



THE LOGISTICS & SUPPLY CHAIN FORUM

At The Trump Doral, Miami FL
June 4-6, 2017

The Logistics & Supply Chain Forum, June 4-6, 2017 Conference Program**

As of May 1, 2017
(**Program Subject to Change)

KEYNOTE PRESENTATION

Draw Me the Money: Sell, Lead, and Innovate With Pictures

Dan Roam, Author, "The Back of the Napkin: Solving Problems and Selling Ideas with Pictures"

SEMINARS & CASE STUDIES (Additional sessions to be announced)

The Forgotten Art of Demand Planning and Forecasting

Genevieve Caplette, Supply Chain, Michelin North America Truck

How to Create and Sustain a Collaborative Supply Chain

Steve Bostwick, Director of Supply Chain, Ping

How to Construct, Utilize and Benefit from Cost Modeling

Chris Sower, Vice President, Supply Chain Operations, Americas & W. Africa at Nalco Champion

Social-Shaping's Influence on Supply Chain Strategy, Technology and Culture in Medium-Size Enterprises

Stephen Kalyta, Head of National Mobile Supply Chain, Wind Mobile

Building the Largest Peacetime Temporary and Sustainable Supply Chain: How We Did It

Fernando Cotrim, former Supply Chain Director for the RIO 2016 Olympic Games

Impacts of 'The Amazon Effect' on Supply Chain Service Providers: Potential Consolidation and Opportunities

Craig Decker, Head of Investment Banking, Wolfe Capital Markets & Advisory

Creating a Customer Centric Supply Chain

Kim Shelby, VP of Operations, RATIONAL USA

Extended Warehouse Management in Retail Environment

Kathy O'Brien, VP Information Technology - Applications, Bob's Discount Furniture, Inc.

Implementing a Computerized Maintenance Management System (CMMS)

Wes Whalberg, Director of Supply Chain Engineering, Best Buy



KEYNOTE PRESENTATION

Draw Me the Money: Sell, Lead, and Innovate With Pictures

Dan Roam, Author, "The Back of the Napkin: Solving Problems and Selling Ideas with Pictures"

For more than 25 years, bestselling author Dan Roam ("*The Back of the Napkin*," "*Blah Blah Blah*," and "*Show and Tell*") has led the visual-business revolution, traveling to five continents to share with business leaders the incredible problem-solving power of pictures. From Microsoft and Google to Wells Fargo and JP Morgan, from the US Navy to the US Senate and to the White House, Dan's breakthrough understanding of how to use vision to succeed in business has captivated leading thinkers in technology, finance, science, politics, and education.

In this fast-paced interactive presentation, Dan will share the Top-10 Visual Rules he has learned and show you exactly how to seize the power of pictures in your work:

1. When in doubt, draw it out.
2. Whoever draws the best picture wins.
3. Lead with the eye and the mind will follow.
4. First, draw a circle.
5. To lead, draw your destination.

These simple but insightful revelations will have you rethinking how you approach financial and technology challenges, communications, and problem-solving.

During this session, you will:

- See how vision drives all other modes of thought.
- Learn how to hot-wire the visual process for faster problem-solving.
- Understand how to use the neuromechanics of vision to explain any concept, no matter how complex.
- Recognize the incredible power of your own visual mind -- even if you can't draw.



Dan Roam is the author of the international bestseller, "*The Back of the Napkin: Solving Problems and Selling Ideas with Pictures*," which was named the innovation and creativity book of the year by Fast Company, BusinessWeek, and the Times of London. "*The Back of the Napkin*" has been published in 27 languages and topped the business book charts in the US, UK, Japan, Germany, China, Korea, and France.

Dan's newest book is "*Show & Tell: How Regular People Make Extraordinary Presentations*." Dan and his whiteboard are frequent guests on CNN, NBC, ABC, CBS, Fox, and NPR.

Dan is the founder and president of Digital Roam Inc., a management-consulting firm that uses visual thinking to solve complex problems for such clients as Google, Boeing, eBay, Microsoft, Wal-Mart, Wells Fargo, the U.S. Navy, and the United States Senate.

Dan's analysis of American health care on 50 napkins was hailed by BusinessWeek as "*The World's Greatest Presentation of 2009*" and prompted the White House Office of Communications to invite Dan in for discussions on how to visually clarify complex policy issues.



