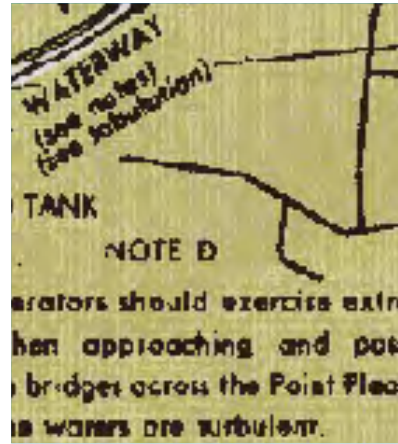


# Charting Your Course to Trade Promotion Optimization Summit



## Summit Program

**March 13-15, 2011**  
Chicago Marriott Downtown  
Magnificent Mile- Chicago, IL

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## Charting Your Course to Trade Promotion Optimization Summit

### Table of Contents

Welcome.....	4
General Information.....	6
POI Certified Collaborative Marketer(CCM) <sup>™</sup> Education Advisory Board.....	11
Summit Agenda.....	13
Sponsors.....	20
Speakers.....	26

# Welcome

## *Dear POI Summit Attendees:*

Welcome to Chicago, and the inaugural Promotion Optimization Institute (POI) Summit! This seminal meeting has drawn the attendance and participation of more than 150 top professionals from across CPG, retail, and beyond.

The full program promises to deliver an ever-expanding dialogue among trading partners, academia, and knowledge resources related to bringing clarity and understanding of price/promotion optimization, and how to structure your team, utilize tools, and align to effectively collaborate with your trading partners.

This unique summit is an opportunity for all of us to listen, share perspectives, and network with our peers to gain new insights and wisdom, and to identify/execute next steps into the future.

Many thanks to all those who gave their time and resources to plan and coordinate this event, including our Education Advisory Board, POI members, those of you who participate in our research initiatives, and Institute sponsors.

POI is continuing to advance collaborative promotion optimization, and working with Saint Joseph's University in developing the Certified Collaborative Marketer (CCM)<sup>™</sup> certificate. The coursework and certificate provide an objective measure of an individual's knowledge and competence in the field of marketing at retail. It is designed with the industry to give executives recognized certification for collaboration with their trading partners. We look forward to ongoing dialogue and collaboration via future executive meetings, online forums, white papers and pilot projects.

It is POI's desire that you not only have a great conference, but, even more importantly, that you will take back with you new ideas, relationships, and measurable steps to put into action and produce results.

Let's enjoy Chicago!

*Mike Kantor  
and the entire POI team*



# #1

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## Exhibit Hours

### **Monday, March 14, 2011**

- |                     |  |
|---------------------|--|
| 7:30 AM – 8:15 AM   | Networking Breakfast<br><i>Sponsored by: Capgemini</i>         |
| 10:10 AM – 10:35 AM | Networking Refreshment Break<br><i>Sponsored by: Promax</i>    |
| 3:05 PM – 3:30 PM   | Networking Refreshment Break<br><i>Sponsored by: DemandTec</i> |
| 6:00 PM – 7:30 PM   | Reception<br><i>Sponsored by: Accenture and Colangelo</i>      |

### **Tuesday, March 15, 2011**

- |                     |  |
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| 7:30 AM – 8:15 AM   | Networking Breakfast<br><i>Sponsored by: River Logic, Inc.</i> |
| 10:15 AM – 10:35 AM | Networking Refreshment Break<br><i>Sponsored by: Oracle</i>    |

The exhibits can be found in Halsted Foyer. Refuel between educational sessions with a beverage, network with peers and obtain the answers to all of your questions.

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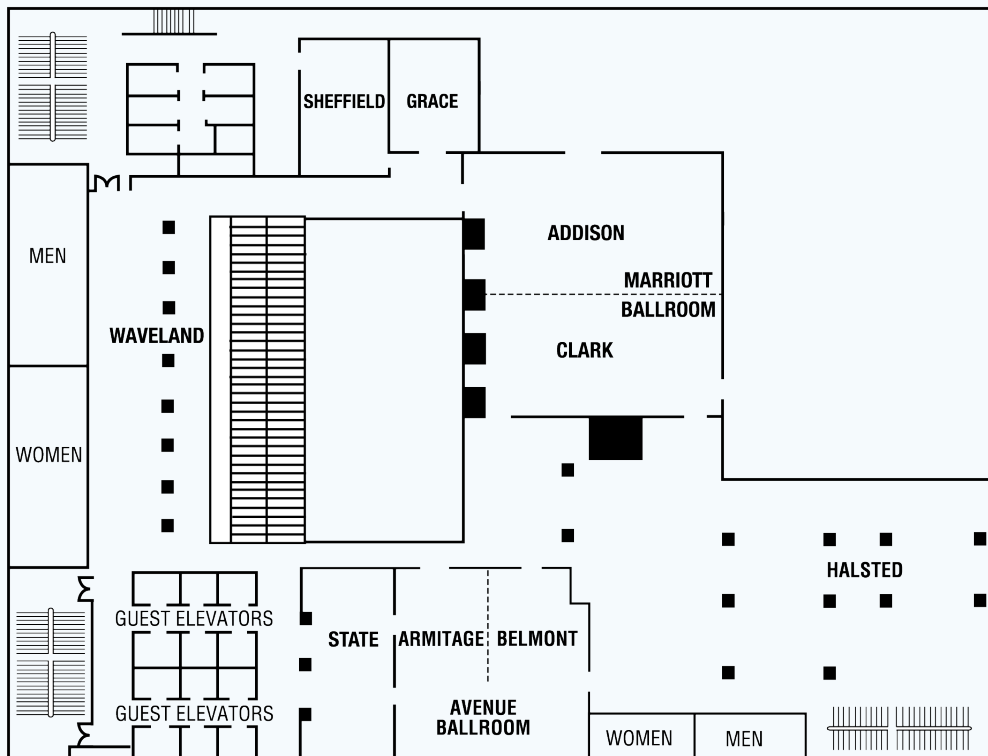
The safety and security of attendees is our first priority. Should you have or be aware of an emergency, please be prepared to provide the following information immediately:

- Nature of the emergency
- Exact location of the emergency

**To report an emergency:** Dial "0" from any house phone OR alert any hotel employee.

## Services

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Smoking Policy:	Smoking is not permitted in the hotel.
Cell Phones and Pagers:	As a courtesy to our speakers and your fellow Summit attendees, please silence cellular telephones and pagers during all Summit sessions.







