



**“This is the
best conference
I have ever
attended.”**

**Ben Deyi
Merck & Co., Inc.**

FORECAST PRO USER CONFERENCE 2009

September 21-23, 2009

The Seaport Hotel: Boston, Massachusetts USA

Presentations from:

- ◆ **3M Health Care**
- ◆ **Daiichi Sankyo**
- ◆ **Hershey Mexico**
- ◆ **Kellogg Company**
- ◆ **Marcal**
- ◆ **and many others**





Something for Everyone

The Forecast Pro User Conference is a unique opportunity to meet with and learn from fellow forecasters and forecasting experts representing a wide range of industries and disciplines. Featuring three tracks, it is a content-rich event where you can learn a tremendous amount about forecasting and have a lot of fun doing it. From learning how to use Forecast Pro effectively, to hearing the experts talk about the latest forecasting trends, to comparing your forecasting practices with those of others, you will find it all at this conference!

The seminar track offers a series of presentations on different forecasting approaches, detailing both how they work and how they are applied. The software track provides hands-on training with Forecast Pro—there's a laptop set up for each attendee and expert instructors to teach you how to get the most out of your software. In the user presentations and tutorials track, Forecast Pro users explain how they are using the software to address their forecasting needs and invited forecasting experts present tutorials on relevant topics. All of the presentations are modular and you are always free to move between tracks, allowing you to customize the conference to suit your interests and needs. You will also find plenty of opportunities to network with your fellow forecasters during meals, breaks and at the reception on Monday evening overlooking Boston Harbor.

"I liked the flexibility to attend sessions in the various tracks. This made the conference more useful. Overall, I found the conference to be informative and well worth the time. Great conference!"

Mary C. Hayes, City of Lakeland

"The presentations were very helpful in providing insight into what other forecasters and Industries are doing to improve their forecasts. . . great job!"

Jim Martek, Visteon Climate Control Systems

A Unique Opportunity to:

- ◆ Learn how to get the most out of Forecast Pro
- ◆ Discover the latest trends in forecasting
- ◆ Hear best practices and discover new forecasting approaches
- ◆ Exchange ideas, share knowledge and network with other forecasters

Monday, September 21, 2009

7:30 - 9:00 AM
8:00 - 9:00 AM
8:45 AM

**Registration
Breakfast
Welcome and Opening Remarks**

Forecasting Seminar

Forecast Pro Training

User Presentations & Tutorials

9:00 - 10:30

Introduction to Business Forecasting

Overview of Forecast Pro Unlimited
Overview of Forecast Pro TRAC (part I)

Daiichi Sankyo

10:45 - 12:15

Forecast Accuracy and Evaluation

Overview of Forecast Pro TRAC (part II)

Kellogg Company

12:15 - 1:15

Lunch

1:15 - 2:45

Exponential Smoothing Models
(1:15 - 3:00)

Overview of Forecast Pro XE

Integrating Forecast Pro with Corporate
Databases and Other Applications

3:15 - 4:45

Event Models

Setting Up Data and Saving Your Work

New Product Forecasting Applications

6:00 - 8:00 PM

Reception and Cocktail Party

Tuesday, September 22, 2009

8:00 - 9:00 AM

Breakfast

Forecasting Seminar

Forecast Pro Training

User Presentations & Tutorials

9:00 - 10:30

Forecasting a Product Hierarchy

Overview of Forecast Pro Unlimited
Overview of Forecast Pro TRAC (Part I)

3M Health Care

10:45 - 12:15

Dynamic Regression

Overview of Forecast Pro TRAC (Part II)

Hershey Mexico

12:15 - 1:15

Lunch

1:15 - 2:45

Forecast Pro Panel:
Ask the Experts

Creating Event and Multiple-Level Models

Demand Planning
in Volatile Economic Times

3:00 - 4:30

Exception Reporting

Team Forecasting

Marcal

Wednesday, September 23, 2009



Optional Post-Conference Forecast Pro Training (9 AM - 5 PM):

Hands-on Training with the Experts:

- ◆ Forecast Pro XE
- ◆ Forecast Pro Unlimited
- ◆ Forecast Pro TRAC for Experienced Forecast Pro Unlimited Users

Visit our Web site for detailed up-to-the-minute conference information. Schedule subject to change.

www.forecastpro.com

TRACK 1: FORECASTING SEMINAR



Eric A. Stellwagen, Vice President
Sam O. Sugiyama, Ph.D.,
Senior Forecasting Consultant
Business Forecast Systems, Inc.

