

IBF RECERTIFICATION: 10 POINTS

# BUSINESS PLANNING FORECASTING & S&OP

BEST PRACTICES CONFERENCE

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

ORLANDO, FLORIDA USA | OCTOBER 24-27 2017

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**Institute of Business  
Forecasting & Planning**

TEL: +1.516.504.7576 | EMAIL: [info@ibf.org](mailto:info@ibf.org) | WEB: [ibf.org/1710.cfm](http://ibf.org/1710.cfm)

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 28, 2017.**

**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)**

**WEDNESDAY | OCTOBER 25 | 8:00AM - 8:00PM (INCLUDES VIP DINNER)**

**LEADERSHIP**

**BUSINESSPLANNING FORECASTING & S&OP**

**F O R U M**



**Executive Stream 1:**

The Building Blocks of Greater Insight and Strategy: Designing & Maintaining a Successful Demand Planning Organization

**Executive Stream 2:**

Embracing the Revolution: Surviving and Thriving in A Disruptive Business Environment With Integrated Business Planning and S&OP

**Executive Stream 3:**

A Matter of Life and Death: Optimizing Your Product Portfolio Through Integrated Lifecycle Management

**Executive Stream 4:**

Taking Responsibility for Your Own Skills Shortage: Talent Management To Build the Next Generation of Planning Professionals

**PANELISTS (partial list):**

- Patrick Bower, Senior Director, Global Supply Chain Planning | **COMBE INC.**
- Rick Davis, Vice President and Global Lead, Office of Data Acquisition and Governance | **KELLOGG'S**
- Todd Dunn, CPF, Director of Supply Chain | **ACCUCAPS LIMITED**
- Dele Oladeji, Group Director, Forecasting and Inventory Management | **THE COCA-COLA COMPANY**
- Steven Hainey, CPF, Director of Supply Chain | **NEWELL BRANDS**
- Dustin Deal, Director of North American Business Operations | **LENOVO**

- Larry Lapide, Research Affiliate | **MIT CENTER FOR TRANSPORTATION & LOGISTICS**
- Carlos Londono, Vice President, Global Supply Chain | **OCI**
- Jeff Marthins, CPF, Director of Supply Chain | **TASTYKAKE / FLOWER FOODS**
- Sara Park, Group Director, CCNA Forecasting | **THE COCA-COLA COMPANY**
- Brinson Silver, Senior Director | **MONSTER ENERGY**
- Peter C. Thomas, CPF, Head of Demand Planning & Forecasting | **DUPONT CROP PROTECTION**
- Ken Young, Senior Director, S&OP | **YOUNG'S MARKET COMPANY**



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



This session will cover the topic of an article in the IBF's Journal of Business Forecasting Spring 2017 edition. The start of the monthly S&OP cycle is driven by the strength and success of the Demand Review process and formal presentation of the latest demand for the organization. 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  
**ACCUCAPS LIMITED**



**2 The Journey to Demand Planning Excellence and Using Less Conventional Forecasting Approaches**



During the past decade most firms have performed projects to improve their demand planning processes. Many have invested heavily in new technology, and process consulting. Business leaders have dedicated major resources to these efforts and they are looking for direct improvements in profits and working capital performance. BASF, the world's leading chemical company, is among those firms who recognized the critical role of demand planning in the business. For more than a decade, the firm has been addressing improvement of the demand planning process from a people, process, and technology perspective. The journey has included investments in technology to improve predictive analytics and to provide descriptive analytics regarding performance. New process steps such as ABC-XYZ volume-variance analysis have improved the ability to identify those items for which conventional forecasting is not the best approach. Those involved in demand planning have received education and training in statistics & math, use of the forecasting software system and process knowledge. While much progress has been made, the journey continues.

**You will learn:**

- The correct approach to simultaneously developing people skills, advancing technology and improving demand planning processes
- Key success factors for effective demand planning and barriers to progress based on actual case studies
- How to leverage analytics (e.g. reports, metrics, etc.) to ensure continuous improvement

**Alan L. Milliken, CPF**  
 Senior Manager - Supply Chain Capaility Development  
**BASF**



**3 Calling All Marketing and Forecasting Professionals: How You Can Collaborate to Set Best Prices for Maximum Profit**



Over the years, companies have only looked at unit forecasts, but there is also great opportunity in shaping demand forecasts with pricing. As the tools, processes and capabilities around unit forecasting matures, we must also improve the capabilities of price forecasting. This means taking our insight into future



demand and looking at the sensitivity of pricing to optimize sales and margins. This way, Marketing can be more confident in their strategies, and Finance more confident in terms of financial outlook and whether budgets will be met. In this hands-on session, I will reveal how market analysis, customer behavior, company objectives and contract terms and conditions help to better understand product pricing for greater impact. We will touch upon dynamic pricing often used by eCommerce merchants to optimize sales as well. Certainly, changes in prices is a major upheaval for any business: do new prices impact the brand, has the target demographic changed, will new marketing campaigns be required, do geographic regions vary, and do existing accounts restrict price increases? Price forecasting is a wonderful tool to squeeze the most profit out of products, but it requires engagement with Sales and Marketing to reap the benefits and overcome these variables. If you're a marketing professional or price forecaster looking to understand the wider strategy behind better pricing, this session is not one to miss.

**You will learn:**

- To understand the correlation between unit forecasting and price forecasting concepts
- To differentiate between long-term price forecasting versus short term price forecasting models
- To understand the potential approaches and capability improvements that can be made to improve price forecasting models


**Rakesh Tripathy**

Senior Manager, Integrated Business Planning

CISCO SYSTEMS



## 4 Change Management 101: Get the Buy-in You Need to Build a New Organization

 When I was tasked with building a Demand Planning team from scratch, I faced one major problem: lack of buy-in and engagement. I soon realized that without a strong desire from all stakeholders to implement changes, the project was doomed to failure. What I was doing wasn't simply building a new team of demand planners, I was attempting to implement seismic structural changes that would upset the way that all departments worked, and that would require a fundamental shift in company culture. How does one person deliver that kind of change? I needed a strategy that incorporated leadership, organizational culture, business needs and demand drivers. In short, I had to look beyond building a team of demand planners, and quickly become an expert in Change Management. In this session, I will reveal the importance of ascertaining your firm's ability to change, and identify the reasons it is needed.

These positive reasons must then be communicated to all stakeholders. Only then will there be sufficient engagement to implement the processes and systems to establish a new demand planning organization. I will also discuss how to develop a public relations program to counter resistance, as well as methods for measuring performance to ensure objectives are being achieved. I succeeded in building a demand management team that has delivered 5 point forecast accuracy improvement and over \$70 million inventory reduction. Come to this hands-on session and I will arm you with key insights and practical tips to deliver similar changes in your organization.

**You will learn:**

- How to develop a plan for implementing organizational design and identify and communicate key behavior changes
- Key considerations for achieving buy-in, including staffing, culture, business needs, and demand drivers
- How to effectively manage change through competency building, assessments, and reinforcement

**Peter C. Thomas, CPF**

Head of Demand Planning & Forecasting

DUPONT CROP PROTECTION



## 5 Managing Forecasting & Planning From Massive Change at Coca-Cola: Refranchising the Bottling System for the World's Most Popular Drink



Coca-Cola North America is embarking on one of the most challenging and complex transformations it has ever experienced - refranchising the Bottling System. With this major go-to-market change, the newly formed forecasting team must rely on more effective collaboration, both internally with various cross-functional teams as well as externally with bottlers and customers. In this interactive session, you will learn how a core team is addressing this massive change in the business model to bring clarity and transparency to the financial forecasting activities and supply chain planning.

