IBF ACADEMY 2017

Business Planning, Forecasting & S&OP

AUGUST 14-15, 2017

GREEN VALLEY RANCH RESORT SPA & CASINO | LAS VEGAS, NEVADA USA

Institute of Business Forecasting & Planning

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Academy Highlights & Learnings

- *IBF'S BUSINESS FORECASTING & PLANNING ACADEMY is designed at 2 levels** that offer two full days of expert training:*

LEVEL I:	LEVEL II:
For those that require the fundamentals and are just getting started	For those with experience that are looking for new and better ways to improve planning & forecasting performance

**We know Levels can be subjective. Therefore, all attendees can customize their IBF Academy schedule with Level I and Level II sessions of their choice. Plus all attendees will receive material for all sessions and levels!

- *IMPROVE INVENTORY MANAGEMENT and working capital with better forecasting*
- *LEARN HOW TO FORECAST and build high performing statistical & predictive analytic models*
- *CREATE A HIGHLY FUNCTIONING DEMAND REVIEW meeting that accelerates your S&OP*
- *SUCCESSFULLY DESIGN & IMPLEMENT S&OP / IBP regionally as well as globally*
- *GROW MARKET-SHARE with superior new product planning & forecasting*
- *UNDERSTAND YOUR FORECASTING & PLANNING SOFTWARE from the ground-up*
- *IMPROVE ACCURACY and learn how to achieve true cross-functional consensus*
- *IMPROVE YOUR MASTER DATA through better and proven data management techniques*
- *LEARN TO CREATE AN EFFECTIVE AND SUCCESSFUL FORECASTING process that works in any industry*
- *LEAN FORECASTING & planning practices, prepare accurate forecasts faster with less resources*
- *MITIGATING & MANAGING RISK WITH S&OP*
- *AND MUCH MORE!*

Remember, one learning point, one tip could mean millions added to your bottom line. There is no other event of this kind available anywhere in the world. This is IBF's premier training event of the year.

World-Class Educators, Industry Experts, and the Opportunity to Network with your Peers

- Our highly experienced Academy workshop leaders have committed time to guide you step-by-step on how to address the challenges you currently face in S&OP or IBP, Demand Planning & Forecasting.

- Our workshop leaders represent experts from well-known companies and institutions. As an attendee, you will be able to take advantage of over 100 years of combined experience in improving, implementing, and coaching forecasting and planning.

- As with every IBF event, we strive to ensure that attendees walk away with something they can put to use immediately upon returning to the office. You can expect to leave the event with a stronger foundation and tool-kit to execute immediately.

- Plus, the IBF Academy is an excellent step in preparing and becoming a Certified Professional Forecaster (CPF®). Exams will be offered on August 16, 2017.

LEVEL I	8:15 AM – 10:15 PM	LEVEL II	8:15 AM – 10:15 PM

Nuts and Bolts of Demand Planning and Forecasting for Better Decision Making

With greater insight into demand, the better your decision making, and planning becomes. Without effective collaboration, however, even the best demand planning processes are doomed to fail. Input from sales and marketing is crucial to gain the company intelligence required to achieve accurate forecasts, and this means getting out of your silo and building the necessary relationships.

In this interactive workshop, I will show you how to design a better forecasting and planning process around cross-functional collaboration with the steps to supercharge your monthly Demand Review Meetings.

Join this hands-on session for real-world learnings and practical steps to build your own forecasting process, and turn your forecasts into a driver of company growth.

You will learn:
- The crucial elements of a successful forecasting process
- Why collaboration is the cornerstone of effective S&OP
- Why you cannot rely on statistical models alone
- What a "Single Number" consensus is, why it works, and how to achieve it
- How to organize a successful Demand Review Meeting and what it should achieve
- Understanding the risks and opportunities within demand management
- How to provide new product demand status and visibility

Todd Dunn, CPF
Director of Supply Chain
ACCUCAPS

Forecasting Without Data? How to Achieve Successful New Product Launches with Little or No History

Forecasting for new products is tough because you have no historical data to use as your reference points for likely demand. This makes new product launches very risky, due to the danger of producing too little and missing out on sales, or producing too much and wasting capital on excess inventory. Especially, if your company produces fashion, electronics, or technology products, you know how fast demand can disappear with their short life-cycles- and how dangerous that can be.

