

Chief Strategy Officer

Balance Strategy Formulation & Ensure Flawless Execution

Strategic Planning Innovation



the experts....

There is no question that IE Group provides the gold standard summits in the industry and will connect you with decision makers within the strategy field. You will be meeting senior level executives from major corporations and innovative small to medium size companies.

Confirmed speakers include:

- Clarence So, *Chief Strategy Officer*, **Salesforce**
- Todd Simpson, *Chief Innovation Officer*, **Mozilla**
- James Stikeleather, *Chief Innovation Officer*, **Dell**
- Tony Haile, *Chief Executive Officer*, **Chartbeat**
- Barry Margerum, *Chief Strategy Officer*, **Plantronics**
- Mark Achler, *SVP, New Business Strategy & Innovation*, **Redbox**
- Gabe Vehovsky, *EVP, Digital Strategy*, **Discovery Communications**
- Jeremy Hill, *Chief Operating Officer, Research Department*, **Societe Generale**
- John Abbamondi, *Vice President, Strategy & Analysis*, **San Diego Padres**
- Nhat Ngo, *Vice President, Strategy & Business Development*, **Omnicell**
- Jonathan Karelse, *Vice President, Strategic Planning*, **Wholesale Tire Distributors**
- Andy Miller, *Executive Vice President, Mission*, **Lance Armstrong Foundation**
- Daniel Gastel, *Head of Group CIO Strategy*, **UBS**
- Jon Berlin, *Head of Strategy*, **Wells Fargo**
- Roland Pan, *Head of Strategy*, **Skype**
- Dave Wolf, *VP, Strategy*, **Cynergy**
- John Coyle, *SVP, Innovation*, **Maddock Douglas**
- Tim Johnstone, *Chief Strategy Officer*, **Hopelink**
- Jessica Saperstein, *Division Vice President, Strategy*, **ADP**
- Kapil Jain, *Senior Director, Strategy & Business Development*, **Rosetta Stone**
- Elliot Rawls, *Senior Director, Strategy & Corporate Development*, **USCellular**
- Tom Kindem, *Director, Strategy & Planning*, **BAE Systems**
- Jennifer Scott, *Director, Strategy*, **Virgin Media**
- Jill Steinhour, *Director, B2B Hi Tech Strategy*, **Adobe**
- Steven Krawciw, *Director, Private Banking*, **Credit Suisse**
- Ann Neir, *Senior Manager, Worldwide Sales, Strategy & Planning*, **Cisco**
- Mark Moser, *Vice President, People & Strategy*, **Samet Corporation**
- Gina Copeland, *Senior Director, Strategy & Planning*, **Mitsubishi Electric**



the content....

Effective strategic planning is central to business success. In the modern business environment technological developments and the advances of globalization have created unparalleled opportunities for businesses to expand their markets. But new opportunity has opened the door to new challenges.

This summit will focus on the solutions offered by innovative strategic planning and business forecasting. It will comprise of learning objectives, illustrated intermittently with a number of exploratory case studies, to include:

- Methods designed to deliver the most effective impact on your business through effective strategic planning.
- Tactics to optimize the role of Strategic Management in your organization.
- Learning how to transform the way you set strategy, align resources & effectively execute to deliver superior business outcomes with speed and scale.
- The essential balance between strategy formulation and ensuring flawless execution.

and much more.....

who will you meet?....

Previous delegates (partial list):

- Chief Strategy Officer, **Xerox**
- VP, Strategy, **Charles Schwab & Co**
- SVP, Strategy, **Disney & ESPN**
- VP, Strategic Services, **Wells Fargo**
- SVP, Digital Strategy, **Brunner**
- VP, Strategic Planning, **Auto Zone**
- Director, Strategy, **Santander**
- Chief Strategist, **Prudential**
- Dir, Marketing Strategy, **Microsoft**
- Sr Dir, Strategy & Execution, **Merck**
- Sr Dir, Strategy, **Boeing**

- VP, Strategy, **GlaxoSmithKline**
- Head of Strategy **HSBC**
- Director, Strategy & Planning, **Best Buy**
- VP, Strategy, **Highwoods Properties**
- Director, Strategic Planning, **Intel**
- VP, Innovation Strategy, **Spigit**
- Director, Global Strategy, **Wrigley**
- Sr Dir, Strategy, **Pfizer**
- SVP, Strategy, **ESA**
- Sr Dir, Strategy & Planning, **Mitsubishi**
- Sr Dir, Strategy, **Rosetta Stone**

confirmed speakers...