## Today's Trade Claims Process

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- ❖ Trade Collaboration



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### **Alexander Ring**

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Synectics Group, Inc.

### **Dr. John L. Stanton**

Dept. Chair and Professor  
Saint Joseph’s University – Dept. of Food  
Marketing

### **Ken Sullivan**

Senior Vice President  
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### **Conference Management Team**

#### **Director of Events:**

Samantha Bowerman, CMP

#### **Graphic Design:**

Roy D. Monaro

#### **Saint Joseph’s University Student Assistance:**

Carolyn Creedon  
Jacqueline Stuppiello



## Ken Dickman

Ken is a partner in Accenture's Operational Strategy Service Line and leads Accenture's Consumer Goods & Services Strategy Practice. Ken focuses on increasing growth for both CPG and retail clients via organic growth initiatives that develop and implement growth strategies and value-based transformation programs that build the marketing, merchandising, and supply chain capabilities required to enable these strategies. Ken has helped clients drive consumer-centric performance in product portfolio strategy, category planning and execution, ad/promotion effectiveness, pricing, assortment optimization, vendor management,

and profit-base store formatting. Ken has 15 years of consulting experience and over 18 years of strategy development and implementation experience. Ken also specializes in helping clients with innovative growth programs and corporate venturing disciplines, which includes the conception and launch of new businesses and retail formats. Ken has an MBA from the University of Chicago Booth Graduate School of Business.



## Dale Hagemeyer

Dale Hagemeyer is a research vice president at Gartner Research, where he is part of its Manufacturing Industry Advisory Service. His area of expertise is in CRM for the consumer goods industry including vision and strategy, business case development, vendor evaluation and selection, and implementation and support strategies. He also serves in an advisory board capacity with Trade Promotion Management Associates (TPMA), the Grocery Manufacturers Association (GMA) and Promotion Optimization Institute (POI). Dale has a total of 22 years of consumer goods industry experience, including with General Foods (now Kraft), PepsiCo, Quaker Oats, and Sunbeam. He also fulfilled an international assignment in Mexico

from 1995 to 1996. Dale holds a BA degree from the University of Utah and an MBA from the University of Chicago as a recipient of the State Farm Companies Foundation Outstanding Student Fellowship.



## Gary Singer

Gary is a partner in Accenture's Customer Relationship Management practice and leads their Global Trade Promotion Management offering. His primary focus is working with CPG companies to improve their sales and marketing strategies -- specifically overseeing Accenture's global work in areas of trade promotion management and effectiveness including process redesign, trade analytics, system/tool implementation, trade marketing organization capabilities, and more.

Gary started his career as a marketing analyst with Procter and Gamble. Gary has co-authored the "Daunting Dilemma of Trade Promotion" and "Creating and Sustaining Value Opportunities in Trade Promotion", as well as spoken at industry conferences including GMA, ASMC, and IFBA. Gary has a BS in quantitative business analysis from Penn State University and an MBA in marketing and statistics from The University of Chicago.



## Dr. John L. Stanton

John L. Stanton has a PhD in quantitative methods and marketing from Syracuse University, and been in the food industry for over 30 years. He is currently professor and chairman of the food marketing department at Saint Joseph's University in Philadelphia. Besides academia, John has also worked in the food industry. He has been vice president of marketing for Melitta, an international coffee company, and worked in Germany for Tengelmann, one of the world's largest food retailers and owner of A&P in the USA. John was also director of research of an advertising agency and has consulted for many nationally known

food companies. His published books include: *Winning Marketing Strategy*; *Precision Target Marketing*; *Stanton on Food Marketing*; *MORE Stanton on Food Marketing*; *Success Leaves Clues!*; *Delight Me...The Ten Commandments of Customer Service*; *21 Trends in Food Marketing for the 21st Century*; *325 Ways to Make Customers Feel Like Your Supermarket Is Their Supermarket*; *Marketing Planning in a Total Quality Environment*; *Running a Supermarket Consumer Focus Group*, and *Making Niche Marketing Work* (McGraw-Hill). John is currently the editor of the *Journal of Food Products Marketing*, and an editorial advisor of the *British Food Journal*.

## Charting Your Course to Trade Promotion Optimization Summit

March 13-15, 2011

Chicago Marriott Downtown Magnificent Mile - Chicago, IL

### Sunday, March 13, 2011

<u>TIME</u>	<u>FUNCTION</u>	<u>LOCATION</u>
2:00 PM - 6:00 PM	<b>POI Certified Collaborative Marketer (CCM)™ Education Advisory Board Meeting</b>	<b>Grace</b>
3:00 PM - 7:30 PM	<b>Registration</b>	<b>Halsted</b>
6:00 PM - 7:30 PM	<b>Welcome Reception</b> Reception with your colleagues over wine and cheese. Sponsored by: SymphonyIRI Group	<b>Water Tower</b> (10th Floor)



### Monday, March 14, 2011

<u>TIME</u>	<u>FUNCTION</u>	<u>LOCATION</u>
7:30 AM - 5:30 PM	<b>Registration</b>	<b>Halsted</b>
7:30 AM - 8:15 AM	<b>Networking Breakfast</b> Sponsored by: Capgemini	<b>Halsted</b>