Communicating forecasts to senior management is always a challenge with new product launches, which is why we will compare typical error rates for new products vs. on-going products. This allows you to know what to expect and, crucially, how to manage expectations. Successful new product launches are possible, and I will show you how in this interactive session.

You will learn:
- How successful companies approach forecasting for new products
- The importance of new product forecasting to mitigate risks
- When to include new products in the planning process
- To understand the Product Lifecycle approach and implement it for new products
- How forecasting errors for new products compare to existing products
- How to size the overall opportunity of the product within the market

Eric Wilson, CPF
Director of Demand Planning
Berry Plastics

"This event was very informative and there were great ideas presented that I will be using at our company to improve our forecasting process."

Barbara Thomas, *Demand Planning Manager,* *Ecolab Inc.*

LEVEL I   10:25 AM – 12:25 PM

LEVEL II   10:25 AM – 12:25 PM

Simple Methods for Excellent Forecasts: How to Master Time Series Analytics

Did you know 60% of all firms use the same method to prepare forecasts? They employ time series analytics, and its popularity is due to its simplicity and accuracy. It's also popular since most forecasting software systems use many time series models in their forecasting engines. It is ideal for a range of businesses, thanks to its simple data requirements, and applications across various product types. It can be employed in both sophisticated forecasting systems and simple spreadsheets.

This session is very much hands-on and interactive, so bring a laptop with Microsoft Excel! Together we will prepare time series forecasts, so you can see how easily they can be created in your own organization. I will also leave you with a solid understanding of the difference between times series and other forecasting models such as regression. Plus, you will learn when to use each type of model too. Effective forecasting isn't always easy, but it doesn't have to be complicated - attend this session and you will see why.

You will learn:

- How to use the most popular and easy to use forecasting model, Time Series
- The appropriate time to employ time series models
- The right time to modify your time series forecasts and why
- The value of time series decomposition models for robust forecasts across a variety of industries
- How exponential smoothing works and its importance
- The right amount of data required for time series forecasting
- How to determine which time series model to use and when

Jeff Baker, CPF
Education Advisor
Institute of Business Forecasting & Planning

Institute of Business Forecasting & Planning

Broaden your Forecasting Horizons: A Masterclass in Long-Term Corporate Planning

Long-term forecasting is a unique beast, with many distinctions from short-term planning. Short-term forecasts are tactical and operational, whilst long-term forecasts drive corporate strategy over the course of years. Much of forecasting is dedicated to shorter time horizons, and whilst the techniques that are effective in this timeframe are useful, further methods are required to capture the fundamental shifts in your particular markets, not to mention the economy as a whole.

Long-term forecasts are crucial for management to organize capital investment and explore new markets. For this to be done effectively, your organization must have a clear vision of what lies ahead, and a plan to maximize opportunities and minimize risk. Influencing factors need to be identified and revealed to management at S&OP meetings or the forecast review meeting.

In this session, I will use real-world examples to show how you can place your company in the wider context in order to respond positively, whatever the future may hold.

You will learn:
- How to build long-term forecasts for strategic planning
- The differences between short-term planning and long-term planning
- How to identify risks, drivers, threats and opportunities
- The most effective approaches for long-term planning and forecasting
- How to apply techniques and methods to different scenarios

Mark Lawless, CPF
Sr. Consultant
Institute of Business Forecasting & Planning, IBF

Institute of Business Forecasting & Planning

LEVELS I & II: ROUND ROBIN ROUNDTABLE DISCUSSIONS

Increase your networking opportunities at IBF's Business Forecasting & Planning Academy by joining us at our very popular Round Robin, Round-Table Discussion session. Take this opportunity to bring up the most challenging questions facing your team, share your own war stories from the field and hear and share best practices. Discussion include timely and practical topics for your professional enhancement. These sessions will add new dimensions to the services you provide your customers, and increase your contact base in the demand planning & forecasting community. All experience levels are invited and welcome.

