

# KNOWING, SOCIALIZING AND ADVANCING YOUR VALUE IN THE WORKPLACE

Our panel will share their  
experience in the areas of:

- Developing deeper connections  
in the virtual world
- Asking for a leadership &/or  
stretch assignment
- Knowing when it's time to ask or look for  
advancement opportunities

Hosted by:

The Promotion Optimization Institute

&

 **NextUp**





Sarah Alter, CEO NextUp



Pam Brown, CCO POI



SAME MISSION, NEW NAME.

## Why NextUp?

**We are what's now and what's next.** A future-focused, collaborative community with diverse leadership goals, needs, and aspirations, NextUp offers the opportunities now to achieve what's next.

## Why now?

We are at a pivotal moment. To truly advance all women now and in the future, we evolved our programming, expanded partnerships, and elevated our community to be even more inclusive—and our name needed to reflect this.

We need to grow and become more relevant to future leaders or be left behind in a crowded space. The time to evolve is now.



## What We Need

# NextUp will Redefine & Reposition our Community

## We are what's now

We are leaders, learners, influencers, up-and-comers, over-comers, mentors, allies and achievers. This is our pivotal moment and our time to advance is now.

## We are what's next

NextUp is standing up against the barriers that hold us back, so we can all reach our unique potential, goals, and aspirations. We create leadership opportunities, amplify women's voices in the workplace, and ensure that ALL women in business can seize what's next—whatever that means to them.

[Meet NextUp](#)

- **NextUp** encapsulated the experience and the solutions that we bring to life for our corporate partners, members and regions.
- Your career is a journey --- it's as much about what's now as it is **WHAT'S NEXT**.
- As women prepare for whatever their continued success looks like – they are not looking back – they are looking forward and around the curve.
- The most successful leaders and organizations tackle now by anticipating and preparing for what needs to come **NEXT**.



# You Are NextUp

NextUp is providing a 50% discount off the full yearly membership price for those who are attending the event today.

Attendees can use the complimentary code **URNNextUp**

<https://www.nextupisnow.org> to become a member.

-  **OVER 14,000** MEMBERS
-  **NEARLY 900** ORGANIZATIONS REPRESENTED
-  **21** REGIONS
-  **175+** REGIONAL EVENTS PER YEAR
-  **2** NATIONAL CONFERENCES PER YEAR
-  **300+** NATIONAL & REGIONAL CORPORATE SPONSORS

### Mission

Advancing all women, growing business, and transforming our workplaces through the power of community.

### Vision

A professional world where equity has been achieved and women have seats at every table. Our community is thriving more than ever, as women make a substantial impact on their companies' success and reach their career goals in record time.

### Purpose

NextUp exists out of necessity. Despite the drive and dedication of brave women, allies, and organizations, corporate America is still wildly inequitable. Even as gains are made with women in leadership, new challenges emerge: work-life balance struggles are real and women are leaving the workforce in droves. We remain dedicated to fighting the good fight—for all women.

*Use our influence* by building support for leaders driving top-down change.

*Become the change* by creating DEI&B solutions for equity-focused companies.

*Inspire growth* with leadership development for women on the move.

*Build connection and learning* at inspiring events regionally, nationally, and online.

## About Us

## What We Do

Over 100 National Sponsors



# About the Promotion Optimization Institute

- **POI Summits, Webinars & White Papers** – Advance commercial capabilities, hear peer-set strategies, learn modern approaches, explore vendor capabilities & services, and optimize the perfect store retail experience.
- **Transformational Leadership Council (TLC)** – Cost pressures, board demands, omni-channel shifts, increased consumer expectations, new brand competition, innovation, DTC, aging technology, and organization structures. Discuss how leadership teams prioritize “first things first” business plans and set a strategy for growth. Work through issues/opportunities created by the evolution of the new commercial ecosystem.
- **POI Share Groups** – Gain peer connection & collaboration, insights into best practice & trends, peer benchmarking, workshops, and access to POI resources.
- **POI Manufacturer & Retailer Advisory** – Supports the manufacturer and retailer front-end project development so organizations can move to faster decision making and execution to deliver the organization’s strategic priorities.
- **Certified Collaborative Marketer (CCM)<sup>™</sup> Program** – Upskill talent in your organization through POI’s certification for next generation CPG and Retail professionals.

