IBF ACADEMY 2019
Business Planning, Forecasting & S&OP
AUGUST 12-13, 2019

BOSTON, MASSACHUSETTS | USA

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FREE REGISTRATION
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BENEFITS:
· Taught by top practitioners in S&OP, Demand Planning, Forecasting, Supply Chain & Predictive Analytics
· Hands-on, step-by-step instructions with exercises and case studies
· Network with nearly 100 global professionals to share best practices
· Preparation towards becoming an IBF Certified Professional Forecaster (CPF®)

KEY TOPICS:
· Successfully Implementing S&OP/ IBP
· New Product Forecasting & Planning Methods
· eCommerce and Omni-Channel Forecasting & Planning Approaches
· Leveraging Predictive Analytics for Better Business Planning
· Forecasting Analytics & Big Data Management
· Choosing Inventory Levels with Forecasts
· Quantifying the Impact of Promotions on Sales
· Choosing the Right Aggregation Level for Forecasting

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 14, 2019.

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

Consensus Forecasting: Best Practices In Collaborative Forecasting & Planning

When it comes to operations and order fulfillment, the more insight you have into future demand, the better. But getting a number you can base your business operations on is easier said than done. It relies on a collaborative process with input from sales and marketing to get the data you need to build robust forecasts, and that means you need to get out of your silo and into the business. In this interactive workshop, I will show you how to design a better forecasting and planning process around cross-functional collaboration to supercharge your monthly Demand Review Meetings. You'll learn how to get buy-in for the process, get the key players around the table, what data you need, and the judgmental insight you need to accompany your statistical models. With real-world learnings and practical steps to build your own forecasting process, you'll be able to leverage forecasts for greater insight, streamlined inventory, better customer service, and even spot commercial opportunities.

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
- The risks and opportunities within demand management
- How to provide new product demand status and visibility

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

Institute of Business Forecasting & Planning

Product Lifecycle Approach: Forecasting New Product Launches With Little or No Sales Data

New products are crucial to competing in today's retail environment but with such low success rates for new launches, it is a very risky business. And that's no surprise because forecasting sales for a product that has no sales history is very challenging. To avoid excess expenditure on the one hand, and ensure enough inventory on the other, we need to think outside the box. In this interactive workshop, you'll learn how best-in-class companies use the Product Lifecycle approach for new product launches, and how you can implement it in your own organization. We'll take a close look at error rates compared to existing products, how to size the overall opportunity, what data you can use to build a workable forecast, and crucially, how to update and manage forecasts post-launch to mitigate the risk and maximize opportunity. Successful new product launches are possible, and I will show you how.

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 Thought Leadership
Institute of Business Forecasting & Planning (IBF)

Institute of Business Forecasting & Planning

Director of Planning
Escalade Sports

escalade S P O R T S

"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 will be 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 and other smoothing models work and their 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 (IBF)

Omni-challenging: Ecommerce and Retail Forecasting & Planning Best Practices

Omnichannel is being adopted by retailers to enable a seamless shopping experience for their customers across all possible points of contact. This new approach to selling comes with its own challenges, with a key factor to omnichannel success being unrestricted access to inventory across all channels, including in-store, website and mobile app. This workshop will discuss the findings from a multiple case study of global retailers, including identifying the newly emerging channel-related variables that impact sales. In this interactive session I'll reveal channel-specific nuances so you can effectively forecast for each channel. We'll also discuss how to determine the optimal location for staging inventory to deliver the best customer service at the lowest cost, as well as the implications of omnichannel on forecasting, planning and S&OP. If you work in retail forecasting or planning, omnichannel is now a fact of life, and understanding the demand drivers for each channel is key to survival.

