

# BUSINESS PLANNING FORECASTING & S&OP

## BEST PRACTICES CONFERENCE

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

ORLANDO, FLORIDA USA | OCTOBER 20-23, 2019

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**ONLY \$1599\* (USD)**

*When you register by September 24, 2019*

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**SUNDAY | OCTOBER 20 | 9:00 AM - 4:30 PM**

## 1-DAY FUNDAMENTALS OF DEMAND PLANNING & FORECASTING TUTORIAL

**FREE 1-DAY  
TUTORIAL**  
w/ Gold or Diamond  
Package that includes  
IBF Membership

IBF will provide expert instruction on the Fundamentals of Demand Planning & Forecasting, based on IBF's body of knowledge used by 1000's of global companies. You'll hear about what works and what successful companies are doing today to improve business performance.

If you get the forecast right, you will be able to optimize inventory, improve customer service, foster more collaboration and energize your S&OP process, while increasing profitability and market-share.

The hands-on and interactive nature of the program will foster discussion and idea sharing with participants to ensure knowledge shared is fully absorbed.

Also, with the limited supply of qualified demand planning & forecasting professionals in the marketplace, a global phenomenon, you have a chance to supercharge your career in this profession. The IBF has the salary benchmarking reports to prove it.

### Key Learnings:

- Ingredients of a successful forecasting process
- Fundamentals of Sales & Operations Planning (S&OP)
- How to measure forecasting performance, a key to continuous improvement
- Learn next level forecasting analytics used by best-in-class companies
- How to analyze and treat data before using your ERP System
- How to prepare baseline forecasts using Time Series methods, the most widely used method for forecasting
- How to use Regression/ Causal analytical methods to explain, forecast, and drive demand
- How to forecast and plan new products, where limited or no data may be available
- And much more

***Plus, this workshop is an excellent step in preparing and becoming a Certified Professional Forecaster (CPF)! Exams will be offered on October 24, 2019.***

### MORNING | 9:00 AM-12:10 PM

#### ROLE OF FORECASTING IN THE ORGANIZATION

- Benefits and its impact on supply chain, management decisions, financial plans
- Responsibilities/Accountability
- Consensus development and management support
- Relationship to other decision and planning processes
- Cross-function participation and involvement

#### S&OP & FORECASTING PROCESS

- Process design and interfaces
- Cross-functional involvement and consensus building
- Forecaster competencies & skills
- Forecast user Information needs
- Risk and error tolerances

#### FORECAST ERROR MEASUREMENT

- Importance of error measurement and analysis
- Sources and remediation of error
- Interpretation and application of error metrics
- Mean Absolute % Error (MAPE)

- Weighted Mean Absolute % Error (WMAPE)
- Error analysis and cost of error 5 PM - 1:15 PM

#### DATA MANAGEMENT AND DATA CLEANING

- Data identification and definition
- Structure of time series data
- Data collection and analysis
- Identifying and adjusting for anomalies

### 12:15 PM-1:15 PM | LUNCH

### AFTERNOON | 1:20 PM-4:30 PM

#### HOW TO FORECAST WITH TIMES SERIES MODELS - THE MOST WIDELY USED METHOD OF FORECASTING

- Importance of pattern identification
- Time series model development
- When to use time series models
- Advantages and disadvantages of time series
- Event adjustments and when to use
- Underlying assumptions

- Widely used time series methods - averages, naïve model, exponential smoothing, decomposition, trend, seasonal, and other time series methods

#### REGRESSION ANALYTICS - FORECASTING AND EVALUATING CAUSES OF VARIATION IN DEMAND

- An Overview of Regression Analysis
- Advantages and disadvantages
- Application in estimating effects of promotions, pricing, advertising, and other program actions

#### NEW PRODUCT FORECASTING - FORECASTING OVER LONGER TIME PERIODS WITH GREATER UNKNOWNNS

- Expected error and accuracy

John Hellriegel, CPF

*Sr. Advisor/Facilitator*

**INSITUTE OF BUSINESS FORECASTING & PLANNING (IBF)**



**Institute of Business  
Forecasting & Planning**

MONDAY | OCTOBER 21 | 8:00AM - 8:00PM (INCLUDES VIP DINNER)

INCLUDED  
w/ Platinum or Diamond  
Package

# LEADERSHIP

## BUSINESS PLANNING FORECASTING & S&OP

### F O R U M

LOEWS ROYAL PACIFIC RESORT AT UNIVERSAL ORLANDO | ORLANDO, FLORIDA USA

OCTOBER 21, 2019

#### Executive Stream 1:

A Data Driven Organization: Embracing Technology, Digital Transformation & Culture for the New Age Of Demand Planning

#### Executive Stream 2:

The Competitive Advantage of the Future: Becoming The Powerful Minority Who Successfully Implement Integrated Business Planning (IBP or S&OP)

#### Executive Stream 3:

Leveraging Predictive Analytics: Talent Management to Build the Next Generation of Planning Professionals

#### Executive Stream 4:

The Amazon Effect: Planning And Forecasting For eCommerce/ Omnichannel & The New Consumer Market



# WHY ATTEND IBF'S BEST PRACTICES CONFERENCE IN ORLANDO?

- *Join the largest gathering of global professionals from well-known brands, representing all industries with S&OP/ IBP, Demand Planning, Supply Chain, Forecasting, and Analytics/ Data Science responsibilities*
- *Meet other professionals from Sales, Marketing, Finance, HR, Executive Management, and other key functions in the S&OP/ IBP process*
- *Learn how to bring change to your organization for better S&OP and operations planning*
- *Truly learn how to reach Integrated Business Planning (IBP) at your company*
- *Bring your organization to best-in-class levels in performance through better business planning & forecasting*
- *Learn step-by-step from lessons learned and case studies shared by well-known global companies*
- *Get instant feedback on your specific challenges and truly network during our Round-Robin Round-Table Discussions*
- *Enjoy further networking during our after conference cocktail reception*
- *Take advantage before or after the conference of our exceptional location in the heart of Disney World and Orlando*
- *And more!*

KEYNOTE PRESENTER



***"It's All About the People"***

**Garry O. Ridge**  
*President,  
 Chief Executive Officer and Director*



***" This has been the best IBF conference I've attended! The presenters were great and I have grown and improved as a demand planner. Now the information has more meaning. "***

*Angela Hoak, Global Demand Manager  
 GOWAN COMPANY*



## ESSENTIAL

The building blocks for successful S&OP, Demand Planning and Forecasting in your organization



## NEXT-LEVEL

Getting more from your S&OP processes, reaching maturity and utilizing resources more efficiently



## VANGUARD

Staying ahead of the curve to future-proof your S&OP, Demand Planning, and Forecasting processes

### AWARDS PRESENTATION



**EXCELLENCE IN BUSINESS  
FORECASTING &  
PLANNING AWARD**

**LIFETIME ACHIEVEMENT  
IN BUSINESS  
FORECASTING &  
PLANNING**

## 1 Oiling The Wheels Of Forecasting Success: How WD-40 Uses Point of Sale (POS) Data For Better Forecasting & Planning



In the consumer products industry, at the retail level, companies are tightening up on their inventory controls and reducing their overall inventory. This inventory optimization is of course a cost savings measure, but it also ties into a wider pull strategy which starts with the end user in mind. In this hands-on session I will discuss how to start integrating Point Of Sale (POS) data into your planning, and how to forecast with consumption data. The results are greater forecast accuracy and improvements in inventory and customer service. I'll walk you through our approach at WD-40 and how to build the necessary assumptions into your forecasting.

