

# S&OP AND IBP BOOT CAMP

AS PART OF THE IBF'S BOOT CAMP SERIES

FEBRUARY 11-12, 2019 | SCOTTSDALE, ARIZONA USA

## WHAT OTHERS HAVE SAID ABOUT OUR BOOT CAMP LEADERS

“Excellent engagement and instruction”

J. Piechule, CPF  
*Senior Manager, Supply Chain*  
SARTOMER

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

W. Valiant  
*Director Supply Chain Management*  
KENT

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

H. Snoek  
*Demand Planning*  
CANADA BREAD

**SILVER PACKAGE**  
**ONLY \$1299\* (USD)**  
**WHEN YOU REGISTER**  
**BY DECEMBER 20, 2018**  
\*IBF Members receive an additional \$100 off



**Institute of Business  
Forecasting & Planning**

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# S&OP AND IBP BOOT CAMP

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

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

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

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

This event is part of the **IBF'S BOOT CAMP SERIES. SEE IBF'S DEMAND PLANNING & FORECASTING BOOT CAMP** taking place March, April and June 2019.



# S&OP AND IBP BOOT CAMP

**DAY 1 | MONDAY | FEBRUARY 11, 2019**

**8:30 am – 11:55 am | MORNING SESSION**

## **S&OP & IBP OVERVIEW (WHAT, WHY)**

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

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

## **DATA GATHERING**

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

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

## **DEMAND REVIEW – DEMAND PLANNING FUNDAMENTALS**

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

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



## DAY 1 | MONDAY | FEBRUARY 11, 2019

### DEMAND REVIEW - FORECASTING FUNDAMENTALS

*Fundamentals of Forecasting in the IBP & S&OP process*

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

### 12:00 PM – 1:00 PM | LUNCH

### 1:00 PM – 4:30 PM | AFTERNOON SESSION

### DEMAND REVIEW - PRODUCT PORTFOLIO & LIFE-CYCLE MANAGEMENT

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

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

### DEMAND REVIEW - FORECAST ERROR MEASUREMENT

*Metrics for assessing forecasting & planning performance*

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

### SUPPLY REVIEW

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

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

### Q&A





## DAY 2 | TUESDAY | FEBRUARY 12, 2019

### 8:30 am – 11:55 am | MORNING SESSION

#### PRE-S&OP MEETING

*Preparing in Advance for the S&OP Meeting*

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

#### IBP & EXECUTIVE S&OP MEETING

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

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

### 12:00 PM – 1:00 PM | LUNCH

## DAY 2 | TUESDAY | FEBRUARY 12, 2019

### 1:00 PM – 4:30 PM | AFTERNOON SESSION

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

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

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

#### **STAKEHOLDER ALIGNMENT – KEEPING PARTICIPANTS ACTIVELY ENGAGED IN THE PROCESS**

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

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

#### **CASE STUDIES**

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

#### **Q&A**

### BOOT CAMP CONCLUDES



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

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 and he is an IBF Certified Professional Forecaster (CPF).



Todd Dunn, CPF  
IBF's 2018 Excellence Award Winner  
Director of Supply Chain  
**Catalent**

Todd Dunn is currently the Director of Supply Chain at Catalent Pharmaceutical. Most recently, he is IBF's 2018 "Excellence in Business Forecasting & Planning" award winner. Todd has held several management positions in supply chain and production within his 28 years of manufacturing experience. He was the project manager to successfully lead his organization to Class A MRP II 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 a Certified Professional Forecaster (CPF).

## EVENT SPONSORS



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#### Available Top Tier Sponsorships

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- Lunch Sponsorship

### Exhibit Space is Available!

#### What You Get:

- Area for the exhibitor's 10' pop up booth, 6' skirted table and two chairs
- Access for up to 2 people to man your booth
- Networking opportunities with attendees during breaks and all food functions
- 1 complimentary registration pass for a client

Exhibitor Fees: \$3200 (USD)

For further information:

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### Hotel Information:

#### Hilton Scottsdale Resort & Villas

6333 North Scottsdale Road

Scottsdale, Arizona 85250-5428 USA

Reservations: + 1.480.948.7750

Website: <https://bit.ly/2QaVM7C>

Special IBF Group Rate: \$229 + tax when you register by January 11, 2019.