**You will learn:**

- The challenges currently faced by the business in refranchising the Bottling System
- The importance of implementing a process that incorporates inputs from important business partners, both internally and externally
- How to develop a plan for handling massive business change and building processes to maintain robust forecasts amidst upheaval

**Sara Park**

Group Director, CCNA Forecasting

THE COCA-COLA COMPANY





## 6 A Look Into the Crystal Ball: Future-Proofing Your Demand Planning Career



It is both an exciting and uncertain time for analytical professions. The speed of growth in data capturing is astounding, and the capabilities for processing, visualizing, and yielding insights from data are growing exponentially each year. Companies owning this change curve are investing in new and exciting uses for data; disrupting industries, influencing consumer behaviors, and defining new business norms. What insights can we derive from these early adopters? What emerging skills, technology platforms, and correlations to other analytical practices can Demand Planning take cues from? In this interactive session, one of the industry's thought leaders will take a peek into his crystal ball to make his predictions in these areas. Like all forecasts, this soothsayer's predictions may not prove to be perfectly accurate but anticipate potential scenarios. My aim for this session is to arm you the knowledge to future-proof your career in Demand Planning.

### You will learn:

- What type "big data" we can expect businesses to be collecting in the future
- What kinds of artificial intelligence and machine learning may be leveraged in demand planning
- Emerging skills that will be sought-after in the new landscape of Data Sciences and how day-to-day life of Demand Planner will evolve

**Andrew D. Schneider, ACPF**  
Global Demand Manager, Supply Chain  
**MEDTRONIC**



## 7 Demand Planners Are Not Born, But Cultivated: How to Find and Keep the Right Talent



In this session, we will discuss some of the challenges facing planning organizations in talent management. There is a very serious gap in the employment pool which makes finding the right talent for your forecasting and demand planning roles very difficult. What can we do to ensure we have the talent necessary to support our business both now and into the future? The reality is that demand planners are not born, but rather cultivated within organizations. Graduates in economics, supply chain, or mathematics are not hard to find, but getting them to a point where they add value as demand planners and forecasters takes time, investment and commitment. In this hands-on session, I will share what makes ideal candidates and the skills and behaviors you should look out for that you can build upon with guidance and training. I will also discuss how to create a nurturing environment that allows your quantitatively-minded graduates to be both data gurus and storytellers, who can both number crunch and explain the conclusions

to various stakeholders. Come to this session and I'll show you how at we at Siemens create an environment where people are continually growing, how we build strong teams, and inspire professionals to out-perform.

### You will learn:

- Key attributes of successful planning organizations and the core skills required
- Behaviors and skills that deliver value to your forecasting output
- How to build adaptable teams by identifying the right people and delivering the right training

**Kristie Bane, ACPF, Demand Planning Manager** **SIEMENS**  
**SIEMENS BUILDING TECHNOLOGIES**

## 8 Tapping into the Data Goldmine: How to Exploit Supply & Demand Analytics, Data Management, and Metrics



With the technology available today, there is a tremendous amount of data available for effective supply chain management. Companies must now transform massive amounts of data into business intelligence using analytics, but understanding how to harness this innovation for more robust planning is not easy. In the supply chain and demand planning functions, the goal is to convert the mass of both structured and unstructured data into value-added insight to help improve service, reduce costs, improve inventory management, and increase profits. How do we accomplish this and what metrics are most appropriate to measure performance? This presentation will discuss the journey to becoming "practitioners" at "managing the analytics" for the planning process.

### You will learn:

- How to use descriptive analytics (e. g. reports, KPI's, dashboards) to report on performance metrics and determine plans for possible change
- How to use predictive analytics to improve forecasting, customer relationship management and inventory control
- How to determine when to use judgement or qualitative measures instead of analytics for better planning and forecasting

**Brinson Silver, Senior Director**  
**MONSTER ENERGY**



## 9 Omni Channel Meets S&OP: How to Integrate Omni Channel into Your S&OP Process



Omni Channel is here to stay, and incorporating it into S&OP should be any organization's top priority. S&OP for Direct to Consumer is a different beast, but share similarities with B2B S&OP. The questions to be answered are: at what point do these meet, how do they



interact, and how do demand planners manage these two concepts within their existing S&OP process? Direct to Consumer relies on trip hammer responsiveness from the supply chain, where demand planning and S&OP need to adjust to help organizations run effectively and efficiently over different horizons. In this session, we will look closely at the synergy between fast paced Direct to Consumer and mid to long range supply chain planning, and what you need to understand to make them work effectively together. I will discuss specific measures to integrate Omni Channel into your S&OP process and vice versa with practical takeaways you can incorporate straight away, as well as the benefits of developing a symbiotic demand planning approach. If you're struggling to adapt your demand planning to the changing retail landscape, this session is for you.

**You will learn:**


- What exactly Omni Channel is and how companies are leveraging these concepts to change their business models
- How Omni Channel and Direct to Consumer inputs feed the demand planning process for better company performance
- Where Omni Channel fits into the S&OP process and specific Omni Channel measures to integrate into your existing process

**Patrick Bower**

Senior Director, Global Supply Chain Planning  
COMBE INC.



## 10 Forecast Bias Is Your Achilles Heel: Choosing Between Centralized & Decentralized Planning for Maximum Objectivity

 We know that independent business planning/forecasting is critical to minimize forecast bias and to serve as a check and balance to other business functions, but what organizational options are there and what is best? Do you know the differences between centralized planning and decentralized planning, and how they can benefit your business? If not, you have golden opportunity to make positive changes. In this session, I will reveal how both can add value, and which one you should implement according to the needs of your company. I will give practical advice on which functions to include in the business planning organization, so you have the right people leading change in your firm. I will also reveal which departments have a tendency for over-forecast bias, which departments act as a check and balance on this bias, and how independent Standalone Planning cuts out many of the factors that cause forecast bias - but at the cost of limited influence in the organization. I will help you navigate these different approaches to planning, and

arm you with the tools to implement the most effective IBP. The result will be a planning process and culture that drives strategy and profitability.

**You will learn:**

- The theoretical and practical differences between centralized and decentralized planning, and how to identify which is right for your organization
- Which functions to include in Business Planning organization including Merchandise Planning, Assortment Planning, Demand Planning and more
- Which functions have a tendency for forecast bias, and which functions mitigate it, and the plusses and minuses of Standalone Planning


**Elisa Spencer, CPF**

Demand and Inventory Planning Manager

HALLMARK CARDS, INC.



## 11 How Samsung Bridges the Gap Between “Off the Shelf” Information Systems and Bespoke Software to Drive Forecasting Accuracy

 Samsung has an enviably smooth global supply chain, despite its massive size and exposure to various external factors. What are the processes and systems that make it work so well? Join us for a “behind the scenes” look into Samsung’s supply chain management software system portfolio, and best in class forecasting processes. Samsung has been ranked as a top 10 supply chain organization since 2005 and is recognized as a leader in customer collaboration practices by global industry rating agencies. This position is maintained and supported by both “commercial-off the shelf” and bespoke software information systems. These systems drive weekly communication between 4 major global parties: customers, subsidiaries, headquarters and factories. They empower Samsung to lead robust CPFR collaboration with all customers and drive alignment on key supply chain joint strategic objectives. Internally, the systems facilitate increased and timely communication between internal stakeholders for demand planning, production planning, shipping and delivery. In this masterclass, I will discuss the specific concepts that make us so efficient, with practical takeaways you can use in your own organization for greater communication and collaboration, and enjoy the subsequent improvement in insight and visibility.

**You will learn:**

- Key elements and structure for a world class supply chain information management system
- Best practice collaborative forecasting processes that become achievable with additional system support
- How to combine “commercial-off the shelf” software solutions (e. g. Salesforce.com, SAP, Oracle, JDE,



Tableau etc.) with bespoke information systems for effective forecasting and planning

**Aviel Hillman**

*Integrated Demand Manager*

**SAMSUNG ELECTRONICS AMERICA**



## 12 Hashtag Winning: Leveraging Social Media Data For Better Planning and Forecasting



Social media is about sharing photos and liking posts, right? Yes, but that's not all! A few years ago, it became apparent that analysis of Tweets about movies provided a better indication of box office sales than the leading information market in the industry. It may sound unlikely, but off-the-cuff posts about any product, topic or event often provide much better insight into demand than the so-called experts. Social media data is unstructured, and so requires a thorough process to make sense of it. In this session, I will show you how we do it at Adventist Health System, and use social media data to gain insights into demand that no other datasets can provide. I will instill in you the fundamental value of this approach, which lies in the fact that these datasets are vast, honest, and straight from end consumers themselves. There is information that you can learn about your customers from social media that is very difficult to learn otherwise, and becoming an expert at gathering social media data and synthesizing it correctly can mean the difference between keeping and losing customers. There is much more to social media than just posting comments and liking posts - this is the future of data analytics, and I will show you how to turn it into a valuable forecasting tool.

