

November 15<sup>th</sup> & 16<sup>th</sup>, 2010  
Sheraton Hotel ♦ Atlanta, GA

# Business Planning & Analysis *2010*



Integrated Business Planning  
Competitive Advantage Through Analytics ♦ Financial Planning & Analysis  
Marketing Planning & Analysis ♦ Business Intelligence Through Collaboration  
Workforce Planning & Analysis

# Business Planning & Analysis 2010



In today's marketplace, good analytics are the key differentiator for smarter decision making and gaining competitive advantage. An organization's ability to harness and leverage the wealth of available data is a key factor in effective strategic planning.

**Business Planning & Analysis 2010** is a cross-functional learning and networking opportunity analyzing the most pressing concerns of corporate finance, workforce and marketing analytics.

*This three-in-one event is a very unique opportunity for those looking to expand their knowledge of corporate planning through analytics in the areas of finance, marketing and workforce planning.*

**Business Planning & Analysis 2010** is a three-in-one event, combining Marketing Planning & Analysis, FP&A and Workforce Planning & Analysis. Each functional focus has its own separate track, giving attendees the opportunity to sit in and learn from those sessions that are of most interest. This unique collaborative program provides attendees the opportunity to learn from industry-leading practitioners and methodologists. Mornings begin with plenary keynote addresses from some of the nation's top corporate strategic planners and innovative minds, focusing on business analytics. Following these keynote sessions, attendees will then choose the track that is most relevant to their interest or roll allowing attendees the opportunity to learn from case studies and in-depth learning exercises designed for specific analytical functions.

## 3 components of **Business Planning & Analysis 2010**

### **FP&A 2010**

*Financial Planning & Analysis*

### **Marketing Planning & Analysis 2010**

*Product and customer  
insight through analytics*

### **Workforce Planning & Analysis 2010**

*Workforce optimization  
through analytics*

Combining these three functional components provides a comprehensive program for excellent business planning through analytics.

3 Attendee Group Rate

**\$ 3,995.<sup>00</sup>**

# Program Agenda



Day One: Monday, November 15<sup>th</sup>

8:00 am Registration, Orientation & Continental Breakfast

## Keynote Presentations

8:30 am **Integrated Business Planning**  
*Improve organizational performance with cross functional enterprise planning*  
**Andy Bodea**, Chief Global Operating Officer, **Equifax**

9:30 am **Competitive Advantage Through Analytics**  
*Harness analytics to promote better strategic planning and drive execution*  
**Manish Shah**, Director of Strategy & Analytics, **Intercontinental Hotels Group**

### FP&A Functional Track A

### Marketing Planning & Analysis Functional Track B

### Workforce Planning & Analysis Functional Track C

11:00 am **Planning, Budgeting and Forecasting**  
*Implement innovative approaches to improve your budgeting and forecasting processes*  
  
 Presenter:  
**Nigel Andre**  
 VP of Corporate FP&A  
**HD Supply**

**Leveraging Customer Insight**  
*Leverage analytics for better customer insight and competitive advantage*  
  
 Presenter:  
**Nathaniel Lin**  
 Founder  
**Analytics Executives Network**

**Strategic Workforce Planning**  
*Link human capital strategy to organizational strategy*  
  
 Presenter:  
**Lucia Erwin**  
 VP, Consulting Services  
**Vemo**

12:00 pm Lunch & Networking Break

1:00 pm **Dynamic Planning & Forecasting**  
*Moving beyond traditional ways of planning in volatile times, when the "crystal ball" no longer works*  
  
 Presenter:  
**Evert Hulleman**  
 Managing Director, Advisory at  
**PRGX**

**"Value-Based" Customer Management**  
*Determine customer value for effective targeting and ROI optimization*  
  
 Presenter:  
**Bryan Throckmorton**  
 Principal, Global Marketing Strategy  
 at **Acxiom**

**Competitive Advantage through Workforce Planning & Analysis**  
*Drive optimal decision making through extensive qualitative and quantitative analysis*  
  
 Presenter:  
**Al Adamsen**  
 Founder at  
**People-Centered Strategies LLC**

2:15 pm **Data Consolidation, Translation and Delivery**  
*Deliver meaningful information to drive better business decisions*  
  
 Presenter:  
**Jason Seeby**  
 Director of Reporting  
**AT&T Mobility**

**Marketing Forecasting and Scenario Analysis**  
*Forecasting tactics for accurate marketing and sales planning*  
  
 Presenter:  
**Stuart Roesel**  
 Director of Customer Analytics and  
 Insight at **EarthLink, Inc.**