### You will learn:

- How Point of Sale (POS) affects your statistical demand forecasts
- What happens when we pass inventory along to the end user
- Examples of sell in vs sell through

**Jonathan Schwartz, CPF**

*Demand Manager*

**WD-40**



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



This session will cover the topic of an article in the IBF's Journal of Business Forecasting Spring 2017 edition. The start of the monthly S&OP cycle is driven by the strength and success of the Demand Review process and formal presentation of the latest demand for the organization. The overall aim of the S&OP process is to arrive at a game plan to manage and allocate the firm's resources to meet the needs of customers and grow the business. A key driver for effective S&OP is demand planning and forecasting, which many companies find extremely challenging.

Demand Planning and Forecasting drives the Demand Review meeting. Forecasts must therefore be assessed to ensure that they are realistic and unbiased. Gaps between supply and demand, and between forecasts and plans, must be closed to maximize revenue and profit, whilst risks and opportunities need to be visible to develop corporate strategy. In this session, we will explore these issues through practical examples, enabling you to assess the gaps in your own organization. If your team struggles to achieve an effective demand review process driven by accurate forecasts, this session is for you.

### You will learn:

- Optimize the success at Executive S&OP with a stronger Demand Review process
- Understanding the key elements of the monthly Demand Review meeting including roles, responsibilities, inputs and outputs
- Gaining alignment with participants and stakeholders to work towards achieving the objectives of S&OP

**Todd Dunn, CPF**

*Director of Supply Chain*

**CATALENT**



## 3 Will AI Take Over My S&OP? Preparing For The Future Of Your S&OP Today



S&OP has been around before the conception of the internet and in terms of its core concepts, not much has changed since then.



Linkedin



#IBF1

This is a serious issue for all demand planners and S&OP professionals because your particular market and consumer bases have changed drastically over the last 30-plus years. The problem is not a lack of understanding of existing processes or a lack of results. The problem, rather, is that S&OP and Integrated Business Planning may not keep up with where your business is going, and risks failing to deliver value in an evolving marketplace. In this opening session, we will look at emerging technologies and their potential impacts, current processes and potential gaps, and how all roads lead back to predictive analytics and the value you will add in the future. This presentation is designed to challenge your perceptions, guide you to the sessions at this conference that will benefit you most, and provide you with a solid foundation so you are ready for when AI takes over your S&OP process.

#### You will learn:

- How S&OP hasn't adapted to advancements in technology and where your business is going
- How to think about your business going forward, and how delivering value will increasingly rely on predictive analytics
- How to start thinking about laying a foundation so that your business is ready when AI takes over your S&OP process

**Eric Wilson, CPF**  
Director of Planning

**ESCALADE SPORTS**



## 4 New Solutions & Old Wisdom: Tackling Modern Demand Planning Challenges By Blending New Technologies With S&OP Best Practices



The challenges for demand planning are becoming increasingly difficult - portfolio complexity and ever-increasing amounts of data combined with lack of suitable resources make for a deadly combination. Will new technology like AI and the Digital Supply Chain save us? Or should we rely on tried and true process and experience to understand and react to customer demand? This hand-on presentation will discuss how to incorporate valuable new technologies while making use of tried and true planning processes and concepts. I will reveal that by understanding our internal partners and driving positive cross-functional collaboration, we can successfully leverage AI to anticipate and manage volatile demand for a wide range of different products.

#### You will learn:

- How to understand and manage functional bias in the S&OP process
- How to effectively manage complexity surrounding vast portfolios and demand drivers in demand planning
- How demand planning processes evolve as the organization matures, and future states of demand planning technology

**John Hellriegel**

*Sr. Advisor/Facilitator*

**INSTITUTE OF BUSINESS  
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**Institute of Business  
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## 5 Building Healthy Relationships: Demand & Supply Planning Collaboration In The Medical Industry



Demand & Supply Planning are essential steps in Supply Chain Planning and collaboration is a key contributor to success. As a result of effective collaboration, you will see enriched relationships, improved customer service with enhanced service levels and reduced inventory costs. Demand Planners play a critical role in this process, serving in a Gatekeeper capacity and it is important to develop these relationships and trust with all your business partners. Oftentimes however it can be an "us" vs "them" attitude and just how do you go about creating a collaborative environment? In this session, you will follow one organization's implementation of a complex system conversion during a multifaceted divestiture through collaborative leadership.. Finally, we will discuss what good looks like in your organization and explore how you can incorporate effective collaboration into your role.

#### You will learn:

- Why collaboration is so critical and how collaboration can best be accomplished with all your business partners
- Why demand planning is important in the Supply Planner's goal to maintain optimal inventory
- How demand and supply collaboration can reduce excess non-moving inventory and improve service levels

**Lori Anter**

*Director of Demand Planning, Medical Segment*

**Peter Bennett**

*Global Director of Supply Planning*

**CARDINAL HEALTH**



**CardinalHealth**



**LinkedIn**



**#IBF1**

## 6 Go Big or Go Home: Leveraging Big Data to Improve Supply Chain Performance



Today's systems capture a tremendous amount of supply chain related data. To take advantage of this capability, firms must transform this information into better decisions and improved performance. The ultimate goal is to transform this mass of unstructured data into useful performance indicators and diagnostics that result in improved service, lower costs and lower inventory. Those firms who can successfully transform data into actionable business insight will gain a sustainable competitive advantage. In this interactive session, I will provide a roadmap for applying a supply chain analytics framework that coordinates people, process and technology, and integrates all three to maximize results. I will discuss what data is needed and how should it be structured. Highlights include using the SCOR Model to provide a comprehensive set of performance indicators at both the business and operational levels, and why selecting the correct analytics and creating detailed definitions needs to occur before software programming. With practical insight into managing the whole process, you'll learn how to overcome resistance to such an ambitious transformation project and leave with a solid idea of how to leverage Big Data in your own organizations.

### You will learn:

- How to structure a reporting and analysis process based on end user needs.
- How to link performance indicators across strategic, tactical and operational levels.
- Examples of KPI's, process performance indicators and root-cause diagnostics

**Alan L. Milliken, CPF**  
Sr. Manager, SC Capability Development  
**BASF**



## 7 Orchestrating Consensus in S&OP: Leading An Effective Demand Planning Consensus Meeting



Demand Planning Consensus meetings are the pivot point of supply chain success because key stakeholders need to agree on a plan for all functions to work towards order fulfilment in synchronicity. That means getting the consensus meetings right, and that requires some careful orchestra-

tion. This session will review who should attend, what the agenda should look like, what pre-work needs to be done, how to manage new product launches, and more. This interactive session is a primer for those unfamiliar with the process, as well as being a thought-provoking session to help experienced demand planners and managers tune up their processes with best practices. You'll come away with the knowledge to integrate Finance, Sales and Marketing insight into the demand plan, as well as POS data, econometrics and weather – and crucially build a framework to pass the information to the relevant parts of the business so all functions are singing from the same hymn sheet. This is the cornerstone of S&OP – come to this session and I'll show you how to get it right.