### You will learn:

- Concepts of social media forecasting and why it is important to your company's success
- How to use different types of social media to your advantage and incorporate it into forecasting
- How to analyze social media data with tips on synthesizing unstructured data

**John Martinous**, *Supply Chain Manager*

**ADVENTIST HEALTH SYSTEM**



## 13 Demand Management KPIs Are as Unique as Your Business, Are You Using The Right Ones? Identifying and Leveraging Optimal KPIs



Are you focussing your time and energy on the right KPIs? Probably not. Many organizations have a full suite of KPIs to evaluate their supply chain processes to foster continual improvement, but, KPI's need to be balanced and value added. Oftentimes,

the most important KPIs get lost amongst the rest, and the forecast suffers. The demand management process can be easily filled with objective and often subjective KPIs. Identifying and truly understanding those that offer the most value to the demand management process is the real challenge. In this interactive session, I will reveal how a global chemical giant identifies the optimal KPIs that drive business performance, and expands them to determine correct inventory protocols. At Sartomer, we strive to use KPIs that are readily understood by management, sales and marketing, operations and the supply chain team so that the whole business understands and can leverage the insight of our findings. I will explain how to choose the right KPIs to 'translate' for other areas of business to keep them engaged and assist in strategic decision-making. With practical steps and actionable insight, you will learn what the most important KPIs, how they are identified and implemented, and the positive impact they can have on your business.

### You will learn:

- How to quickly separate the most critical demand management KPIs for measuring and monitoring process capability
- Implement trend KPIs as well as the single point KPIs that are the most important to the organization
- Expand the use of these critical KPIs to help determine correct inventory protocols and ensure the right inventory is available

**John Piechule, CPF**

*Supply Chain / Sr. Manager, Product Supply*

**ARKEMA INC., SARTOMER BUSINESS UNIT**



## 14 State of Employment in Demand Planning



S&OP requires dedication, consistency, and qualified key decision makers for a company to succeed in achieving its business objectives. Meticulous consideration must be paid not only to identifying individuals with the desired leadership abilities, but also to those added post-implementation. S&OP functional requirements are essential for consideration for anyone joining the S&OP family of leaders within an organization. How can you ensure that HR is aligned with your S&OP objectives? Whether you are adding specialized practitioners, mid management managers, or executive level leaders, soft skills in collaboration with management are fundamental requirements for any team member. This session will detail how to strengthen your S&OP team with the right balance of skills to establish S&OP as a cross-functional value driver.

### You will learn:

- How your company can avoid the pitfalls of the "wrong choice" for highly visible S&OP roles





- - How to identify the necessary 'soft skills' for your organization based on its strategic vision, S&OP leadership needs, and functional strength
- - How to take a collaborative and consensus approach to the selection process to avoid miscommunication or waste of valuable resources

**Jason Breault**  
 Managing Director  
**LIFEWORK SEARCH**



## 15 How will Artificial Intelligence (AI) Change Your IBP Over the Next Decade?



What will the Integrated Business Planning (IBP) processes of the next decade encompass, and why must companies start preparing for them today? Technology is advancing faster than ever, and indiscriminately disrupts all industries. With today's market dynamics and changing corporate structures, getting internal and external planning alignment across key customers, functional areas, geographical regions, and suppliers is more complex than ever before. Against this backdrop, Artificial Intelligence (AI) provides a substantial competitive advantage for those who embrace it. Is your company preparing for this fundamental shift, or will it become one of the many organizations that will be displaced?

### You will learn:

- What IBP is and why it's so difficult
- The rapid technological changes happening now, and what the IBP processes of the next decade may look like
- The different IBP maturity stages for People, Process, and Technology
- Your competitors' IBP maturity levels through an interactive smartphone survey
- Best practices to progress your IBP maturity in preparation for AI

**Steven Hainey, CPF**  
 Director of Supply Chain, Applied Materials  
**NEWELL BRANDS**



## 16 How to Get Sales More Engaged in Your S&OP Routine By Leveraging These Awesome Techniques



Are you having difficulty convincing your sales team why it's important to forecast accurately? If you're forever bending their arm, trying to pin them down for meetings, get them to send you their potential pipelines, and get buy-in for a feedback loop, you are not alone. Sales teams, sell. Your team forecasts. That's their point of view. Why should they sit down in forecast meetings when they could be on the phone, or out meeting clients, and actually sell the company's product?

They're out there making money, after all. But what they don't know is that their lack of engagement is hurting the company, and is even restricting their own sales efforts. In this session, I will share my experiences and lessons learned from many years building S&OP organizational discipline, and having successfully incorporated sales teams into a collaborative, integrated S&OP process. Highlights of this hands-on session include leveraging soft skills for influence, and understanding opposing points of view, leveraging KPIs to build capabilities, and engaging your sales organization to establish a feedback loop to support forecasting best practices. Getting Sales to buy in to your processes is a perennial problem for S&OP, but there is a clear framework to make it happen. Come to this session and I'll show you how.

### You will learn:

- How to maximize your effort in getting sales to forecast by truly understanding their point of view
- How to use KPIs to build capabilities, instead of destroying morale
- How to design technology and tools around your customer facing teams, not the other way around

**Ken Young**  
 Senior Director, Sales & Operations Planning  
**YOUNG'S MARKET COMPANY**



## 17 Only 30% of Companies Have Mature S&OP: Here's How to Join Them with 12 Best Practices



Since emerging over 30 years ago, S&OP has moved from business buzzword to standard corporate process. It is a vital tool utilized by the world's large supply chain-focused organizations, whose appeal lies in its ability to drive dramatic improvements in key business performance metrics. The benefits are extremely compelling: lower operating costs, reduced inventory, improved service, and increased top-line growth. Few business improvement initiatives match the economic return that implementing an effective S&OP process can generate. While 75% of companies have implemented S&OP, only 30% of those companies have mature S&OP processes that are delivering substantial business benefits. This illustrates just how difficult achieving S&OP excellence is, and you won't be surprised that it is usually only the supply chain leaders that do so. We have unique insight into those 30% of firms with mature S&OP processes. In this session we will review the roadmaps and best practices used to develop world-class S&OP environments, complete with real-life examples and practical takeaways. Our aim for this session is to give you the tools so you too can become part of the 30%.

### You will learn:

- The most effective S&OP implementation roadmap used to deliver world-class benefits







- The 12 best practices critical to S&OP success in any organization
- The single greatest challenge to improving S&OP that you are not even aware of, and how to overcome it

**Thomas Hyland**

Corporate S&OP Manager

**BLOMMER CHOCOLATE COMPANY**



**Stephen Crane**

President

**STEPHEN CRANE CONSULTING, LLC**



## 18 The 'Make the Numbers Approach' (MTNA) to Sales and Operations Planning

The Make The Numbers Approach is a methodology that allows a company to have full control of the business by working to one set of numbers. Forecasts are developed cross-functionally and the resulting plan is made available to each organization at the level at which they would use the information. This discussion will focus on how Breville integrated the MTNA approach into its Sales and Operations Planning process, and how Breville teamed with Vanguard Software to make it possible. The result is an improved S&OP process that supports the MTNA approach by integrating the supply and demand signals across all products and business units, providing the optimal balance of on-hand inventory and customer satisfaction.

**You will learn:**

- How to build your own MTNA 'Gameboard' by combining Demand and Supply Planning into one role and planning to a forward-looking weeks-of-supply.
- How to deal with the human-dynamics of integrating demand and supply planning teams.
- How to determine which forecasting levels matter most.
- How to work to a Production forecast and firm up Purchase Orders within lead time.
- How the MTNA approach helps you engage with suppliers to reduce replenishment risk.