The Forecasting Seminar features education sessions on various forecasting approaches, detailing both how they work and how they are applied. Topics are presented using a combination of lecture and real-world examples drawn from a wide range of industries.

Introduction to Business Forecasting

Properties of data • Overview of methods • Selecting an appropriate forecasting method

Forecast Accuracy and Evaluation

Out-of-sample evaluation • Error measurement statistics • Findings from forecasting competitions

Exponential Smoothing Models

Pros and cons • The Holt-Winters family of models • How the models work • Parameter optimization • Model diagnosis

Event Models

Modeling promotions, strikes and other aperiodic events • How and when to use • How the models work • Customizing event variables to best suit your needs

Forecasting a Product Hierarchy

Data characteristics • ABC (Pareto) classification of data • Measuring accuracy across multiple time series • Product vs. geographical hierarchies • Top-down vs. bottom-up approaches • Other reconciliation strategies • Adjustment for seasonality • The role of forecasting in DP and SCM

Dynamic Regression

Pros and cons • When to use • The model building process • Ordinary least squares • Leading indicators • Lagged variables • Cochrane-Orcutt models • Hypothesis testing • Dummy variables

Forecast Pro Roundtable: Ask the Experts

What if, after spending nearly two days learning about Forecast Pro, you have outstanding questions about the software and its use? This interactive session gives you the opportunity to ask questions of a panel of Forecast Pro experts including the co-author of the product line, the lead technical support manager and a long-time user. You will be given the opportunity to submit questions to the panel beforehand as well as querying these seasoned experts directly during the session.

Exception Reporting

This session explores the use of exception reports to automatically flag forecasts that may need human attention. You will learn how to “manage by exception” for those items that you do not routinely subject to manual review. Topics include: setting up performance metrics using ranges and thresholds; monitoring both current and past forecast performance; and flagging exceptions on a global vs. an item-level basis.

TRACK 2: FORECAST PRO TRAINING



These hands-on training sessions teach you to use Forecast Pro effectively. Each participant will be provided with a PC loaded with Forecast Pro and Microsoft Excel. With the help of experienced Forecast Pro trainers, you'll work through a variety of forecasting exercises using real data. Sessions range in complexity to allow both new and experienced users the opportunity to hone their skills.

Forecast Pro Overview Sessions

These sessions provide detailed tours of each edition of Forecast Pro—XE, Unlimited and TRAC. Topics include: navigating efficiently through the software using the toolbar, Navigator and context menus; creating forecasts using expert selection and user-defined models; saving output files; and customizing graphs and reports.

Forecast Pro TRAC is built on the Forecast Pro Unlimited framework and all of the forecasting, graphing, reporting and adjustment capabilities are identical in the two products. Therefore, the Overview of Forecast Pro Unlimited and the Overview of TRAC (part I) sessions are presented as a single unit. The Overview of TRAC

(part II) session will focus on the advanced functionality found only in Forecast Pro TRAC, such as multiple units of measure, “shuffling” (on-the-fly hierarchy changes), exception reporting, accuracy tracking and team forecasting.

Setting Up Data and Saving Your Work (XE, FPU, TRAC)

This session is designed to help you set up your data files and understand the various output options. Spreadsheets, text files and ODBC formats will be presented and discussed and you will be guided through creating and using an Excel data file. All output options, including Formatted Reports, Forecast Output files, Script files and Forecast Projects will also be discussed.

Creating Event and Multiple-Level Models (XE, FPU, TRAC)

This session illustrates how to create event and multiple-level models. You will build several event models in Forecast Pro and create an event variable using Excel. In addition, you will be guided through the process of building forecasting hierarchies of varying complexity and length.

Team Forecasting (FPU, TRAC)

This session explores how Forecast Pro Unlimited and Forecast Pro TRAC allow you to collaborate with your colleagues to establish the final forecast. Two different approaches will be illustrated—sequential review of a stand-alone project and the use of a team archive to break large forecasting projects into smaller pieces that can be worked on separately and then reassembled into consolidated forecasts. The first approach is supported in both products, while the second is only available in Forecast Pro TRAC.

“The hands-on training and educational lectures were a powerful combination. Thanks for another useful and informative conference.”

Matt Laws,
Sprint PCS

*“Great product.
Great instruction.”*

James Hicks,
Coca-Cola Enterprises, Inc.

