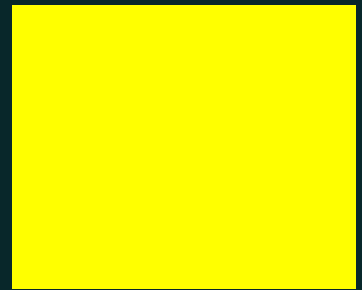
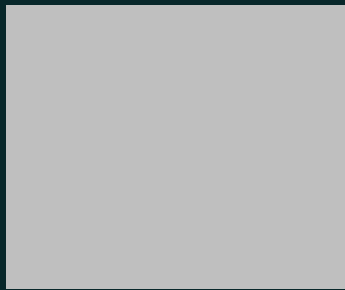


December 2<sup>nd</sup> & 3<sup>rd</sup>, 2010

Wyndham Parc 55 Hotel ♦ San Francisco

# Sales *and* Operations Planning & Analysis **2010**



Integrated Business Planning

Sales Forecasting & Demand Planning ♦ Cost Analysis & Price Optimization

FP&A for Sales and Operations ♦ S&OP Performance Analysis

Lean Data Management



# Program Agenda

Thursday, December 2<sup>nd</sup>, Day One

8:00 am Registration, orientation and opening remarks

8:30 am Keynote:  
**Integrated Business Planning**  
*Improve organizational performance with cross functional enterprise planning*

9:45 am Keynote:  
**Sales and Operations Planning Framework**  
*A strategic approach to integrating demand and sales activities*

11:00 am **Supply Planning and Analysis**  
*Map the entire supply chain capacity to better understand S&O capabilities*

Noon Lunch & Networking Break

1:00 pm **Sales Forecasting and Demand Planning**  
*Scenario analysis, continuous and rolling forecasting for sales and operations planning*

2:15 pm **FP&A for Sales and Operations**  
*Translate supply and demand variables into financial metrics*

3:30 pm **Technology Brief**  
*Leverage technology and integrate marketing analytics across the organization*

4:30 pm Adjourn

Friday, December 3<sup>rd</sup>, Day Two

8:00 am Registration, orientation and opening remarks

8:30 am Keynote:  
**Supply Chain Network Optimization**  
*Leveraging S&OP to improve productivity and maximize results*

9:45 am **Product Price Optimization**  
*Moving from cost-plus to modern pricing methods*

11:00 am **S&OP Performance Analysis**  
*Utilize KPIs and performance drivers to improve sales and operations planning results*

Noon Lunch & Networking Break

1:00 pm **S&OP Data Management**  
*Develop meaningful interpretations and recommendations to drive better business decisions*

2:15 pm **Sales and Operations Alignment**  
*Synchronize demand planning, supply chain, finance and execution to meet objectives*

3:30 pm Adjourn

# Sales and Operations Planning & Analysis 2010

In today's marketplace, good analytics can be the key differentiator in challenging markets. An organization's ability to harness and leverage the wealth of historical data available to them is a key factor in effective strategic planning. **Sales and Operations Planning & Analysis** is an integrated system of optimizing forecasting, supply chain management, creating alignment and synchronizing internal processes.

**Sales and Operations Planning & Analysis** is designed to give you effective tools for forecasting, measuring, monitoring and managing sales and operations processes. This forum provides best practices, case studies, hands on learning approaches and interactive dialogue sessions delivered by industry experts, practitioners and methodologists.

**Sales and Operations Planning & Analysis 2010** is a comprehensive training and networking opportunity that is uniquely designed for business professionals working in operations, sales, budgeting & forecasting, product development, strategic planning and business intelligence. Presentations and case studies are delivered by expert industry practitioners, educators and methodologists to provide new insight and build upon existing skills. This format allows attendees to assess best practices from leading organizations and learn how to apply the challenging approaches through hands on learning.