**HR Measures and Metrics**  
*Understanding the numbers behind the metrics*  
  
 Presenter:  
**Kathy Brooks**  
 VP of Human Resources at  
**Green Mountain Coffee Roasters**

3:30 pm **Advanced Financial Analytics**  
*Drive optimal decision making through extensive qualitative and quantitative analysis*  
  
 Presenter:  
**Lawrence Maisel**  
 Managing Partner at  
**DecisionVu**

**Advanced Marketing Analytics**  
*How using advanced testing and modeling techniques better predicts market behavior*  
  
 Presenter:  
**Dudley Gwaltney**  
 Manager of Analytical Modeling at  
**SunTrust Bank**

**Advanced Workforce Analytics**  
*Implement data driven analysis to more accurately drive workforce decisions*  
  
 Presenter:  
**Heather Avery**  
 Manager, Business Analytics at  
**Aflac**

5:00 pm **Networking Reception**



# Program Agenda

Day Two: Tuesday, November 16<sup>th</sup>

8:00 am Registration, Orientation & Continental Breakfast

## Keynote Presentations

8:30 am **Drive Business Excellence Through Collaboration**  
*A cross-functional approach to business planning and analysis*  
**Jay Janco**, Associate Director of Strategic Business Analysis, **Abbott Laboratories**

9:30 am **Performance Analysis**  
*Utilize KPIs and performance drivers to impact financial and operational results*  
**Srinath Perera**, Director of Corporate Strategic Planning & Analysis, **Burger King**

### FP&A Functional Track A

### Marketing Planning & Analysis Functional Track B

### Workforce Planning & Analysis Functional Track C

11:00 am **Process Improvement for FP&A**  
*Develop consistent forecasting, budgeting, reporting and analysis*  
  
 Presenter:  
**Melissa B. Kennebrew**  
 Manager Financial Planning & Reporting at **RockTenn**

**Data Translation and Interpretation**  
*Identify and utilize high quality data to develop meaningful interpretations to drive business decisions*  
  
 Presenter:  
**David Weinberger**

**Data Aggregation and Interpretation**  
*Evidence Based Decision Making for HR*  
  
 Presenter:  
**Al Adamsen**  
 Founder at **People-Centered Strategies LLC**

12:00 pm Lunch & Networking Break

1:00 pm **Revenue Management and Price Optimization**  
*Enhance revenue recognition through the application of advanced financial intelligence*  
  
 Presenter:  
**Neha Parikh**  
 Executive Finance Director at **Cox Communication**

**ROI Optimization and Marketing Accountability**  
*Identify returns on marketing activities for more efficient use of marketing capital*  
  
 Presenter:  
**Bryan Throckmorton**  
 Principal, Global Marketing Strategy at **Axiom**

**Workforce Analytics**  
*Link HR Initiatives to Business Outcomes through Workforce Analytics Presenter*  
  
 Presenter:  
**Brian Wiemhoff**  
 Manager, Human Capital Analytics **Sears Holdings Corporation**

2:15 pm **Reporting Planning and Analysis**  
*Develop accurate and timely reports for improved decision making*  
  
 Presenter:  
**Brett Vanderwater**  
 Controller at **Kellogg Company**

**Pricing Analysis and Optimization**  
*Support managerial pricing decisions with better operational and full-cost analysis*  
  
 Presenter:  
**Malena Rosero**  
 Lead Strategic Pricing Manager at **AT&T**

**Integrated Talent Management**  
*A comprehensive approach to talent management and succession planning*  
  
 Presenter:  
**Lucia Erwin**  
 VP, Consulting Services at **Vemo**

3:30 pm **Financial Intelligence Round Table**  
*Group discussion and interactive Q&A with presenters and attendees*