Michael Kantor Founder & CEO Promotion Optimization Institute (POI) 914-319-7309 [mkantor@p-o-i.org](mailto:mkantor@p-o-i.org)

Pam Brown, Partner & CCO Promotion Optimization Institute (POI) 707-332-0450 [pambrown@p-o-i.org](mailto:pambrown@p-o-i.org)

# POI has essential insights to help you on your journey!

POI is providing manufacturer/retailer attendees 2 complimentary passes for the upcoming POI Summit in Chicago

Utilize Complimentary Code: **CompNEW** when registering for the POI Summit April 27-29.

<https://poinstitute.com/events>  
[jmalin@p-o-i.org](mailto:jmalin@p-o-i.org)



**Events**



**Webinars**



**Advisory**



**Digital Customer Personalization**



**State of the Industry**



**TPM**



**Revenue Growth Management**



**Data Management**



**Change Management Transformation**



**Advanced Analytics & Optimization (TPO, ML, AI)**



**RetX**



**Ecommerce**

## How will you transform personally & professionally in 2022?

Join POI Summits to network, peer share and learn.

**POI SPRING HYBRID SUMMIT | APRIL 27-29, 2022 | HILTON CHICAGO**

**Retail Transformation 2022:  
Advancing Capabilities for Omnichannel Growth**

- Analytics & Optimization • Pricing • Data Management
- eCommerce • Revenue Growth Management • Digital
- Trade Promotion • Retail Execution

**10-11, MAY, 2022 | HILTON BERLIN**

**POI European Promotion Optimization Summit**

**Successfully Navigating Growth in the New CPG and Retail World**

Share and learn best practices for today’s challenges across RGM, Omnichannel, AI, Trade Promotion, ECommerce, Data and Advanced Analytics, Digital Transformation and Customer Experience.

**JUNE 8-9, 2022 | TORONTO CANADA**

**The POI Canadian Summit**

**Driving Profitable Growth North!**

**POI FALL SUMMIT DALLAS | NOVEMBER 9-11, 2022 | WESTIN GALLERIA DALLAS**

**From Strategic to Tactical Engagement Throughout the POI Summit**

# POI Summits, Research, Content & Connection



Promotion Optimization Institute, LLC  
2021 Vendor Panorama for Retail Sales Execution and Monitoring in Consumer Goods



Promotion Optimization Institute, LLC  
POI 2021 Enterprise Planning Vendor Panorama

Promotion Optimization Institute  
State of the Industry  
**Reset & Re-Plan 2020-21**

Understand the Best Practices of Highly Effective CPG Organizations & What Steps They Are Taking to Proactively Respond to Covid & Transform their Organization for The Next Generation of Holistic Enterprise Planning



HOSTED BY POI WEBINAR SERIES SPONSOR

**POI** PROMOTION OPTIMIZATION INSTITUTE  
**Pepsi's Evolution from Trade Promotion Management to Revenue Management**  
WEDNESDAY, OCTOBER 28, 2020 NOON ET/9:00 AM PT  
TABS

DIGITAL TRANSFORMATION WEBINAR SERIES  
**The Kraft Heinz Journey: TPx Digital Transformation Across Borders**  
November 10th 10:00 AM ET/ 4:00 PM CEST  
KANTAR | Microsoft | KraftHeinz | IBM | Register Now

HOSTED BY POI WEBINAR SERIES  
**Reimagining growth using data and advanced analytics**  
THURSDAY, NOVEMBER 5, 2020 2 PM ET/11 AM PT

HOSTED BY POI WEBINAR SERIES  
**How are CPG companies adapting to change in the face of Covid-19?**  
THURSDAY, JULY 9, 2020 • 2 PM EDT / 11 AM PDT  
SPONSORED BY EXCEEDRA  
KIND Snacks Method ACH Foods

POI-VeevaWebinar:  
**How Jack Link's Beets up Growth with Industry Leading RGM and TPO Capabilities.**  
Thursday, September 10, 2020 11:00 am ET / 7:30 CEST  
Register now

C O N N E C T  
I N S P I R E

**POI MANUFACTURER CONNECT**  
Join the Quarterly Call hosted by POI with benefits including • Peer Connection • Insight into Best Practices & Trends • Peer Benchmarking • Opportunities for Collaboration • Resources  
Contact Joanie Hampton at [jhampto@p-o-i.org](mailto:jhampto@p-o-i.org) to join.  
Space is limited to the first 30 manufacturers to RSVP.  
**POI** PROMOTION OPTIMIZATION INSTITUTE

**New Strategies for CPG Revenue Growth Management: Harnessing AI to Change the Game**

CPG companies are struggling to achieve profitable growth in today's shifting shopper behavior. In this new playing field, it is clear that additional opportunities to use the consumer granularly through investments in Trade Promotions at the retail shelf are not enough. Leading CPGs are increasingly adopting "SMART" Now. It enables these organizations to scale B2B practices across their own organizations and realize a 30% increase in margin.