**Eric Frankenberg**

Director, Sales and Operations Planning

**BREVILLE**



**Neal Goffman**

VP of Sales and Marketing

**VANGUARD SOFTWARE**



## 19 A Bumpy But Worthwhile Journey: Our 10 Year Path to Achieving Planning Excellence

A key goal for any company is to reach S&OP maturity, while leveraging its value. The benefits are clear: better forecasting processes highlight risks and opportunities, where a clear picture of demand is created; demand is met in a way that is time and cost-

efficient; and crucially, insights are leveraged for strategic growth initiatives. These combine to help solidify a stronger position for your company in the marketplace. Before any of this can happen, though, your team must first understand the business including its history, organization and strategy. S&OP is not an off-the-shelf solution that can be immediately implemented with quick results - it must be made to fit each unique organization, and this takes time. Keep in mind the need to constantly monitor business development and adjust the S&OP process accordingly, with staff dialled in to the nuances of your unique products and industry. Implementing S&OP is often a bumpy journey, but in this session I will reveal how it can be achieved, complete with practical takeaways and real-life examples of the opportunities and challenges you will face.

**You will learn:**

- How learning the theory is essential, but not enough to achieve S&OP maturity
- The importance of understanding company culture, business environment and needs
- How to be flexible, adjust the route, and keep improving the process, even when facing challenges

**Eliane Santos**

Head of Supply Chain, Crop Protection Latin America

**BASF**



## 20 S&OP Disciplines



Whether you are embarking on starting an S&OP process or you are maturing through the process, the success of the S&OP meeting relies on certain disciplines that must be followed. Too many times, projects or processes begin with vigor and enthusiasm. With time, they can grow stale, routine, and soon loses its power to drive the organization. We must understand that to keep the effectiveness of a solid S&OP process, we must nurture it to maturity. In this session, we will look into some disciplines to help start to process as well as drive the process to an effective, powerful, decision-making meeting. We will look at obstacles that can quickly erode the power that the S&OP process can have. We will look at real life examples from a mature S&OP process and lessons learned from history.

**You will learn:**

- How to build a solid structure/foundation for an S&OP process to build on
- How a solid S&OP process can drive important organizational decisions
- How to involve healthy cross functional discussions that involve many facets of the organization
- How to identify plagues that can ruin an S&OP process

**Jeff Marthins, CPF**

Director of Supply Chain

**TASTYKAKE / FLOWERS FOODS**





## 21 Power of the Masses: Why Crowdsourced Forecasting is a Game Changer



Large organizations spend tens of millions of dollars each year on data initiatives, management consultants, and their own subject matter experts to make demand forecasts ahead of important strategic decisions. Yet they continue to suffer from poor market fit for new products, slow reaction to industry changes, or investment in the wrong areas. This can often be attributed to wrong or overly optimistic forecasts. But there is another approach that your organization can use which is set to change the way we look at Forecasting and Demand Planning. Crowdsourced Forecasting is the anonymous collection of opinions on an event or topic from a wide number of people, for example forecast figures for a particular KPI or overall market. In a manufacturing or retail company, opinions are collected from everybody involved in the business, both internally and externally. If external crowdsourcing can be used to alert drivers to traffic delays as soon as they happen, predict the outcome of elections better than polls, and launch and finance new companies, consider what it can do for your organization. In this session, I will discuss why traditional forecasts are often so wrong, and how organizations must evolve beyond their current techniques and use the collective wisdom of their own people. I will share stories from organizations who have already begun this process, key learnings, and the benefits they've experienced. This is a hugely exciting and game changing development, and one that is ready waiting to be harnessed by your organization - don't miss this presentation.

### You will learn:

- An introduction to crowdsourced forecasting and why it is effective at quantifying forecasts and providing context to those forecasts
- How Crowdsourced Forecasting can improve people's forecasting abilities over time through measurement and feedback
- How large organizations like Ferrovial, Woodside Energy, and Twitch are already using crowdsourced forecasting

**Adam Siegel**  
CEO  
CULTIVATE LABS



## 22 Cutting Glass, Cutting Edge: How this Industrial Titan Turned Broken S&OP into Best in Class Forecasting & Planning



Historically, Corning's S&OP processes were manual Excel based processes - very unsophisticated considering the size of this

glass and ceramics giant. This required a lot of effort to consolidate and validate data, resulting in a lack of transparency in data edits as the data flowed from Excel sheet to Excel sheet. This resulted in multiple conference calls to try and understand why numbers changed from month to month, and to confirm the accuracy of the data. Our approach meant time consuming manual collection of data points, lack of collaboration and, worst of all, unacceptable forecasting errors which destroyed all trust in our numbers, causing the business to hold excess inventory just in case. In this interactive session, I will share how we improved these processes through the implementation of a central demand and supply planning process. By implementing Integrated Business Planning software and changing how we looked at S&OP, we achieved global visibility and collaboration in the planning cycle tasks. If you are looking to move beyond basic forecasting in your own organization, this session is not one to miss.

### You will learn:

- How Corning achieved large savings in inventory reductions while improving forecasting accuracy
- How functional areas responsible for Supply, Demand and Manufacturing planning are benefitting from a centralized unified plan
- How to drive significant productivity improvements for Demand Analysis, driven by greater transparency of data sources with self-service analytics and reporting

**Laura Knapp**  
Short-Term Forecasting Manager

CORNING ENVIRONMENTAL TECHNOLOGIES



## 23 Walking on a Planning Journey: LaCrosse Footwear's Road to Forecasting Maturity



With a complex business model that spans e-commerce, retail, wholesale and government channels, LaCrosse Footwear is many things to many people. In the omni-channel age and vastly different consumer bases, we knew that we had to drive improvements in forecasting to better manage inventory and meet demand. This historic American footwear company, founded in 1897 in La Crosse, Wisconsin and now based in Portland, Oregon, manufactures boots and other footwear serving a vast consumer base. We sell to those passionate about the great outdoors to industrial workers and military/service personnel around the world. In this interactive session, I will share how we started our journey to forecasting maturity, complete with the steps we took to overhaul our entire S&OP process. I will reveal how the company has completely overhauled its entire forecasting process to better manage inventory quality and build a cross-functional collaborative planning processes - complete with tips for your own forecasting and planning.





**You will learn:**

- How we create robust forecasts based on a two pyramid system
- How to drive cross-departmental collaboration and facilitate data transfer
- How to achieve more effective inventory management in a multi-modal business

**Brad Blasi, CPF, Demand Planning**  
**LACROSSE FOOTWEAR, INC.**



## 24 A Force for Good? How and When Your Sales Force Can Drive Accuracy in Forecasting



Using forecasting input from the sales force can be hugely valuable, but an experienced demand planner will tell you that in practice it is rarely straightforward. The value of sales force engagement rests on three crucial assumptions: that salespeople can accurately predict their customers' future buying behaviour; that salespeople will provide an honest forecast; and that improving customer-level forecasts improves company performance. Can you safely make these assumptions in your organization? This presentation examines the plausibility of these three assumptions, and reviews the literature on sales force incentives for honest forecasts. While there can be good reasons to engage the sales force in forecasting, we can't assume this is always the case, and we should be wary of any inputs into the forecasting process. In this hands-on session, I will leave you with a viable plan to assess the value of engaging your own sales teams, how to encourage honest sales forecasts, and practical steps to incorporate sales data into your forecasts.