**Marketing Intelligence Round Table**  
*Group discussion and interactive Q&A with presenters and attendees*

**Workforce Intelligence Round Table**  
*Group discussion and interactive Q&A with presenters and attendees*

4:00 pm **Adjourn**

Monday, November 15

# Keynote Sessions



Day One - 8:30

## Integrated Business Planning

*Improve organizational performance with cross functional enterprise planning*



### Andy Bodea

Chief Global Operations Officer, **Equifax, Inc.**

Andy Bodea leads Equifax Global Operations, which includes global process management and execution of the primary strategic growth initiatives for the enterprise; global operations; global process improvement including LEAN initiatives; and procurement and global shared services. Prior to joining Equifax, Bodea led the turnaround of The Home Depot's \$6 billion Special Orders business and directed a \$2 billion sales organization. Previous to The Home Depot, Bodea directed strategic initiatives and led the Services business for the \$8 billion Gateway Inc. Before Gateway, he was an executive with General Electric and GE Capital, where he worked on corporate strategy, led the development and rollout of Six Sigma and New Product Introduction initiatives across GE, and led sales and account management for large private equity firms. Bodea also spent several years as a management consultant at Monitor Company and McKinsey & Company.

Bodea holds a Ph.D. from Harvard University and a Bachelor's degree from U.C. Berkeley. He is a member of the Board of Directors for Steamlite Inc. and a member of The Council on Foreign Relations.

Day One – 9:30

## Competitive Advantage Through Analytics

*Harness analytics to promote better strategic planning and drive execution*



### Manish Shah

Director of Strategy & Analytics, **Intercontinental Hotels Group**

Manish is a 10 yr veteran of consulting and cross-channel strategy and joined IHG (hotel supplier of the InterContinental, Crowne Plaza and Holiday Inn family of Brands, etc) in June 2006. He has since been instrumental in the delivery of the company's cross-channel revenue ROI in the Americas as well as optimizing the overall analytics infrastructure at IHG. Prior to joining IHG, Manish was the Strategy Manager for delta.com with Delta Air Lines, where he was part of the strategy turnaround team to advance the delta.com web-site into an award winning business and leisure site. He also worked for a number of years with Cap Gemini (Ernst & Young) as a CRM Project Manager across the Pharmaceutical, High Tech, and Consumer Products industries. Manish obtained his MBA from UNC-Chapel Hill and Bachelors from the University of Western Ontario. Manish is also a current chair with the Atlanta Interactive Marketing Association. At home he has been married for 13 years with two boys 8 and 5.

Tuesday, November 16

# Keynote Sessions



Day Two - 8:30

## Drive Business Excellence Through Collaboration

*A cross-functional approach to business planning and analysis*



### Jay Janco

Associate Director, Strategic Business Analysis, **Abbott Laboratories**

Jay Janco is a transformational leader with more than ten years experience providing business and strategy insights. In his current role at Abbott, Jay leads Strategic Business Analysis for the Metabolics Division while also ensuring business continuity and performance during the ongoing integration of recently acquired Solvay Pharmaceuticals. Before Abbott's acquisition of Solvay, Jay led an internal strategy consultancy across five integrated cross-functional teams: Decision Science, Market Research, Contract Pricing and Reimbursement, Competitive Intelligence Research Center and Strategic Analysis. These teams provided holistic, evidence-based, strategic decision support at Solvay. Prior to his tenure at Solvay, Jay was the Director of Business Analysis at CaseBauer, a consulting firm specializing in market research of medical devices, pharmaceuticals, genomics and diagnostics. Jay received his MBA from Southern Methodist University and his BA in Economics from Vanderbilt University.

Day Two - 9:30

## Performance Analysis

*Utilize KPIs and performance drivers to impact financial and operational results*



### Srinath Perera

Director, Corporate Strategic Planning & Analysis, **Burger King**

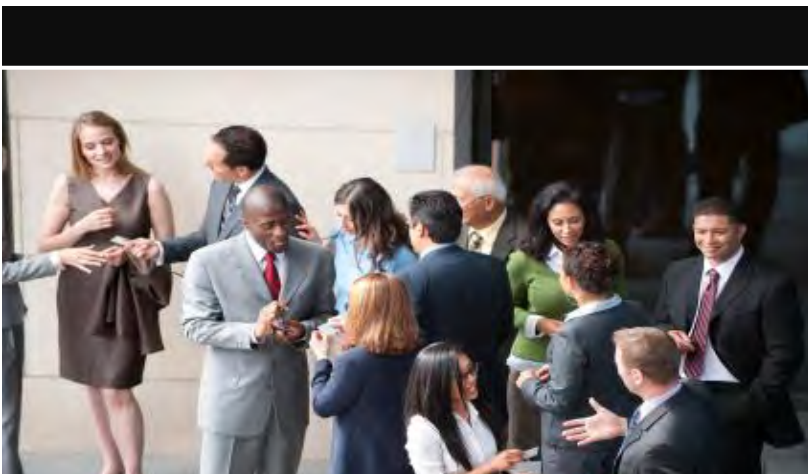
Srinath currently holds the role of Director of Corporate Strategic Planning & Analysis at Burger King. As Director of NA Company operations finance, responsibilities include budgeting, profitability and business analytical support to field and management. His primary focus is on Company operations across US and Canada. Srinath has a wealth of analytical/ fiscal administrative experience in the fast food industry focusing on identifying business opportunities, analytical insight into performance, target setting for over 1,000 restaurants and performance tracking. Prior to moving to his current role, Srinath worked in corporate planning heading the corporate strategy, planning and analysis function covering the world wide operations.

