

Professional Development Meeting

Thursday, September 25, 2014

APICS Introduction to Sales & Operations Planning (S&OP)

This presentation is about the foundations of constructing an effective S&OP:

- ♦ S&OP Definition
- ♦ S&OP process overview
- ♦ Attributes and objectives of S&OP
- ♦ S&OP implementation challenges
- ♦ Foundation components for successful S&OP
- ♦ Benefits of S&OP

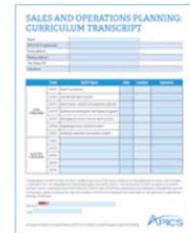
Benefits of Sales and Operations Planning:

- ♦ Establishes operational plans consistent with the business plan
- ♦ Continually updates the production, financial, and sales plan
- ♦ Provides for cross-functional planning
- ♦ Establishes regular meetings with senior executives to resolve demand versus supply trade-offs
- ♦ Checks availability of resources to validate the production plan
- ♦ Increases teamwork and collaborative skills

Congratulations!

- *Participation in today's session qualifies for one content hour (SOPE1) toward the APICS S&OP certificate.*

- Download the transcript to track your progress and learn how you can qualify for the remaining hours at www.apics.org/sop.



About the Presenter

Anthony Zampello, CPIM, CSCP

Consultant - Zampello and Associates

Educator - APICS Master Instructor: CPIM, CSCP & Lead Instructor - Principles of Operations Management.

Tony has 30 years manufacturing experience and 10 years consulting experience. He is CPIM, CIRM and CSCP Certified.



PDM Event Information

Date:	THURSDAY, September 25, 2014
Location:	Salvatore's Italian Gardens, 6461 Transit Road (at Genesee Street), Depew, NY 14043
Time:	5:30 -6:00 pm....Registration, Cash Bar & Networking 6:00-7:00 pm.....Dinner 7:00-8:00 pm....Program
Cost:	\$25.00 Members & Guests; \$15.00 Full-Time Students
Meal Choices:	1) Chicken Francaise; 2) Asiago Bruschetta Tilapia; or 3) Portabella Mushroom Stack
Notes:	Reservations requested by Tuesday, September 23rd, but will be accepted later.
Register:	Online at http://www.apics-buffalo.com or call APICS at PPM OffiCenter (716) 648-0972



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President's Message



Welcome back APICS Buffalo!

I want to welcome all the current and future APICS Buffalo Chapter members to our 2014-15 year. I hope that you're as excited about the upcoming year as I am! The programs team is in the process of finalizing the calendar of events for the upcoming year.

I would be remiss if I did not thank Joost Vles for his three years of service as Chapter President. All of us in the Buffalo Chapter have been fortunate to have a string of excellent leaders at the helm. I only hope that I can continue the tradition of making the Chapter stronger for the next President to build upon. Joost will continue to serve on the Board as the Director of Programs until January, when he will take over the role as District manager for the APICS Northeast District. We all wish Joost good luck with his new role. It will be good exposure for both Joost and the Chapter. Joost's success can be attributed to his ongoing engagement and commitment to giving back to APICS.

The APICS International Conference is in New Orleans on October 19-21. If you have the opportunity to attend, you will be exposed to great thought leaders in the Supply Chain and be able to network with your peers. APICS is offering multiple "Learning Paths" including: Operational Efficiency, Supply Chain Innovation, Supply Chain Leadership, and several more paths so you can customize your learning experience. I have attended past conferences and I expect that this will be another excellent educational opportunity. For more information you can go to APICS.org, I hope to see you there.

This month we welcome the new Board of Directors, including several new faces, as well as new positions for some of the experienced Board members.

Hopefully you can make our Thursday, September 25 PDM at Salvatore's. Our speaker, Tony Zampello, will be talking

President's Message continued on page 3



Mission Statement:

To be the number one resource for Operations and Supply Chain Management education in WNY.

Vision Statement:

To develop leaders and inspire individuals and organizations to pursue excellence through lifelong learning and career advancement in the field of Operations and Supply Chain Management.

President's Message continued from page 2

about S&OP; the details are on page one of this newsletter.

On October 15 we will be hosting our friends at ISM, formerly NAPM, for a joint meeting at the Protocol Restaurant. Our speaker will be Carol Ptak. I have had the pleasure of seeing Carol speak a couple of times and you won't be disappointed.