8:15 AM - 8:25 AM	<b>Welcome</b> <b>Michael Kantor</b> , CEO and Founder, Promotion Optimization Institute, LLC	<b>Marriott Ballroom</b>
8:25 AM - 9:20 AM	<b>Keynote - Winning Marketing Strategy: The Rules</b> <i>Speaker: Dr. John L. Stanton</i> - Department Chair, Department of Food Marketing - Saint Joseph's University School of Business	<b>Marriott Ballroom</b>
9:20 AM - 10:10 AM	<b>Keynote - Charting Your Course - Successful Navigation</b> <i>Speakers: Gary Singer</i> - Partner - Accenture <i>Ken Dickman</i> - Partner - Accenture	<b>Marriott Ballroom</b>
10:10 AM - 10:35 AM	<b>Networking Refreshment Break</b> Sponsored by: Promax	<b>Halsted</b>



# Agenda

<u>TIME</u>	<u>FUNCTION</u>	<u>LOCATION</u>
10:35 AM - 11:20 AM	<p><b>Concurrent Session A</b>  <b>Taking Your Marketing &amp; Sustainability Goals to the Next Level to Drive Sales</b>  <i>Speakers: Bob “Bubba” Terry</i> - Chief Executive Officer gro360, <b>Lesley Lehr</b> – Account Director gro360, <b>Dr. Neal Hooker, PhD</b> - CJ McNutt Chair &amp; Professor, Saint Joseph’s University</p>	Marriott Ballroom
10:35 AM - 12:10 AM	<p><b>Concurrent Session B</b>  <b>Foodservice Trade Investment 2020 - What It Will Look Like and How We’ll Get There</b>  <i>Speaker: Jim Klass</i> - Managing Partner- MarketIntelligence, LLC  <i>Panelists: Scott Modica</i> - Vice President Foodservice Sales &amp; Marketing - Smithfield, <b>William Mason</b> - Managing Director - The Hale Group, <b>Dror Karidi</b> - Senior Director Operational Strategy - US Foodservice</p>	Sheffield
11:25 AM - 12:10 PM	<p><b>Concurrent Session A</b>  <b>Shopper Marketing - Melding New and Old Media for Optimal Customer Engagement</b>  <i>Speakers: Dan Bracken</i> - Director of Marketing Services - Church &amp; Dwight Co., Inc., <b>Ed Wallon</b> - Director of Retail Strategy - Colangelo</p>	Marriott Ballroom
12:10 PM - 1:30 PM	<p><b>Lunch</b>  <b>Chicago Marriott Downtown Executive Chef, Myk Banas, will present local sourcing strategies</b>            Sponsored by: Synectics Group, Inc.</p>	Avenue Ballroom
		
1:30 PM - 2:15 PM	<p><b>Concurrent Session A</b>  <b>Charting Your Course - Laying Out a Clear Vision, Including the Business Case for Implementation</b>  <i>Moderator: Michael Kantor</i> - Chief Executive Officer - Promotion Optimization Institute  <i>Panelists: Chris Boever</i> - Senior Vice President, Sales - ConAgra, <b>Kevin Kroymann</b> - National Manager Trade Marketing - Hormel Foods</p>	Marriott Ballroom
1:30 PM - 2:15 PM	<p><b>Concurrent Session B</b>  <b>Foodservice Operator Deviated and Rebate Claims - Would You Pass a True Audit?</b>  <i>Speakers: Chris Martin</i> - CEO and Founder - Tibersoft Corporation, <b>Nelson Craig</b> - Vice President Business Development - Heinz Foodservice</p>	Sheffield

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<u>TIME</u>	<u>FUNCTION</u>	<u>LOCATION</u>
2:20 PM - 3:05 PM	<b>Concurrent Session A</b> <b>Implementing a Demand-Driven Supply Network</b> <i>Speaker: Chris McDivitt</i> - Vice President - Capgemini	Marriott Ballroom
2:20 PM - 3:05 PM	<b>Concurrent Session B</b> <b>Trade Promotion Management - Getting Your Foundational Capabilities Bedded Down</b> <i>Speaker: Chuck Scott</i> - Director Trade Promotion & Demand Planning - Ainsworth Pet Nutrition	Sheffield
3:05 PM - 3:30 PM	<b>Networking Refreshment Break</b> Sponsored by: DemandTec	Halsted
		
3:30 PM - 4:15 PM	<b>Concurrent Session A</b> <b>Integrated Business Planning: Sales, Customer &amp; the Supply Chain</b> <i>Speaker: Gary Herd</i> - Senior Vice President, Production & Inventory Planning - Beaulieu Group	Marriott Ballroom
3:30 PM - 4:15 PM	<b>Concurrent Session B</b> <b>Foodservice Trade Investment Strategies for the Independent Distributor</b> <i>Speakers: Steve Scales</i> - Vice President - Campbell Foodservice, <i>Jim Klass</i> - Managing Partner - MarketIntelligence, LLC	Sheffield
4:15 PM - 5:00 PM	<b>Concurrent Session A</b> <b>Continuous Improvement Through Delivering Category-Level Promotional Insights to Retailers</b> <i>Speaker: Harry Post</i> - Category Management Team Lead, Perishables - Unilever	Marriott Ballroom
4:15 PM - 5:00 PM	<b>Concurrent Session B</b> <b>A Foodservice Approach to Claims Management</b> <i>Speaker: Jack Robinson</i> - Vice President - SPI, <i>Harish Sharma</i> - Global Engagement Manager - SPI	Sheffield
5:00 PM - 5:45 PM	<b>Price and Promotion Best Practices for a Changing Economy</b> <i>Speaker: Dhruv Grewal, PhD</i> - Toyota Chair, Professor of Marketing - Babson College	Marriott Ballroom
6:00 PM - 7:30 PM	<b>Reception</b> Sponsored by: Accenture and Colangelo	Halsted