Round Robin Topics Include:
- Demand Planning and Forecasting Organizational Design
- Collaboration Within and Outside the Organization: S&OP and CPFR Respectively
- Improving Predictive Analytics & Forecast Accuracy

LEVEL I	2:00 PM – 4:00 PM

Implementing an S&OP Process from the Ground Up: A Step by Step Guide

S&OP serves to enable effective allocation of labor, resources, capital and materials to meet demand with the appropriate level of supply. When implemented effectively, it lowers costs, satisfies customers, and minimizes unnecessary investment. We can say then, that S&OP is a hugely powerful tool in streamlining business operations.

S&OP is nothing new, but it is becoming more and more important as supply chains become ever more complex; outsourcing and Globalization create unprecedented volatility and uncertainty, and consumerism is shortening product life-cycles. This means your role as demand planner has never been so important to the health of your company.

In this interactive session, beginners will learn how to design and implement an effective S&OP process, and experienced practitioners will discover ideas that will help improve their current S&OP process. Highlights include practical steps to communicate demand and supply issues to management and seamlessly integrate S&OP with management priorities.

You will learn:
- What S&OP is and its value to your business
- Practical steps to implement S&OP and keys to success
- How to use S&OP to foster a culture of continual improvement and positive change
- How to use S&OP as driver of growth
- How to encourage an environment where stakeholders own their responsibilities
- How to encourage cross-functional buy-in by communicating the value of S&OP to different areas of the business
- How to define the role of participants in the preparation meetings leading up to the Executive Review

Todd Dunn, CPF
Director of Supply Chain
Accucaps

ACCUCAPS
POWERFUL PARTNERSHIPS.
ENCAPSULATING EXCELLENCE.

LEVEL II	2:00 PM – 4:00 PM

Why Forecasters Need to Be Salespeople: Selling the Process to Get Buy-In for a One Number Forecast

Selling, in some form or another, has its role in every sphere of business; in forecasting, you must sell your forecast to stakeholders to provide the value you know it can deliver. This happens primarily in the Consensus Meeting or Forecast Review Meeting, and you mustn't be shy about stating your case as to why your forecast should be adopted. Not only is your aim for it to be adopted, but the company must have confidence in it, so management can devise strategic initiatives based on it. If confidence in a forecast is secured, the company has a plan and vision for the quarter, with all departments moving in step to reach a common goal. That is a hugely powerful thing for any organization, and it all starts with your ability to "sell".

In this interactive session, I will reveal the steps to becoming a confident salesperson of your forecast, with in-depth insight and practical tips to develop the soft skills required to gain influence. This includes understanding the different views, challenges, and objectives of various departments. We will look at how leading forecasting teams at major firms unite stakeholders in a common goal, complete with full buy-in from executive management - and how the whole organization benefits.

You will learn:
- Skills and tips to exert positive influence to secure engagement and buy-in
- Why leading companies use a "one number forecast", with benefits clearly explained
- The power of soft skills and influence in achieving your goals, and how anyone can learn them
- Reporting and visualization techniques that impress and inspire, and present your case in the most effective way

Jeff Marthins, CPF
Director of Supply Chain Operation
Flowers Foods

FlowersFoods

LEVEL I   8:15 AM – 10:15 AM

LEVEL II   8:15 AM – 10:15 AM

Small Changes, Dramatic Results: Reducing Forecast Error for a Serious Jump in Profits

Competitive advantage in supply chain is this: ensuring your customers have the right products when and where they want them, whilst minimizing working capital. The key to achieving this advantage is reducing forecast error. It's a simple concept, but not always easy to achieve.

In this session, I will share the most effective metrics to measure forecast error and which ones to apply in each scenario, all within a clear and systematic framework. I will use IBF's own benchmarking data to reveal the best practices and methods of S&OP leaders, which products are difficult to forecast, and the impact errors have on the company's bottom line. Most importantly, I will discuss the procedural and institutional hurdles that you will face, and how you can navigate them so planning achieves its rightful place within management's priorities. Consider this: just a 1% reduction in forecast error can equate to a huge increase in profits. As demand planners you can dramatically increase your company's bottom line, and I'll show you how.