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Chief Executive Officer
Chartbeat



Gabe Vehovsky,
EVP, Digital Strategy
& Emerging Business
Discovery Communications



Roland Pan,
Head of Strategy
Skype



Nark Kapczynski,
VP, Corporate
Dev & Strategy
Experian



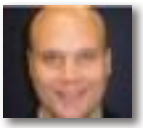
James Stikeleather,
Chief Innovation Officer
Dell



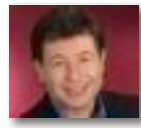
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VP, People & Strategy
Samet Corporation



Jennifer Scott,
Director, Strategy
Virgin Media



Tom Kindem,
Director, Strategy
BAE Systems



Mark Achler,
SVP, New Business
Strategy & Innovation
Redbox



Jonathan Karelse,
VP, Strategic Planning,
**Wholesale Tire
Distributors**



Drew Aldrich,
Senior Vice President &
Chief Strategy Officer
Trans-Lux



Mark Russel,
Director, Strategic
Development
Boeing



Jessica Saperstein,
Division VP, Strategy &
Business Development
ADP



Tim Johnstone,
Chief Strategy Officer
Hopelink



Nhat Ngo,
VP, Strategy & Business
Development
Omnicell



Daniel Gastel,
Head of Group
CIO Strategy
UBS



Matt Kaness,
Executive Director,
Strategy
Urban Outfitters



Steven Krawciw,
Director, Private Banking
Credit Suisse



John Coyle,
SVP, Innovation
Maddock Douglas



Jon Berlin,
Head of Strategy
Wells Fargo



Ann Neir,
Senior Manager,
Strategy & Planning
Cisco Systems



Mark Chussil,
Founder & CEO
**Advanced Competitive
Strategies**

the presentations...

Barry Margerum, Chief Strategy Officer, Plantronics



Smart Strategies for the Connected World

Mr. Margerum will talk about the intersection of communications technology, working styles, and changing workplace topologies. Today, the only constant in business communications and collaboration is change. Not only are there more devices, types of communications and varied information sources, but people are working in more places and in different ways than ever before. This means that the ways to approach the markets is rapidly changing and places ever-increasing demands on the corporate strategy to navigate these uncharted waters. With this background Mr. Margerum will talk about best practices of assessing markets, identifying the best market spaces, developing the corresponding strategy, setting goals for alignment and execution and developing the metrics for monitoring.



Barry Margerum is the Chief Strategy Officer for Plantronics, Inc., the leading supplier of communication devices that allow people to simply communicate. He is responsible for long range strategic vision and planning, new business development and new ventures. Previously he lead the company's initial efforts into the high growth mobile phone and PC markets, developing the market segmentation for the wireless office market and more recently developing its strategy for Unified Communications market. His career highlights include CEO positions at both private and public companies, where he was responsible for developing business strategies and the timely execution of them.

Tom Kindem, Director of Strategy, BAE Systems



Military Strategy and Implications for Business Strategy: The Battle of Gaugamela

BAE SYSTEMS

A brilliant military strategist, Alexander the Great created one of the largest empires of the ancient world. Despite repeated engagements against numerically superior forces, he was undefeated. At the battle of Gaugamela, Alexander and his 47,000 troops crushed Darius III's army of 100,000 -250,000. What lessons from his victory at Gaugamela can we apply to enhance our own strategies for business success?