On a sad note, APICS lost a good friend and one of our biggest supporters. For those of you who do not know, Rick Haniszewski lost his multi-year battle with cancer. For those who had the privilege of knowing Rick, either inside or outside of APICS, you know what a great person he was. Rick's passion for life translated over to his commitment to APICS. He was always the first to volunteer, lend a helping hand, or do the task others did not want to do. I will always consider him a Friend, Mentor, and Coach. I can honestly say he left a strong mark on this world and will be missed by all who he touched. In honor of Rick, the Board unanimously voted to change the name of the member of the year award to "The Rick Haniszewski Award." That way Rick will always be a visible part of the Buffalo Chapter.

Yours in APICS,

Matt Bartels, CPIM
President, APICS Buffalo Chapter



Welcome New Members!

Joshua Allen
Sarah Fields
Emily Kenney
Pamella Giglia
Jamie Linneborn
Theodore Smith
Michelle Schul
Shawn Hooper
Gregory Mergel
Cheryl Wozniak
Christopher Maggiore
John Ensminger
Darren Jurewicz

- Donna McGrew, Membership Director

JOB POSTINGS



APICS Placement Director Mike Draper encourages area companies to let us know about any job openings in the supply chain and operations fields.

There is a convenient form to fill out to post your job opening on our web site at www.apics-buffalo.com.

Current postings:

- ♦ **INVENTORY ANALYST** (posted 8/29/14)
- ♦ **INVENTORY CONTROL SPVSR** (posted 9/11/14)

Contact Mike Draper at 716-740-1208 or mldraper1@mmm.com for more information.

Mentoring APICS Student Was a Positive Experience

I want to let the APICS members know how pleased we were to have worked with an APICS student member during his final semester. Roy Bao, a student from UB School of Management, became part of the Sherex family while he was here. He had several different directions he wanted his career to go, so we let him work on two different projects in our warehouse area. He helped to develop a Kanban inventory management system and he helped develop a cycle count procedure. We are using both of them today. He worked really well with our employees and was willing to jump in to do the heavy lifting. In our warehouse that is not a coy way to say he pitched in; our products are sense and heavy. He didn't shy away at all. He has a keen eye for details and has a desire for efficiency and organization. I really appreciated how he stayed on task and both projects were finished just as he graduated.

I think he received some real world experience that he will be able to take with him into his career. Lastly we did a thorough résumé review and made some changes to it that I think will make it clear how his schooling and practical experience make him a great addition to any organization.

Thanks again for keeping me on your mentor list. I always find it a positive experience and I think these interactions always help me too. I love the interaction and their perspectives on life and business. I look forward to another great upcoming year. Let me know how I can help.

Thanks,
Rich Stauffer,
Sherex Fastening Solutions

THE UN-COMFORT ZONE with Robert Wilson

Outsourcing Innovation

Ideas from other industries may be just what you need



In the early 2000s, Dr. Allan Goldman, a chief physician at the Great Ormond Street Hospital, a children's hospital in London, observed that too many mistakes were being made when patients were transferred from surgery to ICU. It seemed that no one person was specifically in charge of a patient hand-off, and confusion would arise as several people would exchange vital information all at once. The process was slow, inefficient, and occasionally disastrous - such as when a patient, needing assistance in breathing, arrived in ICU before the ventilator was set up.

Then one day after watching a Formula One automobile race, Dr. Goldman noticed similarities between patient transfers and a race car making a pit stop. The race car crew was able to change tires, refuel, clean vents, and more in seven seconds. The process was systematic and precise. It was exactly what the hospital needed, and he decided to consult the Ferrari race team to help design an efficient patient transfer protocol.

The people from Ferrari helped develop a three-step procedure to complete patient transfers, and the result was a decrease in technical errors of 42 percent, and a decrease of clinical information omission of 49 percent.

In a previous article, I wrote that creativity takes time, and because of this busy people are seldom innovators. Time is needed not just for innovation, but also for identifying where the innovation is needed. Now busy companies can outsource innovation to creative think tanks.

Recently I had the opportunity to speak with Joey Reiman, founder of BrightHouse, an idea consultancy. He said, "We thought the notion of ruminating could have powerful implications for businesses that seldom have time to stop and think."