### You will learn:

- The basic logistics of a consensus meeting – who should attend, facilitate, as well as what the content should look like, including the necessary preparation steps beforehand
- How to integrate different internal points of influence over the demand plan (Sales, Marketing and Finance)
- How to gain consensus for new product forecasts, and what a typical consensus output looks like for passing to supply planning/S&OP

**COMBE**

**Patrick Bower**  
Senior Director,  
Global Supply Chain Planning & Customer Service  
**COMBE INC.**

## 8 Worst Practices in Forecasting and Better Alternatives



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



## 9 “Any Product, From Any Place, Right Now”: How To Succeed In Omnichannel Retail Planning



Within the Planning community, aspiring to have the “right product in the right place at the right time” has long been the norm as our supply chains became increasingly complex. With the rise of the digital consumer experience, however, a paradigm shift has taken place no longer is it good enough to have the right product in the right place at the right time, we now must support “any product from any place right now.” Such ambition has a major impact on planning processes and tools that were built to support non-digital retail models. While challenging, this is a natural evolution within consumer goods markets. In this interactive session I'll discuss the various models of omnichannel planning and the differences between planning for brick & mortar, digital and wholesale, complete with some specific examples from Cole Haan, a major consumer goods brand. Finally, I'll reveal how data fits into this new landscape naturally we will discuss various tools that give us nimble yet powerful ways to handle the voluminous information available within the omnichannel.

### You will learn:

- The importance of adapting supply chains and planning in the omnichannel environment
- The different omnichannel planning models and which is best for your organization
- How to leverage the vast amounts of data to effectively balance supply and demand in the omnichannel

**Todd Gallant, ACPF**  
Sr. Advisor/Facilitator  
**INSTITUTE OF BUSINESS  
FORECASTING & PLANNING**



## 10 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**



## 11 Profitability In Your Sights: Aligning Financial Budgets or Goals With Supply Chain Forecasting & Planning



Leupold & Stevens, Inc. manufactures telescopic and red dot sights, spotting scopes and binoculars. In this session, I will discuss how this traditional manufacturing company built a sophisticated supply chain planning process to align the financial budgeting and statistical planning and forecasting processes. The result was shorter execution lead times, more flexibility and the ability to quickly respond to changing market conditions. I will reveal real-life examples of how we aligned the forecasts with the financial budget, how we managed discrepancies between the forecasts and financial budgets, and how we identify and capitalize on commercial opportunities in the forecasts. I'll leave you with practical takeaways you can apply in your own organization.

### You will learn:

- How to set the initial financial budget using a statistical



forecast and what to do when changes are needed

- How to maintain forecasts throughout the budget period (annual or quarterly)
- Techniques to identify financial opportunity within your forecast, while identifying the acceptable variation between budgets and forecasts.

**Jay Schmidt**, Sr. Forecast Analyst

**LEUPOLD & STEVENS, INC.**



## 12 Nothing Artificial About The Benefits Of AI: Gaining Competitive Advantage With IBP/ S&OP & Advanced Analytics



What will the integrated business planning (IBP) processes of the next decade involve and why must companies start preparing for them today? The pace of technology change is happening faster than ever before, indiscriminately disrupting industries. With today's market dynamics and changing corporate structures, getting internal and external planning alignment across key customers, functional areas, geographical regions, and suppliers is more complex than ever. But despite these challenges, advanced analytics, including Artificial Intelligence (AI), is providing a substantial competitive advantage for those who embrace it. Is your company preparing for this movement or will it become one of the many organizations who will be displaced? This hands-on session includes Interactive smartphone survey benchmarking of attendees' IBP maturity levels and other related topics.

### You will learn:

- The rapid technology changes occurring and the IBP/ S&OP processes of the next decade
- The different IBP maturity stages for People, Process, and Technology
- Different methods to progress your IBP maturity to prepare for advanced analytics

**Steven Hailey**, CPF, CPSM, CPIM, MCIPS, C.P.M.  
Director of Supply Chain, Process Solutions

**NEWELL BRANDS**



## 13 Is Your Forecasting Providing An ROI? Why Knowing Your Forecasting Cost-Benefit Ratio Adds Dollars To Your Bottom Line



To forecast is to lay the foundation for our business plan and its future. But at what cost? Afterall, forecasting isn't free, and the people,

processes and technology required to deliver forecasts are not cheap. It is important that we determine the cost vs. the benefit of our forecast models. But how do we know if the economic trade-off provides a positive ROI? As a long-time business owner and financial consultant, I have seen immeasurable value in understanding the simplest of ratios: cost vs. benefit. A simple calculation can give your business the tools to predict its future quite accurately. In this hands-on session, I will reveal that, if your company is struggling with these issues, then the value of this knowledge can dramatically improve your sales, profits and growth strategies. If you need to connect the dots and find the holes in your plans, then this session is for you.

### You will learn:

- How to calculate a cost/benefit ratio specific to your forecast
- How a forecast is put together, with a simple step by step plan
- How to review, revise and redirect based upon the results of your forecast; plan vs actual

**Bobbie Brooks**

President & CEO

**MEDIA 4 WOMEN  
ENTERPRISES, INC.**

**Media4Women**  
your partner in entrepreneurial success

## 14 Is Your Inventory A Liability or Asset? Proven Strategies To Reduce Inventory Risk



Inventory is considered an asset in accounting but when it's in the wrong form or location, it becomes a liability. In this interactive session, I will discuss how to reduce inventory risk using strategies that reduce inventory costs while increasing service levels, sales and profit. I'll reveal how to measure how your supply chain is performing using Pareto inventory analysis and know the reasons for high cancellations and dead stock. There are many things that are out of your control including market conditions, competitor decisions, last minute customer promotions, etc. but there are many more things you can control including demand plan inputs, where in the supply chain you position your inventory, what signal is used to drive manufacturing, when you manufacture product, and where you position inventory. This means you will eliminate making to stock items with no current demand and make more products that can be sold immediately. The result? Better service levels and financial performance.

**You will learn:**

- How to streamline inventory for better service levels and financial performance
- How to use risk pooling to reduce variance and inventory risk
- How to use inventory staging in production at key areas of differentiation to reduce dead stock

**Zachary Smith**

Director-Demand Planning &amp; Replenishment

**HANDCRAFT MANUFACTURING**

Handcraft

## 15 The Crossroads Of Strategy & Operations: Owens Corning's Journey In Implementing Successful S&OP/S&OE



We will explore the differences between S&OE vs S&OP and the importance of these processes, taking you on our journey to implementation.

The flow of this hands-on presentation will stick to the basics of "People, Process and Technology" and how we incorporated each aspect into our journey of establishing and improving the S&OE/S&OP culture at Owens Corning. In terms of People, we'll discuss how to deploy the right talent in an organizational structure with clear roles and responsibilities; in terms of Process we'll talk about cash, cost and service operating rhythms, rules of engagement and executive/tactical audience; and in terms of Technology we'll talk about reliable data, automating when possible, and scheduling tools. With practical tips and real-life lessons, you should come away with a clearer understanding of what it takes to implement S&OP/S&OE in your own organization.