# A unique Networking Opportunity

Not only do attendees come to learn innovative skills and best practices in marketing planning, they also come to meet with peers from different industries across the nation. Keeping this in mind, attendees are given a chance to network with colleagues from across analytical functions.

*Network with colleagues and industry experts from different analytical functions*

Three business analytics events are being held simultaneously, focusing on marketing, financial and workforce planning and analysis. The combined networking event offers a great chance to learn from peers and discuss issues and initiatives that drive better performance.



## Represented Companies

Attendees from these companies have attended past Planning & Analysis events:

Chipotle Mexican Grill	Metaswitch
Express Scripts	Direct Energy
Sara Lee	Crowe Paradis Services
facebook	Kobie
Hamilton Beach Brands, Inc.	Lonza
Salt River Project	Zodiac Pool Systems
Toyota	Beekley
Research in Motion	FL Smidth
Kaiser Permanente	Copa Airlines
Qualcomm	Access Pass & Design
Roche	AHIMA
Juniper	Ametek
Wells Fargo	BitTorrent Inc.
Maxwell Technologies	Bryant Rubber
Arup	Colorado Technical University
YSU	Cross Country Home Services
Abraxas Energy Consulting	F5
Bonneville Environmental	Genomic Health
Infinity Pharmaceuticals	GreenRoad Technologies
Medicus	Jacksonville Aviation Authority
Belo	Life Technologies Corporation
Tempur Pedic	Lyris
eSource	Majestic Steel
Genentech	Maxygen, Inc.
Lithia	Milestone AV Technologies
Citrix	Redwood Trust
Palm	Transtector Systems, Inc.
Southwest Airlines	URS
PayPal	Wafergen Bio-Systems, Inc.
Ernst & Young	ZIN Technologies, Inc.
Symantec	Resource Planning Solutions
IAC	OnBase
Arrow Electronics	Security Benefit
Blue Shield of CA	Intcomex
Apple	Occam Networks
PG&E	Unified TelData Inc
Jones Hearing	JAKKS
UHC	Tibco
Rack Space	Radian
Cummins	3ds
Nike	Hardie's Fruit and Vegetable
NetApp	Merisant
Eon US	MRC
Cadence	Accuray Incorporated
Intuit	RDO Equipment Co.
Price Waterhouse Coopers	Bazaar Voice
Adobe Systems	Microsoft

Atlanta

# Area, Venue & Travel Information



## Area – Atlanta, GA

Located in the heart of downtown Atlanta, our venue is conveniently positioned to access the best of what the city has to offer. **Close to some of the city's best restaurants and attractions** will ensure that attendees will enjoy their experience away from the conference as well.

## Hotel and Accommodation Facilities

Our venue's prime location offers dozens of choices of accommodations from boutique to internationally recognized brands. We have special attendee rates available at summit location: **The Sheraton Hotel Atlanta**.

## Travel

Most guests will arrive via Hartsfield-Jackson Atlanta International Airport. The venue is located approximately 15 minutes by car or shuttle. Once downtown, amenities are accessible via a short walk or by **MARTA, Atlanta's public transportation system**.

## Summit Venue – The Sheraton Hotel Atlanta

Venue Address:

**The Sheraton Hotel Atlanta  
165 Courtland Street, NE  
Atlanta, GA 30303**



### Earn CPEs

**CPE Credits: 12**

Gateway Management is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be addressed to the National Registry of CPE Sponsors, 150 Fourth Avenue North, Suite 700, Nashville, TN, 37219-2417. Web site: [www.nasba.org](http://www.nasba.org).

Program Level:	Basic
Delivery Method:	Group-Live
Prerequisites:	None
Advanced Preparation:	None