Companies looking to develop strategies and tactics, new products, HR programs and practices, or consumer communications, can now turn that over to BrightHouse. Reiman said his 21 person team of creative thinkers will spend 16 weeks developing a Master Idea. Making his consultancy unique, Reiman begins by identifying a company's purpose.

According to Reiman, "Purpose is your organization's distinct reason for being, and the positive impact you seek to make in the world. The soul of an organization and its purpose lies at its origins. That's why we excavate purpose. The fruits are in the roots."

I also had the opportunity to speak with John Palumbo, founder of BigHeads Network. He describes his company as the curator of a brain-trust of more than 1000 hand-picked creative minds, visionaries, and problem-solvers who all

come from different backgrounds including: a Documentary Producer, Collegiate Coach, Jewelry Designer, Professional Firefighter, Cardiologist, Celebrity Chef, Iron Worker, Video Game Developer, Tattoo Artist, Music Therapist, Small Town Mayor, Yoga Instructor, Reality Show Host, and a Major League Baseball Umpire.

When companies come to Palumbo for ideas, he assembles a creative team of six or more of these diverse minds to work with a core team from the client business. According to Palumbo, "Innovation is often the result of random collisions where ideas from outside your industry are applied to your own." His unique creative teams bring their contrasting perspectives to the table to accelerate the process.

Similar to the hospital surgery/race car pit crew collaboration, Palumbo brings in experts from outside industries to identify techniques and approaches they use that could be applied to his client's objectives.

In my own work with innovation, I have found that people can also use their hobbies to give them unique insights that they may combine with their work. Whatever your hobby: singing, skiing, knitting, rock climbing, tennis, or painting, it is something about which you are very passionate and have developed a powerful knowledge base.

Think about your work, your products and services, your business practices, and the problems you may have encountered. How can you apply your special expertise from your hobby to your company? What aspect of your hobby could improve your business?

Whether you outsource ideas from a think tank or from your hobbies, you will gain a unique perspective on your problems.

Robert Evans Wilson, Jr. is an author, humorist and innovation consultant. He works with companies that want to be more competitive and with people who want to think like innovators. Robert is also the author of the humorous children's book: The Annoying Ghost Kid. For more information on Robert, please visit www.jumpstartyourmeeting.com.

Rick Haniszewski Member of the Year Award

Annual awards for contributions to the Chapter are officially recognized by the APICS Buffalo Chapter at Top Management Night. Three categories are traditionally recognized: Educator, Member, and Company of the Year.

The BOD unanimously approved renaming the prestigious Member of the Year Award to sustain our memory of Rick Haniszewski who was this year's recipient. The Member of the Year Award will now be titled the "Rick Haniszewski Member of the Year Award".

The membership lost a great friend with Rick's passing in July at age 58. The significance of renaming the award in his honor provides the Chapter a remembrance of his positive influence on our success.

- Kimberly Frew, Marketing Chair

STUDENT CHAPTER REPORTS



Canisius College Chapter

The Canisius College APICS chapter has expanded to include graduate business students this year. The chapter is currently planning their annual membership meeting, a speaker and a plant tour.

Submitted by: Lynn A. Fish, Ph.D.
Professor, Canisius College

University at Buffalo

The new team of E-board members of UB Supply Chain and Operations Management club (SCOM) has planned out club events for the fall 2014 semester. The goal of SCOM this year is to provide members the opportunity to bridge the gap between the knowledge learned in class and application in real world scenario. To ensure that we recruit members from a diverse background, we have promoted SCOM in the UB School of Management Club Fair and various supply chain classes that consist of students from School of Management and School of Engineering. Our first SCOM meeting in the second week of September will be to introduce the club to UB students who are interested in being part of the family.

There are a couple of things we want to continue, such as inviting experienced professionals in the field of supply chain and operations management to join our monthly speaker series. Also, we will schedule a plant tour to a manufacturing or logistics site in Buffalo/Niagara area to fulfill both educational and networking purposes. Meanwhile, we have updated SCOM website and Facebook page with our previous events and latest APICS news to keep members well-informed. Last but not the least, we have decided to promote the SCOM case competition aggressively this year, not only to bring the awareness of SCOM but also to find the best fit for APICS case competition.

