

## 2018 SCLA Peer Group Descriptions

*Peer group discussions will be facilitated by a leading academic as well as an industry expert. Pre-conference calls (April and May) will be arranged for each peer group to provide an opportunity for introductions and discussion on hot topics and/or specific issues attendees would like to address with the group in June. Notes will be taken, the calls will be recorded and playback instructions will be sent to each peer group for reference and for those unable to join the conversations.*

<p><b>1. Customer Relationship Management</b></p> <p><i>Academic facilitator: Judy Whipple, Ph.D., Michigan State University</i></p>	<p><b>Description:</b> The customer relationship management process provides the structure for how relationships with customers will be developed and maintained. Management identifies key customers and customer groups to be targeted as part of the firm’s business mission. The goal is to segment customers based on their value over time and increase customer loyalty of target customers by providing customized products and services. Partnerships are developed with a small group of key customers. Cross-functional customer teams tailor Product and Service Agreements (PSAs) to meet the needs of key accounts while achieving the firm’s profit goals. The teams work with key customers to improve processes and reduce non-value-added activities. Performance reports are designed to measure the profitability of individual customers as well as the firm’s impact on the financial performance of the customer.</p> <p><b>Scope of session:</b> Segmenting customers, selecting members of the cross-functional customer team(s), developing a joint plan for each key relationship, measuring performance.</p> <p><b>Topics to be discussed:</b> Topics will include: methods of segmenting customers; how to build effective cross-functional, cross-firm teams; tools for developing a joint plan that leads to the co-creation of value; developing measures of success; and, guidelines for sharing benefits.</p> <p><b>Who should attend:</b> Professionals with responsibilities for the following areas should consider attending this session: Sales, Marketing, Logistics, Purchasing/Product Supply, Production/Operations, Finance, Research and Development, and Sustainability.</p>
<p><b>2. Demand Planning Responsiveness &amp; Supplier Collaboration</b></p> <p><i>Academic facilitator: Chip White, Ph.D., Georgia Institute of Technology</i></p>	<p><b>Description:</b> Forecasting and demand planning serve to predict future events and simultaneously achieve maximum responsiveness to demand requirements through alignment within the organization and throughout the supply chain. Associates involved in these activities focus on forecasting and demand planning with a goal of synchronizing activities and processes throughout their organizations and their supply chain partners, including customers and suppliers.</p> <p><b>Scope of session:</b> Forecasting methods, software and technology, organizational processes for demand planning, S&amp;OP leadership, performance metrics, Collaborative Planning and Forecasting for Replenishment (CPFR), and design of demand-driven supply chains.</p> <p><b>Topics to be discussed:</b> Best forecasting methods, benchmarks of performance, software and technology to use, organizational processes and structures for demand planning, S&amp;OP leadership, performance metrics, Collaborative Planning and Forecasting for Replenishment (CPFR), and design of agile and responsive supply chains.</p> <p><b>Who should attend:</b> Professionals from the following functional areas should consider attending this session: Supply Chain Management, Sales, Inventory Management, Marketing, Analytics, Supply Chain Optimization, Product Supply / Sourcing, Operations, Forecasting, Demand Planning</p>
<p><b>3. Distribution Management, Material Handling &amp; Operational Support</b></p> <p><i>Academic facilitator: Omar Keith Helferich, Ph.D., Calvin College</i></p>	<p><b>Description:</b> The effective management of distribution facilities is a critical component to overall supply chain performance in order to optimize cost and provide excellent service. Scope of this peer focus group includes the full range of activities within distribution centers, from order processing to order fulfillment and all the functions in between. This peer focus group supports these important areas by evaluating and/or recommending distribution management practices, facility design (including “green”), material handling equipment, automation, technology, and operating procedures, including lean practices and KPIs. This peer group may also lead the execution of these projects.</p> <p><b>Who should attend:</b> Professionals from the following functional areas should consider attending this session: Warehousing and Distribution/Logistics Management, Industrial Engineering, Sales</p>

