

# **C** COMPETITIVE Intelligence



## Market Forecasting Summit 2012

June 14-15, 2012  
Chicago, IL

- Link market forecasting to operational drivers and key performance indicators
- Incorporate continuous planning to keep your forecasts current and accurate
- Optimize knowledge management to effectively align with end user needs
- Utilize predictive analytics to improve competitive intelligence

ALTAMONT  GROUP



[www.altamont-group.com](http://www.altamont-group.com) • 510-984-2949



Earn 13 CPE Credits

# Summit Presenters



**Andres Munoz** – Senior Director, Finance at PepsiCo



**Nan Bulger** – Senior Director and Global Lead, Marketing/Strategic Planning at Philips Healthcare



**Michael Grzywinski** – Competitive Intelligence - Industry Insights Manager at Discover Financial Services



**Lloyd Babbitt** – Head of Competitive Intelligence at Grainger

**Greg Yezerky** – President at Institute of Professional Innovators



**Eugene Roytburg** – Senior Advisor at A.T. Kearney



*And many more....*



# Event Agenda



## Day One – June 14<sup>th</sup>, 2012

8:00 am	Registration & Continental Breakfast
8:30 am	Keynote: <b>The Art and Science of Good Forecasting</b> <i>Combining math and analysis with good instincts and sound judgment</i>
9:45 am	Keynote: <b>Measuring Forecasting Performance</b> <i>Support better decision making with forecasting measures, metrics and KPIs</i>
	Competitive Intelligence
11:00 am	<b>Forecasting Market Conditions</b> <i>Use econometric methods to forecast future market conditions</i>
12:00 pm	Lunch & Networking Break
1:00 pm	<b>Competitive Landscape Analysis</b> <i>The “How-To” (Process, Tools and Techniques) of identifying strategic opportunities and threats</i>
2:15 pm	<b>Scenario Planning &amp; Modeling</b> <i>Knowledge management techniques for determining and evaluating both expected and unexpected events</i>
3:30 pm	<b>Innovations in Competitive Wargaming</b> <i>Develop situational awareness of competitive position</i>
4:30 pm	Networking Reception

## Day Two – June 15<sup>th</sup>, 2012

8:00 am	Registration & Continental Breakfast
8:30 am	Keynote: <b>Collaborative Business Forecasting</b> <i>Establish integrated business planning through synchronized forecasting processes</i>
9:45 am	Keynote: <b>Dynamic Forecasting</b> <i>Incorporate event and market driven forecasting for “real world” results</i>
	Competitive Intelligence
11:00 am	<b>Information Management for Decision Making</b> <i>Managing CI information in a multi-decision making environment</i>
12:00 pm	Lunch & Networking Break
1:00 pm	<b>CI Usage and Allocation</b> <i>Framework for ensuring competitor profiles meet the needs of multiple end-users</i>
2:15 pm	<b>Establishing Competitive Intelligence Value &amp; ROI</b> <i>Effectively managing CI initiatives to ensure the most value-add possible</i>
3:30 pm	Adjourn

# Competitive Intelligence 2012

www.altamont-group.com • 510-984-2949

**Competitive Intelligence 2012** is a two-day learning, exchange of best practices and networking summit focused on competitive and market forecasting by way of superior prediction capabilities. This comprehensive program explores a breadth of market forecasting challenges including competitive landscape, wargaming, information management and trend forecasting. Attendees are given an unrivaled opportunity to learn from case studies, hands-on workshops, and technology round tables, presented by some of the most innovative practitioners, thought leaders and methodologists working in forecasting today.

**Competitive Intelligence 2012** is also part of our flagship event **Business Forecasting 2012** which is comprised of three unique events; **Financial Forecasting 2012**, **Competitive Intelligence 2012** and **Demand Planning & Forecasting 2012**.

Attendees from a wide range of industry and functional experience make it a goal to attend **Competitive Intelligence 2012**. Attendee involvement and interaction provides exceptional **Networking Opportunities** to enhance attendees' experience at the event, as well as build lasting relationships for continued learning well into the future.