TRACK 3: USER PRESENTATIONS & TUTORIALS

Pills on TRAC—A Software Solution to a Forecasting Challenge

John F. Brown

Senior Manager, Forecasting, Daiichi Sankyo, Inc.



After years of having produced accurate product-level forecasts on a national level, Daiichi Sankyo, Inc. identified the need to create forecasts at a more granular geographic level. Specifically, the midsize pharmaceutical company required product-by-region forecasts to support measuring and tracking regional sales performance and marketing program effectiveness. With the daunting task of producing thousands of detailed forecasts and a forecasting staff of only one, the company looked to Forecast Pro TRAC to address the challenge. In this session, you will be shown a step-by-step live demonstration of how these forecasts are created, including data manipulation, automatic outlier identification and forecast accuracy tracking.

Driving Forecasting Alignment: Process. Execution. Results.

Joseph P. Zortman

Director, Business Management Specialty Retail Group, Kellogg Company

In the current economic environment, it's critical that an organization aligns around processes which provide visibility to risks and opportunities that maximize results and minimize waste. This session provides insights on how to collaborate with various groups within your organization to integrate your forecasts in alignment with the company's goals, decision-making process and resources to maximize success. You will understand how to navigate through real-world challenges—including getting inputs from multiple sources, working with decentralized teams, conflicting priorities and differing management styles—to provide an accurate outlook for the business. The session reveals how to best approach an Integrated Business Planning (IBP) process, who's involved, what information is provided and what the targeted outcome should be.



Integrating Forecast Pro with Corporate Databases and Other Applications

Eric A. Stellwagen, V.P., Business Forecast Systems, Inc.

This session discusses options for integrating Forecast Pro with databases and other applications. It explores integration to Forecast Pro via ODBC, file interfaces and command-line operation, as well as seamless integration of the Forecast Pro forecasting algorithms into custom applications using the Forecast Pro SDK. A significant portion of this session will be devoted to Q&A and a discussion of the pros and cons of the various approaches.



New Product Forecasting Applications

Kenneth B. Kahn, Ph.D.

Professor, Virginia Commonwealth University

New product forecasting should not be viewed as mysterious; however, it certainly can be a challenge in light of the variety of useful new product forecasting techniques available. This session introduces select qualitative and quantitative approaches that you can readily employ in your organization. Several case examples using real data will be provided to illustrate how you can make these new product forecasting techniques applicable in your own environment. In addition to learning about these approaches, you will be given guidelines and prescriptions which will lead to a better process for forecasting new products and sounder new product decision-making.

Sales Forecasting—Establishing A Best Practice

C.J. Hughley

U.S. Market Development Supervisor, 3M Health Care



Establishing a best practice for sales forecasting can be extremely difficult, particularly for a global company with sales in more than 200 countries. But this is exactly what 3M Health Care's Skin and Wound Care Division set out to do when they launched a Six Sigma project designed to improve forecasting accuracy. The cross-functional team was given the task of improving upon a process that was already 98% accurate by determining the best sources of quantitative and qualitative data and combining them into a forecasting model that could be replicated globally across the division. In this session, you will be guided through the journey the team took to achieve this goal.

Combining Different Techniques to Improve Forecast Accuracy

Mauro Rodríguez Marín

Demand Planning Manager, Hershey Mexico



In this session, you will learn how Hershey Mexico combines different statistical forecasting techniques to improve forecast accuracy and how the forecasts are reviewed and finalized as part of the company's Sales & Operations Planning (S&OP) process. A review of the models will demonstrate the effects of significant factors in determining sales demand, as well as the impact that the improved forecasts have on fill rates and inventory levels.



Demand Planning in Volatile Economic Times

Colleen "Coco" Crum

Managing Principal, Oliver Wight

Critical eyes are on the demand plan in corporations today.

Some of the questions being asked: How reliable is our forecast of demand? How can we improve demand plan accuracy? In turn, some demand managers and demand planners are asking whether these questions—and expectations—of the demand plan are fair in these volatile economic times. This session will address the above issues and explore whether companies should be using a different approach to forecasting and demand planning during recessionary periods. Finally, the presentation will examine the use of assumptions and scenarios in demand planning during economic downturns and discuss how to anticipate upturns in business.