You will learn:
- How much forecasting error costs your company and how even slight improvements drive significant profits
- The points at which you can expect errors, and for which products
- Practical steps to improve forecast accuracy
- Benchmarks of forecast error and more
- The best forecasting metrics and how to apply them

Dr. Chaman L. Jain
Professor of Economics
St. John's University

Chief Editor
IBF's Journal of Business Forecasting (JBF)

st. john's UNIVERSITY

Institute of Business Forecasting & Planning

Safety First: Inventory Management & Calculating Safety Stocks with Forecasts

Inventory management is always important, but when we see slowdowns in economic growth, it becomes absolutely critical. It's a delicate balancing act: maintaining enough reserve to handle any fluctuations in supply and demand without committing excess capital. Calculating how much safety stock to hold is tricky, but with an understanding of the fundamentals of supply and demand and the right models, it can be done. In this hands-on workshop, I will reveal how to develop a process for calculating the amount of safety stock you need in your business. You will find out what information you need, the specific calculations and formulas, and the factors influencing the demand for your products. These factors include lead time, replenishment time, and cycle time. Most importantly, I'll discuss the 'forecastability' of a product, and how some SKUs are inherently more volatile than others.

My aim for this session is to enable you to implement the Dynamic Safety Stock model in your own organization, so if you're looking for a practical solution to inventory management, this masterclass is not to be missed. This interactive session will use Microsoft Excel, so please bring a laptop.

You will learn:
- The different factors affecting supply and demand
- The concepts of lead time, replenishment time, and cycle time to better understand fluctuations in demand
- Standard safety stock calculations and the required inputs
- How to implement your own Dynamic Safety Stock model

Jeff Marthins, CPF
Director of Supply Chain Operation
Flowers Foods

FlowersFoods

"This event was very informative and there were great ideas presented that I will be using at our company to improve our forecasting process."

Barbara Thomas, *Demand Planning Manager,* **Ecolab Inc.**

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| LEVEL I | 10:25 AM – 12:25 AM | LEVEL II | 10:25 AM – 12:25 AM |

What to Do If… : The Game of Managing Difficult Situations in Demand Planning

Put your game face on because I will throw you some tough situations to handle, and you must devise appropriate responses in this game of situational management. This free-flowing case study session is truly hands-on, and will test your ability to react effectively to problems to achieve your aims as demand planners and forecasters.

Business isn't always pretty, and situations arise that require skills that go far beyond your technical job function. Managing different personalities and views can be enormously challenging. This is why you will be faced with two fictional scenarios, designed to represent common problems encountered in the demand planning process. Apply your knowledge gained from your experience and from the IBF Academy, and see how you stack up! With a supportive and fun environment, you will learn how to successfully navigate the cultural and institutional obstacles in your own organization. This is a great opportunity to increase your influence, drive stakeholder buy-in, and place your forecasts at the heart of your company. All levels welcome!

You will learn:

- To improve your situation analysis skills and understand different points of view to reach a consensus
- To apply knowledge gained in other sessions at the IBF Academy and your professional career
- How to gain influence through soft skills, manage conflict, and put forward solutions to problems encountered in the planning process

Mark Lawless
Sr. Consultant
Institute of Business Forecasting & Planning, IBF

Institute of Business Forecasting & Planning

Forecasting Faster with Less: How to Achieve Lean Forecasting with FVA, Whilst Right-Sizing your Investments

Effective forecasting is a growth driver, but any organization must contain the costs associated with the forecasting process. All capital expenditure on personnel and software must offer a return on investment. Considering ever shorter product life-cycles and the increase in new products, forecasters must work quicker, and not always with more resources. So how do demand planning teams become 'lean', and work in the most productive way possible?

The answer lies in reducing the cycle time of forecasts, and understanding which products take priority. In this session, we will discuss these concepts, and share IBF's benchmarking research to reveal the optimal number of SKUs a demand planner should handle. Highlights of this session include practical tips to implement Forecast Value Analysis which will uncover your own team's worst practices and identify what is really adding value to your forecasting, and what is not. If you need to cut costs and manage your resources better, this session is for you.