**You will learn:**

- How to establish operating models with clear priorities, accountabilities and time fences
- How to enable data/technology to drive decision making
- How S&OP/E collaboration is the crossroads of strategy and operational execution
- How To develop organizational structure with clear boundaries and rules of engagement

**Andrew Morrin**

Sales &amp; Operations Execution Leader

**OWENS CORNING**

## 16 Have Faith in the Forecast: Knowing When to Override Baseline Forecasts



Forecasters and demand planners work towards a one number forecast, whereby all viewpoints are considered and a consensus

is reached. Collaboration is key to this process and sometimes, in an effort to be truly collaborative, forecasters will often override a baseline statistical forecast based on judgemental insight. Sometimes this is the right thing to do, assuming the judgemental insight is valid. Most of the time, however, it does not add value to the forecast. In fact, it can be highly dangerous and can cause the company to operate on a completely false set of assumptions. Machine learning can be used to identify non value added overrides, maximizing the value that experts add to the process, making sure valuable knowledge is incorporated whilst protecting the forecast against erroneous assumptions. In this session we'll discuss forecast variability when overriding and how to gauge the impact, as well as avoiding common pitfalls when deciding to override a forecast. Assessing the value of qualitative information is highly effective – both in terms of leveraging knowledge from other departments, and giving forecasters the confidence to insist on sticking to the baseline when necessary.

**You will learn:**

- How machine learning can guide users when to override a forecast, and when not to
- How the magnitude and direction of an override impact Forecast Value Add
- Common errors in creating overrides and how to avoid them

**Jeff Baker, CPF**

Director of Integrated Demand &amp; Supply Planning

**CHAINALYTICS**

CHAINALYTICS

## 17 Applying Forecast Value Add (FVA) at Your Organization



How does your business identify areas of low productivity and inefficiency? Can analyzing use of time and resources improve business performance and forecasting? FVA analysis lets businesses identify waste and inefficiency across sales and marketing, finance and operations to drive profits and improve customer service. It also helps to identify process steps and participants that are failing to improve the accuracy of the forecast. Many companies now use FVA analysis to streamline their forecasting by eliminating unnecessary process steps. What's more, FVA can even improve forecast accuracy by stopping those activities that make the forecast worse. This presentation delivers an overview of the FVA methodology, and how to conduct FVA analysis at your own organization. We will also discuss an in-depth

case study on FVA at a food company and how it was implemented as a forecasting performance metric, as well as the results.

**You will learn:**

- What FVA analysis is and how to apply it to better serve customers and drive profitability
- Some of the common “worst practices” in a business that FVA can identify
- How Tastykake adopted FVA to streamline and improve our forecasting performance

**Jeff Marthins, CPF**

*Director of Supply Chain*

## 18 Follow The Crowd: Using Crowd Forecasting to Benchmark & Improve Forecasts



Internal crowd forecasting using prediction markets and other mechanisms is being used by large organizations like AbbVie, the U. S. Intelligence Community, LG, and Deutsche Bank to better understand “ground truth” assessments of the future. Getting forecasts from employees’ or partner organizations on such key metrics as product demand, delivery dates, and quality issues and enabling them to anonymously update those forecasts at any time as the situation on the ground changes allows for the tracking of accuracy, biases, and other performance metrics on an individual, departmental, and organizational level. In this session we’ll explore the history of crowd forecasting, how it is being used today in organizations around the world, and why it is poised to become a key input for forecasting in every large organization.

**You will learn:**

- How crowd forecasting can drive a continuous cycle of insights and forecasting improvement
- Relevant case studies showcasing the value and challenges of rolling out crowd forecasting
- A summary of data and insights you could expect to gain if you decide to introduce a crowd forecasting program of your own

**Adam Siegel**  
CEO

**CULTIVATE LABS**



## 19 S&OP/S&OE Journey: From Software Selection to Implementation



Where do you begin when you know your organization needs robust S&OP planning and there are currently no formal planning

processes or systems in place? What if your S&OP is disconnected from execution results. Inherently you know that S&OP plans need to be linked to execution but how can you make that happen without creating manual processes and a myriad of spreadsheets?

A year ago Charles Rivers Microbial Solutions’ global inventory and production planning relied solely on spreadsheets and tribal knowledge to determine inventory levels. There were no S&OP or capacity planning processes in place. In this B2B business with consistent double-digit revenue growth, added distribution complexity and customer expectations of 24-hour shipment lead-times, manual planning was unsustainable.

Over the course of the last year Charles River has been on a journey of selecting and implementing a best fit integrated business planning solution to facilitate S&OP planning processes that link to multi-echelon inventory and production planning.

In this presentation we will walk through how Charles Rivers started and progressed through their journey to begin S&OP planning that links to daily execution decisions.

**You will learn:**

- The process used to define requirements and select a best fit S&OP software solution
- S&OP to S&OE process and system linkages that are enabling complete end-to-end integration through the supply chain
- To avoid some pitfalls from critical lessons learned along the journey

**Jody Rogers**

*Director-Integrated Business Planning*

**CHARLES RIVER LABORATORIES**

 **charles river**

## 20 Smarter & Faster Planning: The Role Of Forecasting In Speeding Up Inventory Turns & Identifying Supply Chain Risk



Depending on the nature and culture of your business, “Inventory” may mean different things. In a Lean company, inventory may be regarded as “waste” and in others it may be completely disregarded due to focusing on other service or operational efficiency KPIs. In reality, Inventory optimization helps free up working capital and highlight areas in the business that need attention. In this hands-on session, I’ll discuss how forecasting plays a vital role in speeding up inventory turns as well as assessing risk in other areas of the supply chain. I’ll discuss the importance of being more agile to better

manage longer lead times and shorter life cycles for our products. How do we balance it all? Come to this workshop and I'll show you how to not only plan better by forecasting at lower levels of aggregation, but with speed and agility. I aim to inspire you to measure planning and service performance differently and put targeted emphasis on service and inventory.

#### You will learn:

- The importance of planners' understanding the broader business to help minimize risk
- To establish targeted KPIs in shorter periods and closer to the individual for maximum agility and reaction speed
- How to build partnership with downstream internal customers in scheduling

**David Hovey, CPF**  
Senior Director Planning and Services  
**HOSTESS BRANDS, INC.**



## 21 Faster IBP/S&OP to Accelerate Decision Making at Citizen Watch



For consumer goods companies, omnichannel presents great opportunity but given each channel has its own nuances and demand drivers, there is significant risk in not planning effectively. Citizen Watch America relies on a robust S&OP process to manage a complex omnichannel network of stores, brick and mortar customers and major e-commerce sites. In this interactive and value-added session, I will discuss how this timeless watch brand successfully balances merchandise and assortment planning to ensure products are where they need to be, and at the right time. I will reveal how you can identify opportunities to shape demand for specific products/channels; how to use S&OP to drive more productive conversations with internal stakeholders; and how to facilitate powerful decision making to reduce risks and seize opportunities.

#### You will learn:

- How to balance merchandise and assortment planning across an omnichannel network
- How to identify opportunities to shape demand for specific products and channels
- How to leverage S&OP to drive more productive conversations between management, sales, product development, merchandising and planning teams to make better decisions that reduce risk and maximize opportunities

**Glenn Pascrell**  
Senior Vice President, Merchandise Planning  
& Market Analytics

**CITIZEN.**

**CITIZEN WATCH AMERICA**

## 22 Profitable Partnerships: Putting The Collaboration Into CPFR For Greater Supply Chain Efficiency



There are many challenges in implementing a CPFR process. Two organizations agreeing to collaborate is just the beginning – a shared vision, transparency, commitment to communication and KPI measurement are all key to a successful Forecast Collaboration process. In this value-added session, I will share a real CPFR implementation case study with a local P&G partner which delivered better forecast accuracy and greater supply chain efficiency through clear KPI's and a shared business vision. I will share lessons learned from my own journey, including how pressure from Sales nearly jeopardized the whole process, customer type and data gathering for a successful implementation. I'll leave you with practical insight into how to tackle the challenges of this ambitious initiative, and how you can use it to reduce back orders and inventory, and promote sales and marketing ideas to boost client sell out.