Deloitte. **POI**  
Reshaping commercial priorities  
88% 97% 50%

**POI & Deloitte whitepaper: Reshaping Commercial Priorities**

**POI** PROMOTION OPTIMIZATION INSTITUTE  
**CCM** COLLABORATIVE MARKETING  
**CERTIFICATION IN COLLABORATIVE MARKETING CCM™**  
The POI Executive Certification Program is specifically designed to develop the skills of current and future leaders in CPG & Retail in the New Reality

- CCM Executive Training/Certification**
- 100% Online delivery
  - Included with POI Membership
  - Executive Program held virtually, or at St. Joseph's University, PSU, ASU
  - Learn Collaborative Cultures, Analytics, RGM, Digital Skills & Strategies
  - One day virtual kick-off, 16-week self directed study, exercises, and final collaborative project
  - <https://pointstitute.com/certification-ccm/>



**New Share Group**  
**SHARING INFORMATION & BEST PRACTICES**

**REVENUE MANAGEMENT SHARE GROUP**  
PURPOSE: To provide members with a forum to discuss and share best practices, industry trends, emerging challenges and capabilities, as well as other relevant topics of interest.  
HOW IT WORKS: This group meets twice per year (Spring and Fall) at easy in-and-out locations for one overnight. Meet 1-5pm on Day 1, followed by group dinner, then 8am-Noon on Day 2.  
AGENDA: Is driven by members and their priorities so that we are focused on the key topics and issues that are most relevant and valuable to the group.  
OUR LEGAL COUNSEL will attend bi-annual meetings.  
BENCHMARKING survey allows members to compare their approach with others (e.g. structure, size, reporting relationships, budget expenditures, tools, etc.)  
MEMBER QUESTIONS of the group that come up throughout the year are asked by the group facilitators and reported back to the group anonymously.  
MEMBERSHIP FEE: \$3,000 annually per member. This covers all meeting expenses (meeting room, food, AV, Wi-Fi, #hashtags, etc.). We do the room reservations. You just book your flight and pay for your sleeping room on arrival.