COLANGELO

# Agenda

**Tuesday, March 15, 2011**

<u>TIME</u>	<u>FUNCTION</u>	<u>LOCATION</u>
7:30 AM - 8:15 AM	<b>Networking Breakfast</b> Sponsored by: River Logic, Inc. 	Halsted
7:30 AM - 12:15 PM	<b>Registration</b>	Halsted
8:15 AM - 9:20 AM	<b>Keynote - A Guide to Manufacturer/Retailer Collaboration for Promotional Activities</b> <i>Speaker: Dale Hagemeyer</i> - Managing Vice President - Gartner, Inc.	Marriott Ballroom
9:20 AM - 10:15 AM	<b>Collaborating with Vendor Partners (National, Regional &amp; Local) for Promotion Optimization</b> <i>Speaker: Lisa J. Overman</i> - Director of Marketing & Advertising - Delhaize America - Harveys & Reid's Supermarkets	Marriott Ballroom
10:15 AM - 10:35 AM	<b>Networking Refreshment Break</b> Sponsored by: Oracle 	Halsted
10:35 AM - 11:25 AM	<b>Getting the Right TPO Results for Joint Business Planning</b> <i>Speakers:</i> Hormel Foods Customer Team: <b>Kevin Kroymann</b> - National Manager Trade Marketing, <b>Bob Samples</b> - CPSA Director Category Planning and Support	Marriott Ballroom
11:25 AM - 12:15 PM	<b>Executing Your TPO Strategy - Tying It All Together to Start Today!</b>	Marriott Ballroom

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Through our management consulting, outsourcing and technology services, Accenture helps companies in the consumer goods and services industry transform businesses to attain high performance, increasing shareholder returns and ensuring long-term success. Our industry solutions develop an in-depth understanding of consumers and their varying needs; enable sustained capabilities through ERP, custom and emerging technologies; optimize supply chain and cost structures; and offer a unique mix of strategies that serve as building blocks for accelerating growth, increasing shareholder returns and sustaining long-term success and high performance.

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## **Accenture CAS**

Accenture CAS is a powerful, integrated customer management and mobility solution that helps consumer products companies to deliver products to market faster at lower cost. Versatile and robust, Accenture CAS combines a suite of retail execution and trade promotion management solutions to improve sales performance. Accenture CAS uses optimization technologies or predictive analytics to achieve promotion effectiveness and better decision making to drive profitability. Backed by Accenture, a global management consulting, technology services and outsourcing company, Accenture CAS has deployed more than 200 implementations at leading industry players to realize better business outcomes, measurable value and, ultimately, help them achieve high performance.

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### Capgemini

Capgemini, one of the world's foremost providers of consulting, technology and outsourcing services, works with many of the world's consumer products and retail companies in defining and achieving their comprehensive strategy to win at the shelf. As a key component, Capgemini helps clients improve retailer collaboration — enabling fact-based investment decisions to improve ROI and integrating mobile solutions to get clients closest to the shelf and the consumer. Through trade promotion management & optimization, demand synchronization, retail execution and direct store delivery, we help companies achieve end-to-end Demand-Driven Enterprise Management market leadership. Present in more than 35 countries, Capgemini employs over 100,000 people worldwide. Please visit our website at [www.us.capgemini.com](http://www.us.capgemini.com).

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### DemandTec

DemandTec (NASDAQ:DMAN) connects more than 340 retailers and consumer products companies, providing common tools to transact, interact, and collaborate on core merchandising and marketing activities. DemandTec's services enable customers to achieve their sales volume, revenue, shopper loyalty, and profitability objectives. DemandTec customers have collaborated on nearly four million trade deals. DemandTec software and analytical services utilize a science-based platform to model and understand consumer behavior. DemandTec customers include leading retailers and consumer products companies such as Ahold USA, Best Buy, ConAgra Foods, Delhaize America, General Mills, H-E-B Grocery Co., The Home Depot, Hormel Foods, Monoprix, PETCO, Safeway, Sara Lee, Target, Walmart, and WH Smith.

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## G4 Analytics

G4 Analytics is a leading provider of business intelligence and planning applications to the consumer goods industry. G4 helps consumer goods companies to increase sales through analytics. Most G4 customers typically increase their return on promotional trade spend by 5-10%. G4 also improves forecast accuracy that helps eliminate supply chain issues. Our solutions for Trade Promotion Optimization, Key Account Planning, In-store Availability and Downstream Data Management utilize advanced predictive modeling to support an integrated approach to sales. G4 eliminates in-store stock problems and provides root-cause insights to action plans to get them resolved.

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## Mind Tree

MindTree is a global solutions and services company with 10,000 employees and over \$300M in revenue that specializes in Analytics, Reporting, IT Services, and Product Development. Our extensive consumer goods and retail industry expertise has enabled us to deliver over 500 projects to 80 consumer goods and retail customers across the globe. MindTree is uniquely positioned to deliver deep business insights across all functional areas for consumer goods and retail companies. Some of our specialized areas of analysis include: Spend Analytics, Trade Promotions, Point-of-Sale, Forecasting Models, Customer Life-Cycle Management, Pricing Analysis, and HR Analytics. Please visit us at [www.mindtree.com](http://www.mindtree.com).

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## The Nielsen Company

The Nielsen Company is a leading global provider of information and analytics around what consumers watch and buy. Please visit our website at [www.nielsen.com](http://www.nielsen.com).

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### Promax Applications Group

Promax Applications Group (PAG) is a world-leading specialist in trade promotion planning, management, and optimization solutions. With headquarter operations based in Australia and offices now in New Zealand, Japan, Central Europe, United Kingdom and North America, PAG boasts an impressive stable of global consumer goods companies such as Kraft, L'Oreal, Heinz, Johnson & Johnson, Beiersdorf, Henkel and many others. Our solutions are the result of more than twenty years' experience working in close collaboration with leading consumer goods manufacturers, retailers and distributors. The Promax solution, including Promax® PX and Promax® AnalytX, has been designed to allow a seamless, automated process to Track, Predict and Optimize promotions and trade spend. It incorporates the most sophisticated tools to maximize a client's return on trade spend investment and deliver optimal outcomes for retail partners. For more information about about Promax, visit [www.promaxtpo.com](http://www.promaxtpo.com).