#### You will learn:

- How to engage your partner with transparency and a shared vision
- How to improve CPFR results by measuring KPI's and improving efficiency
- How to manage Sales pressure, client inventory and company targets and use CPFR to bring new ideas to the business

**Eduardo Fusco**  
Demand Planning Coordinator  
**P&G HEALTHCARE**



## 23 Growing Old Gracefully: Bringing Life Cycle Management Into S&OP With Product Reviews



A thorough product review is a vital part of any mature S&OP process. Most companies have processes and reviews in place to actively monitor and manage new product launches typically independent of any S&OP process. While the management of mature items and end of life products is often an afterthought and poorly planned, a complete product review from launch to end of life is critical to managing inventory health and service levels. In this session, you will follow Escalade's journey to incorporating a product review that encompasses management of mature items impact to excess inventory, safety stock, and managing an item's life



cycle as part of a product review during the S&OP process. Finally, you will see how forecasting plays an integral part in managing product life cycles and drives the process.

#### You will learn:

- How bad assumptions can lead to bad life-cycle management
- Impacts of incomplete and bad forecasts on managing inventory, and how to gain visibility into MOQ and lead time cost
- How defining a road map for change can lead to improved reporting

**Misty Eldridge**  
Supply Planning Manager  
**ESCALADE SPORTS**



## 24 Do You Want A Self-Operating, Self-Learning Forecasting Assistant? It's Time To Stop Building Forecasts and Start Acting On Them



Conventional planning and forecasting tools are rigid, requiring us to specify relationships in the data in advance. Things that are not known in advance don't get specified and the software cannot handle these scenarios. Consequently, there are several interpretations of truth, numerous versions of spreadsheets, tons of external market research data that does not fit to the internal numbers, and a real struggle with the accuracy. Not only does this make

achieving forecasting accuracy a matter of chance, it requires forecasters to rely heavily on Excel before inputting into the tools. In this interactive session I will reveal why corporations need to be able to use new technologies without needing a team of highly qualified data scientists. The good news is new systems are now available that act like an expert assistant who is looking at all available data all the time, who is learning from this data and from every prediction, who are creating forecasts, and crucially, who can explain these to the user. Around this assistant a new type of planning and forecasting enterprise software can then be built, integrating processes like sourcing, finance, marketing and sales, and removing the repetitive manual work, allowing forecasters and planners to focus on acting on forecasting insight instead of providing it.

#### You will learn:

- Forecasts can now be generated, with increased accuracy at a lower, manual effort
- The time gain can be used to work on strategic directives to better act upon trends
- Increased accuracy means optimized operations directly adding dollars to your bottom line

**Natalia Aguirre**  
Director Business Analytics

**GRUPO FAMILIA**

**Dr. Klemen Cas**  
Founder & CEO  
**KAPUA INC.**



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  - *eCommerce/Omni-Channel Forecasting, Planning and S&OP*
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  - *Worst Practices in S&OP & Forecasting*

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## **KEYNOTE PRESENTER** **Garry O. Ridge**, *President, Chief Executive Officer and Director* | **WD-40**

As CEO and a member of the board of directors of WD-40 Company, Garry Ridge is responsible for developing and implementing high-level strategies, all operations, and the oversight of all relationships and partnerships for the company. Garry joined WD-40 Company in 1987 and has held various management positions in the company, including executive vice president and chief operating officer, and vice president of international. In 1997, he was appointed president and chief executive officer. A native of Australia, Garry served in advisory roles for the Australian Marketing Institute and the Australian Automotive Aftermarket Association. Currently, he serves as a member of the board of governors of The San Diego Foundation, and the University of San Diego's School of Business Administration. Garry is an adjunct professor at the University of San Diego where he teaches leadership development, talent management, and succession planning in the Master of Science in Executive Leadership program. In 2009, he co-authored a book with Ken Blanchard outlining his effective leadership techniques, titled "Helping People Win at Work: A Business Philosophy called 'Don't Mark My Paper, Help Me Get an A.' "



## **Natalia Aguirre**, *Director Business Analytics* | **GRUPO FAMILIA**

Natalia Aguirre is the Business Analytics Director of Grupo Familia, a CPG Company specializing in generating well-being through hygiene and cleanliness solutions via many household brands. Natalia is responsible for leading the analytics efforts for marketing and sales, unlocking strategic opportunities to support effective decision making. Prior to managing predictive analytics, she was category manager for several categories in Grupo Familia. Natalia holds an MBA from US-EAD Westfield Business School and a business administration degree from Eafit University in Colombia.



## **Lori Anter**, *Director of Demand Planning, Medical Segment* | **CARDINAL HEALTH**

She joined Cardinal Health in 2017 and has 20 years' experience in Demand Planning and S&OP. In her current role as Director of Demand Planning, she oversees the Americas Demand Planning Department and Global consolidation of forecasts, develops new processes and drives change. Lori created a team of Demand Planners, developed the Demand Planning process and templates, and led the implementation of IBP during and through the completion of a Transition Service Agreement. Her prior roles include Global SIOP Leader at Honeywell, Pricing and Logistics Analyst at CVS, and Demand Planning Manager at NDS. Lori Anter is an active member of the New England IBF Chapter and has a passion for mentoring and coaching Demand Planners. She holds an MBA, Logistics, Materials and Supply Chain, from Bryant University.



## **Jeff Baker**, *CPF, Director of Integrated Demand & Supply Planning* | **CHAINALYTICS**

Jeff is a Supply Chain Planning expert with extensive experience in Demand Management, Integrated Business Planning/S&OP, and Advanced Planning and Scheduling. 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).



## **Pete Bennett**, *Global Director of Supply Planning* | **CARDINAL HEALTH**

Peter Bennett joined Cardinal Health in 2012 and has 18 years' experience in Supply Planning, Distribution and S&OP. In his current role as Director of Supply Planning, he oversees the Global Supply Planning Department and development of global Master Production Schedules for 17 manufacturing sites, is a change agent across the organization and has been instrumental in development of the technical supply chain footprint within Cardinal Health. Peter manages a team of Supply Planners, developed the Supply Planning process, Supply S&OP standardization and led the implementation of Supply Planning IBP during and through the completion of the largest medical device divestiture in history (from Medtronic to Cardinal Health). His background includes several system conversions between Oracle, SAP, Fourth Shift and others into single regional/global Planning Platforms. Peter's previous roles at Medtronic/Cardinal Health cover Supply Chain Manager, Senior Supply Chain Planning Manager and Senior Logistics Planner. Before civilian life, Peter was a Logistics Officer in the US Army, and served in Iraq. He is APICS certified and holds an MSc in Administration from Central Michigan University.