**CHALLENGES**  
Strategic challenges and opportunities...  
**POI** **S&P**

# NextUp – Today's Panel



GenZ

Rebecca Nason  
College/Politics

Andre Romero  
Strategic HQ  
Capabilities  
& Insights



GenX

Diane Giansante  
Sales Strategy,  
Planning & Leadership



Boomers



Millennials

Kelli Sullivan  
Solution Consultant



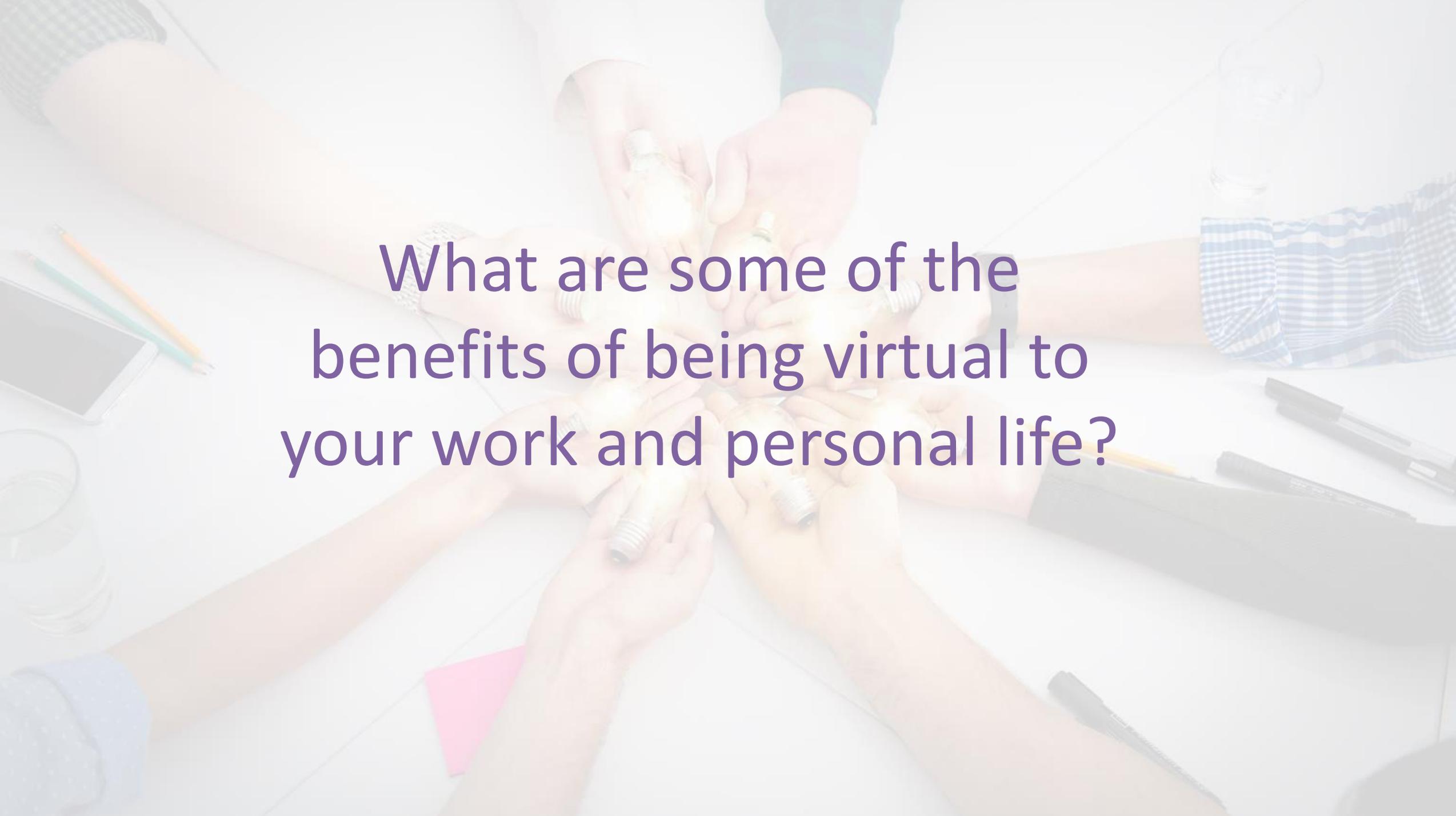
Leabe Commisso  
Head of Sales, North America