	<p>&amp; Marketing, Operations Management, Fulfillment &amp; Delivery, Customer Service, Inbound &amp; Outbound Transportation, Lean/Six Sigma, Quality/Process Improvement, Inventory Management, and Information Technology. Participants should have at least 3-5 years' experience in two or more of the functional areas mentioned in order to actively participate and contribute to the group discussion.</p>
<p><b>4. Inventory Management &amp; Information Technology</b></p> <p><i>Academic facilitator: Dave Closs, Ph.D., Michigan State University</i></p>	<p><b>Description:</b> Responsibilities for executing day to day product fulfillment activities will be discussed. Service (i.e. ensuring the supply chain is in stock for the customer), inventory efficiency, and implementation of new technologies are the key areas of focus for this peer group.</p> <p><b>Scope of session:</b> The session will cover issues related to planning and managing inventory using information technology.</p> <p><b>Topics to be discussed:</b> Potential specific topics include new technologies for managing inventory, new processes, forecasting demand (models and collaborative approaches), cycle and safety stock levels, software innovations, process optimization, recruiting and retaining talent.</p> <p><b>Who should attend:</b> Professionals from the following functional areas should consider attending this session: Logistics, Planning, Inventory Management, Warehousing, Fulfillment, Information Technology, Supply Chain Management</p>
<p><b>5. Process Improvement</b></p> <p><i>Academic facilitators: Mary Holcomb, Ph.D., University of Tennessee &amp; Sean Goffnett, Ph.D., Central Michigan University</i></p>	<p><b>Description:</b> This peer group will explore leading practices in process improvement throughout the supply chain -- efforts designed to enhance value and reduce costs.</p> <p><b>Scope of session:</b> This group will discuss the applications of Lean, Six Sigma, and other improvement methods to achieve operational excellence. Focus will be directed to non-manufacturing as well as manufacturing environments toward effective implementation and sustainment of operational excellence.</p> <p><b>Topics to be discussed:</b> The session will illuminate the benefits and challenges associated with process improvement in organizations today, including organizational culture, barriers to improvement, measurement systems, tools and methods, and success factors.</p> <p><b>Who should attend:</b> Professionals from the following functional areas should consider attending this session: Supply Chain Operations, Logistics, Purchasing/Supply Management, Operational Excellence</p>
<p><b>6. Senior Executive</b></p> <p><i>Facilitators: Mark Heinrich, US Navy &amp; Tom Frese, Solera</i></p>	<p><b>Description:</b> This peer group covers critical issues facing supply chain executives today and discusses what companies are doing about them. Foresight into future growth opportunities as well as unanticipated pitfalls will be explored.</p> <p><b>Who should attend:</b> Only corporate members who serve on the Executive Committee are to register for this peer group.</p>
<p><b>7. Sourcing, Procurement &amp; Supply Management</b></p> <p><i>Academic facilitator: Don Klock, Ph.D., Rutgers Business School</i></p>	<p><b>Description:</b> Effective purchasing and supply management contributes significantly to organizational success through the purchase of goods and services. This area of management includes purchasing operations, strategic sourcing, outsourcing and insourcing, contract manufacturing, supplier evaluation, supplier selection, supplier relations and supplier innovation. The goal is to secure reliable supply at the best cost while meeting service and quality levels. There must be alignment with corporate competitive strategy and supply chain flow strategy such as facilitation of postponement throughout the supply chain.</p> <p><b>Scope of session:</b></p> <ul style="list-style-type: none"> <li>• Current challenges and opportunities in Sourcing, Procurement &amp; Supply Management</li> <li>• Identify current and best practice.</li> <li>• Share experience on successful implementation of sourcing initiatives.</li> <li>• Discussion of benefits, barriers to implementation and success factors.</li> <li>• Best Supply Management Practices by product category or industry sector.</li> </ul> <p><b>Topics to be discussed:</b> Initial topics are chosen by pre-conference participant feedback. The following list reflects past topics discussed and current issues.</p> <ul style="list-style-type: none"> <li>• Sourcing Strategy</li> <li>• Supplier Management</li> </ul>

