

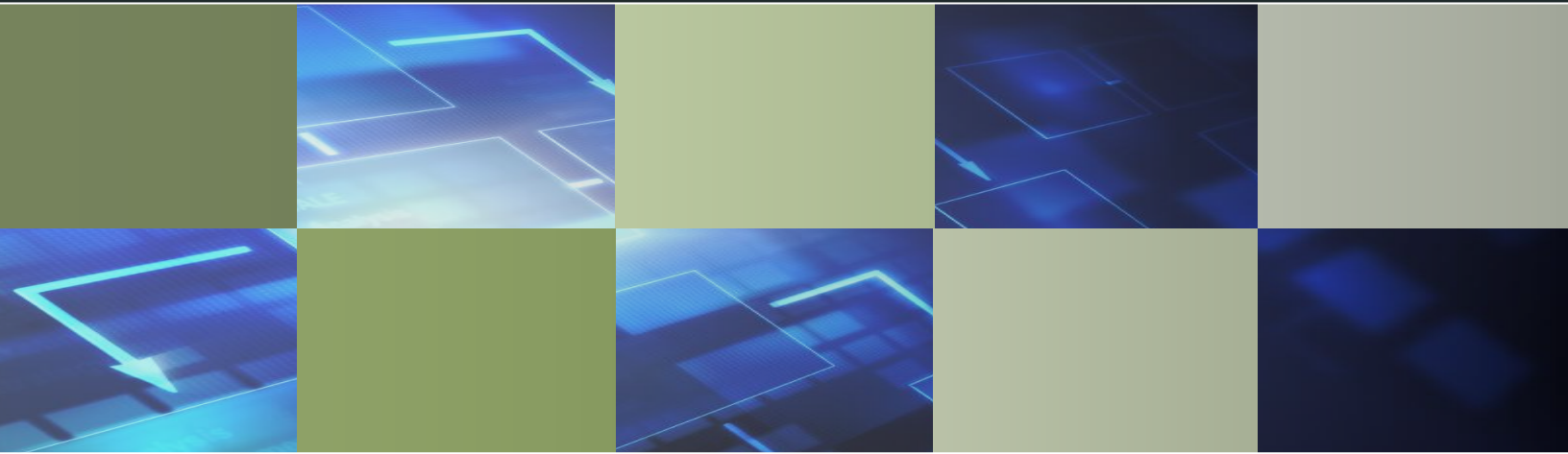
May 14 – 16, 2012

InterContinental Hotel ♦ Atlanta

**GAO**  
Gateway Analytics Network

Business Planning & Analysis

# Marketing Planning & Analysis



Integrated Business Planning  
Competitive Advantage through Analytics  
Advanced Analytics  
Data Translation, Interpretation & Delivery  
Performance Analysis  
Predictive Analytics & Forecasting



Earn 13 CPE Credits

# Agenda



## Day One – May 14, 2012

8:30 am	<i>Keynote:</i> <b>Competitive Advantage Through Analytics</b> <i>Harness analytics to promote better strategic planning and drive execution</i>
9:45 am	<i>Keynote::</i> <b>Integrated Strategic Planning</b> <i>Improve organizational performance with cross functional enterprise planning</i>
11:00 am	<b>Leveraging Customer Insight</b> <i>What drives your customers and how do you segment them according to their value</i>
12:00 pm	Lunch and Networking Break
1:00 pm	<b>ROI and Value-Based Customer Management</b> <i>Determine customer value and identify returns on marketing activities</i>
2:15 pm	<b>Predictive Marketing Analytics</b> <i>Foresight-driven, analytics-enabled marketing</i>
3:30 pm	<b>Campaign Planning and Activation</b> <i>An interactive approach to building a marketing campaign activation idea</i>
4:30 pm	Networking Reception

## Day Two – May 15, 2012

8:30 am	<i>Keynote:</i> <b>Analytics Enablement and Deployment</b> <i>Create a governance, usage and accountability system that aligns to strategic, analytics-based objectives</i>
9:45 am	<i>Keynote::</i> <b>Evidence-Based Decision Making</b> <i>How data-based insight facilitates planned change</i>
11:00 am	<b>Marketing Performance Measurement and Management</b> <i>Use metrics and analytical approaches to measure marketing impacts and ROI</i>
12:00 pm	Lunch and Networking Break
1:00 pm	<b>Customer Relationship Measuring and Monitoring</b> <i>Evaluate channel and engagement strategies through effective customer performance management</i>
2:15 pm	<b>Marketing Mix Optimization</b> <i>Maximize resource allocation for more effective usage of marketing spend</i>
3:30 pm	Adjourn

510-768-7920 ♦ [www.gmi-solutions.com](http://www.gmi-solutions.com)  
Contact Jeff Brown for detailed speaker information:  
[jbrown@gmi-solutions.com](mailto:jbrown@gmi-solutions.com)

  
[www.gmi-solutions.com](http://www.gmi-solutions.com)  
510-984-3620

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 product and customer data is a key factor in effective strategic and tactical planning. **Marketing Planning & Analysis 2012** is a comprehensive learning and networking opportunity analyzing the most pressing concerns of marketing planning through the use of analytical insight.