You will learn:

- The challenges in forecasting and planning in the omnichannel environment
- How to identify demand drivers for each channel
- How to organize inventory to ensure optimal order fulfillment
- ecommerce planning vs traditional planning
- Using POS/ Consumption data for forecasting
- How to know if the data is good
- CPFR (Collaborative Planning, Forecasting and Replenishment)

Todd Gallant, ACPF
Vice President, Planning & Allocation
Cole Haan

COLE HAAN

LEVEL I	2:00 PM – 4:00 PM	LEVEL II	2:00 PM – 4:00 PM

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

organizations, it can be very complicated. That's where S&OP comes in to provide clarity and structure to make sure the customer gets what they need and when they need it, allowing for 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 expenditure. In this workshop, we are going to learn how S&OP is becoming more and more important as Supply Chains become ever more complex due to outsourcing, globalization and shortened product lifecycles. 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, how to use S&OP to spot commercial opportunities, encourage cross-functional buy in, 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 define the role of participants in the preparation meetings leading up to the Executive Review
- How to encourage cross-functional buy-in by communicating the value of S&OP to different areas of the business

Todd Gallant, ACPF
Vice President,
Planning & Allocation
Cole Haan

COLE HAAN

How to Leverage Predictive Analytics: Talent Management and Organization Structure to Build the Next Generation of Planning Professionals

There is a very serious gap in the employment pool which makes finding the right talent for your Forecasting and Demand Planning very difficult. Effective organization design is key to managing this change, and it is about more than just structure: it is architecting and aligning all facets of the organization to enable strategy. When processes, structures, technology, people, systems and culture work in concert, an enterprise is best positioned to deliver dynamic results. But in a world of constant change, how will your centralized Predictive Analytics and Planning Department keep the pieces in sync? What can we do to ensure we have the talent necessary to support our business both now and into the future? Whether you're looking to redesign one function or the whole organization, you need to look beyond hierarchies and organizational charts to be successful. Come to this session and I'll leave you with a roadmap to upgrade your company's approach to organization design to be successful in the new age of analytics and insight.

You will learn:

- The differences and opinions of the centralized or decentralized roles of Data Science, Predictive analytics, and Demand Planning
- Women in planning and how to "challenge" your demand planning for more diversity
- The core competencies companies will be looking for in the future and what gaps we currently see
- How to build adaptable teams by identifying the right people and delivering the right training

Eric Wilson, CPF
Director of Thought Leadership
Institute of Business Forecasting & Planning (IBF)

Director of Planning
Escalade Sports

Institute of Business Forecasting & Planning

escalade SPORTS

| 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 workshop, 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
Journal of Business Forecasting (JBF)

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

"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 PM | LEVEL II | 10:25 AM – 12:25 PM |

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
Senior Consultant
Institute of Business Forecasting & Planning (IBF)

Institute of Business Forecasting & Planning

How to Use Cluster Analysis For More Accurate Forecasts

Cluster analysis can identify groups of like customers or products which is valuable because it enables more precise forecasts. Cluster analysis uses customer or product attributes, along with their demand history, to form such groups. The result is groups with values that are as similar to each other as possible, and the groups as a whole are as different to each other as possible. In this hands-on session, we'll examine the assumptions behind cluster analysis, the two main types of cluster analysis and how to identify the optimal attributes of clusters for maximum effect. This methodology is an effective way of improving forecast accuracy, and I'll leave you with the knowledge you need to implement it in your own organization.

You will learn:

- The logic behind cluster analysis and comparison of two key types of methods (hierarchical and partitioning)
- How to identify clustering methods for both statistical forecasting and machine learning
- Measures of demand history "RFM" (recency, frequency and monetary) and how clusters are chosen and evaluated

Sara Brumbaugh
Managing Principal
Ceres Analytics

CERES ANALYTICS
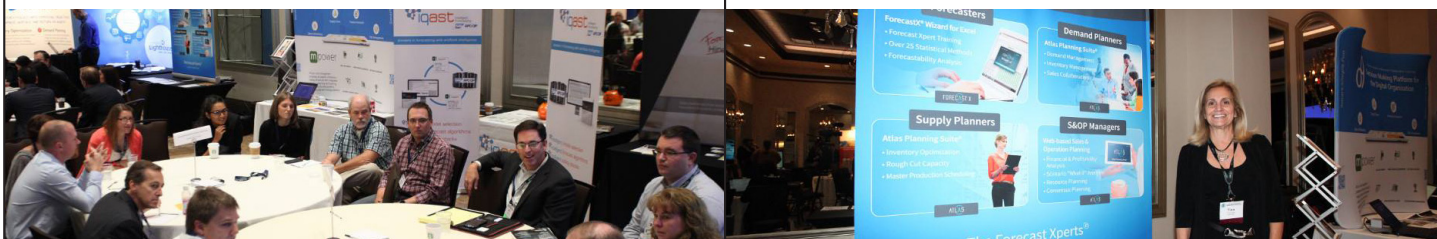
"The sessions and speakers were great!
This is a 'must attend' for those who need to improve
their S&OP processes."