## The 2010 S&OPA Summit Snapshot

- 2 days of advanced sales and operations planning strategies
- 12 presentations on innovative topics
- Best practice case studies from industry leading practitioners and experts
- Useful guidance from pioneering methodologists with unique insight
- Take home presentations
- Group software demonstration opportunities



Day One:

# Keynote Case Studies & Best Practices



8:30 am

## **Keynote:** Integrated Business 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

9:45 am

## **Keynote:** Sales & Operations Planning Framework

*A strategic approach to integrating demand and sales activities*

- Develop a system to speed up commercialization of new offerings
- Make budgeting less complex and more accurate
- Enhance sales organization effectiveness
- Reduce operating costs and lower order fulfillment times
- Promote collaboration between all stakeholders

11:00 am

## Supply Planning and Analysis

*Map the entire supply chain capacity to better understand S&O capabilities*

- Use an "Outside – In" approach to continuously monitor and forecast needs
- **Better identify internal capabilities and outsourcing needs**
- Determine the constraints most relevant to each product offering
- Standardize metrics to evaluate overall supply chain capacity
- Analyze the supply chain for business continuity

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

Contact Alex Smith for detailed speaker information:

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



Day One:

# Best Practices & Strategy Sessions

1:00 pm

## Sales Forecasting and Demand Planning

*Scenario analysis, continuous and rolling forecasting for sales and operations planning*

- Link sales forecasting to supply chain activities
- Develop driver based models that incorporate key business drivers
- Utilize “what if” scenarios for exploring alternative decisions or actions to predict possible outcomes
- Capitalize on analytics to improve forecasting and planning
- Balance tops-down and bottoms-up planning to ensure the process adds value for all participants

2:15 pm

## FP&A for Sales and Operations

*Translate supply and demand variables into financial metrics*

- Make budgeting less complex and more accurate
- Generate analysis that allows senior management to make more informed decisions
- Provide decision support aligned to business objectives and market environments
- Relate S&O plan to revenue, margin and working capital requirements
- Use financial metrics to balance supply and demand

3:30 pm

## Technology Brief

*Leverage technology and integrate marketing analytics across the organization*

A voluntary opportunity to participate in demonstrations showing innovative tools in sales and operations planning.

Day Two:

# Keynote Case Studies & Best Practices



8:30 am

## **Keynote:** Supply Chain Network Optimization

*Leveraging S&OP to improve productivity and maximize results*

- Optimize lean supply chain capabilities to gain competitive advantage
- Ensure business continuity through forecasting and planning methodologies
- Effective analysis that allows senior management to make more informed decisions
- Decision support aligned to business needs and objectives
- Better navigate business and supply chain volatility

9:45 am

## Product Price Optimization

*Moving from cost-plus to modern pricing methods*

- Estimate perceived value from the customer's perspective
- Segment customers into those who value your products & services vs. just price
- Support managerial pricing decisions with better pricing analysis
- Track key metrics, like win/loss, to gauge pricing adjustments

11:00 am

## S&OP Performance Analysis

*Utilize KPIs and performance drivers to improve sales and operations planning results*

- Incorporate the most effective sales & operations 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



Day Two:

# Best Practices & Strategy Sessions

1:00 pm

## S&OP Data Management

*Develop meaningful interpretations with less data to drive better business decisions*

- Use a problem-first, data-second approach to planning
- Segmentation and integration techniques for addressing multiple stakeholders
- Recognize and eliminate **incomplete, redundant and "dirty" data**
- Integrated approach to data translation, interpretation and quality analysis
- Utilize best data storing and organizing methodologies for efficient data access

2:15 pm

## Sales and Operations Alignment

*Synchronize demand planning, supply chain, finance and execution to meet objectives*