*Marketing Planning & Analysis 2012 is a unique opportunity for those looking to expand their ability to effectively maximize the potential of marketing spend through the use of analytical insight.*

Attendees will instantly realize the difference between this forum and other conferences. Learning sessions are vendor agnostic and there are **NO sales pitches**. Presentations will be conducted by the most talented corporate experts and thought leaders, both regionally and nationally. For those who are interested in learning more about available tools, a select few vendors will be invited to provide demos and information by request.

- *A unique experience designed specifically for Marketing Analysts, Managers and Executives*
- *Expert practitioners and methodologists across industry sectors*
- *Networking opportunity to meet with colleagues and industry experts*

Bring Your Team  
**3 Attendee Group Rate**

**\$ 3,999**

# Marketing Planning & Analysis 2012

Recent Presenters Include:



**GMI**  
 www.gmi-solutions.com  
 510-984-3620

Marketing Analysis  
Workforce Planning  
Predictive Analytics & Insights  
Financial Planning & Analysis

# Business Planning & Analysis 2012



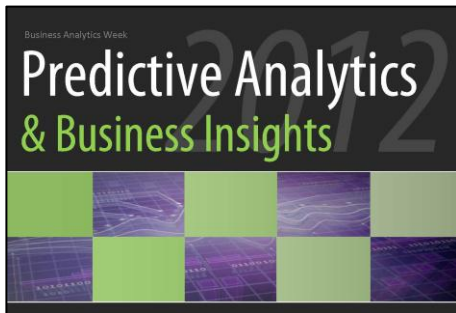
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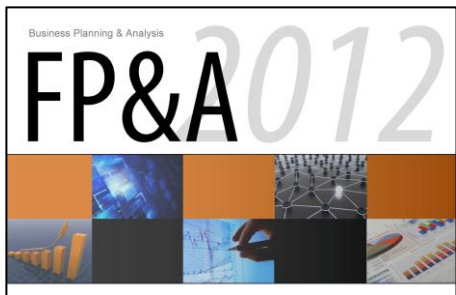
510-984-3026 ♦ www.gmi-solutions.com

## Be part of an integrated, four-track analytics event!

This unique collaborative program provides attendees the opportunity to learn from industry-leading practitioners and methodologists. Each morning, attendees will gather for keynote presentations from strategic planners and business intelligence executives from top organizations. Following these keynote addresses, attendees will break out into separate areas to learn from experts discussing topics specific to their functional and organizational interests.

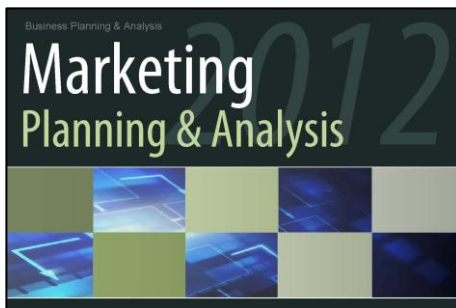


Registered attendees at any of these events are entitled to attend sessions across all programs at **Business Planning & Analysis**

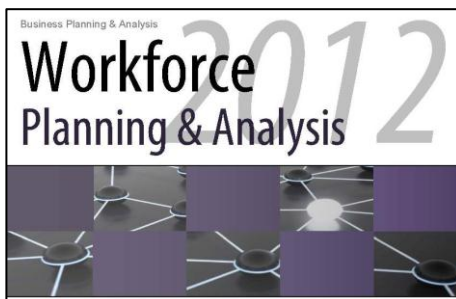


**Predictive Analytics and Business Insights 2012** offers tools and unique perspective on how businesses are leveraging analytics to develop better business and customer insights, forecasting capabilities and manage risk.

**FP&A 2012** promotes thought leadership and skill building on topics related to budgeting, forecasting and superior financial planning through the use of analytics.



**Marketing Planning & Analysis 2012** focuses on optimizing how marketers target their customers, gain insight, gauge ROI and performance, and maximize marketing spend through the use of analytical insight.