Robert Filice, *Manager Mobile Portfolio Planning* | ***Bell Mobility***

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

How & When to Use Top down, Bottom Up, and Other Forecasting Approaches

In forecasting, we can choose to make forecasts using different approaches including bottom up, top down, or a combination of both. These approaches do the same thing, predict demand, but at different levels of product hierarchy. If we need to forecast for production or build plans, it requires a particular approach. If we need to forecast for strategic planning, financial planning, market share, or commercial planning, it can require another approach. According to IBF's benchmarking research, as we forecast at higher levels of product aggregation, forecast accuracy increases. But, when we forecast at the lower level, for example at the SKU level, we often find lower levels of accuracy. Is it practical to use one approach all the time? What impact would our choice of approach have on company performance? In this hands-on session, I will share lessons learned and case studies from Puma to reveal when to use which approach, how to implement them, and which one is best for building robust demand and operational plans. We will also discuss how to break down aggregate or category level forecasts down to their SKU level forecasts.

You will learn:

- What bottom up and top down forecasting are and when to use them
- How to reconcile top down and bottom up approaches into one forecast
- How to break down aggregate or category level forecasts into SKU level forecasts

Joseph Eschenbrenner, ACPF
Director of Demand & Supply Planning
Puma

Forecasting Faster with Less: Lean Forecasting with FVA, Segmentation, and Right-Sizing Your Investments

A forecast is designed to predict demand so that money is saved by avoiding excess inventory, and money is made by ensuring enough stock is available. 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 efficient 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 Add (FVA) 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 to:

- How Forecast Value Add (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

Jeff Marthins, CPF
Director of Supply Chain

" 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 |

Are You Sure You Want to Offer That Discount? Understanding the Impact of Promotions With Regression Analysis

Expenses for advertising and promotions can add up to more than 20 percent of a company's annual sales according to the Promotion Optimization Institute. Only about 1 in 50 brands are able to model and predict promotion uplifts with any reliability to guarantee product availability and to evaluate the economic returns on those promotions. In this workshop, you will learn how to quantify the relationships between certain promotional activities and the resulting shifts in demand. You will gain a clear understanding of how to apply ARIMA models using time series data, review various causal factors that support demand promotions, and how they are applied in real-world situations. Highlights include tips on using powerful ARIMA and ARIMA (X) models. This workshop will focus on how to apply ARIMA/ARIMA(X) models to model and predict sales promotion lifts using real data including syndicated scanner data and shipments data.

You will learn:

- How to gauge the effect of different promotional activities on demand, and the corresponding impact on shipments (supply)
- How to apply and interpret ARIMA models using automated technology—no programming required
- What-if analysis and how to use ARIMA models for scenario planning
- How to apply true demand sensing and shaping linking consumption to supply

Charles Chase, CPF
Executive Industry Consultant
SAS Institute

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

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 to implementation. Prior to consulting, Jeff worked in the chemical process industry, and after completing his MBA, spent three years with Coopers & Lybrand as a Senior Manager in their supply chain optimization practice. Currently Jeff is a Director in the Integrated Demand & Supply Planning practice at Chainalytics. In this role, he works with some of the world's best-known companies to improve their supply chain planning processes and capabilities, from design to implementation. Jeff holds a B.S. in Chemical Engineering, an MBA, and a Master of Engineering in Supply Chain Management from MIT. He is also a recipient of Supply & Demand Chain Executive's 2019 Pros to Know award. Jeff is an advocate for advancing the supply chain management field and does so through training, speaking, and volunteering at IBF events worldwide. He is an IBF Certified Professional Forecaster (CPF).

Sara Brumbaugh
Managing Principal | **Ceres Analytics**

Sara Brumbaugh is Managing Principal of Ceres Analytics, a consultancy specializing in applied mathematics, statistics, and machine learning. Sara's roots are in business forecasting: she's worked with the IBF for 20 years, and is the 2015 recipient of IBF's Lifetime Achievement Award. Sara's work in predictive analytics began with construction of forecast drivers to predict stock returns. Her current analytic work supports genetic brain research at Harvard Medical School. Other recent work includes patent-pending algorithms to detect financial fraud, and genetic models to predict success of cancer chemotherapy. Sara holds a masters in Economics from Florida State University.