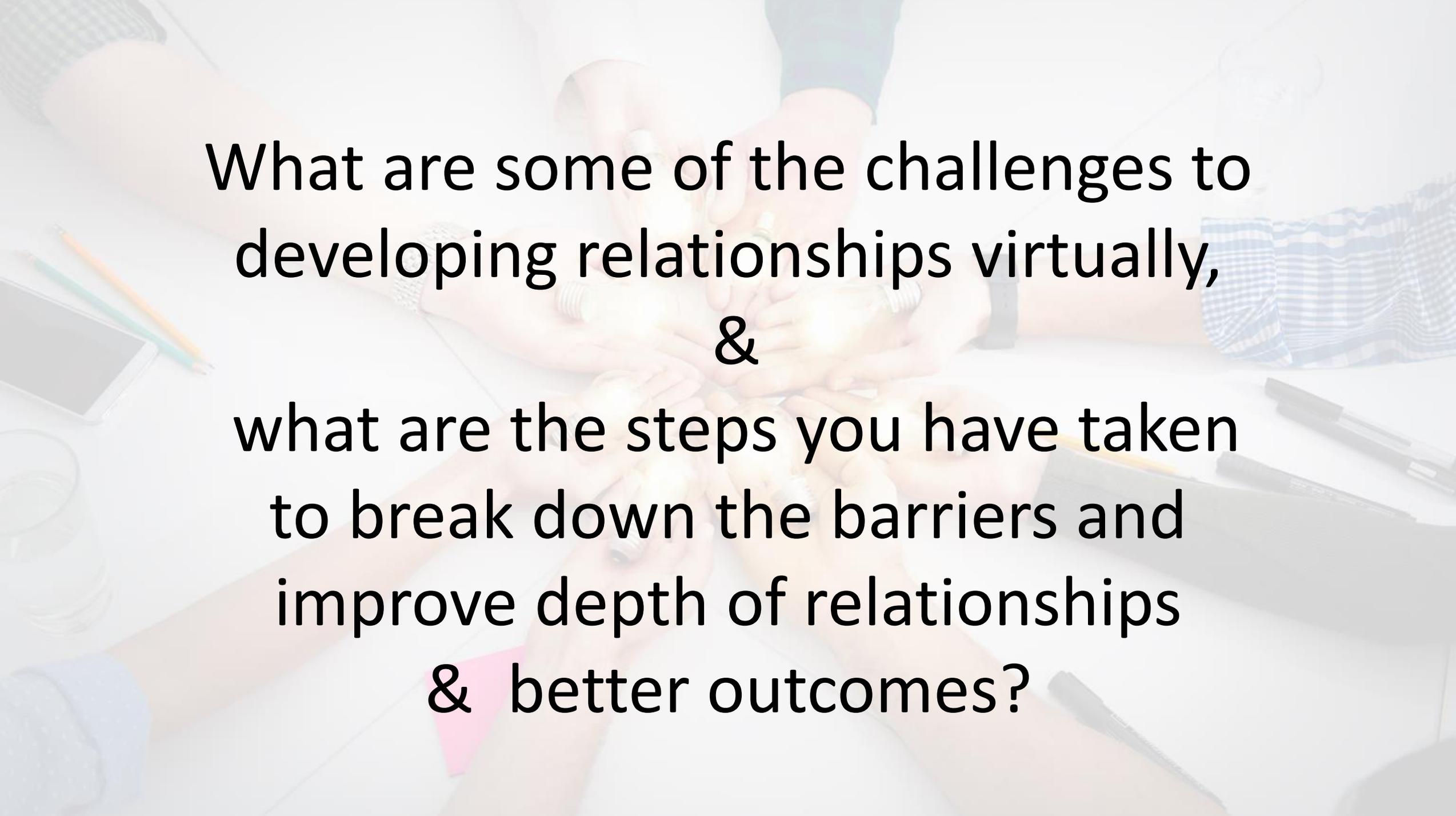
Sayed Naimi  
Responsible Business Alliance-  
Compliance