You will learn:

- How Forecast Value Analysis (FVA) improves forecasts
- How to identify worst practices in your forecasting process
- How to gauge the efficacy of your forecasts to drive improvements
- How to use product rationalization to your advantage
- How to foster a culture of lean forecasting and eliminate bureaucracy
- The optimal number of SKUs a demand planner should handle

Eric Wilson, CPF
Director of Demand Planning
Berry Plastics

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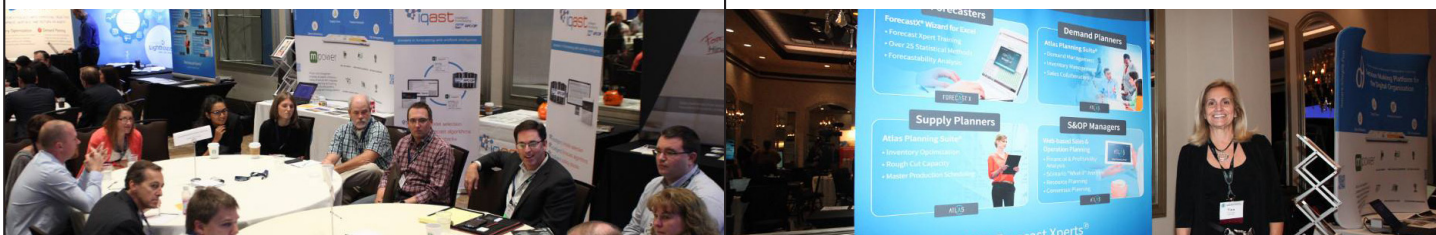
> *"The sessions and speakers were great!*
> *This is a 'must attend' for those who need to improve*
> *their S&OP processes."*
>
> ***Robert Filice,*** *Manager Mobile Portfolio Planning* | *Bell Mobility*

LEVEL I	1:30 PM – 3:30 PM	LEVEL II	1:30 PM – 3:30 PM

Spring Clean your Data: How to Select, Clean, and Manage Data for Greater Forecasting Performance

Even the best forecasting models are not fit for purpose unless the data you're inputting has been cleaned and verified. Not only will your forecasts be ineffective, they can be dangerously skewed. Can you say that your current data has been sufficiently analyzed and filtered before inputting? Does it account for massive fluctuations caused by promotional activities, natural disasters and other unplanned events? If you are not fully confident in your data, then this interactive masterclass is for you.

Together, we will look into data and how to cleanse and correct it for greater forecasting performance. The results include more accurate forecasts and greater credibility with your internal customers, including top management. Real data will be studied and we will work systematically to learn the concepts behind choosing the right data types for forecasting and the most effective demand signals. The whole workshop is designed for you to return to your forecasting teams and make practical changes straight away.

You will learn:
- How to manage data to accommodate natural disasters and unplanned events
- How to account for changes in consumer behavior
- How to adjust for missing data and how to select the right data to provide greater forecast accuracy
- How to identify demand signals to be included in your forecasts and plans

Jeff Baker, CPF
Education Advisor
Institute of Business Forecasting & Planning, IBF

Institute of Business Forecasting & Planning

It's a Risky Business: Introducing Innovative Scenario Planning Tools to Mitigate Risk

In S&OP there exists a 'new normal' where the only absolutes are uncertainty, complexity and risk. This highly interactive session will provide a broad perspective of the S&OP process: where it is now, where it is headed, and how the next generation of S&OP processes are adapting to increasing volatility.

Ideal for both S&OP novices and experienced professionals operating mature S&OP processes, this workshop will leverage several fundamental concepts such as the S&OP Maturity Model, Product Portfolio Management, Customer Segmentation, and Total Cost to Serve methods. I will equip you with a clear understanding of how these concepts affect your business, and how you can use them to mitigate risk across your supply chain. There will be a discussion on Scenario Planning as a Risk Mitigation tool with practical takeaways for your own organization. Something not to be missed is the introduction of a cloud-based Risk Awareness Tool, which is set to revolutionize the way we understand and implement S&OP.

You will learn to:
- The various stages of the S&OP Maturity Model and best practices
- The factors that cause uncertainty, complexity and risk in your supply chain
- The fundamentals of Supply Chain Risk Management
- New Total Cost to Serve methods that are driving profitability in forward thinking organizations
- The basics of Deterministic and Probabilistic Scenario Planning
- How a new Supply Chain Risk Awareness Tool can be leveraged for S&OP risk mitigation

Gregory L. Schlegel
Adjunct Professor,
Supply Chain-Risk Management,
Lehigh University

LEHIGH UNIVERSITY

" Thoroughly enlightening workshop. I can't wait to unleash the power that I now possess!"