*Reserve your room today!*

## BECOME A CERTIFIED PROFESSIONAL FORECASTER (CPF)

### Master Demand Planning, Forecasting, and S&OP with IBF Certification

#### Benefits of IBF Certification

##### FOR EMPLOYEES:

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

#### GET CERTIFIED AFTER THE EVENT!

Please visit [www.ibf.org](http://www.ibf.org) for exam dates and locations.

Register on our website, [www.ibf.org](http://www.ibf.org) or call us

@+1.516.504.7576 for more details.

##### FOR EMPLOYERS:

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

**EARN 10 POINTS TOWARD RE-CERTIFICATION BY ATTENDING THIS CONFERENCE!**

IBF'S BODY OF KNOWLEDGE  
\$124.95 USD





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Registration Type	Silver Package	Gold Package	Silver Group Package (2 Persons)	Gold Group Package (2 Persons)	Gold Group (4 persons for price of 3)	Gold Certify Package
<b>SUPER EARLY BIRD PRICING</b> EXPIRES DECEMBER 20, 2018 (POSSIBLE EXTENSION JANUARY 8, 2019)	\$1,299 (USD)	\$1,449 (USD)	\$2,498 (USD)	\$2,798 (USD)	\$4,347 (USD)	\$2,649 (USD)
<b>EARLY BIRD PRICING</b> EXPIRES JANUARY 22, 2019	\$1,499 (USD)	\$1,649 (USD)	\$2,898 (USD)	\$3,198 (USD)	\$4,947 (USD)	\$2,849 (USD)
<b>REGULAR PRICING</b> EXPIRES FEBRUARY 10, 2019	\$1,599 (USD)	\$1,749 (USD)	\$3,098 (USD)	\$3,398 (USD)	\$5,247 (USD)	\$2,949 (USD)
<b>ONSITE PRICING</b>	\$1,699 (USD)	\$1,849 (USD)	\$3,298 (USD)	\$3,598 (USD)	\$5,547 (USD)	\$3,049 (USD)
<b>IBF MEMBERSHIP DISCOUNT \$100 (USD) OFF</b>	ELIGIBLE	INCLUDED	N/A	INCLUDED +	INCLUDED +	INCLUDED
<b>IBP/ S&amp;OP BOOT CAMP</b>   February 11-12, 2019	YES	YES		YES	YES	YES
<b>1 YEAR SUBSCRIPTION TO JOURNAL OF BUSINESS FORECASTING</b> (INCLUDED WITH IBF MEMBERSHIP)		YES		YES	YES	YES
<b>ACCESS TO 30+ YEARS OF ARTICLES AND IBF RESEARCH</b> (INCLUDED WITH IBF MEMBERSHIP)		YES		YES	YES	YES
<b>ACCESS TO COST OF FORECAST ERROR TEMPLATE</b> (INCLUDED WITH IBF MEMBERSHIP)		YES		YES	YES	YES
<b>CONTINENTAL BREAKFAST &amp; LUNCH</b>	YES	YES	YES	YES	YES	YES
<b>SIGNIFICANT DISCOUNTS AT FUTURE IBF EVENTS</b> (INCLUDED WITH IBF MEMBERSHIP)		YES		YES	YES	YES
<b>FREE FORECASTING TUTORIAL AT SELECT IBF EVENTS</b> (INCLUDED WITH IBF MEMBERSHIP, \$1000 Value)		YES		YES	YES	YES
<b>BENCHMARKING RESEARCH REPORTS</b> (INCLUDED WITH IBF MEMBERSHIP)		YES		YES	YES	YES
<b>IBF CPF CERTIFICATION EXAMS</b>						YES
<b>FUNDAMENTALS OF DEMAND PLANNING &amp; FORECASTING BOOK</b>						YES

## CERTIFICATION FEE (OPTIONAL)

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

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

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

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

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Signature

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

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

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

**IBF Membership included in Gold Package. IBF Members receive an additional \$100 Off!**