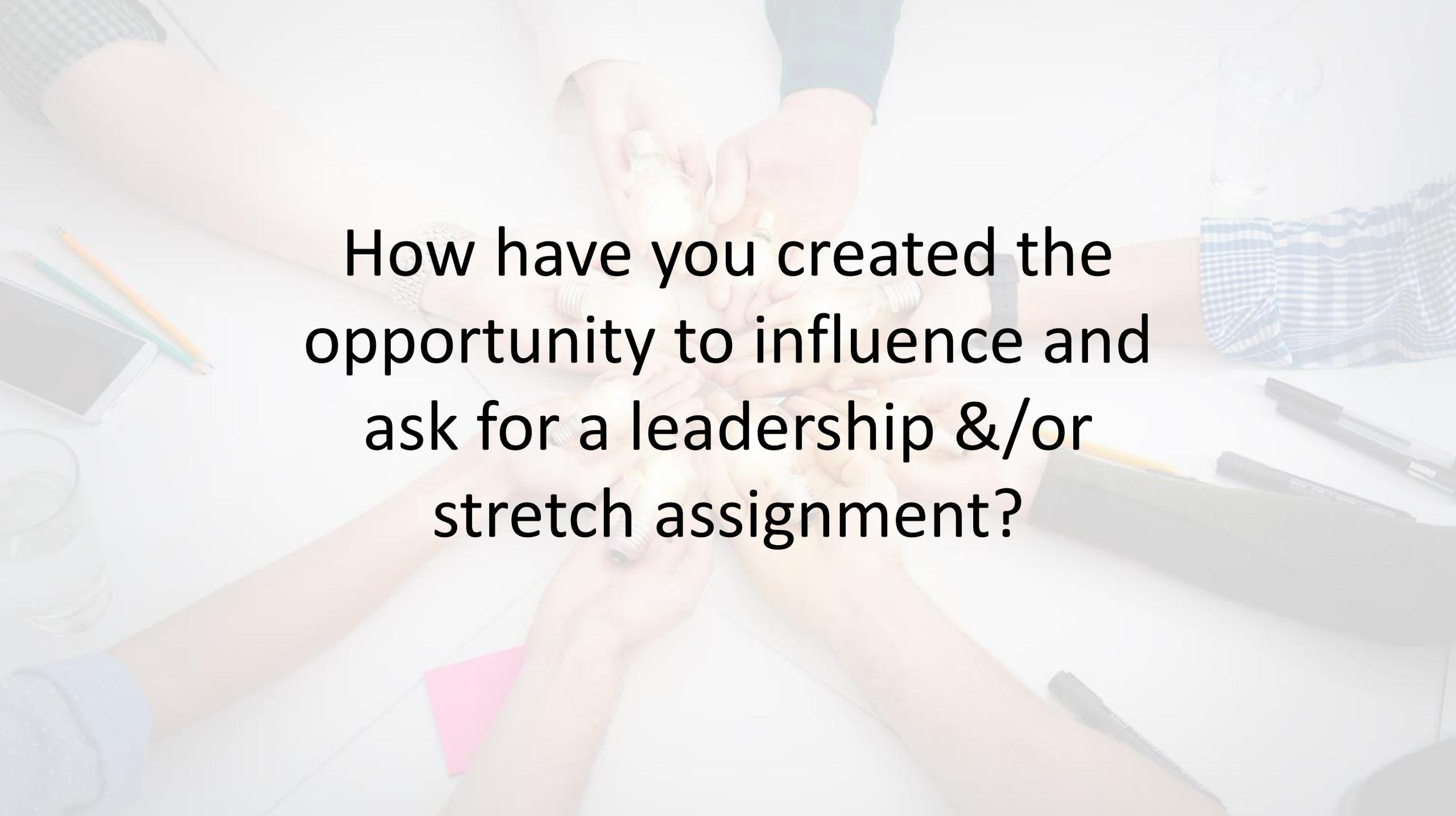
Greg Scott  
Creative Content Manager

A top-down view of several hands reaching towards the center, each holding a glowing yellow lightbulb. The hands are arranged in a circle, creating a sense of unity and shared ideas. The background is a bright, white surface with various office supplies like pens, pencils, and a glass of water scattered around, suggesting a collaborative work environment.

What are some of the  
benefits of being virtual to  
your work and personal life?



What are some of the challenges to developing relationships virtually,  
&  
what are the steps you have taken to break down the barriers and improve depth of relationships & better outcomes?

A top-down view of several people's hands reaching into the center of a white table, each holding a glowing yellow lightbulb. The hands are arranged in a circle, creating a sense of unity and shared purpose. The background is a soft-focus office or meeting environment with various items like pens, a tablet, and a glass of water visible on the table.

How have you created the  
opportunity to influence and  
ask for a leadership &/or  
stretch assignment?

A top-down view of several people's hands reaching towards the center, each holding a glowing yellow lightbulb. The hands are arranged in a circle, creating a sense of unity and shared purpose. The background is a bright, slightly blurred office or meeting room with various items like pens, a glass, and a tablet visible on a white table.

How will/have you increased opportunities for your team to share their ideas, be heard and help them to advance their careers?

A top-down view of a group of people's hands gathered around a table, each holding a glowing lightbulb. The hands are arranged in a circle, with the lightbulbs pointing towards the center. The background shows a white desk with various office supplies: a smartphone, pencils, a glass of water, a clipboard with a pen, and a pink sticky note. The overall scene is brightly lit and conveys a sense of collaboration and shared ideas.

If you are mentoring a person on this topic what would your advice or elevator speech be to them?

A top-down view of a group of people's hands holding several glowing lightbulbs in a circle over a white desk. The desk is cluttered with various office supplies including pens, pencils, a smartphone, a glass of water, and a notebook. The background is a soft, out-of-focus office setting.

If you are being mentored  
through this topic what  
advice would you like to hear  
from your mentor?



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[https://bit.ly/POI\\_Spring2022\\_ChicagoSummit](https://bit.ly/POI_Spring2022_ChicagoSummit)

KNOWING, SOCIALIZING AND ADVANCING  
YOUR VALUE IN THE WORKPLACE

THANK YOU FOR  
JOINING TODAY!

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