	<ul style="list-style-type: none"> <li>• Global Sourcing (off shore and near shore) and Manufacturing</li> <li>• Cost Optimization and Reduction</li> <li>• Contracts and RFPs</li> <li>• Leveraging new and existing information technology for procurement and manufacturing</li> <li>• Supplier Performance Management</li> <li>• Supplier Innovation</li> <li>• Managing Supply and Sourcing Risk</li> <li>• Organizing Sourcing and Procurement</li> <li>• Organizational Change/ HRM in the sourcing and procurement organization</li> <li>• Implementing sustainability and CSR policy in procurement policy and practice</li> <li>• Compliance with evolving regulations, e.g. Conflict metals</li> </ul> <p><b>Who should attend:</b> Professional decision-makers from the following functional areas should consider attending this session: Sourcing and Procurement, Global Sourcing, Product Supply, Sales, Logistics, Global Supply Chain, Manufacturing, Product Management, Materials Management, Analysis</p>
<p><b>8. Supply Chain and Logistics Strategy</b></p> <p><i>Academic facilitators: Tom Goldsby, Ph.D., Ohio State University &amp; Michael Watson, Ph.D., Northwestern University</i></p>	<p><b>Description:</b> Your supply chain strategy sets the direction and roadmap to where you want to be over a multiyear time horizon. That strategy must be responsive to the market and recognize the company’s core competencies and resources. The supply chain strategy needs to be systematically developed, monitored and continuously reevaluated, responsive to the supply chain environment. In turn each component of the supply chain such as logistics must have its own strategy that is aligned with the overall supply chain strategy. Elements of supply chain and logistics strategy include operating models, product flow (push versus pull and postponement), service versus cost goals, network planning and relationships, alignment, performance measurement, strategic investments and risk management.</p> <p><b>Scope of session and topics to be discussed:</b> This session could cover any aspect of the development, implementation and performance measurement of the supply chain and logistics strategic plan. Specific topics could include: alignment of supply chain strategies with those of the firm and its customers, and across supply chain functions, conducting timely environmental scans to maintain/enhance competitiveness, keeping supply chain complexity from undermining strategy, using metrics consistent with strategy, coordinating supply chain functions, recognizing megatrends impacting strategy, assessing supply chain capabilities, impact of mergers and acquisitions, supply chain transformation, and accounting for supply chain risk.</p> <p><b>Who should attend:</b> Managers of one or more supply chain functions such as Transportation, Logistics, Distribution, Operations, Sourcing and overall Supply Chain who have input into the strategic direction of the supply chain or its components.</p>
<p><b>9. Talent Management and Leadership</b></p> <p><i>Academic facilitator: Misty Bennett, Ph.D., Central Michigan University</i></p>	<p><b>Description:</b> One of the major battles being fought today by employers is in the area of talent management and leadership.</p> <p><b>Scope of session:</b> Scope of session will provide insight into critical areas needed to succeed in a competitive global market, such as: customer focused innovation, talent recruitment, development and retention, staff that can handle systemic continuous improvement programs such as Lean, change management in implementing new initiatives and programs, tying the corporate vision and values into the workplace for maximum communication, understanding and buy in by the employee health and wellness resulting in productivity and satisfaction gains</p> <p><b>Topics to be discussed:</b> SCM Talent Gap and how to overcome it, Management Development Programs, Succession Planning Processes, Training and Development Activities, Competencies Skills Assessment and Development, Recruiting Best Practices, Change Management, Corporate Goal Alignment, Managing your Hi-Potentials and Boomers, Gen X and Gen Y people, and How to leverage Universities in this important strategic initiative.</p> <p><b>Who should attend:</b> Senior SCM Leadership, Senior Human Resources Leadership, and any SCM executive that is interested in increasing productivity in his/her organization.</p>

## 10. Transportation

*Academic facilitator:  
Terry Pohlen, Ph.D.,  
University of North  
Texas*

**Description:** The transportation peer group is a facilitated discussion among industry professionals focused on the key transportation issues confronting carriers and shippers. The participants consist of a combination of shippers, carriers, third-party logistics providers, and software providers. The agenda for the sessions is based on input obtained from participants prior to the conference. During the peer group sessions, the participants engage in a frank, open discussion of the challenges they confront and the strategies employed by others facing similar issues. Key takeaways from previous sessions include: learning best practices employed by industry leaders; identifying alternative business practices to drive operational improvements; developing strategies for working more effectively across the shipper-carrier interface; and building a personal network of transportation professionals.

**Scope of session:** peer group discussion focuses on exchanging alternatives and best practices to address the challenges confronted in the transportation marketplace from carrier, shipper, and third-party provider perspectives.

**Topics to be addressed:** peer group members will have several opportunities to submit topics that set the agenda these sessions. Topics submitted covered during previous conferences have addressed a wide range of topics including: improving shipper-carrier relationships; managing transportation spend more effectively; navigating uncertain capacity in the transportation market; changing consumer buying patterns and increasing parcel [ecommerce] volumes; mitigating the effects of regulatory changes and driver shortages through joint shipper-carrier actions; negotiating and bidding of transportation requirements from both the shipper and carrier perspectives; and determining how to most effectively use brokers, freight forwarders, NVOCCs and other transportation intermediaries.

**Who should attend:** individuals influencing or making key transportation decisions; having responsibility for managing transportation operations or budgets; or managing relationships across the shipper-carrier interface.