SEMINARS & CASE STUDIES

The Forgotten Art of Demand Planning and Forecasting

Genevieve Caplette, Supply Chain, Michelin North America Truck

Do high inventory levels keep you up at night? Are you concerned about product replenishment being constrained by supply? Have you had to deal with low service levels and store stock outs?

The first step you need to take to address the above gaps in your supply chain is to improve the accuracy of your forecasting. Consensus demand planning improves forecast accuracy and reduces inventory through communication and collaboration.

In this workshop we will discuss the Three Steps in Demand:

1. **Demand forecasting:** The creation of a projection for unconstrained demand for a product or service over time
2. **Demand planning:** The development of a forecast that reflects known constraints and any possible associated impacts that may occur as a result of external events, capacity (either production or logistics) or changing priorities
3. **Demand management:** Influencing demand via the addition (or cancellation) of activity, the increasing or reduction of price, or the rationing or allocation of stock

We will also review the Four Basic Benefits of improving and measuring forecast accuracy:

1. **Service benefits** – in addition to having a clear impact on customer service, a formal demand planning process helps companies to respond quicker to market-related developments
2. **Cost benefits** – these include lower waste, improved production accuracy, reduced stock holding and better capacity planning
3. **Revenue benefits** – through stronger availability on-shelf, and being closer to the business plan
4. **Organizational benefits** – such as better accountability, greater control over processes, a reduced level of ambiguity and improved internal collaboration



Genevieve Caplette's prior experience includes Demand Management with Heinz, Demand & Material and Six Sigma Leadership with GE-Plastic, and Supply Chain Leadership with SABIC Innovative Plastics. Currently she leads the Tactical/Strategic Planning & Forecasting Team for Michelin North America Truck Tires, which includes the ownership of the monthly S&OP Process.

Join Genevieve for a session on "The Forgotten Art of Demand Planning" where she will share her experiences, focusing on the above fundamentals. The goal is for you to walk away with some basic steps you can use to enhance your demand process.



THE LOGISTICS & SUPPLY CHAIN FORUM

At The Trump Doral, Miami FL
June 4-6, 2017

How to Construct, Utilize and Benefit from Cost Modeling

Chris Sower, Vice President, Supply Chain Operations, Americas & W. Africa, Nalco Champion

Information is power in supply chain operations, strategic sourcing and negotiations. This power here doesn't relate to coercive power, but rather fact-based power to ensure that negotiated contractual agreements are competitive at the point of execution and throughout the contractual term. Company and product/service projected cost models are excellent tools to provide this competitive assurance to organizations. In this session you will get a high level understanding of how these models are constructed, but more importantly, how to apply these to the betterment of your enterprise bottom-line.



Chris is the Vice President of Supply Chain for Nalco Champion, a \$4 billion division of Ecolab responsible for domestic and international supply chain. In his remit, Chris is responsible for planning, procurement, manufacturing, logistics and oilfield operations with over 1,300 employees in his organization. Previous to his employment with Nalco Champion, Chris served in several functional supply chain leadership roles in both the energy and retail industries. Chris has his B.S. and M.B.A. degrees from Sam Houston State University, in Huntsville, TX.



Social-Shaping's Influence on Supply Chain Strategy, Technology and Culture in Medium-Size Enterprises

Stephen Kalyta, Head of National Mobile Supply Chain, Wind Mobile

Issue

1. Social paradigms are changing the impact and influence of the customer on supply chains.
2. To remain competitive, medium size enterprises require an Omni channel perspective that balances the individualized customization of customer experience with scarcity in resources when compared to large multi-nationals
3. Does the customer archetype drive corporate culture, technology investment and strategy or the other way around?

Discussion

1. How can supply chains can be leveraged to maximize efficiency while accommodating multiple variants in customer experience?
2. Can social shaping in near real time positively influence the social engineering aspect of the products and processes? What are the risks?
3. Adapting to an emerging IoT help or hinder social shaping of supply chains?

Outcome

1. Getting the issues on the radar of supply chain practitioners whom will be required to accommodate the paradigm shift created by the social shaping of strategy, culture and technology investment.