**Workforce Planning & Analysis 2012** enables business planners to effectively manage talent, engage in workforce planning, and leverage analytics for superior human capital management.

For additional information on Business Planning & Analysis:

Call Alex Smith at: 510-984-3026  
Or email at: asmith@gmi-solutions.com



8:30 am

*Keynote:*

## **Competitive Advantage through Analytics**

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

- Optimize distinct business capabilities to gain competitive advantage
- Effective analysis that allows senior management to make more informed decisions
- Decision support aligned to business needs and objectives
- Utilize analytics to better determine ROI
- Establish predictive capabilities through analytics for better forecasting

9:45 am

*Keynote:*

## **Integrated Strategic Planning**

*Improve organizational performance with cross functional enterprise planning*

- Use a functionally integrated approach for streamlined business planning
- Leverage technology and advanced processes for more accurate enterprise information
- Insure sales and operations plans are linked to strategic plan
- Evaluate plans and activities based on the true economic impact of each consideration
- Extend visibility to identify impacts of specific market events well into the future

11:00 am

## Leveraging Customer Insight

*What drives your customers and how do you segment them according to their value*

- Using data to develop effective customer retention programs
- Acquire new customers based on existing customer analytics
- Applying customer data to predict future behavior and sales
- Measuring the lifetime value of customers for better forecasting
- Create good impact assessments based on customer reactions

1:00 pm

## ROI and Value-Based Customer Management

*Determine customer value and identify returns on marketing activities*

- Resource allocation based on lifetime customer profitability
- Use a value-based approach to product and service development
- Leverage data to transition from campaign-based to customer-based marketing
- Quantify the benefit of each marketing investment using rigorous measurement practices
- Effective analysis for senior management to make more informed decisions

2:15 pm

## Predictive Marketing Analytics

*Foresight-driven, analytics-enabled marketing*

- Leverage the marketing transformation; moving from 1-to-many to 1-to-1 interactions with customers
- Re-examine all traditional methods and approaches to marketing
- ...and begin leveraging more advanced future (rather than past) driven customer behaviours coupled with advanced analytics to drive more predictable future brand and marketing decisions
- Foresight-driven marketing framework to help address key marketing issues but leveraging approaches of 21<sup>st</sup> century

3:30 pm

## Campaign Planning and Activation

*An interactive approach to building a marketing campaign activation idea*

- Gain valuable market and product insight through the use of social media data mining
- Advanced tactics in personalized one-to-one marketing
- Test marketing initiatives through social media



8:30 am

*Keynote:*

## **Analytics Enablement and Deployment**

***Create a governance, usage and accountability system that aligns to strategic, analytics-based objectives***

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

9:45 am

*Keynote:*

## **Evidence-Based Decision Making**

***How data-based insight facilitates planned change***

- Bridge the gap between knowledge and action
- Aggregate and analyze data to make more effective strategic decisions
- Optimize the quantity and quality of useful information
- Implement evolving techniques to help drive effective strategy planning and execution
- Leverage technology for improved accuracy, deeper business knowledge and real time decision making

11:00 am

## Marketing Performance Measurement and Management

*Use metrics and analytical approaches to measure marketing impacts and ROI*

- Incorporate the most effective marketing measures
- Determine what KPIs are essential to meet strategic objectives
- Assess the input and performance metrics used in the forecasting process
- Utilize a management system to monitor and drive performance
- Develop timely, engaging reports with thorough analysis of results

1:00 pm

## Customer Relationship Measuring and Monitoring

*Evaluate channel and engagement strategies through effective customer performance management*

- Create brand loyalty through customer insights
- Techniques for combining customer data to create full views of customers and customer segments
- Strategies for the most effective engagement medium and messaging

2:15 pm

## Marketing Mix Optimization

*Maximize resource allocation for more effective usage of marketing spend*

- Identify key advertising, marketing, internal and external drivers
- Provide an analytical framework for strategy assessment via simulations
- Support continuous feedback and improvement

# Workshops

## Business Analytics Workshop

Half-day workshop 12:30 – 4:00pm

Analytics are a fundamental tool to address business challenges and reveal business insights. Though business analytics offer a wealth of opportunity and competitive advantage, there are also risks associated with not performing analytics processes efficiently and accurately. Both business users and data and analytics managers must speak the same language and understand the business concerns being addressed. This workshop introduces a framework for effectively using analytics to address a breadth of organizational issues, across functional disciplines.