**You will learn:**

- Effective ways to incorporate sales force input into the forecasting process
- Methods to incentivize honest forecasts by the sales force
- Reasons why customer level forecasting may not be necessary for your organization

**Simon Clarke, Group Director of Forecasting**  
**COCA-COLA REFRESHMENTS**



**Michael Gilliland, Product Marketing Manager**  
**SAS INSTITUTE**



## 25 Leading in the Next Decade: How Forecasting and Demand Planning Will Evolve in the Future



Being a leader means anticipating the changing landscape of the industry and being prepared to mobilize people, process and technology to capitalize on those changes. With that in mind, are you leading now? Is your company a truly demand driven organization and are the right people driving the bus? We live in exciting times and have an amazing opportunity to be part of, and impact, change in the years to come. The one true constant is change and we are about to see a radical transformation in business and demand planning in the next decade - are you ready? In this presentation, we will discuss many of the evolutions already taking place in forecasting and demand planning, as well as further developments that the discipline must bring about to ensure it continues to deliver value. I will look at the key factors of people, process, and technology and how they may look in ten years so we as planners remain not only relevant, but the true drivers of growth and operational efficiency.

**You will learn:**

- Emerging core competencies and how the Demand Planner will evolve
- The current and future state of S&OP/IBP and how to prepare
- Technological changes happening now, and what the next decade may look like

**Eric Wilson, CPF**  
*Director, Business Planning*

**ESCALADE SPORTS**  
*Director, Thought Leader,*  
**INSTITUTE OF BUSINESS FORECASTING & PLANNING**



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## KEYNOTE PRESENTER

**Malcolm Goonetilleke**, *SVP Global Planning & Inventory Management* | **LEVI STRAUSS & CO.**

Malcolm Goonetilleke joined Levi Strauss & Co. in the summer of 2014 as the Senior Vice President of Global Merchandise Planning & Inventory Management. In his role, Malcolm is responsible for forecasting and monetizing all product strategies while optimizing inventory investments. He leads the global planning organization (400+ employees) designed to drive revenue and profitability by region and channel. His immediate focus is on transforming the planning function through best-in-class capability building and systems implementation. An accomplished planning veteran with almost 20 years of experience in retail, Malcolm has worked for multiple global brands including Reebok, Guess, Gap, Ann Taylor, J Crew and Coach. He joined Levi's from Coach where he led the Global Merchandise Planning team. Malcolm has a successful track record of building planning competencies having led major functional transformations at both Ann Taylor and Coach. He is passionate about fostering talented and cohesive planning teams that know how to shape demand to drive growth. Malcolm views planning as the analytical muscle that enables design and merchants to create game changing, profitable assortments while driving regional category leadership with effective inventory investment strategies.



**Brad Blasi**, *CPF, Senior Demand Planner* | **LACROSSE FOOTWEAR, INC.**

Brad Blasi is currently a Demand Planner at LaCrosse Footwear, Inc. Prior to his current role, he worked as a Buyer/Planner for LaCrosse and a Finance Operations Analyst at Nike. Brad's collegiate studies included Business, Entrepreneurship and Economics. He holds an MBA in Finance and is an IBF Certified Professional Forecaster (CPF).



**Kristie Bane**, *ACPF, Demand Planning Manager* | **SIEMENS BUILDING TECHNOLOGIES**

Kristie Bane has over 15 years' experience working within ISC in many different roles and functions. Kristie loves overcoming challenges in SCM through people, process and enabling technology, and for the last several years her focus has been bringing these three elements together for various supply focussed organizations. Kristie has worked in Automotive Aftermarket and OE/M, Consumer Products, Entertainment, and Fashion/Apparel. She has had broad exposure to different process frameworks, functional alignments, technical solutions and a robust tool-kit for navigating change. Before joining Siemens Building Technologies, Kristie worked for MAT Holdings as Business Relationship Manager. She is CPIM, SAP Certified Solutions Consultant for SCM and an IBF Advanced Certified Professional Forecaster (ACPF).



**Patrick Bower**, *Senior Director, Global Supply Chain Planning* | **COMBE INC.**

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, Glaxo Smith Kline, 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.*



**Jason Breault**, *Managing Director* | **LIFEWORX SEARCH**

Mr. Breault is the Managing Director of LifeWork Search, a Management Recruiting firm. Jason has worked with leading soft goods, hard goods, and food and beverage companies—ranging in size from \$50 million to \$20 billion—to identify top talent in areas like demand planning, supply planning, operations planning, production planning, and S&OP. He is a board member of the New England chapter of IBF. He has also spoken at several APICS and IBF events and appeared in several SupplyChainBrain.com videos on the subject of Talent Management. Jason spent more than five years at AMR Research in Boston (now Gartner), a leading research and advisory organization focusing on the supply chain best practices and applications being leveraged to help cut costs and increase revenues.



**Simon Clarke**, *Group Director of Forecasting* | **COCA-COLA REFRESHMENTS**

Simon Clarke leads the Forecast Center of Excellence within Coca-Cola Refreshments. His team is responsible for forecasting volume and revenue in North America. Simon was originally part of the Coca-Cola Enterprises team that designed and implemented a unified collaborative process and standard tool-set, and since 2008 he has been a lead practitioner within The Coca-Cola Company. He hails from the United Kingdom, but has lived in Atlanta, Georgia since 2002. Simon received his Bachelor of Arts (Hons) in Geography from Grey College, Durham University.



**Stephen Crane**, *President* | **STEPHEN CRANE CONSULTING, LLC**

Stephen Crane is an independent S&OP consultant focused on helping companies improve their Sales and Operations Planning processes (S&OP), and increase business profitability by improving planning and reducing costs. He has implemented S&OP in 15 businesses, generating more than \$200 Million in cost savings over the last 30 years. His most recent position was with Firmenich, Inc., a world-wide leader in fragrances and flavors where he served as Director of S&OP for the Flavors Division. Prior to joining Firmenich in 2010, Steve was Director of Global Supply Chain Management for Wacker-Chemie, a \$6 billion specialty chemical company where he led the whole S&OP effort. Steve also worked at Products and Chemicals, a \$10 billion industry gas and chemical company, where he was responsible for supply chain management and operations for 10 plants worldwide. Steve has a BS in Chemical Engineering from the University of New Hampshire.



**Rick Davis**, *Vice President and Global Lead, Office of Data Acquisition and Governance* | **KELLOGG'S**

Rick has led multiple efforts for continuous improvement in demand planning, demand sensing, and technology solutions for Kellogg USA. He also leads the Sales Technology Council for Kellogg Sales Company. Rick joined Kellogg Company in 1990 as a sales representative and has held numerous positions in field sales and HQ, in both account management and sales management positions.



**Dustin Deal**, *Director of North American Business Operations* | **LENOVO**

Dustin is the Director of Business Planning & Operations at Motorola Mobility. Over the past 20 years he has held various functions at Motorola including Global Inventory Planning, Global Demand Planning and North American Fulfillment Operations. Dustin earned a BBA in Operations Management from the University of Wisconsin-Whitewater and his MBA from Texas Christian University.



**Todd Dunn, CPF**, *Director of Supply Chain* | **ACCUCAPS LIMITED**

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 28 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 for many years covering topics related to Demand Management and S&OP/ IBP. Todd is an IBF Certified Professional Forecaster (CPF).



**Eric Frankenberg**, *Director, Sales and Operations Planning* | **BREVILLE**

Eric is the Director of Sales and Operations Planning for Breville Global. In this capacity he is responsible for Demand, Supply and Inventory planning across all regions and product lines. Eric has held similar positions at Belkin, the Linksys division of Cisco and Gateway Computers. He has also held leadership roles in Finance, Product Marketing and Strategic Planning. Eric graduated from UCLA with a B.A. in Economics and obtained an MBA from Indiana University.



**Michael Gilliland**, *Product Marketing Manager* | **SAS INSTITUTE**

Michael Gilliland is author of The Business Forecasting Deal, and currently Product Marketing Manager for SAS forecasting software. He worked in consumer products forecasting for over fifteen years in the food, electronics, and apparel industries, and as a consultant. Mike holds a BA in Philosophy from Michigan State University, and Master's degrees in Philosophy and Mathematical Sciences from Johns Hopkins University. He has published in Journal of Business Forecasting, Supply Chain Management Review, Foresight: The International Journal of Applied Forecasting, Analytics, and APICS Magazine, and wrote a quarterly column on "Worst Practices" for Supply Chain Forecasting Digest.