Brian Florenz, Demand Planning | *Fuji Photo Film*

| LEVEL I | 3:40 PM – 5:40 PM | LEVEL II | 3:40 PM – 5:40 PM |

The Big Data Revolution and You: Why Predictive Business Analytics Should Be your Number 1 Priority

We are firmly in the 4th Industrial Revolution, and a key component of this is Big Data. Big Data is revolutionary both in its scale, and its ability to be collected and interpreted for unprecedented marketing intelligence. And it couldn't have come at a better time; with increasing globalization and consumerism, uncertainty and volatility have never been greater. Just as these new challenges emerge, so do the tools necessary to meet them.

This session explains the basic terms and definitions of Big Data and learns from leaders in the field like the NBA and 3PL that are leveraging Big Data and Predictive Analytics to drive profits. I will give you a thorough understanding of WHO is leveraging Big Data, WHAT they do with it, and HOW they manage the processes. This will allow you to apply the key concepts to the people, processes, and programs in your own organization. With real world examples and practical ideas to take back to your team, you will have a road map to incorporate Big Data into the culture of your company. I assure you, this session is not one to be missed.

You will learn:

- The definitions of Big Data, Predictive Analytics and the 4-V's
- The industries benefitting from Big Data and Predictive Analytics and how you can use them to drive profits
- The innovative Big Data tools that your forecasting team can use
- How Predictive Analytics provides better forecasting that reveals greater insight and mitigates riskecastings

Gregory L. Schlegel
Adjunct Professor,
Supply Chain-Risk Management,
Lehigh University

The Real Forecasting Growth Driver: How You Can Know the Impact of Promotions & Planned Events Ahead of Time

If your company increased promotional activities by 10% tomorrow, would you know how it would affect demand? What if prices are dropped by 20%? You should know this information, as it allows for smarter marketing activity, better planning to meet client demand, and the ability to employ initiatives to drive profits. In this workshop, you will learn how to quantify relationships between certain promotional activities and the resulting shifts in demand.

We will gain a clear understanding of the causal methods that use time series data and we will review various causal forecasting models and how they are applied in real-world situations. Highlights include tips on using the powerful MLR and ARIMA models. We often talk about forecasting as a tool to drive profits - this is how it happens.

You will learn:

- How to gauge the effect of different promotional activities on demand, complete with estimated ROI
- How to prepare forecasts with regression and ARIMA models
- What-if analysis and how to use regression/ARIMA for scenario planning
- The basics of R programming and how to implement it in your organization

Charles W. Chase, Jr., CPF
Advisory Industry Consultant
SAS Institute, Inc.

Jeff Baker, CPF
Education Advisor | **Institute of Business Forecasting & Planning (IBF)**

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, 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. Plus, he is an IBF Certified Professional Forecaster (CPF).

Charles W. Chase, Jr., CPF
Advisory Industry Consultant | **SAS Institute, Inc.**

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

Todd Dunn, CPF
Director of Supply Chain | **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 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).

Dr. Chaman L. Jain
Professor of Economics | **St. John's University**
Chief Editor | **IBF's Journal of Business Forecasting (JBF)**

Dr. Jain is Professor of Economics at St. John's University based in New York USA, where he mainly teaches a graduate course on business forecasting. He is also Chief Editor of the IBF's Journal of Business Forecasting. He has written over 100 articles, mostly in the area of forecasting and planning, and has authored/co-authored/edited nine books, seven in the area of forecasting and planning. His new book, "Fundamentals of Demand Planning and Forecasting," is the basis of IBF's body of knowledge. In a consulting capacity, he has worked for Brown and Williamson, Hewlett Packard, Union Fidelity Life Insurance Company, Prince Manufacturing, CECO Doors, Taylor Made Golf and Bilgore Groves. He has conducted workshops on business forecasting and planning for various organizations including Sweetheart Cup, Eastman Kodak, Jockey International, SABIC, Saudi Aramco, DU-Emirates Integrated Telecommunications Co. -Dubai UAE, and Symbios Consulting Group-Egypt, Goody-Saudi Arabia, Al-Nahdi Medical. He has made presentations on business forecasting and planning at IBF conferences / workshops, Council of Supply Chain Management, Informs, DMDNY in New York, John Galt Solutions and SAS. He has been invited by various institutions to speak on business forecasting & planning including University Technology Malaysia, Malaysia, School of Future Studies & Planning, Devi Ahilya University, India, and Apeejay Svran Institute of Management, India. He is the recipient of 1994 award of the Direct Marketing Educational Foundation for his best paper.