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*Email: [Alan.Miller@promaxtpo.com](mailto:Alan.Miller@promaxtpo.com)*



### River Logic

River Logic's solutions, built on our Enterprise Optimizer® platform, drive our differentiation and yield significant commercial advantages to partners and clients. Consumer goods companies discover hidden potential through: Cost-to-Serve Planner™ – provides insight into which customers and products matter most and how they can be managed at the appropriate cost; Integrated Business Planner™ – enhances S&OP through seamless integration of financials, what-if analyses, and marginal profitability analyses; Trade Promotion Optimization Planner™ – ensures maximum return on trade spending by analyzing brand and account-level promotion strategies on an ongoing basis; and Network Design & Optimization Planner™ – optimizes networks to changes in demand, supply, labor, transportation, and outsourcing initiatives.

*For additional information contact:*

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*Director of Client Services*

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### SPI

In an increasingly competitive environment, the bottom line depends on lowering costs, improving productivity and outpacing the competition. SPI helps trading partners achieve these goals by combining its unmatched expertise in the retail value chain with an unparalleled technology capability that, through a collaborative approach, yields business process improvements. SPI works seamlessly with our clients' internal teams, and we implement the processes and systems that specifically address our clients' individual business needs. For retailers and manufacturers seeking IT, Financial and Accounting solutions that dramatically reduce costs, increase efficiencies and drive competitive advantage, SPI is the right partner for the retail trading process.

*For additional information contact:*

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## SymphonyIRI Group

SymphonyIRI Price & Trade Advantage™ allows you to improve pricing and promotion strategies by providing predictive results through a series of web-based dashboards, reports, and simulated plans. Several applications in this easy-to-use, web-based tool enable you to plan and evaluate alternative price and promotion scenarios, analyze price points and thresholds, and review the success of past events. With brand-specific data and model results, you can predict how new strategies and competitive actions would impact your brand performance. Once implemented, users can evaluate results versus initial plans to measure the success of price changes and make sure your strategies stay on track.

*For additional information contact:*

### **Mike Bruening**

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*Email: Michael.Bruening@symphonyiri.com*



## Synectics Group, Inc.

The Synectics Group is a leading TPM/TPO software and consulting company in the CPG sector. Synectics Group has been solely focused on trade promotion management in the CPG sector for 26 years. We offer a comprehensive suite solution that manages the client's trade spending in our Account Review closed-loop system. Account review manages a CPG manufacturer's budget, plans, financial settlements, and pre-post reporting. The jointly owned Synectics Group/River Logic TPO Planner strategically optimizes the corporate portfolio of products utilizing constraint-based modeling coupled with the ability to optimize for profit, volume and revenue.

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## TABS Group, Inc.

TABS Group, Inc. is a leading provider of research and consulting services to the consumer products and financial services industries. TABS Group, Inc. based in Shelton, CT, was founded by Dr. Kurt Jetta in 1998. TABS Group has developed unique and affordable processes to strip out time and cost from the analytical process. The commitment TABS shows towards analytical innovation is a testament to the value gained by our clients. Our methodologies are robust, proven, and put to work daily for dozens of clients across a variety of Food, Drug, and General Merchandise categories. TABS Group, Inc. challenges the paradigm. We will deliver the most accurate, relevant, derivative, actionable information your company will ever purchase. Please visit our website at [www.tabsgroup.com](http://www.tabsgroup.com).

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E-mail: [michael.heberle@nielsen.com](mailto:michael.heberle@nielsen.com)

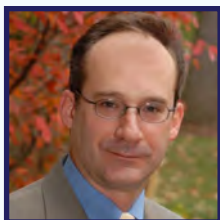


## Chris Boever

Chris Boever became senior vice president, sales of ConAgra foods in 2010. In this role, he oversees the sales of many consumer-favorite brands, including Healthy Choice, Marie Callendar, Orville Redenbacher's, Chef Boyardee, Hunt's and Hebrew National. Prior to this position, Chris was vice president, planning & operations where he led trade funds management and business analytics functions. He began his career with Hormel Foods as a sales representative, eventually assuming several senior positions, including vice president sales strategy and business development.

## Dan Bracken

Dan Bracken is the director of marketing services at Church & Dwight. Previously, he's held director positions at Callaway Golf, Spalding Sports Worldwide and Kraft Foods.



## Ken Dickman

Ken is a partner in Accenture's Operational Strategy Service Line and leads Accenture's Consumer Goods & Services Strategy Practice. Ken focuses on increasing growth for both CPG and retail clients via organic growth initiatives that develop and implement growth strategies and value-based transformation programs that build the marketing, merchandising, and supply chain capabilities required to enable these strategies. Ken has helped clients drive consumer-centric performance in product portfolio strategy, category planning and execution, ad/promotion effectiveness, pricing, assortment optimization, vendor management, and profit-base store formatting. Ken has 15 years of consulting experience and over 18 years of strategy development and implementation experience. Ken also specializes in helping clients with innovative growth programs and corporate venturing disciplines, which includes the conception and launch of new businesses and retail formats. Ken has an MBA from the University of Chicago Booth Graduate School of Business.



## Dhruv Grewal

Dhruv Grewal (PhD Virginia Tech) is the Toyota Chair in Commerce and Electronic Business and a Professor of Marketing at Babson College. He was co-editor of the *Journal of Retailing* (2001-2007). His research and teaching interests focus on retailing, pricing and value-based marketing strategies. He was ranked 1st in the marketing field in terms of publications in the top six marketing journals during the 1991-1998 period and again from the 2000-2007 period. He was awarded the 2010 Lifetime Achievement Award in Retailing (AMA Retailing SIG), 2005 Lifetime Achievement in Behavioral Pricing Award (Fordham University, November 2005) and the AMS Cutco/Vector Distinguished Educator Award in May 2010. He is a "Distinguished Fellow" of the Academy of Marketing Science. He is currently working on a book on game changing innovative retail strategies. He has taught executive seminars, courses and worked on research projects with numerous firms.