- Link market forecasting to operational drivers and key performance indicators
- Incorporate continuous planning to keep your forecasts current and accurate
- Optimize knowledge management to effectively align with end user needs
- Utilize predictive analytics to improve competitive intelligence



The attendee profile at Competitive Intelligence 2012 represents a breadth of functional backgrounds who rely on forecasting to meet business needs.

## Who Should Attend?

Strategic Planning Executives  
Brand/Product Manager  
Analytics Teams  
Market Research  
Customer Analytics  
Customer Insights  
Forecasting Executives  
Competitive Insights Executives  
Product Managers  
Knowledge Managers  
Research Director / Manager  
Purchasing Director / Manager  
Marketing Director / Manager  
M & A Director / Manager

8:30 am

Keynote:

## The Art and Science of Good Forecasting

*Combining math and analysis with good instincts and sound judgment*

- Bridge the gap between data analysis and effective forecasting
- Predictive tools to better understand anomalies that disrupt accurate forecasting
- Effectively manage organizational knowledge to for better strategic planning
- Identify and leverage creative thinking to support the forecasting process

9:45 am

Keynote:

## Measuring Forecasting Performance

*Support better decision making with forecasting measures, metrics and KPIs*

- Determine KPIs that are essential to evaluating and meeting strategic objectives
- Assess the input and performance metrics used in the forecasting process
- Reduce forecasting error through improved reporting accuracy and process improvement

For group rates, detailed speaker or event information, please contact:

Jason Evans: [jevans@altamont-group.com](mailto:jevans@altamont-group.com) • 510-984-2949

### *Network with colleagues from across industries and functions*

Not only do attendees come to learn innovative skills and best practices in competitive intelligence, they also come to meet with peers from different industries across the nation. Keeping this in mind, attendees are given a chance to network with colleagues from an array of backgrounds and disciplines.

This unique networking opportunity enhances attendees experience both on site and through subsequent relationships built at the event.



11:00 am

**Forecasting Market Conditions***Use econometric methods to forecast future market conditions*

- Anticipate future competition, degree of competitive environment and potential market growth rate
- Develop ideal experiment design to test market outcomes
- Use *Trend Analysis* methodologies to forecast opportunity
- Use historical information to spot patterns that predict future events

1:00 pm

**Competitive Landscape Analysis***Tools and techniques to identify existing and emerging competitive elements*

- Identify latent (unspoken, unmet) and future customers needs
- Address the full breadth of the competitive landscape
- Learn the science-based framework for forecasting the future of competition and objectively identifying strategic opportunities and threats

2:15 pm

**Scenario Planning & Modeling***Knowledge management techniques for determining and evaluating both expected and unexpected events*

- Use *systems thinking* to develop scenarios that predict future market and competitor behavior
- Develop a system of rank-and-order to evaluate the likelihood of outcomes
- Employ scenario planning to break traditional organizational "world views"

3:30 pm

**Innovations in Competitive Wargaming***Develop situational awareness of competitive position*

- Strategy testing and competitive positioning scenarios
- Anticipate and accurately forecast competitor response
- Validate current strategic and tactical plans, and test alternative strategic initiatives

For group rates, detailed speaker or event information, please contact:  
Jason Evans: [jevans@altamont-group.com](mailto:jevans@altamont-group.com) • 510-984-2949



8:30 am

Keynote:

## Dynamic Forecasting

*Incorporate event and market driven forecasting for “real world” results*

- Static vs. Dynamic Forecasting methods
- Scenario planning to better understand the impact of unknown events
- Understanding and applying variable data results properly

9:45 am

Keynote:

## Collaborative Business Forecasting

*Establish integrated business planning through synchronized forecasting processes*

- Develop, implement, and manage collaborative forecasts
- Establish collaborative planning and forecasting partnerships
- Make transparent, interrelated and aligned business assumptions
- Capitalize on collective knowledge & decision making, while reducing redundancy
- Utilize tools and technology to implement advance forecasting practices

For group rates, detailed speaker or event information, please contact:

Jason Evans: [jevens@altamont-group.com](mailto:jevens@altamont-group.com) • 510-984-2949

### *Network with colleagues from across industries and functions*

Not only do attendees come to learn innovative skills and best practices in competitive intelligence, they also come to meet with peers from different industries across the nation. Keeping this in mind, attendees are given a chance to network with colleagues from an array of backgrounds and disciplines.