**Neal Goffman**, *VP of Sales and Marketing* | **VANGUARD SOFTWARE**

Neal is VP of Sales and Marketing at Vanguard Software, which delivers advanced analytic forecasting and optimization through a single cloud platform for IBP, S&OP, Supply Chain, and Financial Management. He has more than 20 years' experience in Analytics and Planning arenas. He began his career working for top consulting companies in the market including Cap Gemini. Before taking his current role at Vanguard Software, Neal led a Watson Consulting practice for IBM Global Business Services. Prior to that role with IBM, Neal was an executive with Strikelron, which was successfully acquired by Informatica.



**Steven Hainey, CPF, CPSM, CPIM, MCIPS, C.P.M.**, *Director of Supply Chain, Applied Materials* | **NEWELL BRANDS**

Steven has over 20 years' experience in global multi-site supply chain planning for Fortune 100 & 500 manufacturing companies. Steven has built up a wealth of knowledge and expertise in retail consumable goods, chemical materials and medical device products. He has also led numerous S&OP implementation and enhancement projects throughout his career. As the Director of Supply Chain for Jarden Applied Materials, he currently oversees the S&OP, production planning, procurement, warehousing and logistics for servicing big box retailers. Clients include Walmart, Lowe's, Home Depot and more. In a senior supply chain role at Honeywell Fluorine Products, he was accountable for all inventory planning elements, including the business's S&OP processes for their chemical plants, blending facilities and distribution centers across 7 countries. He led Fluorine Products to be Honeywell PMT's first BU to achieve a corporate audit of "Green" for S&OP tools and reporting.



**Aviel Hillman**, *Integrated Demand Manager*, **SAMSUNG ELECTRONICS AMERICA**

Aviel is the Integrated Demand Manager at Samsung Business where he is implementing the S&OP process for IT and mobile products. Prior to Samsung, Aviel was a management consultant with Deloitte's Supply Chain Advisory practice for 5 years where he developed a passion for helping clients work cross-functionally to improve forecast accuracy and resolve supply chain operational challenges. He completed an MBA at Loyola University in Maryland and enjoys being an active participant at Institute of Business Forecasting & Planning (IBF) national and chapter events.



**Thomas Hyland**, *Corporate S&OP Manager* | **BLOMMER CHOCOLATE COMPANY**

Tom is the Corporate S&OP Manager for Blommer Chocolate Company, the largest cocoa processor and ingredient chocolate supplier in North America. With over 650 employees and four manufacturing facilities in North America, the company provides comprehensive business solutions for domestic and international customers of all sizes in the confectionery, baking and dairy industries. As the S&OP Manager, Tom is responsible for implementing and leading the company-wide monthly S&OP process including demand planning, supply planning, capacity planning, inventory management, master production scheduling, and the KPI scorecard. Prior to joining Blommer in 2013, Tom was the Supply Chain Manager for Datwyler, a \$1 billion Swiss-based supplier of state-of-the-art solutions for drug packaging and medical devices. It was at this Swiss giant where he was trained in Lean Management and Continuous Improvement and was responsible for supply chain management including purchasing, production planning, inventory control, and logistics. Tom has a BS in Business Logistics from Penn State University.


**Laura Knapp, Short-Term Forecasting Manager | CORNING ENVIRONMENTAL TECHNOLOGIES**

Laura Knapp has over 15 years' Supply Chain experience working in many different industries and roles. She has an extensive background in Demand Management, Sales & Operations Planning, Purchasing, Planning and Scheduling, and Lean Six Sigma process improvement. Laura joined Corning Environmental Technologies as the functional project manager on the SAP IBP implementation. She then became Short Term Forecasting Manager in 2016, leveraging IBP's capabilities, and her knowledge of the software. Prior to joining Corning Inc., Laura worked in various functions supporting supply chain and ERP software implementations in the Automotive, Consumer Products, and Defense industries, working at Harris FR Communications and Delphi. She has had broad exposure to different process frameworks and business functional solutions, responsible for delivering major business changes. Laura has a B.S. in Packaging Science from Rochester Institute of Technology and an MBA from The University of Rochester's Simon School of Business.


**Dr. Larry Lapide, Research Affiliate | MIT CENTER FOR TRANSPORTATION & LOGISTICS**

Dr. Larry Lapide is an MIT research affiliate and has over 30 years of experience in industry, consulting, research, and academia. He is a 2012 recipient of the IBF's inaugural Lifetime Achievement in Business Forecasting & Planning Award. He recently worked in MIT's Center for Transportation & Logistics where he managed the launch of its Supply Chain 2020 Project and oversaw its Demand Management research. He is also a part-time lecturer at the University of Massachusetts, and is a well-known frequent presenter at IBF and other supply chain events. His prior employment includes AMR Research/ Gartner, Accenture, and Data General. He has published in numerous publications, including his 14-year ongoing column in the IBF's Journal of Business Forecasting (JBF) and his co-authorship of a book on the impact of e-business on supply chain. Dr. Lapide holds an SMEE from MIT and a Ph.D. in Operations Research from the Wharton School.


**Carlos Londono, Vice President, Global Supply Chain | O-I**

Carlos currently leads supply chain on a global level based in Perrysburg, Ohio 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.


**Jeff Marthins, CPF, Director of Supply Chain | TASTYKAKE / 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.


**John Martinous, Supply Chain Manager | ADVENTIST HEALTH SYSTEM**

John is the Supply Chain Manager at Adventist Health System, where he is responsible for the entire Supply Chain, including demand planning and S&OP. Prior to his current role, John was a subcontractor to CSC at the Rock Island Army Arsenal, where he drew on his extensive experience working on DoD projects. Other career highlights include working for Booz Allen Hamilton at The Supply Chain & Logistics Center Of Excellence, and on the CapMed project for the U.S. Government at the Walter Reed National Military Medical Center. John also managed a project with CBM+ where he led a 180 million-dollar endeavor mandated by DoD to improve their maintenance program. He received a B.A. in Psychology from the University of Massachusetts, and a Masters in Health Administration from Salve Regina University in Newport, RI. John holds certifications as a Six Sigma Black Belt, and is a Certified Manager of Process Excellence.


**Alan L. Milliken, CPF, Senior Manager - Supply Chain Capability Development | BASF**

Alan Milliken is a Senior Manager assigned to the Supply Chain Capability Development Team at BASF, the world's leading chemical company. He has 40 years of experience in Supply Chain and Operations Management including 22 years at major manufacturing sites, 14 years as a business process & Supply Chain consultant and 6 years as a full-time educator. He is a frequent speaker at Supply Chain conferences and has been published many times. Alan has participated first-hand in demand planning implementations as both a practitioner and consultant and, as subject matter expert, created the demand planning education course at BASF. He is an IBF Certified Professional Forecaster (CPF) and a member of IBF's Board of Advisors.


**Sara Park, Group Director, CCNA Forecasting | THE COCA-COLA COMPANY**

Sara Park, Group Director at Coca-Cola Refreshments, runs the Sales& Operations Planning process for the largest Coca-Cola bottler in the world. She also leads and facilitates the innovation launch process, portfolio optimization efforts, and shelf space strategy and planning. Sara has extensive experience in establishing and evolving the S&OP process across multiple organizations; as such, she has deep knowledge in integrated business planning and within the areas of collaborative forecasting and demand and supply planning. Prior to Coca-Cola, she held executive-level positions at Georgia-Pacific, Evergreen Packaging, and H.J. Heinz. Sara is a results-driven leader with a track record of delivering sustained results in an ever-changing environment. Sara has a BA from the University of California at Los Angeles and an MBA from Case Western Reserve University. She has published in the Journal of Business Forecasting and speaks at conferences covering the S&OP Process Foundations and Best Practices. Sara currently serves on IBF's Board of Advisors.



