



Learn.
Connect.
Transform.

2019 DEMAND PLANNING, FORECASTING AND S&OP SUMMIT

MARCH 25-26, 2019
SAN FRANCISCO, CA

7:45am Registration and Breakfast

8:15am Welcome and Opening Comments

8:30am Opening Keynote:

The Revolution of Forecasting

From Weatherman to Engineer – Why You Might Want to Start Updating Your Resume

The Forecasting Discipline has changed dramatically over the past 20 years. What started out as simply a way to better understand the past and trend out the future, has turned into a highly-strategic capability within the enterprise – one which is used to uncover upside potential & efficiencies, and leveraged to engineer organizational success. Technology, innovation, and analytic advances have helped propel the Forecaster into a trusted C-Suite partner. With this evolution comes power, influence, and a seat at the table. An effective strategist helps break down organizational silos, enables data & insight transparency, and helps connect functions in ways unimaginable in the recent past. But it also requires fresh talent, new skills, open-mindedness, and an evolved business acumen. So you better secure your updated train ticket before you get left behind in the station...

Topics to be covered:

The PAST: The Evolution of Forecasting Over the Years

- The Analytic Journey – Improvements over the years
- The types of roles we have played

The PRESENT: Functional Experts & Advanced Capabilities

- Elevated Roles & Responsibilities
- Case Studies: How we leverage analytics

The FUTURE: Strategic Enterprise Leaders

- Evolving Value Proposition
- Innovation – Connecting the Dots
- Tomorrow's Hires

9:30am 15 Minute Networking and Refreshment Break

9:45am (choose from 2 sessions)

In-Depth Workshop (Continued): Increasing Supply Chain Resilience Through S&OP/IBP

Nestlé India Net Profit Falls 60% After Maggi Noodles Scare, Nike loses \$100 million in sales as a result of supply chain software, Toyota Seen Losing \$277 Million as Quakes Halt Japan Output ... These are examples where a lack of resilience led to significant business losses. While S&OP/IBP deals with the effects of disruptions, identification of risks and investments in resilience are generally not part of the meeting agenda beyond the coordination of factory/supplier outages; this is a missed opportunity and a significant risk. Some companies have recognized the value of resilience and have implemented processes that bring it into their S&OP/IBP processes. This workshop will provide concrete examples and hands on experience to add resilience to your S&OP/IBP process so that your company doesn't end up being the next disaster headline and you turn adversity into triumph.

9:45am (choose from 2 sessions)

Data Governance: Creating Value from your Data

Leverage your accessible, trustworthy data to drive new revenues, re-imagine business processes and improve the customer experience

- Align data governance to business strategies and goals
- Establish an operating model for success empowering everyone to use the data to optimize data
- Assemble a data governance team to define and ensure best practices
- Create business-relevant metrics associated with data governance policies

10:45am 15 Minute Networking and Refreshment Break

11:00am (choose from 2 sessions)

In-Depth Workshop (Continued): Increasing Supply Chain Resilience Through S&OP/IBP

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11:00am (choose from 2 sessions)

Data Monetization

Organizations around the globe are faced with a deluge of data. There has been significant attention placed on what to do with this data including how to capture it, store it, mine it, and leverage it for better decisions and analytics. What is missing in these discussions is how to unlock the value in the data and use it to fuel growth. As subject matter experts in this space and having worked with dozens of organizations across a wide spectrum of industries we have developed the Data Monetization Maturity Model. This model will help organizations see the potential value that their data holds and is used as a roadmap to plan the Data Monetization Journey. Encompassing 5 key phases from Data Storage, BI & Reporting, Visualization, Predictive Analytics, and AI & Machine Learning, this model will identify the applications of these capabilities and the potential benefit each level brings to the organization. Underlying the model is a focus on helping organizations shift away from cost savings and operational efficiency measures to using data to develop new products, services, and business models to fuel growth. We have seen many organizations falter in their efforts, so we focus on helping organizations "Cross the Chasm" from understanding what happened to powering a model that creates the future. We will identify the key challenges that organizations face in this journey and demonstrate practical solutions that can be deployed today to remedy them. The session will be interactive and cover several case studies of organizations that have made this journey and the tremendous benefits they have achieved as a result.

12:00pm Lunch

1:00pm (choose from 2 sessions)

Machine Learning Applications in Supply Chain Planning

This session will introduce you to some analytics applications we have seen making a true difference within companies across different industries. We will review different types of machine learning solutions and talk about the importance of feature engineering. We will also share the latest trends in incorporating machine learning into forecasting, the addition of predictive analytics in managing inventory, the use case of machine learning to optimize key parameters, as well as the automation of root cause analysis used to prevent operational issues before they occur.