As Director and Head of Supply Chain for Freedom Mobile, Stephen Kalyta is responsible for the strategy and operational launch of one of Canada's largest national telecom carriers. Stephen started his career as a military officer in Logistics serving as a detachment commander for global operations. He is a graduate of Royal Military College with a BBA and recently completed his Masters of Science in Procurement, Logistics and Supply Chain from University of Salford.

Stephen Kalyta has enjoyed a variety of roles in operations, 3PL, consulting and business development over a span of 27 years. His skills in Logistics are further refined in managing three daughters, a son, and two dogs with the assistance of his astoundingly patient wife. Stephen resides in Toronto, Canada.



THE LOGISTICS & SUPPLY CHAIN FORUM

At The Trump Doral, Miami FL
June 4-6, 2017

Building the Largest Peacetime Temporary and Sustainable Supply Chain: How We Did It

Fernando Cotrim, former Supply Chain Director for the RIO 2016 Olympic Games

3,000 suppliers, 10,000 contracts, 30 million items, 1 million pieces of sports equipment. Those are only some of the numbers from the Rio 2016 organization. It gets even more complex when you have to start from scratch. This was a huge supply chain exercise, that encompassed all phases of planning and supply chain methodologies, policies and procedures, e-procurement, strategic sourcing, global sourcing, SRM, SCM, inventory management, warehouse management, transport management, and much more.



Fernando Cotrim started his career in the supply chain and logistics industry in 1997. He has worked for almost 20 years in multiple positions in supply chain.

He has international experience and worked in Chile and Mexico. He has also worked as a consultant in the supply chain industry in Brazil and other countries in Latin America in strategic sourcing projects, planning and optimization of the supply chain, organizational restructuring, and process automation.

Fernando has a degree in Business Administration from Universidade de São Paulo (USP) and an MBA from Fundação Getúlio Vargas (FGV).

He joined the Rio 2016 Organizing Committee in 2011 and served as supply chain director through the end of the Games.



Impacts of 'The Amazon Effect' on Supply Chain Service Providers: Potential Consolidation and Opportunities

Craig Decker, Head of Investment Banking, Wolfe Capital Markets & Advisory

Over the coming year the logistics industry can expect an increase in consolidation among service providers due, in large part, to competitive pressures resulting from Amazon's impact on the supply chain. But with challenges come potential advantages. Will changing distribution patterns influence the type and quantity of equipment required to fulfill your customer's needs? How will this consolidation impact stakeholders across the supply chain?



Craig Decker is Managing Director and Head of Investment Banking at Wolfe Capital Markets and Advisory with over 20 years of experience providing advisory services to clients in the transportation and logistics industry.

Craig's focus on the transportation sector began at Credit Suisse as a member of the M&A Group, then ultimately becoming a coverage officer in the Transportation & Logistics Group. Subsequent to Credit Suisse, Craig was a founding principal of Legacy Partners Group, a privately held investment bank focusing on M&A advisory. In 2005 Craig joined Morgan Keegan & Co. and was co-head of the Transportation and Logistics Investment Banking Group prior to joining Wolfe in 2012.

Craig joined Wolfe Capital Markets and Advisory in 2012 with the mandate of developing an investment banking group dedicated to strategic and financial advisory. Since 2012 Craig has completed over 25 transactions and has successfully grown revenues. Craig has built a team of dedicated, industry focused bankers based in New York.

In his 20 year career, Craig has advised a wide range of clients from large cap companies to privately held family businesses spanning the freight transportation & logistics and energy logistics sectors. Representative clients include Con-way Inc., CSX Corporation, Knight Transportation, Deutsche Post, APL Logistics, and Walter Industries among others.

In addition to his work in investment banking, Craig has served on the boards of various charitable organizations, and was invited to serve as a member of The Energy Policy Advisory Group for the 2012 Romney for President Campaign.

Craig graduated from Villanova University with a BSA in accounting, and received an MBA from New York University's Leonard N. Stern School of Business.



How to Create and Sustain a Collaborative Supply Chain

Steve Bostwick, Director of Supply Chain, Ping

The goal is to keep your organization competitive. One key to achieving this success is to build a plan that generates supply chain success. This requires long term thinking that focuses on win/win relationships. Leaders must promote and embrace a collaborative community in order to reach this goal.