## **Patrick Bower**, *Senior Director, Global Supply Chain Planning & Customer Service* | **COMBE INC.**

Patrick Bower has a wide area of expertise, including S&OP, Demand Planning, Inventory, Network Optimization, and Production Scheduling. A recognized expert on demand planning and S&OP, and a self-professed "S&OP geek" - Patrick was previously Practice Manager of Supply Chain Planning at the consulting firm, Plan4Demand where his client list included Diageo, Bayer, GlaxoSmithKline, Pfizer, Foster Farms, Cabot Industries and American Girl. Patrick's experience encompasses tenures with Cadbury, Kraft Foods, Unisys, and Snapple. Patrick also worked for the supply chain software company - Numetrix, and was Vice President of R&D at Atrion International. He was also the recipient of IBF's 2012 award for Excellence in Business Forecasting & Planning.

**Bobbye Brooks, President & CEO | MEDIA 4 WOMEN ENTERPRISES, INC.**

Bobbye Brooks is CEO at Media Enterprises and consultant to Fortune 500 companies. She spent much of her career working for Cornerstone, a commercial management and consulting firm, as Chief Operations Officer. She now runs Media Enterprises, consulting for companies on operations, sales, financial reporting, technology evaluation, legal, HR, public relations, capital investments and more. Bobbye is a regular on radio and television, and in digital and print publications. She holds an MBA from San Diego State University and a bachelor's degree in Psychology and Chemistry from Murray State University.

**Dr. Klemen Cas, Founder & CEO | KAPUA INC.**

Dr. Klemen Cas is founder and CEO of KAPUA Inc., a company that has its roots at Stanford University where he and his team explored the possibilities of autonomous forecasting. Klemen oversees the product vision and works with international clients who use KAPUA solutions to improve their forecasting accuracy. Klemen's experience spans 20+ years in the field of business process design and predictive analytics. With his previous firm, ECENTA, he advised international corporations on utilizing SAP enterprise solutions in forecasting, analytics and customer relationship management. He holds a doctorate in Economics and Social Sciences from the University of Erlangen-Nurnberg and is a Sloan Fellow at Stanford University.

**Misty Eldridge, Supply Planning Manager | ESCALADE SPORTS**

Misty is the Supply Planning Manager at Escalade Sports with over 20 years of experience in Demand and Supply Planning. She leads demand review meetings, product review, inventory and executive S&OP meetings as part of the S&OP process. Her experience covers multiple industries including packaging, food, beauty products, party supplies and sporting goods. Misty led the implementation of the inventory and replenishment modules of Arkieva at Escalade. Prior to joining Escalade in 2018, Misty worked as Demand Planning Manager at multibillion-dollar consumer packaging company Berry Global, and prior to that, as Inventory Planning Manager at cosmetics company Coty. Misty holds degrees from the University of Queensland and the University of Illinois.

**Eduardo Fusco, Demand Planning Coordinator | P&G HEALTHCARE**

Eduardo is a supply chain planning professional with experience in demand planning, material and inventory planning and international trading (export & sales) for a variety of multinational companies. Eduardo is currently Demand Planning Coordinator for Procter & Gamble Healthcare Business Unit, providing a mixture of OTC and RX products in emerging markets. He manages planning amid a challenging environment where political and economic crises affect local markets and make demand very unstable. His previous roles include Senior Supply Chain Analyst at Baxter Healthcare and Material Planning Analyst at Avon Cosmetics. Eduardo holds a master's degree in Economics and Business from Birmingham University in the U.K, and is currently studying for ASCM (formerly APICS) certification.

**Todd Gallant, ACPF, Sr. Advisor/Facilitator | INSTITUTE OF BUSINESS FORECASTING & PLANNING**

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.

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

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

**John Hellriegel, CPF, Sr. Advisor/Facilitator | INSTITUTE OF BUSINESS FORECASTING & PLANNING**

John Hellriegel is a Senior Supply Chain and Demand Planning, CPF leader with over 25 years of experience across multiple industries. He is currently an Adjunct Professor at Rutgers University. He has worked across industries for companies such as Estee Lauder, Honeywell, Diageo, Pepperidge Farm, Accenture, and GE. John has worked in demand planning, inventory optimization, capacity planning, deployment planning, and SIOP development. John is passionate about developing people within companies to lead change. John lives in Mendham, New Jersey with his wife and two boys.



**Grant Hoffman, CPF, Corporate Vice President of Business Operations | LENOVO**

Grant Hoffman is a veteran of Supply Chain with over 17 years of experience in consumer packaged goods (CPG), automotive, and consumer electronics. He currently is the VP of Business Operations at Lenovo. His responsibilities include demand planning, purchasing, materials management, Sales & Operations Planning (S&OP), CPFR, inventory, & supply planning. Prior to joining Lenovo he worked at Motorola Mobility, Continental AG and Del Monte Foods. He holds an undergraduate degree in business and an MBA from Northern Illinois University. He is a member of the Institute of Business Forecasting (IBF) Board of Advisors, and has served as a keynote speaker & panelist for IBF Executive Forums and conferences. Grant is a Certified Professional Forecaster (CPF).

**Tim Hotze, Sr. Vice President, Global Supply Chain and Logistics – Network Planning and Global Intelligence | TARGET**

Tim Hotze is Senior Vice President, Network Planning and Global Intelligence for Target. He oversees Target's future Supply Chain intelligence products as well as end-to-end operational functions for Network and Topology Planning, S&OP, and Guest Order and Availability Management. Before joining Target in November 2017, Tim held a number of leadership roles at Amazon covering Supply Chain Execution, Capacity Planning and Management, Inventory Placement and Labor Planning. He also spent more than a decade at Panalpina World Transport where he had responsibility for worldwide logistics and Supply Chain solutions as well as innovation management. He sat on the board of The Warehouse Education and Research Council and currently sits on the Advisory Board for the Institute of Business Forecasting and Planning (IBF). Tim holds a joint Master's degree in Industrial Engineering, Logistics and Supply Chain from the University of Technology in Darmstadt (Germany).

**David Hovey, CPF, Senior Director Planning and Services | HOSTESS BRANDS, INC.**

David Hovey is an IBF Certified Professional Forecaster (CPF) who provides a broad knowledge base in the areas of Demand Planning, Process Design and Deployment, Building High Performing Teams, and Connecting Supply Chain parties end-to-end within the organization. Since joining Hostess Brands in 2013, he has helped support the redemption of an iconic consumer brand by connecting cross functional teams that excel with high inventory turns, customer focus, and partnership with everyone downstream who has to execute the Demand Plan. In his role, David has oversight over Demand Planning, Supply Planning and Scheduling, Materials Management, and Customer Services. He is a regular at Supply Chain conferences and is looking forward to sharing a piece of Hostess' great turnaround story.

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

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

**Carlos Londono, Head of Supply Chain | CHIPOTLE MEXICAN GRILL**

Carlos is the Head of Supply Chain at Chipotle Mexican Grill. Previously he led Supply Chain on a global level at O-I, and was the Director of Value Chain Planning for Starbucks. Prior to that he was Director of Integrated Supply Chain with HJ Heinz where he implemented the next generation of S&OP. Carlos is fluent in German, Spanish and Mandarin. He holds an MBA from the Babcock School of Business at Wake Forest University and an Industrial Engineering degree from EAFIT University in Colombia, South America.

**Jeff Marthins, CPF, Director of Supply Chain 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. He was also the recipient of IBF's 2016 award for Excellence in Business Forecasting & Planning.