### Course Learning Objectives:

- Understand the link between business analytics and business success
- Understand the analytics value-chain for optimized usage
- Data management, translation and interpretation
- Align business analytics with business objectives
- Create a unified framework for data and analytics usage throughout the organization

## Continuous Improvement Workshop

Full-day workshop 9:00 – 4:00pm

This comprehensive workshop focuses on Continuous Improvement (CI) fundamentals, best practices and tools to drive sustained competitive advantage at your organization. With six learning modules, Continuous Improvement Workshop will you gain a working knowledge of Continuous Improvement, understand the need for a learning organization and develop a relationship between innovation and good growth.

### Course Learning Objectives:

#### i. Introduction to Continuous Improvement

- ✓ What is Continuous Improvement
- ✓ How Lean Six Sigma and Project Management assist in Continuous Improvement
- ✓ Introduce a sample Case Study – students to work in groups across the 6 units to develop content specific solutions throughout the 6 units

#### iii. Aligning Organizational Culture and Organizational Dynamics

- ✓ Organizational Mission
- ✓ Developing Mission congruent organizational culture
- ✓ Cultural Dimensions and resulting Organizational Dynamics

#### v. Change Management and Organizational Development

- ✓ Inevitability of change
- ✓ Need for Change Management (CM) and Organizational Development (OD)
- ✓ Pro-active & Planned Changed .vs. Reactive & Forced Change
- ✓ Images of Change across anticipated and unanticipated change

#### ii. Innovation and Sustained Competitive Advantage

- ✓ Environmental Forces impacting businesses
- ✓ Developing Sustained Competitive Advantage for long-term economic Value
- ✓ Innovation to remain on the leading edge

#### iv. Strategy Focused Good Growth

- ✓ Organizational Strategy with mission congruence
- ✓ Authenticity and Reputation
- ✓ Need for Good Growth
- ✓ Developing Customer Loyalty, Employee Loyalty, and Good Governance for Stakeholder confidence

#### vi. Building a Learning Organization

- ✓ What is a Learning Organization?
- ✓ Value of building a Learning Organization
- ✓ Institutionalization of lessons learned
- ✓ Pulling it all together to drive strategy focused good growth to realize sustained competitive advantage and become a market/industry leader

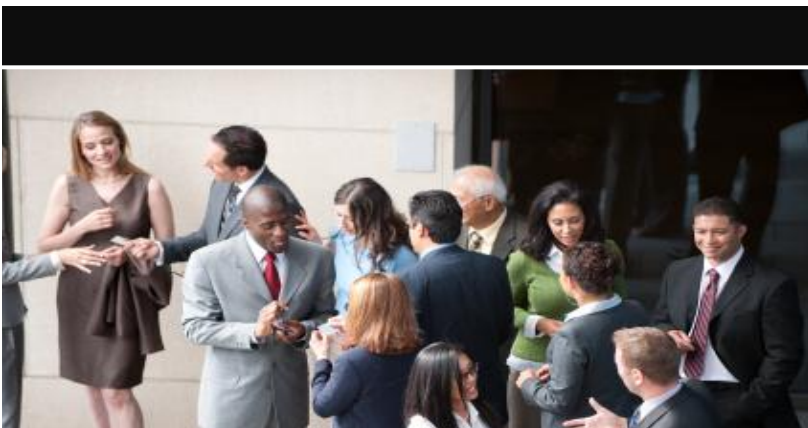


# A unique Networking Opportunity

Not only do attendees come to learn innovative skills and best practices in business planning and analytics, they also come to meet with peers from different industries across and functional backgrounds. 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*

Four business analytics events are being held simultaneously, focusing on FP&A, marketing, predictive analytics and insights, and workforce management. The combined networking event offers a great chance to learn from peers and discuss issues and initiatives that drive better performance. Additionally, an online community will provide a continuous forum for continued engagement among



This is a cross-functional, cross-industry event. Attendees from the following companies have found value in attending past Planning & Analysis events:

Accuray	JCI
Actelion Pharmaceuticals	JDS Uniphase
Adobe Systems	JP Morgan
Affymetrix	Juniper
AGCO	Gap Inc.
Alere	Genworth
Allstate	Hardies
American Superconductor	Harvard Clinical Research Institute
Amway	JDS Uniphase
AMICA MUTUAL INSURANCE	Johnson Matthey
AppliedMicro Circuits	JP Morgan
Appro	Juniper
Array BioPharma	Keurig
Audi	Kaiser Permanente
Atmel	KLA-Tencore
Bank of the West	Lam Research
BASF	Lancer Corp
Beekley	Land O' Lakes
Blessing Health	Levi's
Briggs International	Lexis Nexis
Cadence	Liberty Mutual Group
Cedar Sinai	Life Technologies
Celanese Corporation	Lincoln Industries
Centura Health	McDean
Cepheid	Maxwell Technologies
Charles Schwab	Maxygen, Inc.
Chik-Fil-A	Macys.com
Chipotle	Lonza
Chiquita	Mercedes-Benz USA
Cisco	MGM Resorts
Citrix	Micron Technology
CNN	Microsoft Corporation
Comcast	Morrison & Foerster LLP
ConAgra	Mutual of Omaha
Copa Airlines	Nestle
Cox	NetApp
Dean Foods	Nike
Diebold	Nissan
Dolby	Omnicell, Inc.
Dominoes	Papa Murphy's Intl.
EA	PayPal
eBay	Popeyes® Louisiana Kitchen
EJ Gallo	Procter & Gamble Company
Emerson	RCI
Eon US	Rent-A-Center
ESPN	Research In Motion
Exelon Corporation	Roche
Expedia	SanDisk
F5	Sara Lee
Facebook	Scottrade
FedEx	Sephora
Ferring Pharma	Stryker
Fifth Third Bank	Symantec
FL Smidth	Tibco
Flour	Timberland
Foot Locker	Tempur Pedic
FW Murphy	Trident Micro
Gap Inc.	URS
Genentech	USAA
Gilead	Visa Inc
Grant Thornton LLP	Vonage
Hamilton Beach Brands, Inc.	WellPoint, Inc.
IHG	Wells Fargo
Infinity Pharmaceuticals	Turner Sports
Intuit	And many more...

Atlanta

# Area, Venue & Travel Information



## Earn CPEs

**CPE Credits: 13**

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

## Area – Atlanta, GA

Located in the heart of the Buckhead in uptown Atlanta, our venue is conveniently positioned to access the best of what the city has to offer. Close proximity 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: **InterContinental Buckhead Atlanta**



Room Rate

**\$ 175.<sup>00</sup> / night**

### Reservations:

Mention the **Gateway Management Room Block** to the customer service agent to receive this exclusive reduced rate.

## Travel

Most guests will arrive via Hartsfield-Jackson Atlanta International Airport. The venue is located approximately 25 minutes by car or shuttle.

## Summit Venue – InterContinental Buckhead Atlanta

Venue Address:

**InterContinental Buckhead Atlanta**  
**3315 Peachtree Road NE**  
**Atlanta, GA 30326**





Marketing Planning & Analysis 2012

# Registration & Contact Information

## Attendee Information

Attendee Name

Title Organization

Email Phone Number

Additional Attendee Name

Title Email

Additional Attendee Name

Title Email

## Payment Information

Check/Purchase Order  Credit Card

Name on Card

Card Number

Expiration Date CV2 (card verification number)

Billing Address

City/State/Zip

### Pay By Check:

Checks should be made payable to Gateway Management. The mailing address for checks and tax forms is:

Gateway Management  
2625 Alcatraz Avenue, #341, Berkeley, CA 94705

### Cancellation/Rescheduling Policy:

All cancellations made four weeks or longer from the summit's start date will be provided a full refund or credit toward current or future Gateway Management programs. Any cancellations made within four weeks of the programs start date will be provided with credit toward current or future Altamont Group programs.

## Marketing Planning & Analysis Fees

<input type="checkbox"/>	Early Registration <i>Monday &amp; Tuesday Event</i>	\$ 1,599. <sup>00</sup>
<input type="checkbox"/>	Standard Registration <i>Monday &amp; Tuesday Event</i>	\$ 1,799. <sup>00</sup>
<input type="checkbox"/>	Additional Attendee <i>Monday &amp; Tuesday Event</i>	\$ 1,299. <sup>00</sup>
<input type="checkbox"/>	3 Attendee Rate	\$ 3,999. <sup>00</sup>

## Business Analytics Week Add-On Options

<input type="checkbox"/>	Business Analytics half-day Workshop	\$ 399. <sup>00</sup>
<input type="checkbox"/>	Continuous Improvement Full-day Workshop	\$ 899. <sup>00</sup>

For "Early Registration", register by February 24, 2012

## Call

510-768-7920

## Fax

510-380-7377

## Online

[www.gmi-solutions.com](http://www.gmi-solutions.com)

For group discounts, packages and local information please email Jeff Brown:

[jbrown@gmi-solutions.com](mailto:jbrown@gmi-solutions.com)