We hope to draw more members into SCOM and stay tightly connected with APICS Buffalo chapter this semester, and we look forward to a prosperous outcome in fall 2014.

Submitted by: An-Chieh Teng
UB MBA Class of 2015
V.P. of External Relations, Supply Chain & Operations Club

Let's Link!



Linked in Members....the Chapter has a Group Site. Please join.

<https://www.linkedin.com/groups/APICS-BUFFALO-CHAPTER-942747>.

- Kimberly Frew, Marketing Chair

APICS Buffalo Education



Class Schedule:

Program: CPIM Detailed Scheduling
Starting Date: Monday, September 8 (10 weeks)
Location: Saint-Gobain
FULL; CLASS CLOSED

Program: CPIM Detailed Planning & Scheduling
Starting Date: Monday, September 22 (10 weeks)
Location: Moog
Cost: \$600

Program: CSCP Certified Supply Chain Professional
Starting Date: TBD (13 weeks)
Location: TBD
Cost: \$1795

More details and to register at www.apics-buffalo.com.

For further information or questions regarding CPIM, CSCP, and other training and certification needs, please contact

Jeremy Ballaro, CSCP
APICS Buffalo Education Director
JBallaro@buffalogames.com or
APICSBuffaloEducation@gmail.com
Work: 716-464-5263

Note: Please consider becoming a host company for on-site CPIM & CSCP classes to benefit your employees and fellow Supply Chain & Operations Management colleagues.

A Winner!

Congratulations & Welcome! David Stewart

APICS-Buffalo participated in the Small Business Matchmaker Exposition in May. Past Chapter President Mary Ann Gardner and Nancy Boyd Haley, Current Chapter Administrator, managed the APICS exhibit with the goal of lead generation and chapter growth. Those who visited our booth were registered to win a one-year membership to APICS-Buffalo.

Congratulations!! The membership was won by David Stewart, Master Scheduler with Reichert Technologies. Please look for David at our PDM's and welcome him to APICS!

In addition - other members of the Buffalo business community who left a business card will receive an invitation to attend a PDM; please reach out for guests at upcoming meetings and share with them a positive APICS experience

- Kimberly Frew, Marketing Chair



Develop Your Own Leadership Potential Become an APICS Mentor

Q: How can I expand my leadership skills?

Q: How can I move forward in my career?

Q: How can I help my organization preview up-and-coming talent from WNY colleges?

A: **Become an APICS Student Mentor**

As a professional in our field you have a great deal to offer. By mentoring a Student Chapter member from Canisius or UB, you have an opportunity to build your own leadership and communication skills, which makes you a prime candidate for promotions and new job opportunities. Not to mention the personal gratification you gain from guiding an emerging professional through the beginning of their career.

Your company also benefits from allowing you to mentor a student; mentoring creates a positive professional climate and promotes an understanding of professional responsibilities and expectations on behalf of future job candidates. ***Plus, members whose student mentee has attended at least one professional development seminar during the year will benefit by receiving a discounted rate for Top Management Night.

Mentors' responsibilities include:

- Offer a shadowing experience or a tour of the facility where the mentor is employed
- Encourage the student to attend all professional development meetings where the mentor can provide some insight and introduce the student to other professionals
- Additional career-focused meetings between the student and mentor are always encouraged, (i.e. resume reviews, career planning meetings, etc.) especially if the mentor can arrange meetings with other staff in his/her company and a potential interview with human resources for an internship or full time opportunity

Students' responsibilities include:

- Contact the mentor by phone or email to establish an initial meeting during which the student will conduct an informational interview and the mentor will discuss his or her professional experience
- Keep in contact with the mentor occasionally with relevant academic questions or to update him/her on internship or full time job search status
- Be appropriate and professional in all correspondence
- Have the ability to travel to the mentor's location

Matches are made only as mentors are available and are on a first-come, first served basis. If necessary, mentors who are willing will be matched with more than one student mentee.

Sign up to be a APICS Student Mentor today by emailing Melissa Ruggiero at mrugg@buffalo.edu

Subject: APICS Mentor

With your name, title, all contact info

Melissa will be in touch soon to address any questions and students will be assigned once the students become national APICS members in the fall semester.