## Dale Hagemeyer

Dale Hagemeyer is a research vice president in Gartner Research, where he is part of its Manufacturing Industry Advisory Service. His area of expertise is in CRM for the consumer goods industry including vision and strategy, business case development, vendor evaluation and selection, and implementation and support strategies. He also serves in an advisory board capacity with Trade Promotion Management Associates (TPMA), the Grocery Manufacturers Association (GMA) and Promotion Optimization Institute (POI). Dale has a total of 22 years of consumer goods industry experience, including with General Foods (now Kraft), PepsiCo, Quaker Oats, and Sunbeam. He also fulfilled an international assignment in Mexico from 1995 to 1996. Mr. Hagemeyer holds a BA degree in finance and Spanish from the University of Utah and an MBA from the University of Chicago as a recipient of the State Farm Companies Foundation Outstanding Student Fellowship.

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## **Gary Herd**

Gary A. Herd is senior vice president, Production and Inventory Planning for Beaulieu of America, the third-largest carpet producer in the world. He applies 35 years of experience to the company in the production planning, inventory management, and purchasing fields. Gary is known for his ability to design and implement planning and manufacturing systems to manage inventories and provide service. Since joining Beaulieu in 2004, he has reduced inventory and increased turns from 4.3 to 5.3, while maintaining the company's service goals.

Gary began his career in 1976 at E & B Carpet Mills and very quickly became planning manager of its largest manufacturing facility. In 1989, he left to become director of planning at Horizon Industries. In 1991, Horizon was purchased by Mohawk Industries, and he stayed on with the new company as director of central planning. There he designed and implemented an integrated planning and manufacturing system from the customer order all the way through to shipping. Through improved systems, he was able to reduce inventories by \$40MM with a growing business and maintaining a high level of service. Gary was part of a team that successfully integrated eight acquisitions into the Mohawk planning and manufacturing system.



## **Dr. Neal Hooker**

Dr. Neal Hooker is the CJ McNutt Professor of Food Marketing at Saint Joseph's University. He is also a visiting professor at the Food Policy Institute, Rutgers University. He received a PhD from the University of Massachusetts, an MA from the University of British Columbia (Canada) and a BA (Hons.) from Essex University (U.K.). Neal's research explores marketing and management issues within global food supply chains. He is particularly interested in how safety and nutrition attributes are communicated, controlled, and (where appropriate) certified. Neal has worked at Texas A&M University, Colorado State University and The Ohio State University. He has published more than 40 journal articles and book chapters on the

economics of food quality, product recalls, international marketing of food safety, the demand for functional food, and e-business. Current research projects are exploring: the effectiveness of various forms of food safety and nutrition policy; food innovation strategies; adoption of quality management and certification systems such as GAPs; the e-business practices of food retailers; marketing strategies for functional, organic and fair trade foods; and the business implications of food recalls.



## **Michael Kantor**

Michael Kantor is CEO and founder of the Promotion Optimization Institute, LLC. He is creating and executing with a brilliant, committed group of retail, CPG, and academic leaders the Certified Collaborative Marketer (CCM)<sup>™</sup> curriculum and certification. He is currently the co-chair with Dale Hagemeyer at Gartner, Inc. of the Promotional Collaboration Capability Matrix. Previously he was managing director of TPMA. He has spent his career creating retail and brand price/promotion optimization programs that drive improved loyalty and profits. Mike co-chaired and developed with Gartner, Inc. and leading CPG executives the industry's first

standard set of trade promotion definitions/metrics; and pioneered efforts to define and document trade promotion management in foodservice. Mike began his career in retail advertising and operations as senior vice president, Drug World Pharmacies. He has written for numerous industry publications, primary research, redesigned the NYC Hospice delivery model, and speaks at industry events.



## **Dror Karidi**

Dror Karidi is senior director of operational strategy at in US Foodservice, Inc. Dror's work has spanned a variety of functional topics and areas. Most recently he led initiatives in the areas of Trade Promotion, Pricing Excellence and Procurement. Before joining US Foodservice Dror was an engagement manager at McKinsey and Co., practiced commercial and constitutional law, and served in the Intelligence Corps. Dror received an MBA from The University of Chicago in May 2006. In 2001, he received an LLB and BA from Tel Aviv University.



## Jim Klass

Jim Klass is the managing partner of MarketIntelligence, LLC a business strategy consulting firm focusing on the foodservice industry. Jim has 28 years of experience in foodservice as an owner of a highly successful brokerage firm in Upstate New York and the last 10 years in management consulting and consumer products technology, most recently with Booz & Company. He has a unique, insider's view of the challenges, opportunities and business cycles, having worked closely with numerous foodservice manufacturers, distributors, and operators. Jim has consulted with foodservice manufacturers on projects encompassing trade investment, price optimization, and customer segmentation, assisting firms achieve both improved margins and market share. He has a unique perspective on the industry's trade promotion challenges and has work with distributors and manufactures to align their approach to viewing trade as Trade Investment with a focus on ROI. Jim has been actively engaged with IFMA's Sales & Marketing, COEX, and Presidents Conference, presenting on various topics. Additionally he has moderated the IFDA's Supplier Advisory Council on Data Sync and presented at FSMA Top2Top, TPMA, and P-O-I. Jim holds a BA from Saint Michael's College, graduating summa cum laude.



## Kevin Kroymann

Kevin R. Kroymann is the national manager of trade marketing for the consumer products sales division of Hormel Foods and is based in Austin, Minn. In his role, Kevin is responsible for the customer trade marketing and corporate business analytics teams and delivering the overall business plan to achieve volume, share and sales goals. He assumed his current position in October 2005 after achieving diverse work experience at several Hormel Foods facilities. Kevin began his career with Hormel Foods in 1990 as a relief foreman at the Fremont (Neb.) plant, and held numerous positions there until he transferred to Dold Foods (Wichita,

Kan.) in 1995 to assume the role of personnel manager. In 1996, Kroymann transferred to Osceola (Iowa) Food and became the plant's personnel manager. He was relocated to the Austin (Minn.) plant in 2000, where he served as the superintendent of cured and smoked meats and value-added fresh pork. 2003-2005, Kevin served as a Six Sigma project manager at the corporate office in Austin. Kevin graduated from the University of Iowa in 1988 with a bachelor's degree in business administration economics. He also pursued a master's degree and graduated from the University of Nebraska – Omaha in 1994. Kevin resides in Austin and is a cantor at St. Edward's Catholic Church and also coaches Austin youth baseball and basketball.



