2019 BUSINESS FORECASTING AND ANALYTICS FORUM

MARCH 25-26, 2019
SAN FRANCISCO, CA

7:45am Registration and Breakfast

8:15am Welcome and Opening Comments

8:30am Opening Keynote:

The RISE of the 'Analytics Strategist'
The focus is on:

- What this new role really looks like within an organization
- The cool analytics that we do and the types of strategic business questions that we help address
- Thoughts around how folks need to keep up, or start thinking about what their future career path will look like

Speaker: Michael Devinoff – VP, Head of Enterprise Forecasting and Strategic Analysis at Bristol-Myers Squibb

9:30am 15 Minute Networking and Refreshment Break

9:45am (choose from 2 sessions)
Continuous Planning and Rolling Forecasts
Utilize rolling forecasts to adapt to dynamic business challenges and opportunities

- Utilize the advantages of re-forecasting and rolling forecasts
- Maximize continuous "driver based" forecasting to keep your planning current and accurate
- Analyze, interpret and integrate rolling forecast processes across the organization
- Link the forecast to strategic and operational decisions

Speaker: Juan Porter – Chief Solutions Officer at Archetype Consulting

9:45am (choose from 2 sessions)
Uses of AI Leading to Profitable Business Growth
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

Speaker: Hal Kalechofsky – End-to-End Analytics

10:45am 15 Minute Networking and Refreshment Break

11:00am (choose from 3 sessions)
Continuous Planning and Rolling Forecasts
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11:00am (choose from 3 sessions)
Machine Learning in Supply Chain – the Challenges and the Opportunities

Supply Chain of today has evolved over the decades. Companies use Advanced Planning and Supply Chain systems more commonly than before but there is still a gap when compared to how ERP is being used. Digital Supply Chain and Industry 4.0 are providing the framework for the next phase of Supply Chain. However, Machine Learning is going to change the landscape of Supply Chain in the future. As a Supply Chain practitioner, I will be sharing my thoughts on the opportunities, challenges thereof and some of the use cases that are being explored at Maxim Integrated.

Speaker: Madan Chakravarthi – Executive Director – Supply Chain Management at Maxim Integrated

11:00am (choose from 3 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.

Speaker: Sid Ghatak – Managing Director at Increase Alpha

12:00pm Lunch

1:00pm (choose from 2 sessions)
Analytics Roadmap for Next Generation Finance

This session will provide a roadmap for how to achieve an Analytics Culture for Finance to advance to a Strategic Partner who influences decision making and impacts the strategic direction for the company.

Speakers:
Jesper Sorensen – Co-Founder at Financial Analytics Institute.
Robert Zwerling – Managing Director at Aurora Predictions

1:00pm (choose from 2 sessions)
Bringing S&OP Home

The fundamentals of S&OP have been around for over 30 years and yet organizations often struggle with achieving the promise of S&OP. There are several reasons for this including: culture, beliefs, leadership, data and processes. Build your checklist for evaluating your S&OP process or beginning an implementation. The basics of S&OP will only take you so far.

Attend this session and get below the surface of S&OP to understand how thinking about Collaboration, Time Fences, Ownership and Alignment to Business Strategy play a key role in the success of any S&OP process.

Speaker: Tony Reese – Senior Director at Scimitar, Inc.

2:00pm 15 Minute Networking and Refreshment Break

2:15pm (choose from 3 sessions)
The Collaborative Budgeting Process
How to engage other business leaders to participate in the process

Why involve the business in creating the budget?
- Get better assumptions from those closest to the business
- Get buy-in to better enable using the budget as a tool to evaluate performance
- Opportunity to challenge long standing beliefs held by leadership

How to initiate change in order to get the business engaged in the budget process
- Spend time with each department head explaining historical financials
- Provide extensive hand-holding during the budget process
- Consider the first year a learning experience. Phase in the process of evaluating departments based on performance compared to budget.

Speaker: John Harkavy – VP Global Finance at Jelly Belly Candy Company

2:15pm (choose from 3 sessions)
Building Effective Demand Forecasting Systems

As a Data scientist and hands-on developer and practitioner, I will share my thoughts on what it takes to build effective demand forecasting solutions through

- use cases at Opex Analytics
- what is re-energizing forecasting
- things to think about while developing forecasting projects

Speaker: Hari Murakonda - Solutions Architect at Opex Analytics

2:15pm (choose from 3 sessions)
Big Data Solutions Without Breaking the Bank

Analytics is the solution for many business problems and it requires massive amounts of data. Today we will focus on thinking outside the box where we get the best returns without breaking the bank.