This unique networking opportunity enhances attendees experience both on site and through subsequent relationships built at the event.



11:00 am

### **Information Management for Decision Making**

*Managing CI information in a multi-decision making environment*

- Develop meaningful interpretations and recommendations to drive business decisions
- Cascade strategies across functions and departments to ensure successful execution
- Developing cross-functional support to align people, process, data, metrics and technology

1:00 pm

### **CI Usage and Allocation**

*Framework for ensuring competitor profiles meet the needs of multiple end-users*

- Utilizing internal relationships to determine needs, overlap and consistent but customized briefs
- Building accessible and efficient CI gateways to gather, organize and disseminate CI information
- Empowering CI knowledge gathering through social media outlets

2:15 pm

### **Establishing Competitive Intelligence Value & ROI**

*Effectively managing CI initiatives to ensure the most value-add possible*

- Utilizing CI in sales and other key revenue driving activities
- Implementing practices to track ROI and highlight value
- Unifying CI initiatives to underscore value & significance to organizational leadership

For group rates, detailed speaker or event information, please contact:  
Jason Evans: [jevans@altamont-group.com](mailto:jevans@altamont-group.com) • 510-984-2949



## Product Category Lifecycle: Growth Strategy Workshop

Wednesday, June 13; 1pm – 4:00pm

Price - \$499

Understanding the stages of product category lifecycle is a critical part of strategic planning, forecasting and evaluation. Furthermore, the long term success of a brand often depends on have the foresight to make decisions based on anticipated outcomes. This workshop achieves the developing of a full category lifecycle framework, matching the marketing mix with lifecycle and developing growth strategies throughout the lifecycle stages.

### Course Learning Objectives:

- Understanding the category lifecycle
- Matching the marketing mix to the category lifecycle
- Evaluating and prioritizing innovation, product range, communication and pricing
- Examples and applications of disruptive growth
- How to bring your brand in line to lifecycle thinking

### About the Instructor:

Bob Clark has over 25 years of strategic marketing and product experience in consumer packaged goods. Mr. Clark has held senior marketing positions at Lipton (Unilever), Kellogg Brands, Sara Lee and SC Johnson Company. Mr. Clark is founder and president of 24k Marketing, an independent, strategic marketing resource to help drive growing businesses.

## Competitive Intelligence Workshop

Wednesday, June 13; 4:30pm – 7:30pm

Price - \$499

By not knowing the future of customers' needs, companies pay the heavy price: they create products and services that the market does not embrace. With the emergence of the General Theory of Innovation (GTI), a scientific theory of innovation that has prescriptive and predictive capabilities, any company can reliably identify the future of the evolution of its market and create growth-generating strategic innovations virtually on demand. This tutorial will present the "How-To" (the framework, the processes, and the tools) of strategic forecasting that is applicable for any market and any company. It contains multiple case studies that are based on real projects conducted by the tutorial leader. The participants will continuously practice application of the tools in multiple "hands-on" workshops.

### Course Learning Objectives:

- The root cause of growth cessation and what any firm can do to overcome it
- The fundamentals of the General Theory of Innovation (GTI)
- The Evolutionary Templates enabling reliable forecast of the future of evolution of products and services
- The overall process (a sequence of procedures) aimed at creation of Strategic Innovations on Demand
- A number of "Problem-Solution" Templates (rules; "formulae") enabling solution of identified problems

### About the Instructor:

Greg Yezersky is the creator of the General Theory of Innovation (GTI). He has been in the business of innovation since 1983. Greg has conducted hundreds of seminars on the subject worldwide, taught thousands of students and successfully consulted for many Fortune 500 companies. He is the founder and president of the Institute of Professional Innovators (IPI), a premier innovation education and consulting company dedicated to developing clients' sustainable capability for "on demand innovation".