## William Mason

William Mason, managing director of The Hale Group, has over twenty years' experience working in the food industry and has held executive positions in the areas of finance, sales and marketing, and general management. The combination of his career in public and private companies, as well as consulting to the industry leaders brings a distinguishing viewpoint to our clients. Bill's area of expertise is the creation of realistic and applicable strategies that provide clients with a lasting competitive advantage. He is fluent in several languages and has led many of The Hale Group's multi-national projects. He received his BA

from Santa Clara University and his MBA from Harvard University.



## Chris Martin

Chris helped start Tibersoft in 1996, which achieved early success on the Internet wave providing online order management for distributors like Sysco. In 2002, the company added supply chain monitoring services for multi-unit operators like Aramark. Now as CEO, Chris has led the latest expansion into services for manufacturers. When Chris isn't thinking about how to improve the foodservice system for Tibersoft clients, he occasionally will speak about foodservice supply chain. Its layers of complexity have always fascinated him. He lives in Sherborn, Mass., with his wife Karen and two children.



## **Chris McDivit**

Chris McDivit is a Vice President in Cargill's North America Supply Chain Practice where he leads the PLAN practice. Chris has 18 years of supply chain management experience in consulting, software and logistics industries. His experience spans business strategy to large scale technology transformations with deep knowledge in applying supply chain technologies to solve complex Consumer Goods and Retail business issues using JDA, SAP and Oracle. He possesses a proven track record as a solution architect and an effective project leader capable of building and motivating cross-functional business and

technical teams to deliver real results. Chris has been with Cargill for 8 years. Prior to Cargill, Chris worked for Manugistics and United Parcel Service.



## **Scott Modica**

Scott is currently the vice president, Foodservice Sales & Marketing for Smithfield Packing Company, based in Smithfield, Virginia. He is a 25-year industry veteran and has held numerous sales, marketing, business development and operations within the meat industry, consumer packaged goods working in the foodservice, retail, club stores and international channels. He has also been an independent business owner working in and out of the food business. Over his career, Scott has served on industry advisory boards and has been actively involved in his community. He is a forward-thinking risk taker that has always been willing to

take on new challenges. Scott is a graduate of The University of Nebraska-Lincoln with a BS in business administration.



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### **Lisa Overman**

Lisa Overman is a director of marketing and advertising with Delhaize America where she is responsible for the Harveys & Reid's Supermarket banners in the Southeast region of the US. Previously she was the brand manager at Harveys where she launched the banner's first loyalty card program, website and social media platform. Lisa is a member of the AMA and she is active with the Georgia Food Industry Association and when she is not working or studying she likes to spend time with her family and catch up on her DVR shows. She is a graduate of Louisiana State University in Baton Rouge and will complete her Executive Food Marketing MBA from St. Joseph's University in May of this year. Lisa is

the proud mother of three children, and the lucky wife of Fred who, thank goodness, is in the food industry as well.

### **Harry Post**

Harry has had a career with Unilever for close to 30 years. He currently leads a dedicated team of Category Management professionals in support of Unilever's Margarine, Frozen Meals and Ice Cream businesses.



### **Jack Robinson**

Jack Robinson joined SPI in 2010 as Vice President, North America. In this role, Jack is focused on uncovering and resolving business needs to create longstanding and value-driven partnerships with retailers. Jack has a long track record of helping organizations find solutions to their problems. Before joining SPI, Jack spent more than 15 years in various new business development and client service positions. Most recently, he was a Vice President of Sales and Marketing at Apex Analytix, a technology-enabled business services firm. Previously, he was a Director of New Business Development for more than 5

years with PRG-Schultz, a provider of accounts payable and procurement recovery auditing. Jack holds a B.A. from the University of Connecticut and currently lives in the Chicago area with his wife and three children.



### **Robert G. Samples**

Robert G. Samples is the director of category planning and support services for Hormel Foods Corporation. Hormel Foods Corporation is an independent food manufacturer headquartered in Austin, Minnesota, just 14 miles north of the Iowa border. Hormel has more than 19,000 employees' worldwide, with annual sales exceeding \$6.8 billion dollars. Bob began his career with Hormel Foods in January of 1981 as a sales trainee in Detroit. He has advanced through various positions in sales and sales management, along with marketing positions during his 28-year career. Currently, as director of category planning and support

services, he is responsible for leading a team that handles all the customer-specific analytical work that is done collaboratively with high-profile retailers. Bob also leads a group that manages all order-to-cash activity for the front-line sales force. Bob was an All-American swimmer at Southern Illinois University, where he earned his bachelor's degree in 1980. He later earned his MBA from Mississippi College in 1990.



### **Steve Scales**

Steve's professional experience comes from over 25 years working within the foodservice industry on the manufacture's side of the business with Nestle and Campbell's. His experience covers everything from distribution, chain and independent operator development, club stores, military, vending, and non-commercial channels. Steve has served as the chairman of the IFDA Supplier Advisory Board and has regularly consulted on the emerging and changing foodservice business for Campbell's in Western Europe, Canada, and China. Most recently Steve was vice president of corporate accounts and contract

management for the Campbell Soup Company. Along with extensive customer experience Steve is accomplished in the cross-functional integration of finance, marketing, supply chain, and R & D and how these functions best relate to an integrated approach to the market place.



## Harish Sharma

As a global engagement manager, Harish Sharma helps his clients capitalize on retail technology and financial solutions that yield tangible improvements across all aspects of the retail value chain. Harish began his career in technology in India as a software developer at Cognizant and transitioned from that role to work on challenging assignments in business consulting, product management and engineering for household brands, such as AT&T, Nokia and T-Mobile. Harish joined SPI in 2008 and since then, his vision has been simple: To leverage technology to improve business and promote collaboration. Harish received his

undergraduate degree from the University of Mysore. He obtained his masters in Computer Engineering from Kansas State University and received his MBA with a focus on business strategy and technology management from INSEAD Business School in France. Harish lives in Atlanta with his wife and son.