**Alan L. Milliken, CPF, Sr. Manager, SC Capability Development | BASF**

Mr. Milliken is a Senior Manager on the Supply Chain Capability Development Team at BASF, the world's leading chemical company. Prior to accepting this global assignment, Alan was Manager of Business Process Education at BASF Corporation in North America. Before that he was Business Process Consultant at BASF, where he supported several business re-engineering projects, three major acquisitions; in addition, he received the Chairman's GOLD award for his work on a major acquisition. Alan has been an APICS instructor since 1995. Before becoming a consultant and educator, Mr. Milliken worked at major plant sites for 22 years including assignments in Production, Logistics-SCM, Process Control, Quality Control, Operator Training, Industrial Engineering and Scheduling. He served as one of the original Subject Matter Experts (SME) that created APICS Certified Supply Chain Professional (CSCP) and the IBF's Certified Professional Forecaster (CPF) programs. In 2010, he served as a SME to update both the MRP and ECO courses for the APICS CPIM program. He has been published in many magazines and several textbooks. Alan is a 2013 recipient of IBF's Excellence in Business Forecasting & Planning award. He holds a BS Degree in Industrial Engineering from Auburn University and an MBA in management from Clemson University.

**Andrew Morrin, Sales & Operations Execution Leader | OWENS CORNING**

Andrew currently holds the title of Sales & Operations Execution Leader within Owens Corning's Roofing Components business. He leads a team of global material planners and schedulers with a focus on executing the future 90-day planning horizon. In his 9 years of supply chain experience, he has worked in various functions including manufacturing, S&OP, customer operations, and material planning, mostly in a global supply chain environment. He has held a variety of positions at Owens Corning, starting out as Manufacturing Supervisor and Warehouse Specialist before working as North America Commercial Forecast Lead, then Global S&OP Planner and other related roles. He then assumed a role as End-to-End Supply Chain Leader before taking up his current position as S&OP Execution Leader. Andrew holds a Bachelor of Science in Logistics, Materials and Supply Chain Management/Marketing from Central Michigan University.

**Glenn Pascrell, Senior VP, Merchandise Planning & Market Analytics | CITIZEN WATCH**

Glenn Pascrell is the Senior Vice President of Merchandise Planning and Market Analytics at Citizen Watch America. He is responsible for merchandise planning, inventory management, purchasing and product pricing for the US market. Competitive market research and analytics is his newest area of responsibility in this role. Prior to CITIZEN, Glenn held key merchandising and planning positions (including Director of Planning and Forecasting Manager roles) with Pfizer, VF Corporation and Cambridge Information Group. Glenn holds a bachelors' degree in English Literature and Philosophy and a master's degree in International Economics from Fordham University.

**Jody Rogers, Director-Integrated Business Planning | CHARLES RIVER LABORATORIES**

Jody has been implementing S&OP processes at multiple companies for over 20 years, and has great depth of experience across all aspects of Supply Chain Planning and execution. For the last year, she has been leading Charles Rivers along an end-to-end Integrated Business Planning journey. In addition to S&OP, Jody has held responsibility for Demand Planning, CPFR, Production Planning, Materials Management, Logistics and Customer Service Management, working in the Automotive and Consumer Packaging industries, and now in the Pharmaceutical and Biologics industries. She serves on the APICS Charleston Chapter board, is certified in Production and Inventory Management (CPIM) and is a Certificated Supply Chain Professional (CSCP) and is currently pursuing IBF Certified Professional Forecaster designation (CPF). Jody holds a degree in Management and Communication and holds an MBA.

**Jay Schmidt, Sr. Forecast Analyst | LEUPOLD & STEVENS, INC.**

Jay is an experienced supply chain professional with 10 years of progressive experience including demand planning, forecasting, inventory and production capacity planning roles with Johnstone Supply, LaCrosse Footwear and Emerald Kalama Chemical. He started his career as a Kaizen Consultant for LaCrosse before taking on a role as Supply Chain Manager at Johnstone Supply, before becoming Director of Global Demand and Supply Planning at Emerald Kalama. In his current role at Leupold & Stevens, he is responsible for developing and executing a company-wide Sales, Inventory and Operations Planning (SIOP) process. Jay holds a bachelor's degree in Accounting & Finance and a master's in Financial Analysis from Portland State University.

**Jonathan Schwartz, CPF, Demand Manager | WD-40 COMPANY**

Jonathan has been with WD-40 Company since 2010 and almost immediately gained the opportunity to create the S&OP process from scratch and build the systems and processes required to support it. In his current role, he manages the collaborative forecasting process, participates cross-functionally to build the annual financial plan, ensure reasonable forecast processes and systems through continuous improvement activities. His responsibilities as Demand Manager also include identifying opportunities within the organization to grow sales, decrease inventory, and improve EBITDA. Jonathan is an IBF Certified Professional Forecaster(CPF) and holds a degree in Business Administration.



**Adam Siegel, CEO | CULTIVATE LABS**

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



**Zachary Smith, Director-Demand Planning & Replenishment | HANDCRAFT MANUFACTURING**

Zachary has over 15 years of business planning leadership experience and is currently the Director of Demand Planning & Replenishment for Handcraft Manufacturing. In addition to leading the demand and replenishment planning teams at Handcraft, he manages the customer ordering process, inventory management, and the supply chain technology teams. Zachary previously was the Supply and Demand Team Leader for Micron Technology's multi-billion dollar computer memory module business. He has served as the business expert on several enterprise-planning software implementations and led the design and implementation of the demand planning and replenishment processes at both Micron and Handcraft. Zachary has a BA from Brown University and an MBA from Lehigh University. He is an IBF Certified Professional Forecaster.



**Eric Wilson, CPF, Director of Planning | ESCALADE SPORTS**

Eric is a predictive analytics and business planning innovator, author, and speaker. He is the Director of Demand Planning at Escalade Sports. Prior to this he worked as the Director of Demand Planning at Berry Plastics, and Director of Demand Planning & S&OP at Tempur Sealy International. In 2016, he received the Excellence in Business Forecasting & Planning award from the IBF. He is a Certified Professional Forecaster (CPF) with over 20 years of experience. Eric is a visionary in his field, a frequent speaker and panelist for many executive forums and professional conferences, and has written numerous articles in publications such as The Journal of Business Forecasting and APICS Magazine. He is also the author of the book Cultural Cycles.