Mark Lawless
Senior Consultant | **Institute of Business Forecasting & Planning**

Mark Lawless is a Senior Consultant for the Institute of Business Forecasting & Planning (IBF). He has extensive experience in forecasting, planning, business process development, and business management. Mark has been associated with the Institute of Business Forecasting since its inception. He has held a C-level positions, including Chief Planning Officer, Chief Financial Officer, and Chief Operating Officer in his career. During his company affiliations, he has been responsible for 1) Development of planning and forecasting processes; 2) Development of forecasting models; 3) Selection and implementation of supporting automated systems; 4) Presentation of forecasts and plans to all levels of management and to major investors and analyst groups; 5) Remediation and continuous improvement of forecasting & planning processes and related forecasting models. During his association with the IBF, he has published many articles in the Journal of Business Forecasting (JBF) and serves as an editorial advisor to the publication. Mark has participated in the development of the IBF's Certification Program, and has developed and run tutorials to prepare those taking the certification examination. Mark holds an undergraduate degree in Economics, and graduate degrees in Economics, Finance, and Accounting. He is an alumnus of Southern Illinois University (Edwardsville), Washington University (St. Louis), Boston College, and Bentley University. He is also IBF's 2016 Award recipeient for Lifetime Achievement in Business Forecasting & Planning.

Jeff Marthins, CPF
Director of Supply Chain Operations | **Flower 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. Jeff is an IBF Certified Professional Forecaster (CPF). Plus, he's a 2016 IBF Award receipient for Excellence in Business Forecasting & Planning

Greg Schlegel
VP/ Principal | **SherTrack LLC**
Adjunct Professor Supply Chain Risk Management | **Lehigh University**
Founder | **The Supply Chain Risk Management Consortium**
Adjunct Professor, ERM-Enterprise Risk Management | **Villanova University, EMBA Program**

Greg has over 25 years of experience with several Fortune 100 companies across multiple industries. He has held executive positions in the systems, staff and plant operations environments and has been Supply Chain Director, Materials Director, Logistics Manager, Plant Operations Manager, CIO and Systems Director with companies such as Hercules Chemical, Sandvik Specialty Steel, International Harvester, Schlumberger, Loral Aerospace & Defense Electronics, GAF/ISP Specialty Chemicals and IBM Supply Chain Solutions. Greg is presently teaching MBA supply chain risk management at Lehigh University. Plus, he is VP Business Development/Principal for SherTrack LLC that provides Demand-Driven Predictive Manufacturing solutions. He has also implemented CPFR, collaborative planning, forecasting & replenishment systems, S&OP Processes, and more. Greg was APICS' 1997 International Society President. He is a frequent speaker at IBF conferences and seminars, globally. Greg is widely published in many well known supply chain and logistics publications, including IBF's Journal of Business Forecasting. He is a graduate of Penn State, holding a B.S. in Operations Research and Computer Science, and has attended Lake Forest College of Graduate Studies.