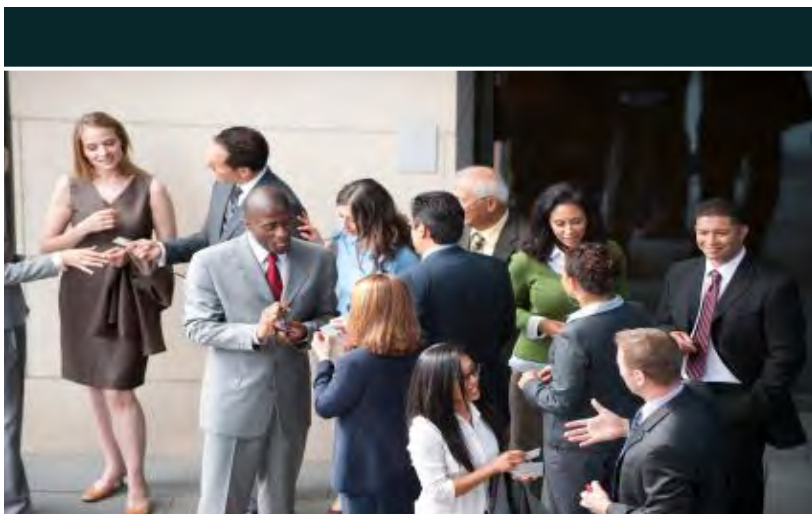
- Drive results through integration and performance management
- Develop cross functional alignment through effective communication
- Create accountability systems for internal stakeholders
- Initiate alignment between corporate strategy and operational execution
- Utilize a methodological approach measuring, management and executing strategies

# Networking Opportunities

Not only do attendees come to learn innovative skills and best practices in sales and operations planning, they also come to meet with peers from different industries across the nation. Keeping this in mind, we have chosen the most unique, tasteful and thought provoking environment available in San Francisco to host a networking reception.

*Network with colleagues and industry experts in one of the Nation's most esteemed art galleries.*

John Pence Gallery is located in the heart of the city, exhibiting classical American realist paintings in this expansive pavilion. During this reception, guests are offered the opportunity to peruse the collection and mingle with colleagues and presenters. A representative will be on hand to answer any questions about the city, the conference or the art.



## Sales and Operations Planning & Analysis

Gateway Management is a recognized leader in providing premier training events on strategic planning through analytical insight. 2010 attendee companies include:

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
Medicis	Jacksonville Aviation Authority
Belo	Life Technologies Corporation
Tempur Pedic	Lyrus
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

San Francisco

# Area, Venue & Travel Information



## 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

To view area map and venue location hold the CTRL key and:

❖❖❖ [Click Here](#) ❖❖❖

## Area – San Francisco, Union Square

Located on San Francisco’s historic Union Square, our venue is located in the heart of the city’s shopping, restaurant, accommodation and entertainment epicenter. Gateway Management has on-the-ground knowledge of the area’s best restaurants, hotels and shows to maximize your experience outside the Summit.

## Hotel and Accommodation Facilities

Our venue’s prime location offers dozens of choices of accommodations from boutique to internationally recognized brands.

## Travel

There are two convenient airports to serve attendees; San Francisco and Oakland International. Both have convenient public transportation by way of BART. Take BART from either airport toward Downtown San Francisco where you will exit at Powell Street Station. Use the accompanying map to walk or cab the 4 blocks to our venue

## Venue – Wyndham Parc 55 Hotel

Venue Address:

**Wyndham Parc 55 Hotel  
55 Cyril Magnin Street  
San Francisco, CA 94102**

Room Rate



**\$ 159.<sup>00</sup> / night**

Reservations: **1.800.697.3103**

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



Sales and Operations Planning & Analysis

# Registration & Contact Information

## Registration Form

Name \_\_\_\_\_

Title \_\_\_\_\_ Organization \_\_\_\_\_

Street Address \_\_\_\_\_

City/State/Zip \_\_\_\_\_

Telephone \_\_\_\_\_ Fax \_\_\_\_\_

Email \_\_\_\_\_

## Payment Information

Check/Purchase Order

Credit Card

Name on Card \_\_\_\_\_

Card Number \_\_\_\_\_

Expiration Date \_\_\_\_\_ CV2 (card verification number) \_\_\_\_\_

Billing Address \_\_\_\_\_

City/State/Zip \_\_\_\_\_

### ***Cancellation/Rescheduling Policy***

All cancellations that 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 Gateway Management programs.

## Fees ♦ Registration

Early Registration \$ 1,599.00

Standard Registration \$ 1,799.00

3 Attendee Group Rate \$ 3,995.00

Additional Attendee \$ 1,299.00

For "Early Registration", register by October 22, 2010

## Call

510-984-3620

## Fax

510-380-7377

## Online

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

For group discounts, packages and local information please email Alex Smith:

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