SUNDAY   OCTOBER 20, 2019			
8:00 am – 9:00 am	TUTORIAL REGISTRATION		
9:00 am – 4:30 pm	1-DAY FUNDAMENTALS OF DEMAND PLANNING & FORECASTING TUTORIAL (IBF MEMBERS ONLY–FREE)		
5:00 pm – 7:00 pm	EARLY LEADERSHIP FORUM REGISTRATION		
MONDAY   OCTOBER 21, 2019			
8:00 am – 8:00 pm	IBF'S LEADERSHIP BUSINESS PLANNING & FORECASTING FORUM W/ VIP DINNER & RECEPTION		
5:00 pm – 7:00 pm	EARLY CONFERENCE REGISTRATION		
TUESDAY   OCTOBER 22, 2019			
7:00 am – 8:00 am	REGISTRATION & VISIT WITH EXHIBITORS   BREAKFAST SPONSORED BY 		
8:00 am – 8:15 am	WELCOME ADDRESS Anish Jain, <i>Managing Director</i>   INSTITUTE OF BUSINESS FORECASTING & PLANNING (IBF)		
8:15 am – 8:55 am	IBF'S BUSINESS FORECASTING & PLANNING AWARDS RECOGNITION CEREMONY		
	ESSENTIAL	NEXT-LEVEL	VANGUARD
9:00 am – 9:55 am	1 Oiling The Wheels Of Forecasting Success: How WD-40 Uses Point of Sale (POS) Data For Better Forecasting & Planning Jonathan Schwartz, CPF <i>Demand Manager</i> WD-40	2 Leveraging the Demand Review Process for a Successful S&OP Meeting Todd Dunn, CPF <i>Director of Supply Chain</i> CATALENT	3 Will AI Take Over My S&OP? Preparing For The Future Of Your S&OP Today Eric Wilson, CPF <i>Director of Planning</i> ESCALADE SPORTS
10:00 am – 10:55 am	4 New Solutions & Old Wisdom: Tackling Modern Demand Planning Challenges By Blending New Technologies With S&OP Best Practices John Hellriegel <i>Sr. Advisor/Facilitator</i> INSTITUTE OF BUSINESS FORECASTING & PLANNING	5 Building Healthy Relationships: Demand & Supply Planning Collaboration In The Medical Industry Lori Anter <i>Director of Demand Planning, Medical Segment</i> Peter Bennett <i>Global Director of Supply Planning</i> CARDINAL HEALTH	6 Go Big or Go Home: Leveraging Big Data to Improve Supply Chain Performance Alan L. Milliken, CPF <i>Sr. Manager, SC Capability Development</i> BASF
10:55 am – 11:15 am	MORNING BREAK   VISIT WITH EXHIBITORS		
11:15 am – 12:10 pm	7 Orchestrating Consensus in S&OP: Leading An Effective Demand Planning Consensus Meeting Patrick Bower <i>Senior Director, Global Supply Chain Planning &amp; Customer Service</i> COMBE INC.	8 Worst Practices in Forecasting and Better Alternatives Michael Gilliland <i>Product Marketing Manager</i> SAS INSTITUTE	9 “Any Product, From Any Place, Right Now”: How To Succeed In Omnichannel Retail Planning Todd Gallant, ACPF <i>Sr. Advisor/Facilitator</i> INSTITUTE OF BUSINESS FORECASTING & PLANNING
12:10 pm – 12:55 pm	LUNCH SPONSORED BY  <small>THE POWER TO KNOW.</small>		
12:55 pm – 1:40 pm	KEYNOTE PRESENTATION It's All About The People: How The CEO Of WD-40 Drives Performance With Employee Engagement Garry O. Ridge, <i>President, Chief Executive Officer and Director</i>   WD-40		
1:40 pm – 2:10 pm	VISIT WITH EXHIBITORS		
2:10 pm – 3:05 pm	10 How & When To Use Top Down, Bottom Up, and Other Forecasting Approaches Joseph Eschenbrenner, ACPF <i>Director of Demand &amp; Supply Planning</i> PUMA	11 Profitability In Your Sights: Aligning Financial Budgets or Goals With Supply Chain Forecasting & Planning Jay Schmidt <i>Sr. Forecast Analyst</i> LEUPOLD & STEVENS, INC.	12 Nothing Artificial About The Benefits Of AI: Gaining Competitive Advantage With IBP/ S&OP & Advanced Analytics Steven Hainey, CPF, CPSM, CPIM, MCIPS, C. P. M. <i>Director of Supply Chain, Process Solutions</i> NEWELL BRANDS
3:05 pm – 3:25 pm	AFTERNOON BREAK   VISIT WITH EXHIBITORS		
3:25 pm – 4:55 pm	ROUND ROBIN ROUNDTABLE DISCUSSIONS		
5:00 pm – 6:00 pm	IBF COCKTAIL RECEPTION SPONSORED BY 		
WEDNESDAY   OCTOBER 23, 2019			
7:00 am – 8:00 am	MORNING REFRESHMENTS & REGISTRATION   VISIT WITH EXHIBITORS		
	ESSENTIAL	NEXT-LEVEL	VANGUARD
8:00 am – 8:55 am	13 Is Your Forecasting Providing An ROI? Why Knowing Your Forecasting Cost-Benefit Ratio Adds Dollars To Your Bottom Line Bobbie Brooks <i>President &amp; CEO</i> MEDIA 4 WOMEN ENTERPRISES, INC.	14 Is Your Inventory A Liability or Asset? Proven Strategies To Reduce Inventory Risk Zachary Smith <i>Director-Demand Planning &amp; Replenishment</i> HANDCRAFT MANUFACTURING	15 The Crossroads Of Strategy & Operations: Owens Corning's Journey In Implementing Successful S&OP/S&OE Andrew Morrin <i>Sales &amp; Operations Execution Leader</i> OWENS CORNING
9:00 am – 9:55 am	16 Have Faith in the Forecast: Knowing When to Override Baseline Forecasts Jeff Baker, CPF <i>Director of Integrated Demand &amp; Supply Planning</i> CHAINALYTICS	17 Applying Forecast Value Add (FVA) at Your Organization Jeff Marthins, CPF <i>Director of Supply Chain</i>	18 Follow The Crowd: Using Crowd Forecasting to Benchmark & Improve Forecasts Adam Siegel <i>CEO</i> CULTIVATE LABS
9:55 am – 10:15 am	MORNING BREAK   VISIT WITH EXHIBITORS		
10:15 am – 11:10 am	19 S&OP Implementation Journey at Charles River Laboratories Jody Rogers <i>S&amp;OP/S&amp;OE Journey: From Software Selection to Implementation</i> CHARLES RIVER LABORATORIES	20 Smarter & Faster Planning: The Role Of Forecasting In Speeding Up Inventory Turns & Identifying Supply Chain Risk David Hovey, CPF <i>Senior Director Planning and Services</i> HOSTESS BRANDS, INC.	21 Faster IBP/S&OP to Accelerate Decision Making at Citizen Watch Glenn Pascrell <i>Senior Vice President, Merchandise Planning &amp; Market Analytics</i> CITIZEN WATCH AMERICA
11:15 am – 12:10 pm	22 Profitable Partnerships: Putting The Collaboration Into CPFR For Greater Supply Chain Efficiency Eduardo Fusco <i>Demand Planning Coordinator</i> P&G HEALTHCARE	23 Growing Old Gracefully: Bringing Life Cycle Management Into S&OP With Product Reviews Misty Eldridge <i>Supply Planning Manager</i> ESCALADE SPORTS	24 Do You Want A Self-Operating, Self-Learning Forecasting Assistant? It's Time To Stop Building Forecasts and Start Acting On Them Natalia Aguirre, <i>Director Business Analytics</i> GRUPO FAMILIA Dr. Klemen Cas, <i>Founder &amp; CEO</i> KAPUA INC.
12:15 pm – 12:30 pm	CLOSING REMARKS		
CONFERENCE CONCLUDES			
THURSDAY   OCTOBER 24, 2019   EXAM DAY 8:30AM – 4:30PM   IBF CERTIFICATION EXAMS   CPF & ACPF GOOD LUCK!			



# BUSINESS PLANNING FORECASTING & S&OP

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