Eric Wilson, CPF
Director of Demand Planning | **Berry Plastics**

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

SCHEDULE AT A GLANCE

DAY 1 | MONDAY | AUGUST 14, 2017

Time	LEVEL I	LEVEL II
7:00 am – 8:00 am	MORNING REFRESHMENTS & REGISTRATION **| VISIT WITH EXHIBITORS**	
8:00 am – 8:15 am	WELCOME	
8:15 am – 10:15 am	**Nuts and Bolts of Demand Planning and Forecasting for Better Decision Making** Todd Dunn, CPF *Director of Supply Chain* **ACCUCAPS**	**Forecasting Without Data? How to Achieve Successful New Product Launches with Little or No History** Eric Wilson, CPF *Director of Demand Planning* **BERRY PLASTICS**
10:15 am – 10:25 am	MORNING BREAK **| VISIT WITH EXHIBITORS**	
10:25 am – 12:25 pm	**Simple Methods for Excellent Forecasts: How to Master Time Series Analytics** **JEFF BAKER, CPF** *Education Advisor* **INSTITUTE OF BUSINESS FORECASTING & PLANNING**	**Broaden your Forecasting Horizons: A Masterclass in Long-Term Corporate Planning** Mark Lawless, CPF *Sr. Consultant* **INSTITUTE OF BUSINESS FORECASTING & PLANNING, IBF**
12:30 pm – 1:30 pm	LUNCH	
1:30 pm – 2:00 pm	**VISIT WITH EXHIBITORS**	
2:00 pm – 4:00 pm	**Implementing an S&OP Process from the Ground Up: A Step by Step Guide** Todd Dunn, CPF *Director of Supply Chain* **ACCUCAPS**	**Why Forecasters Need to Be Salespeople: Selling the Process to Get Buy-In for a One Number Forecast** Jeff Marthins, CPF *Director of Supply Chain Operation* **FLOWERS FOODS**
4:00 pm – 4:15 pm	AFTERNOON BREAK **| VISIT WITH EXHIBITORS**	
4:10 pm – 5:15 pm	**ROUND ROBIN ROUNDTABLE DISCUSSIONS**	

DAY 2 | TUESDAY | AUGUST 15, 2017

Time	LEVEL I	LEVEL II
7:15 am – 8:15 am	MORNING REFRESHMENTS **| VISIT WITH EXHIBITORS**	
8:15 am – 10:15 am	**Small Changes, Dramatic Results: Reducing Forecast Error for a Serious Jump in Profits** Dr. Chaman L. Jain *Professor of Economics* **ST. JOHN'S UNIVERSITY** *Chief Editor* **IBF'S JOURNAL OF BUSINESS FORECASTING (JBF)**	**Safety First: Inventory Management & Calculating Safety Stocks with Forecasts** Jeff Marthins, CPF *Director of Supply Chain Operation* **FLOWERS FOODS**
10:15 am – 10:25 am	MORNING BREAK **| VISIT WITH EXHIBITORS**	
10:25 am – 12:25 pm	**What to Do If… : The Game of Managing Difficult Situations in Demand Planning** Mark Lawless *Sr. Consultant* **INSTITUTE OF BUSINESS FORECASTING & PLANNING, IBF**	**Forecasting Faster with Less: How to Achieve Lean Forecasting with FVA, Whilst Right-Sizing your Investments** Eric Wilson, CPF *Director of Demand Planning* **BERRY PLASTICS**
12:30 pm – 1:30 pm	LUNCH	
1:30 pm – 3:30 pm	**Spring Clean your Data: How to Select, Clean, and Manage Data for Greater Forecasting Performance** Jeff Baker, CPF *Education Advisor* **INSTITUTE OF BUSINESS FORECASTING & PLANNING, IBF**	**It's a Risky Business: Introducing Innovative Scenario Planning Tools to Mitigate Risk** Gregory L. Schlegel *Adjunct Professor,* *Supply Chain-Risk Management* **LEHIGH UNIVERSITY**
3:30 pm – 3:40 pm	AFTERNOON BREAK	
3:40 pm – 5:40 pm	**The Big Data Revolution and You: Why Predictive Business Analytics Should Be your Number 1 Priority** Gregory L. Schlegel *Adjunct Professor,* *Supply Chain-Risk Management,* **LEHIGH UNIVERSITY**	**The Real Forecasting Growth Driver: How You Can Know the Impact of Promotions & Planned Events Ahead of Time** Charles W. Chase, Jr., CPF *Advisory Industry Consultant* **SAS INSTITUTE, INC.**

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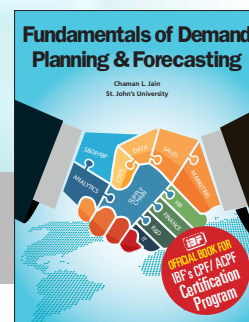
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