Case Study: Implementing Sales and Operations Planning (S&OP)

Denise Hughes

Demand Planner, Marcal



Alan Antin

Senior Consultant, IPSO Innovation Group

When Marcal—a mid-tiered, regional CPG company—repositioned the company in the marketplace and rolled out national distribution for their products, they realized that they needed a more robust demand planning and forecasting solution to help manage the growth. In this session, you will hear how Marcal created a Sales and Operations Planning (S&OP) process to support their strategy, implemented statistical-based forecasting for demand planning and addressed the challenges of change management within the organization.



POST-CONFERENCE FORECAST PRO TRAINING WORKSHOPS

Wednesday, September 23, 2009

To accommodate Forecast Pro User Conference attendees, we are offering special one-day Forecast Pro training workshops immediately following the Forecast Pro User Conference. In these hands-on sessions, you will be provided with a computer loaded with Forecast Pro XE, Forecast Pro Unlimited or Forecast Pro TRAC and guided through numerous forecasting problems using real business data. At the end of the day, you will have explored the entire product and leave armed with the skills and knowledge to get the most from Forecast Pro.

Forecast Pro XE and Forecast Pro Unlimited Workshops

Building on the foundation established at the conference, you will spend the entire day working with Forecast Pro XE or Forecast Pro Unlimited. By the end of the workshop, you will know how to:

- Import your existing data quickly and easily
- Navigate effectively and efficiently through Forecast Pro
- Create accurate forecasts automatically
- Build and evaluate alternative forecasting models with confidence
- Leverage business knowledge by adding judgment to the forecasts
- Build multiple-level models to forecast complex hierarchies
- Detect and correct outliers that might need individual attention
- Incorporate promotions, holidays and other one-time occurrences into the forecasts
- Create dazzling reports and convincing presentations
- Integrate your forecasts smoothly with your other systems
- And much more!

"The hands-on training was fun! I remember much more when I have to do something myself."

Keith Moore
Furman Foods



Forecast Pro TRAC for Experienced Forecast Pro Unlimited Users

This workshop is designed for individuals who have upgraded from Forecast Pro Unlimited to Forecast Pro TRAC or are considering doing so. You will be provided with a computer loaded with Forecast Pro TRAC and guided through numerous forecasting problems using real business data.

This session will focus on the advanced functionality found only in Forecast Pro TRAC including:

- Working with multiple units of measure
- "Shuffling" (on-the-fly hierarchy changes)
- Exception reporting
- Accuracy tracking
- Team forecasting



FORECAST PRO USER CONFERENCE 2009

The Seaport Hotel: Boston, Massachusetts USA
September 21-23, 2009



Attendee Information:

Name: _____ Title: _____

Company: _____

Address: _____

Phone: _____ Fax: _____

E-mail: _____

How did you hear about the conference?

**REGISTER BY
AUGUST 21, 2009
AND SAVE 25%!**

Registration Fees:

Conference Sessions, September 21-22, 2009

One Attendee..... \$1,295

or

One Attendee with Early Bird Discount (by August 21, 2009) \$995

or

One Attendee with Team Discount..... \$995

Sign up 3 or more attendees at the same time and pay only \$995 per attendee.

Names of the other attendees must be listed below to receive this price:

#1 _____ #2 _____

Optional Post-Conference Training, September 23, 2009

Forecast Pro Training Session \$595

Forecast Pro Edition: XE Unlimited TRAC
(you must indicate the session you plan to attend)

Plus _____

TOTAL _____

Payment Method:

Check attached Purchase Order attached (available for U.S. companies only)

Visa MasterCard American Express

Card # _____

Signature: _____ Expiration date: _____

(Please fill out one form per attendee, copy if necessary)

brochv1

Venue

The Forecast Pro User Conference 2009 will be held at The Seaport Hotel, located on the spectacular Boston Waterfront. Reduced room rates of \$211/night are available through August 31, 2009. Call 877-732-7678 or 617-385-4514 or send an email to hotelres@seaportboston.com to book your reservation and mention that you are attending the Forecast Pro User Conference to receive the reduced room rate. You may visit the hotel Web site at www.seaportboston.com for more information but you must make your reservation via telephone or email to receive the special rate.

Substitutions/Cancellations

Our cancellation policy: prior to Aug. 21, 2009—no fee; Aug. 21-Aug. 31, 2009—\$195 administrative fee; after Aug. 31, 2009—no refunds will be made. Personnel substitutions may be made at any time. In case of conference cancellation, BFS liability is limited to refund of conference registration fee only. Program content subject to change without notice.

To Register

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