Steve Bostwick is currently part of the Executive staff reporting directly to the President, for PING Inc., a privately held, Phoenix-based company that manufactures high quality golf equipment. His current title is Director of Global Business Planning & Supply Chain. His current responsibilities include leading our Global Supply Chain, Forecasting and Integrated Business Planning initiatives, as well as overseeing 7 departments, that include Supply Chain, Planning, Market Research, Logistics, Warehouse, Mail Room and IPPD.

In 1992, Steve was hired by PING. He started in the Marketing Department. He has held numerous positions including Product Coordinator, Product Manager, Marketing Manager, Market Analyst and Forecasting Manager, and Global Business Planning and Forecasting Manager.

Steve earned his Bachelor of Science degree in Applied Mathematics, with a minor in Economics from Northern Arizona University.

From 1996 to 2014, Steve spent almost 20 years volunteering with youth sports programs. He has coached football, baseball and softball on many levels from Little League to Gold Level Club Sports. He has also served as a board member for a variety of boards associated with youth sports.

Steve has been married to Cynthia Bostwick for 29 years. They have 3 children. William (25), Andrew (24) and Elizabeth (19). Andrew and Elizabeth are both attending Arizona State University, while William is working.



THE LOGISTICS & SUPPLY CHAIN FORUM

At The Trump Doral, Miami FL
June 4-6, 2017

Creating a Customer Centric Supply Chain

Kim Shelby, VP of Operations, RATIONAL USA

Struggling to keep up with customer requests on your supply chain? Many supply chain professionals feel caught juggling between the requirements of efficient supply chain operations and the demands of the customer base. This seminar will show you how to design your optimal customer centric supply chain, align your metrics and improve the overall performance of your organization. We will do this by linking customer demand, supply, customer service, and logistics.



Kim Shelby is the Vice President of Operations for RATIONAL USA with oversight responsibility in Supply Chain, Customer Service, Operations, and Logistics. For over 15 years she has led Supply Chain Operations that are increasingly efficient and customer centric. Her focus is on improving customer experience while reducing inefficiency at every point of the supply chain. This involves simplifying complexity and keeping the Voice of the Customer central to your strategy. Recognized as a transformational leader she has led teams through significant change projects including Distribution Automation, Organizational Redesign, Centralization and SAP Implementations.

Kim holds an MBA with a specialization in Organizational Behavior.



Leveraging an Enterprise Extended Warehouse Management Solution to Keep Pace with Exponential Growth

Kathy O'Brien, VP Information Technology - Applications, Bob's Discount Furniture, Inc.

Learn how Bob's Discount Furniture, a leading Furniture Retailer, with revenues exceeding \$1B is leveraging an Enterprise Extended Warehouse Management solution. Understand how the solution is enabling the company to keep pace with its exponential growth, including supporting the addition of two distribution centers and an increase in daily shipments from 5000 to 40,000 pieces per day.

Session Overview:

- Will review the initial business challenges imposed on Bob's operations and customer service departments while operating on the prior legacy system
- Highlight the critical business issues and performance gaps that lead the company to move to the solution
- Review why the business need for real time reporting and tighter integration between customer service and operations was critical, in supporting the company's operations and service level objectives while keeping pace with the company's rapid growth
- What are the benefits the company is receiving today since moving over to the new solution and what are its plans in the future?



THE LOGISTICS & SUPPLY CHAIN FORUM

At The Trump Doral, Miami FL
June 4-6, 2017

Implementing a Computerized Maintenance Management System (CMMS)

Wes Whalberg, Director of Supply Chain Engineering, Best Buy

Today's logistics facilities are on the front lines of many organizations, and maintaining them to keep them running without failure has become critical. There are plenty of tools available for automated work order systems and computerized maintenance scheduling. But how do you go from not having a CMMS to having one? This presentation takes you through my journey of implementing a CMMS, complete with the challenges, wins, A-ha moments, and outright stumbles I faced.



Wes Whalberg is the Director of Supply Chain Engineering for Best Buy. He majored in Electrical Engineering and spent six years as a consulting engineer where he spent a majority of his time working on electrical and low voltage systems design for large commercial developments in the Minneapolis area. He received an MBA from the Carlson School of Management and began focusing on supply chain logistics. Since then he worked for Verisae, which provides asset management software for retail multi-site organizations, at Target where he had involvement in many large scale automated material handling projects and joined Best Buy in 2015.