## Gary Singer

Gary is a partner in Accenture's Customer Relationship Management practice and leads their Global Trade Promotion Management offering. His primary focus is working with CPG companies to improve their sales and marketing strategies – specifically overseeing Accenture's global work in areas of trade promotion management and effectiveness including process redesign, trade analytics, system/tool implementation, trade marketing organization capabilities, and more.

Gary started his career as a Marketing Analyst with Procter and Gamble. Gary has co-authored the "Daunting Dilemma of Trade Promotion" and "Creating and Sustaining Value Opportunities in Trade Promotion", as well as spoken at industry conferences including GMA, ASMC, and IFBA. Gary has a BS in quantitative business analysis from Penn State University and an MBA in marketing and statistics from The University of Chicago.

## Chuck Scott

Chuck Scott is manager of trade promotion and demand planning with Ainsworth Pet Nutrition (APN) in Meadville, PA. Ainsworth Pet Nutrition is a leading supplier of safe, high-quality pet foods. Formerly Dad's Pet Care, this 77-year-old company has recently seen a significant growth in its revenue, with sizable increases in revenue in 2010. As a result of this growth Ainsworth has moved from a regional player to a multi-tiered national organization that produces a variety of pet foods and snacks. Chuck has been with APN for over 20 years and has been central in developing the core processes for the two functional groups mentioned above. He has seen their top-line sales increase tenfold over his tenure and therefore, has had to work through all the growing pains of a rapidly expanding Branded CPG company. Chuck spent 11 years in direct sales at APN and then was brought in house as a category analyst to support sales. While working in the analyst role, he was tapped to create "some kind of method" for tracking trade promotion expense by salesperson, customer, product, and event. The result was a very sophisticated Excel program that brought trade spending to within +/- 2% of budget each year, captured all companywide promotional event spending, as well as merch type, retail, timing, actual payments, etc. Eventually APN's continued growth required that they purchase a TPM software package, which they did in 2004. Chuck's group continues to manage TPM at this present time. Concurrent with the TPM responsibilities, Chuck was also charged with developing the demand planning wing of the organization. This too has been an evolution from an Excel-based spreadsheet to actual forecasting software. Chuck manages the sales forecasts for all of APN, including three sales divisions of brands, retailer brands, and co-manufacturing, and five manufacturing facilities, closing in on a half-billion dollars in sales. Chuck has a bachelor's degree in Communications from Cedarville University, OH.



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## Dr. John L. Stanton

John L. Stanton has a PhD in quantitative methods and marketing from Syracuse University, and been in the food industry for over 30 years. He is currently professor and chairman of the food marketing department at Saint Joseph's University in Philadelphia. Besides academia, John has also worked in the food industry. He has been vice president of marketing for Melitta, an international coffee company, and worked in Germany for Tengelmann, one of the world's largest food retailers and owner of A&P in the USA. John was also director of research of an advertising agency and has consulted for many nationally known food companies. His published books include: *Winning Marketing Strategy*; *Precision Target Marketing*; *Stanton on Food Marketing*; *MORE Stanton on Food Marketing*; *Success Leaves Clues!*; *Delight Me...The Ten Commandments of Customer Service*; *21 Trends in Food Marketing for the 21st Century*; *325 Ways to Make Customers Feel Like Your Supermarket Is Their Supermarket*; *Marketing Planning in a Total Quality Environment*; *Running a Supermarket Consumer Focus Group*, and *Making Niche Marketing Work* (McGraw-Hill). John is currently the editor of the *Journal of Food Products Marketing*, and an editorial advisor of the *British Food Journal*.



## Bob "Bubba" Terry

Bob "Bubba" Terry is president and chief creative officer for gro360. An agency veteran of over 25 years, Bubba started gro360 in 2009 to focus on creating "Positive Impact" – for his clients and the world around him. Prior to launching gro360, Bubba was one of the founding members of Colangelo, a full-service, integrated marketing agency in Darien, Conn. He served as the agency's first chief creative officer and was integral in developing Colangelo's Unfair Advantage methodology. During his 12-year tenure at Colangelo, Bubba wore many hats including brand strategist, interactive lead and chief client engagement officer.

A graduate of Dartmouth College, Bubba has been "green" since long before it was ever a marketing buzzword. When not creating Positive Impact for his clients, he can be found at his "gentleman's farm", riding his big green tractor and building goat barns with his wife and family. In his spare time, he is also an All-American Masters Class Track and Field competitor.

## Ed Wallon

Ed is director of retail strategy for Colangelo. He joined the Colangelo team with over 20 years of consumer packaged goods experience. Prior to joining the team, Ed led one of Altria's flagship billion-dollar brands as well as a portfolio of value brands. He has a long record of achievement not only in his brand management roles, but also significant experience in trade marketing and sales. In trade, he was responsible for product commercialization, developing, managing and allocating \$100MM in trade programming, on a regional and national scale.

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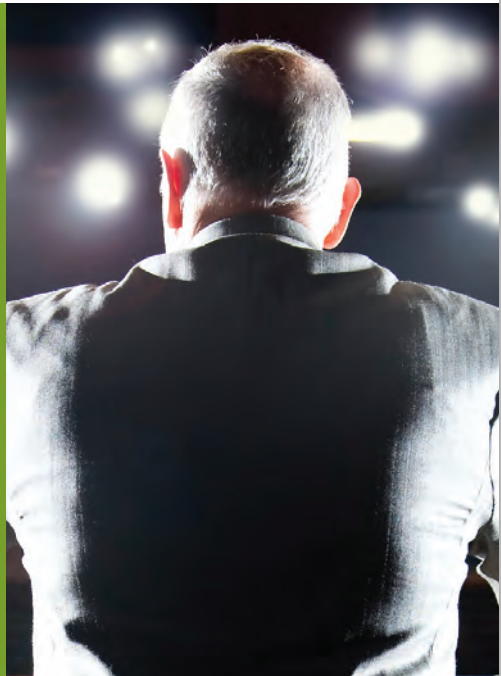
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