IBF MEMBERSHIP, \$1000 Value)		YES		YES	YES	YES
BENCHMARKING RESEARCH REPORTS (INCLUDED WITH IBF MEMBERSHIP)		YES		YES	YES	YES
IBF CPF CERTIFICATION EXAMS						YES
FUNDAMENTALS OF DEMAND PLANNING & FORECASTING BOOK						YES

CERTIFICATION FEE (OPTIONAL)

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

IBF Members: ☐ **\$375** (USD) per exam

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)

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Payment: Payment in full is required 15 days prior to the scheduled date of the event. 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 event and receive a full refund. All cancellations must be submitted in writing. Cancellations received less than 15 days prior to scheduled event are subject to a \$195 (USD) service charge. No refunds will be given for cancellations made on the date and thereafter of scheduled event.

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.