For group rates, detailed speaker or event information, please contact:

Thomas Johnson: [tjohnson@altamont-group.com](mailto:tjohnson@altamont-group.com) • 510-984-2961

or Jason Evans: [jevans@altamont-group.com](mailto:jevans@altamont-group.com) • 510-984-2949



# Area, Venue & Travel Information

# Competitive Intelligence 2012

## Location – Chicago South Loop

Located in Chicago's downtown South Loop area, our venue provides excellent access to transportation as well as all the city has to offer. Gateway Management can assist you with identifying the area's best restaurants, hotels, shopping and shows to maximize your experience outside the Summit.

## Hotel and Accommodation Facilities

Our venue's excellent location offers easy access to the entire city of Chicago. We have scouted locations throughout the region and found that hotels in Chicago's South Loop offer excellent accommodations, an unrivaled meeting environment and tremendous value. Furthermore, venues in the South Loop area offer equal convenience from either Midway or O'Hare airports.

## Travel

This event is best accessed by-way-of Midway or O'Hare Airports. To view shuttle information from either airport:

<http://mccormickplace.hyatt.com/hyatt/hotels/services/transportation/index.jsp>

For driving and public transportation information:

<http://mccormickplace.hyatt.com/hyatt/hotels/services/maps/index.jsp>

## Venue – Hyatt Regency McCormick Place

Hyatt Regency McCormick Place  
2233 South Martin L. King Drive  
Chicago, IL 60616

Earn CPEs

CPE Credits: 13



Altamont Group Inc. is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be addressed to the National Registry of CPE Sponsors, 150 Fourth Avenue North, Suite 700, Nashville, TN, 37219-2417. Web site: [www.nasba.org](http://www.nasba.org).

Program Level:	Basic
Delivery Method:	Group-Live
Prerequisites:	None
Advanced Preparation:	None

Room Rate

**\$ 199.<sup>00</sup> / night**

Reservations: (312) 567-1234

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

Online Reservations:

<https://resweb.passkey.com/go/GatewayManagement>



<input type="checkbox"/>	<b>Early Registration</b> ** Early registration is available until: April 27th, 2012	<b>\$ 1,599</b>
<input type="checkbox"/>	Standard Registration	\$ 1,799
<input type="checkbox"/>	Additional Attendee	\$ 1,299
<input type="checkbox"/>	Three Attendee Rate	\$ 3,999
<input type="checkbox"/>	<b>Optional Add-on: Pre-Summit Workshops</b> ** June 13th - Product Category Lifecycle - Growth Strategy: 1:00-4:00 PM ** June 13th - Competitive Intelligence Workshop: 4:30-7:30 PM	<b>\$ 499/each</b>

For current discount and group rates, please contact **Jason Evans** at:  
jevans@altamont-group.com or 510-984-2949

### Attendee Information

Attendee Name

Title

Organization

Email

Phone

Additional Attendee Name

Title

Email

Additional Attendee Name

Title

Email

### Payment Information

Check/Purchase Order

Credit Card

Name on Card

Card Number

Expiration Date

CV2 (card verification number)

Billing Address

City/State/Zip

#### **Pay By Check:**

Checks should be made payable to Altamont Group Inc. The mailing address for checks and tax forms is 205 N. 2<sup>nd</sup> Avenue, Oakdale, CA 95361

#### **Cancellation/Rescheduling Policy**

All cancellations made four weeks or longer from the summit's start date will be provided a full refund or credit toward current or future Altamont Group programs. Any cancellations made within four weeks of the programs start date will be provided with credit toward current or future Altamont Group programs.

### Registration Information

P: 510-984-2949

F: 510-380-7377

For questions regarding group discounts, accommodations or speaker information, contact Jason Evans at:

**jevans@altamont-group.com**

All mailed registration and inquiries to:

**Altamont Group Inc.**  
205 N. 2<sup>nd</sup> Avenue  
Oakdale, CA 95361