Speaker: Vasu Cherlopalle – Vice President of Big Data and Analytics at PubMatic

3:15pm 15 Minute Networking and Refreshment Break

3:30pm Closing Keynote:
Superiority Analysis: Collaborative Forecasting & Analytics

Predicting industry change can be challenging. We'll use a series of techniques developed by the presenter to help demystify the process and equip participants to anticipate, simulate and monitor for indicators and warnings of changes that will affect their competitiveness. We'll also use a fun industry example to run a small simulation event that can help everybody assess which skills they'll need to develop for the organizations they serve.

Speaker: Arik Johnson – Founder and Chairman at Aurora WDC

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.

Speaker: Gary Angel – CEO at Digital Mortar

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.

Speaker: Roy Barnes – President at Blue Space Consulting

10:45am 15 Minute Networking and Refreshment Break

11:00am (choose from 3 sessions)
Building a High-Performing Finance Team
Create a highly adaptive team while fostering a culture of creativity and innovation

- Develop an effective financial data management system that promotes stewardship and governance
- Streamline financial data to make advanced analytics available to a broader audience throughout the organization
- Create a framework that aligns reporting and analytics to organizational objectives
- Organize FP&A teams to ensure efficiency in the analytics and reporting processes

Speaker: Keith Davidson – BizOps Chief Financial Officer at CLA (CliftonLarsonAllen)

11:00am (choose from 3 sessions)
People, Process & Scenarios
Practical Honesty About Forecasting (and it's not necessarily about forecasting accuracy)

Setting systems and software aside for a moment, let's talk about how to impact people vertically and horizontally in the organization. Then there is process, that logical antagonist to the emotion and bias that subtly fosters unproductive behavior. And if we can handle it, there are scenarios – fighting against the demand for black and white predictions when, in reality, forecasting is more often various shades of grey.

Speaker: Ronald Kantorik – Senior Manager, Distributor Demand Visibility & Analytics at Cypress Semiconductor Corporation

11:00am (choose from 3 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
- What drives Self Service BI and how to create successful roll out plan
- Cultivate a culture that embraces data-informed decision making
- Encouraging interdepartmental collaboration
- Align technology with the needs and skill levels of the end users

Speaker: Shashi Kiran – Business Planning and Analytics – (Retail Business Unit) at Western Digital

12:00pm Lunch

1:00pm (choose from 3 sessions)
Transforming Finance: Leveraging Analytics and Intelligence
In this session, attendees explore what finance transformation and innovation is and what it means to them. Starting with a common current state basis, we will:

> Move through finance organizational models to
> Consider how finance's role is transforming and
> Innovate towards the future state of finance

Speaker: Abhinav Mangal – Director Analytics and Insights at PayPal

1:00pm (choose from 3 sessions)
Combating the Digital Supply Chain Talent Gap

In this session, we will discuss how big the gap actually is, how to find hidden gems, ways to capture their attention, strategies for keeping talent, attracting diversity and sponsorship and mentoring best practices.

Speaker: Felix Anane – Head of Demand Planning and Analytics at Wonder Workshop

1:00pm (choose from 3 sessions)
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.

Speaker: Gary Angel – CEO at Digital Mortar

2:00pm 15 Minute Networking and Refreshment Break

2:15pm (choose from 3 sessions)
Beyond Data Visualization: The Power of Data Storytelling

Dashboards have become a powerful tool for FP&A to share insight. When designed correctly, they deliver a clear message on what's working and what's not, and the actions to take to fix the issue. Technology now enables us to create dashboards in minutes, allowing us to share information in ways we could never before…but how can we deliver the value! The big question has moved from "How do we create dashboards?" to "How do we tell the story that drives business value?" After attending this event you will be able to:

- Understand data and how you can harness it through story telling
- Explore the data maturity model – how to accelerate your data transformation
- Gain recommendations on improving the quality of your dashboards
- Recognize the future of data analytics

Speaker: James Myers – Global Finance Executive and Finance Transformation Consultant at FP&A Strategy Consulting

2:15pm (choose from 3 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

Speaker: Tony Reese – Senior Director at Scimitar, Inc.

2:15pm (choose from 3 sessions)
Forecasting and Analytics: From Momentum Techniques to Bottom-up Models (Continued)

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Speaker: Gary Angel – CEO at Digital Mortar

3:15pm Adjourn