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).

Joseph Eschenbrenner, ACPF
Director of Demand & Supply Planning | **Puma**

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

Todd Gallant, ACPF
Vice President, Planning & Allocation | **Cole Haan**

Todd has extensive experience in coordinating demand planning processes and S&OP. He was involved in Finance, Customer Service, Supply Chain, and Sales Planning. He is a Certified Professional Forecaster (CPF) and holds a BS degree from Boston College and an MBA from University of New Hampshire with a focus in Supply Chain Management and Marketing. Todd is also a member of the Institute of Business Forecasting & Planning (IBF) Board of Advisors, and has served as a keynote speaker & panelist for IBF Executive Forums and conferences. Todd has also published in the IBF's Journal of Business Forecasting.

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 (IBF)**

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

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 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

Eric Wilson, CPF
Director of Thought Leadership | **Institute of Business Forecasting & Planning (IBF)**
Director of Planning | **Escalade Sports**

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).

> *"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.**

SCHEDULE AT A GLANCE

DAY 1 | MONDAY | AUGUST 12, 2019

Time		
7:00 am – 8:00 am	MORNING REFRESHMENTS & REGISTRATION **| VISIT WITH EXHIBITORS**	
8:00 am – 8:15 am	WELCOME	
	LEVEL I	**LEVEL II**
8:15 am – 10:15 am	**Consensus Forecasting: Best Practices In Collaborative Forecasting & Planning** Jeff Baker, CPF *Education Advisor* **INSTITUTE OF BUSINESS FORECASTING & PLANNING (IBF)**	**Product Lifecycle Approach: Forecasting New Product Launches With Little or No Sales Data** Eric Wilson, CPF *Director of Thought Leadership,* **INSTITUTE OF BUSINESS FORECASTING & PLANNING (IBF)** *Director of Planning,* **ESCALADE SPORTS**
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 (IBF)**	**Omni-challenging: Ecommerce and Retail Forecasting & Planning Best Practices** Todd Gallant, ACPF *Vice President, Planning & Allocation* **COLE HAAN**
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 Gallant, ACPF *Vice President, Planning & Allocation* **COLE HAAN**	**How to Leverage Predictive Analytics: Talent Management and Organization Structure To Build the Next Generation of Planning Professionals** Eric Wilson, CPF *Director of Thought Leadership,* **INSTITUTE OF BUSINESS FORECASTING & PLANNING (IBF)** *Director of Planning,* **ESCALADE SPORTS**
4:00 pm – 4:15 pm	AFTERNOON BREAK **| VISIT WITH EXHIBITORS**	
4:15 pm – 5:15 pm	**ROUND ROBIN ROUNDTABLE DISCUSSIONS**	

DAY 2 | TUESDAY | AUGUST 13, 2019

Time		
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* **JOURNAL OF BUSINESS FORECASTING (JBF)**	**Safety First: Inventory Management & Calculating Safety Stocks with Forecasts** Jeff Marthins, CPF *Director of Supply Chain*
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 *Senior Consultant* **INSTITUTE OF BUSINESS FORECASTING & PLANNING (IBF)**	**How To Use Cluster Analysis For More Accurate Forecasts** Sara Brumbaugh *Managing Principal* **CERES ANALYTICS**
12:30 pm – 1:30 pm	LUNCH **| VISIT WITH EXHIBITORS**	
1:30 pm – 3:30 pm	**How & When To Use Top down, Bottom Up, and Other Forecasting Approaches** Joseph Eschenbrenner, ACPF *Director of Demand & Supply Planning* **PUMA**	**Forecasting Faster with Less: Lean Forecasting with FVA, Segmentation, and Right-Sizing Your Investments** Jeff Marthins, CPF *Director of Supply Chain*
3:30 pm – 3:40 pm	AFTERNOON BREAK **| VISIT WITH EXHIBITORS**	
3:40 pm – 5:40 pm	**Are You Sure You Want To Offer That Discount? Understanding the Impact of Promotions With Regression Analysis** Charles Chase, CPF *Executive Industry Consultant* **SAS INSTITUTE**	

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