1:00pm (choose from 2 sessions)

Empowering Users with Self Service Business Intelligence

Allowing end users to spend more time analyzing data for their needs

- Creating a company-wide data governance policy to include SSBI
- Cultivate a culture that embraces data-informed decision making
- Encouraging interdepartmental collaboration
- Align technology with the needs and skill levels of the end users

2:00pm 15 Minute Networking and Refreshment Break

2:15pm (choose from 2 sessions)

Creating a Consumer Driven Supply Chain

Using customer satisfaction as a measure of high performance

- Shifting from an operations driven organization to a customer driven organization
- Finding and eliminating any material, process or production output that doesn't create value
- Balancing organizational priorities to create a nimble and responsive supply chain
- Leveraging customer intelligence to refine your sales projections

2:15pm (choose from 2 sessions)

Utilizing Predictive Analytics to Identify Business Drivers



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Predict trends, understand customers, improve business performance, drive strategic decision-making, and predict behavior

- Harness the ability to respond predictively and proactively to customer needs and wants
- Enabling information streams to be accessed, analyzed and shared in real time
- Drive strategic decision-making with insights from predictive analytics models

3:15pm 15 Minute Networking and Refreshment Break

3:30pm Closing Keynote:

Collaborative Forecasting and Insights

Establish integrated business planning through synchronized forecasting processes

- Develop, implement, and manage collaborative forecasts
- Establish collaborative planning and forecasting partnerships
- Make transparent, interrelated and aligned business assumptions
- Capitalize on collective knowledge & decision making, while reducing redundancy

5:00pm Networking Reception

DAY 2- TUESDAY, MARCH 26TH, 2019

7:45am Registration and Breakfast

8:15am Welcome and Opening Comments

8:30am Opening Keynote:

Lessons in Analytics and Forecasting from the Analytics Frontier

Many of the best analytics companies in the world come out of the digital space. By combining natural measurability of operations, customer and marketing, digital provides a paradigm for how to do better analytics, how to integrate analytics across silos and how to get that analytics to drive change. Gary Angel created the largest digital analytics consultancy in the U.S., sold it to Ernst & Young, and led the practice there for more than three years. Along the way, he pioneered many of the core techniques that have become common in digital analysis. In this presentation, he'll walk you through the biggest learnings over the course of two decades driving analytics transformation for some of the most sophisticated analytics companies in the world. You'll get key learnings around integrating Voice of Customer and Behavioral data, creating an analytics strategy, doing customer journey mapping right, building test & learn methods into the core of your business, separating forecasting from goals, choosing better KPIs, and even finding ways to build reports that actually drive value. It's a master class in how to do analytics that make a difference.

9:30am 15 Minute Networking and Refreshment Break

9:45am Keynote:

Elevating Teams In Strategy Execution

In ever increasing numbers, CEOs are calling on teams to be "more strategic," but exactly what this means is rarely defined. Strategy execution (M&A, capital expenditures, Marketing & IT investments, Analytics and other tactical initiatives) offers senior leaders opportunities to transform this vague commission into tangible results. In this session, you'll learn how to: Select effective decision specialists, Equip them with techniques that produce better business solutions, and Position your specialists for maximum effectiveness.

10:45am 15 Minute Networking and Refreshment Break

11:00am (choose from 2 sessions)

In-Depth Workshop: A Practical Demand Planning Segmentation Workshop

How to apply Demand Planning Segmentation to improve planning and collaboration

This workshop goes beyond the four boxes of Demand Planning Segmentation and shows you how to use this powerful analytical tool to improve your planning and collaboration efforts. Demand Planning Segmentation is a proven analytical process, and by itself often doesn't return meaningful business results. This workshop will cover what the results mean and what actions to consider. You will learn the core principles of Demand Planning Segmentation, including some simple math, along with how to utilize the outputs to improve your planning and collaboration.

11:00am (choose from 2 sessions)

Enhancing the Customer Experience with Digital Decisioning Tools and Techniques

Identify and target the most profitable potential customer segments

- Increase lifetime customer value
- Identify and target the most profitable potential customers
- Utilize a variety of data to develop a more complete view of each consumer and make more optimal decisions and offers that lead to conversions
- Improve the customer experience at every decision point while maximizing profitability and boosting business efficiency

12:00pm Lunch

1:00pm

In-Depth Workshop: A Practical Demand Planning Segmentation Workshop (Continued)

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2:00pm 15 Minute Networking and Refreshment Break

2:15pm

Forecasting and Analytics: From Momentum Techniques to Bottom-up Models

This workshop provides a great introduction to forecasting techniques. It begins with a basic intro into the three types of forecasting models (opinion, momentum, predictive) and when/why you might choose one method or another. Part II dives into basic time-series / momentum techniques for forecasting. It's a straightforward, practical look at different weighting and smoothing techniques for building a forecast. You'll learn why you choose a particular technique and how it works along with simple Excel-based examples. In Part III, we look at a bottoms-up, big data technique for handling a more complex system – this part will focus on CRM analytics. It will include a look at why simple bottom-up approaches to CRM fail, some of the challenges to building models in a complex system like forecasting sales with CRM data, and how model building can be used to support better sales forecasting and deeper knowledge within the organization. Finally, we wrap up in Part IV with some thoughts on the culture and organization of forecasting within the organization.

3:15pm 15 Minute Networking and Refreshment Break

3:30pm (choose from 2 sessions)

Developing a Collaborative Integrated Planning Process

Bring strategic planning, finance, supply chain, sales, marketing and product development into a unified planning operating model to drive transformational performance improvement decisions.

- Harmonize financial and operational processes with customer demand
- Enable collaborative, cross-functional business decision making across the product lifecycles
- Deliver cross-enterprise alignment of planning and execution processes to improve predictability and financial performance while managing risk

3:30pm (choose from 2 sessions)

Forecasting and Analytics: From Momentum Techniques to Bottom-up Models (Continued)

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4:30pm Adjourn