**John Piechule**, *Supply Chain / Sr. Manager, Product Supply* | **ARKEMA INC., SARTOMER BUSINESS UNIT**

John is the Senior Manager of Supply Chain at Arkema Inc.'s Sartomer Business Unit; which produces high quality specialty chemicals. At Sartomer he is responsible for Supply Chain process optimization, sharing best practices within the Sartomer organization and other Arkema business units. John is experienced in demand management, production planning/scheduling, inventory management, quality assurance and quality control. Prior to working at Sartomer he spent significant time in the aerospace and heavy industry business sectors. John is Certified in Production and Inventory Management, a Certified Supply Chain Professional, and an IBF Certified Professional Forecaster (CPF). He received his MBA and undergraduate degrees at Widener University in Chester, PA.



**Eliane Santos**, *Head of Supply Chain, Crop Protection Latin America* | **BASF**

Eliane Santos is the head of Supply Chain for BASF's Latin America Crop Protection Division. Her current responsibilities include Demand and Supply Planning, Customer Service, and Logistics Strategy/Management. In her 19 years at BASF, she has worked in a variety of Supply Chain roles, spending most of her time in Brazil and Germany. Her main achievements are related to the design, implementation and operation of highly efficient Supply Chain Processes (especially S&OP) on local, regional and global scales. Eliane's main tasks are dealing with high cost products with very seasonal and volatile demand factors that are subject to a complex and expensive manufacturing process, making optimal planning critical for business success. Eliane has a Degree in Industrial Engineering from the Federal University of Rio de Janeiro and an MSc in Transportation Management from Chalmers University of Technology in Sweden.



**Andrew D. Schneider, ACPF**, *Global Demand Manager, Supply Chain* | **MEDTRONIC**

Andrew is an award-winning Sales & Operations Planning (S&OP) and Supply Chain Management professional. He is currently employed with Medtronic, the world's largest medical device company. He is also on the Board of Advisors for the Institute of Business Forecasting & Planning (IBF), and a regular international speaker at industry events, including the IBF. Andrew is a hands-on data scientist; but also an inspirational industry leader with a passion for innovating & advancing the fields of demand planning, S&OP/IBP, and enterprise risk management.



**Adam Siegel, CEO** | **CULTIVATE LABS**

Adam Siegel is the CEO and Co-Founder of Cultivate Labs. He has been working in the crowdsourcing space for more than 10 years since starting his first company, InKling Inc., in 2006. InKling, funded by Y Combinator, focused on crowdsourced forecasting using prediction markets. Cultivate Labs recently acquired InKling to become the largest crowdsourced forecasting company in the U.S. Before becoming an entrepreneur, Adam spent a decade as a management and technology consultant at Accenture. Adam is a thought-leader on internal crowdsourcing, advising Fortune 100 clients and the U.S. intelligence community. He regularly speaks at conferences, including O'Reilly Tech, and the State Department's Moneyball Diplomacy event, as well as at top business schools. Adam earned a B.A. in Political Science from Indiana University.



**Elisa Spencer, CPF**, *Demand and Inventory Planning Manager* | **HALLMARK CARDS, INC.**

Elisa Spencer is the Demand and Inventory Planning Manager for the Retail division of Hallmark Cards. Her responsibilities include wholesale merchandise and assortment planning, and demand and inventory planning. In her 16 years working at Hallmark, Elisa has held multiple demand and inventory planning management roles including Supply Chain Planning Process Change Lead for the company's SAP implementation. She is now responsible for a team of 14 planners whose responsibilities include creating shipment forecasts and establishing optimal inventory levels. Elisa leads the cross-functional S&OP process to drive improvements across the supply chain. She holds a J.D. and B.B.A. in International Business, both from the University of Texas at Austin. She started her professional career as an attorney in Austin, Texas, before making a career move to supply chain/planning. Elisa is an IBF Certified Professional Forecaster (CPF) and lives and works in Kansas, MO.



**Brinson Silver**, *Senior Director* | **MONSTER ENERGY**

Brinson Silver has over 15 years' experience in consumer goods, with expertise in product development, product strategy, operations, business development, P&L and team-building initiatives. He is currently with Monster Beverage, and was previously Senior Director of Customer Experience & Digital Strategist with MARS Inc. Brinson is a recognized Brand Champion, and has led global and international brands. Prior to joining MARS, Brinson worked for The Clorox Company and P&G.



**Peter C. Thomas, CPF**, *Head of Demand Planning & Forecasting* | **DUPONT CROP PROTECTION**

Pete Thomas is the Demand Leader for the DuPont Crop Protection business. His experience with DuPont and Agribusiness spans over 35 years in various commercial roles, including sales, market research, product and project management, business development, and business improvement. Before assuming the role of Strategic Planning Manager, he spent 3 years as Portfolio Manager, responsible for revenue totalling more than \$500 million. Pete is an IBF Certified Professional Forecaster (CPF), Certified Supply Chain Consultant, and Certified Six Sigma Champion. He is a graduate of the University of Georgia.



**Rakesh Tripathy**, *Senior Manager, Integrated Business Planning* | **CISCO SYSTEMS**





**Oscar Vázquez**, *Supply Chain Business Partner, Breakfast Category* | **KELLOGG LATIN AMERICA**

Oscar's current role is Supply Chain Business Partner for the Breakfast Category at Kellogg Latin America. He has more than 19 years of experience in IT and Supply Chain positions, his success in which he attributes to fostering a holistic approach. One of Oscar's main responsibilities as Supply Chain Business Partner is to redesign the Supply Planning Team in the Latin American Region, and to implement a network optimization tool that delivers improvements in cost, service, inventory levels, sustainability, and risk mitigation. His experience working in several roles at Kellogg Latin America has afforded Oscar expertise in Supply Chain Network Design, Supply Chain Network Optimization, Product Availability and Materials Planning. Oscar hold post-graduate diplomas in Strategies and Leadership in Supply Chain, and Leading Change and Organization Renewal from Stanford University. He also holds a Supply Chain Management Certificate from Georgia Tech.



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

Eric has exceptional abilities to align end to end processes and develop collaboration. He has a rich career track and has excelled in numerous areas of Supply Chain. He has an established record of significant improvement in developing demand forecasting & supply chain processes, improving inventory turns while maintaining service, Demand Driven end to end collaboration, Championing S&OP and its implementations. Eric's more recent experience includes Eric Wilson working as the Director of Demand Planning at Berry Plastics, and the Director of Global Demand Planning and S&OP with Tempur Sealy International, the world's largest premium mattress manufacturer. He is a member of the Institute of Business Forecasting (IBF) Board of Advisors, and has served as a speaker & panelist for IBF Executive Forums and conferences. Eric has also published in the IBF's Journal of Business Forecasting and is an IBF Certified Professional Forecaster (CPF).



**Ken Young**, *Senior Director, Sales & Operations Planning*, | **YOUNG'S MARKET COMPANY**

Ken has more than 10 years of experience working in the CPG space, specifically in Wine & Spirits. Early in his career he spent time working across many disciplines, from customer service to supply chain. He has gone on to drive improvements in supply chain through implementing S&OP processes and establishing best practices. In his current role as Senior Director of Sales & Operations Planning, Ken is currently developing an S&OP process for a \$3bn industry leader in Wine & Spirits Distribution. Ken earned his Bachelor's Degree in Finance from California State University-San Marcos in 2006 before joining the firm.

