

May 9<sup>th</sup> & 10<sup>th</sup> ♦ San Francisco, CA

# Sales and Operations Planning and Analysis

Integrated Business Planning  
Advanced Analytics  
Sales Forecasting & Demand Planning  
Supply Chain Optimization  
Process Improvement  
Sales and Operations Finance  
Data Management

# Program Agenda

## Monday, May 9<sup>th</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*

9:30 am Keynote:  
**Advanced Business Analytics**  
*Decision making based on facts, data and analytical insight*

10:30 am Networking Break

11:00 am **Sales and Operations Planning Framework**  
*A strategic approach to integrating demand and sales activities*

Noon Lunch

1:00 pm **Supply Planning and Analysis**  
*Map the entire supply chain capacity to better understand S&O capabilities*

2:15 pm **Sales Forecasting and Integrated Demand Planning**  
*Scenario analysis, continuous and rolling forecasting for sales and operations planning*

3:30 pm **FP&A for Sales and Operations**  
*Translate supply and demand variables into financial metrics*

5:00 Networking Reception

## Tuesday, May 10<sup>th</sup>, Day Two

8:00 am Registration, orientation and opening remarks

8:30 am Keynote:  
**S&OP for Competitive Advantage**  
*Harness integrated business processes for better strategic planning and execution*

9:30 am Keynote:  
**Data Translation, Interpretation and Delivery**  
*Deliver meaningful information to drive better business decisions*

10:30 am Networking Break

11:00 am **Supply Chain Network Optimization**  
*Leverage your supply chain to improve productivity and maximize results*

Noon Lunch

1:00 pm **Sales and Operations Alignment**  
*Synchronize demand planning, supply chain, finance and execution to meet objectives*

2:15 pm **Process Improvement for S&OP**  
*Enhance sales and operations planning through consistent forecasting, reporting and analysis*

3:30 pm Adjourn

# Sales and Operations Planning & Analysis 2011

**Sales and Operations Planning & Analysis 2011** 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.

**Sales and Operations Planning & Analysis 2011** 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.

3 Attendee Group Rate

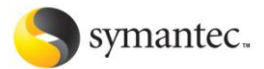
**\$ 3,995.<sup>00</sup>**



## Past Presenter Organizations Include



blue of california



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

9:30 am

## **Keynote: Advanced Business Analytics**

*Decision making based on facts, data and analytical insight*

- Use advanced statistical and econometric methodologies to make better predictions
- Total cost minimization and net revenue maximization methodologies
- Develop models for better scenario planning for predictive sales and risk management
- Multivariate testing and advanced regression modeling
- Synthesize integrated analytical insights into tactical planning

11:00 am

## **Sales & Operations Planning Framework**

*A strategic approach to integrating demand and sales activities*

- Develop a system to speed up commercialization of new offerings
- Optimize supply-chain network capabilities
- Enhance sales organization effectiveness
- Reduce operating costs and lower order fulfillment times
- Promote collaboration between all stakeholders



Day One:

# Best Practices & Strategy Sessions

1:00 pm

## 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

2:15 pm

## Sales Forecasting and Integrated 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

3:30 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

Day Two:

# Keynote Case Studies & Best Practices



8:30 am

## **Keynote: S&OP for Competitive Advantage**

*Harness integrated business processes for better strategic planning and execution*

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

9:30 am

## **Keynote: Data Translation, Interpretation and Delivery**

*Deliver meaningful information to drive better business decisions*

- Developing cross-functional support to align people, process, data, metrics and technology
- Implement controls to ensure data flow and integrity
- Cascade strategies across functions and departments to ensure successful execution
- Identify and evaluate process improvement methodologies for data collection and delivery
- Consistently extract, analyze and collate data from a variety of sources

11:00 am

## **Supply Chain Network Optimization**

*Leverage your supply chain 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



Day Two:

# Best Practices & Strategy Sessions

1:00 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

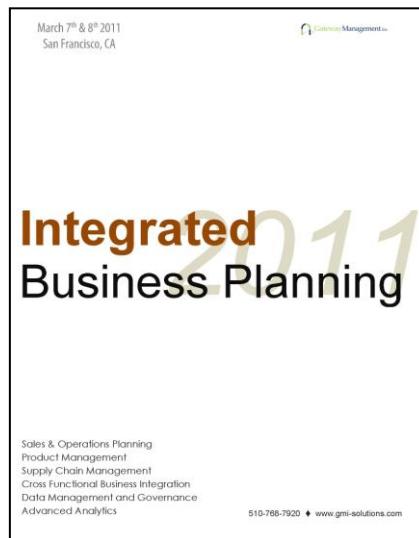
2:15 pm

## Process Improvement for S&OP

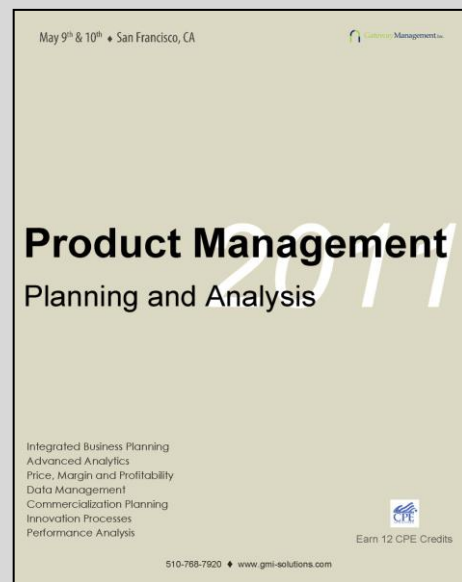
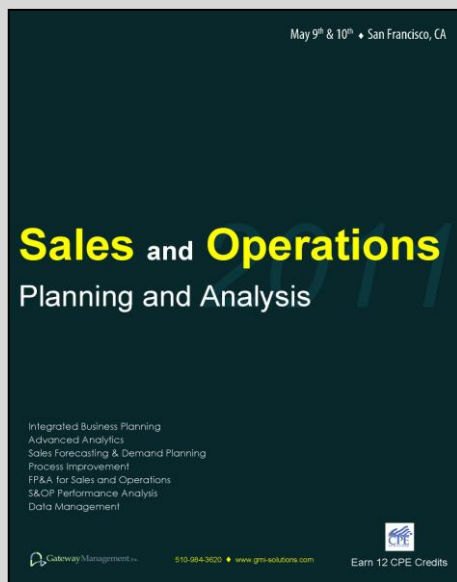
*Enhance sales and operations planning through consistent forecasting, reporting and analysis*

- 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

# Integrated Business Planning 2011 is a premier, two-track, cross-functional learning and networking event



(Click an image to access full brochure)



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

# 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*

A diverse group of attendees with backgrounds in supply chain, S&OP, data management, product management and marketing will be in attendance. The combined networking event offers a great chance to learn from peers and discuss issues and initiatives that drive better performance.



## 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:

Accuray	JDS Uniphase
Actelion Pharmaceuticals	JP Morgan
Adobe Systems	Juniper
Affymetri	FW Murphy
AGCO	Genworth
Alere	Gilead
Allstate	Hardies
American Superconductor	IHG
Amway	IMClone
AMICA MUTUAL INSURANCE COMPANY	INGRAM MICRO
AppliedMicro Circuits	Intuit
Appro	Jabil Circuit
Array BioPharma	JCI
Audi	JDS Uniphase
Atmel	JP Morgan
Bank of the West	Juniper
BASF	Keurig
Beekley	Kaiser Permanente
Blessing Health	KLA-Tencore
Bose Corporation	Lam Research
Briggs International	Land O' Lakes
Cadence	Levi's
Cedar Sinai	Liberty Mutual Group
Celanese Corporation	Life Technologies
Centura Health	Lincoln Industries
Cepheid	McDean
Charles Schwab	Macys.com
Chik-Fil-A	Mercedes-Benz USA
Chipotle	Micron Technology
Chiquita	Microsoft Corporation
Cisco	Mutual of Omaha
Citrix	Nestle
CNN	NetApp
Comcast	Nike
ConAgra	Nissan
Cox	Papa Murphy's Intl.
Dean Foods	PayPal
Diebold	Popeyes@ Louisiana Kitchen
Dolby	Procter & Gamble Company
Dominoes	RCI
EA	Rent-A-Center
eBay	Research In Motion
EJ Gallo	Roche
Gap Inc.	SanDisk
Genentech	Sara Lee
Gilead	Sephora
Hamilton Beach Brands, Inc.	Stryker
	Symantec

San Francisco

# Area, Venue & Travel Information



Room Rate  
**\$ 189.<sup>00</sup> / night**

Reservations: 1-866-781-2364

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

Online Reservations:

[Gateway Management Room Block](#)

## 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** access to all that San Francisco has to offer. We have scouted locations throughout the city and find that the InterContinental San Francisco offers among the best accommodations that we can facilitate at our negotiated rate.

## 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 – Intercontinental San Francisco Hotel

**Venue Address:**

**Intercontinental San Francisco Hotel  
888 Howard Street  
San Francisco, CA 94103**



## 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



Sales and Operations Planning & Analysis 2011, SF

# 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

<input type="checkbox"/>	Early Registration	\$ 1,599.00
<input type="checkbox"/>	Standard Registration	\$ 1,799.00
<input type="checkbox"/>	3 Attendee Group Rate	\$ 3,995.00
<input type="checkbox"/>	Additional Attendee	\$ 1,299.00

For "Early Registration", register by January 28, 2011

## 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)