**TUESDAY | OCTOBER 24, 2017**

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 25, 2017**

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 26, 2017**

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		
	<b>ESSENTIAL</b>	<b>NEXT-LEVEL</b>	<b>VANGUARD</b>
9:00 am - 9:55 am	<b>1 Leveraging the Demand Review Process for a Successful S&amp;OP Meeting</b> Todd Dunn, CPF <i>Director of Supply Chain</i> <b>ACCUCAPS LIMITED</b>	<b>2 The Journey to Demand Planning Excellence and Using Less Conventional Forecasting Approaches</b> Alan L. Milliken, CPF <i>Senior Manager - Supply Chain Capability Development</i> <b>BASF</b>	<b>3 Calling All Marketing and Forecasting Professionals: How You Can Collaborate to Set Best Prices for Maximum Profit</b> Rakesh Tripathy <i>Senior Manager, Integrated Business Planning</i> <b>CISCO SYSTEMS</b>
10:00 am - 10:55 am	<b>4 Change Management 101: Get the Buy-in You Need to Build a New Organization</b> Peter C. Thomas, CPF <i>Head of Demand Planning &amp; Forecasting</i> <b>DUPONT CROP PROTECTION</b>	<b>5 Managing Forecasting &amp; Planning From Massive Change at Coca-Cola: Refranchising the Bottling System for the World's Most Popular Drink</b> Sara Park, <i>Group Director, CCNA Forecasting</i> <b>THE COCA-COLA COMPANY</b>	<b>6 A Look Into the Crystal Ball: Future-Proofing Your Demand Planning Career</b> Andrew D. Schneider, ACPF <i>Global Demand Manager, Supply Chain</i> <b>MEDTRONIC</b>
10:55 am - 11:10 am	MORNING BREAK   VISIT WITH EXHIBITORS		
11:10 am - 12:05 pm	<b>7 Demand Planners Are Not Born, But Cultivated: How to Find and Keep the Right Talent</b> Kristie Bane, ACPF <i>Demand Planning Manager</i> <b>SIEMENS BUILDING TECHNOLOGIES</b>	<b>8 Tapping into the Data Goldmine: How to Exploit Supply &amp; Demand Analytics, Data Management, and Metrics</b> Brinson Silver <i>Senior Director</i> <b>MONSTER ENERGY</b>	<b>9 Omni Channel Meets S&amp;OP: How to Integrate Omni Channel into Your S&amp;OP Process</b> Patrick Bower <i>Senior Director, Global Supply Chain Planning</i> <b>COMBE INCORPORATED</b>
12:05 pm - 12:45 pm	LUNCH SPONSORED BY 		
12:45 pm - 1:25 pm	KEYNOTE PRESENTATION   From Reacting to Shaping Global Demand: A Levi's Chapter Malcolm Goonetilleke, <i>SVP Global Planning &amp; Inventory Management</i>   LEVI STRAUSS & CO.		
1:25 pm - 1:55 pm	VISIT WITH EXHIBITORS		
1:55 pm - 2:50 pm	<b>10 Forecast Bias Is Your Achilles Heel: Choosing Between Centralized &amp; Decentralized Planning for Maximum Objectivity</b> Elisa Spencer, CPF <i>Demand and Inventory Planning Manager</i> <b>HALLMARK CARDS, INC.</b>	<b>11 How Samsung Bridges the Gap Between "Off the Shelf" Information Systems and Bespoke Software to Drive Forecasting Accuracy</b> Aviel Hillman <i>Integrated Demand Manager</i> <b>SAMSUNG ELECTRONICS AMERICA</b>	<b>12 Hashtag Winning: Leveraging Social Media Data For Better Planning and Forecasting</b> John Martinous <i>Supply Chain Manager</i> <b>ADVENTIST HEALTH SYSTEM</b>
2:55 pm - 3:50 pm	<b>13 Demand Management KPIs Are as Unique as Your Business, Are You Using The Right Ones? Identifying and Leveraging Optimal KPIs</b> John Piechule, CPF <i>Supply Chain / Sr. Manager, Product Supply</i> <b>ARKEMA INC., SARTOMER BUSINESS UNIT</b>	<b>14 State of Employment in Demand Planning</b> Jason Breault <i>Managing Director</i> <b>LIFEWORX SEARCH</b>	<b>15 How will Artificial Intelligence (AI) Change Your IBP Over the Next Decade?</b> Steven Hailey, CPF <i>Director of Supply Chain, Applied Materials</i> <b>NEWELL BRANDS</b>
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 27, 2017**

7:00 am - 8:00 am	MORNING REFRESHMENTS   VISIT WITH EXHIBITORS		
8:00 am - 8:55 am	<b>16 How to Get Sales More Engaged in Your S&amp;OP Routine By Leveraging These Awesome Techniques</b> Ken Young <i>Senior Director, Sales &amp; Operations Planning</i> <b>YOUNG'S MARKET COMPANY</b>	<b>17 Only 30% of Companies Have Mature S&amp;OP: Here's How to Join Them with 12 Best Practices</b> Thomas Hyland <i>Corporate S&amp;OP Manager</i> <b>BLOMMER CHOCOLATE COMPANY</b> Stephen Crane, <i>President</i> <b>STEPHEN CRANE CONSULTING, LLC</b>	<b>18 The 'Make the Numbers Approach' (MTNA) to Sales and Operations Planning</b> Eric Frankenberg <i>Director, Sales and Operations Planning</i> <b>BREVILLE</b> Neal Goffman, <i>VP of Sales and Marketing</i> <b>VANGUARD SOFTWARE</b>
9:00 am - 9:55 am	<b>19 A Bumpy But Worthwhile Journey: Our 10 Year Path to Achieving Planning Excellence</b> Eliane Santos <i>Head of Supply Chain, Crop Protection Latin America</i> <b>BASF</b>	<b>20 S&amp;OP Disciplines</b> Jeff Marthins, CPF, <i>Director of Supply Chain</i> <b>TASTYKAKE / FLOWERS FOODS</b>	<b>21 Power of the Masses: Why Crowdsourced Forecasting is a Game Changer</b> Adam Siegel, <i>CEO</i> <b>CULTIVATE LABS</b>
9:55 am - 10:10 am	MORNING BREAK   VISIT WITH EXHIBITORS		
10:10 am - 11:05 am	<b>22 Cutting Glass, Cutting Edge: How this Industrial Titan Turned Broken S&amp;OP into Best in Class Forecasting &amp; Planning</b> Laura Knapp <i>Short-Term Forecasting Manager</i> <b>CORNING ENVIRONMENTAL TECHNOLOGIES</b>	<b>23 Walking on a Planning Journey: LaCrosse Footwear's Road to Forecasting Maturity</b> Brad Blasi, CPF <i>Demand Planning</i> <b>LACROSSE FOOTWEAR, INC.</b>	<b>24 A Force for Good? How and When Your Sales Force Can Drive Accuracy in Forecasting</b> Simon Clarke, <i>Group Director of Forecasting</i> <b>COCA-COLA REFRESHMENTS</b> Michael Gilliland, <i>Product Marketing Manager</i> <b>SAS INSTITUTE</b>
11:10 am - 12:05 pm	<b>25 Leading in the Next Decade: How Forecasting and Demand Planning Will Evolve in the Future</b> Eric Wilson, CPF <i>Director, Demand Planning, ESCALADE SPORTS</i> <i>Director, Thought Leader, INSTITUTE OF BUSINESS FORECASTING &amp; PLANNING</i>		
12:10 pm - 12:25 pm	CLOSING REMARKS		

**CONFERENCE CONCLUDES**

**SATURDAY | OCTOBER 28, 2017 | EXAM DAY 8:30AM - 4:30PM | IBF CERTIFICATION EXAMS | CPF & ACPF GOOD LUCK!**

# BUSINESS PLANNING FORECASTING & S&OP

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LEADERSHIP FORUM   OCTOBER 25, 2017			✓	✓	✓	✓	✓	✓	✓	✓
VIP LEADERSHIP DINNER & ENTERTAINMENT OCTOBER 25, 2017			✓	✓	✓	✓	✓	✓	✓	✓
BEST PRACTICES CONFERENCE   OCTOBER 26-27, 2017	✓	✓	✓	✓	✓	✓	✓			✓
BREAKFAST & LUNCH	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
COCKTAIL RECEPTION   OCTOBER 26, 2017	✓	✓	✓	✓	✓	✓	✓			✓
1-DAY FORECASTING & PLANNING TUTORIAL OCTOBER 24, 2017 (Active IBF Members ONLY)		✓			✓	✓	✓			✓
IBF MEMBERSHIP (1 YEAR)		✓			✓	✓	✓			✓
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Please circle which Exam(s) you are interested in taking 1 2 3 4 5

**CPF/ ACPF Exams will take place October 28, 2017**

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