Tom Kindem is a Director, Strategy and Planning at BAE Systems Inc., a \$17.9B U.S. defense contractor. Prior to his current role, he worked at Booz & Company as a strategy consultant for dozens of defense companies and government clients. Before that, he was a satellite engineer for Lockheed Martin. Mr. Kindem earned his MBA from The University of North Carolina, his BS in Aerospace Engineering from Virginia Tech, and was inducted into the relevant honor's fraternity at both institutions.

Roland Pan, Head of Strategy, Skype



Managing Disruption: Lessons From Skype



Many companies have to operate in an environment of extreme uncertainty and disruption, often while undergoing their own transformations in business process, technology, organization or governance. This situation presents unique challenges for the teams managing strategy and planning, and yet many are ill-equipped with tools to manage these issues. This presentation will offer participants a look at some of the processes, insights and frameworks that have helped Skype strategy navigate disruption at the intersection of communications and the internet.

Roland's strategic planning experience spans over six years. He currently leads strategy at Skype and is responsible for providing strategic planning and consultative services to Skype's senior leadership team.

Roland's prior strategic planning experience includes two years at Mars & Company where he led engagements with fortune 50 global consumer products clients and two years in the corporate strategy function of Ebay. Prior to this Roland was on the startup team of two successful software startups, DataSage (acquired by Vignette) and Delphi Technology where he held engineering and sales leadership roles. He is a graduate of MIT Engineering and Harvard's MBA program.

For more information, contact us at info@theiegroup.com



the presentations...

Dave Wolf, VP, Strategy, Cynergy



People are Strange

As Vice President of Strategy, Dave is responsible for driving thought leadership, vision and direction across each of Cynergy's divisions. An avid and engaging speaker, Dave frequently presents at industry-leading conferences worldwide, as well as to key press and analysts. In earlier lives, Dave held senior engineering and marketing management positions at major software corporations including Microsoft and Sybase. Officially based in Cynergy's headquarters in DC, he is often on the road more than he is in the District, espousing Cynergy's work, research and experience in designing and creating



We like to believe we are level headed, calculated, and rational people. Businesses like to believe we're level headed, calculated, and rational people. Architects, designers, and developers also like to believe we're levelheaded, calculated, and rational people. The truth is that in many ways, we're oddly irrational people who make decisions that don't fit into the view we have of ourselves. The good news is that more than irrational, we're predictably irrational. What makes that good? It means we can plan for it, which means we can design for it. How are we strange and how do you design entirely new experiences for your strange customers?

Mike Cooke, Partner, Booz & Co



CIO 2020

Mike Cooke is a distinguished Booz & Company Partner based in Chicago. He leads the firm's World-Class IT service offering and specializes in helping companies transform how they operate, while creating the capacity to invest in growth. His firsthand experience dealing with boardroom-level strategic initiatives has helped make him a trusted strategy advisor to C-suite executives and industry leaders. Mike has authored more than two dozen articles; his most recent piece: "Does the company CIO have a future?" was published in the Financial Times. Before joining Booz & Company, Mike worked at EDS and was a consultant for A.T. Kearney.



CIO 2020 looks at the transforming role of the CIO and how it will become, once again, one of the most pivotal roles in the C-Suite. This presentation will paint a picture of how this critical leadership position will drive business strategy and market leadership. It will provide practical guidance on how to evolve the strategic role of the CIO to capitalize on the wealth of information available to companies today. This is a topic every C-level executive will need to think about in the future – join Booz & Company Partner Mike Cooke to learn how your organization can gain a strong competitive advantage by rethinking the CIO function.

Dave McMurty, SVP, Strategy & Innovation, Habitat For Humanity International



Lessons from a Non-Profit Leader: Crowdsourcing Your Strategic Plan

Dave McMurty is an experienced Silicon Valley high tech executive, applying his passion for both technology and non-profits to Habitat for Humanity International where he is the Senior Vice President of Strategy and the executive sponsor of Habitat's 5-year strategic plan for the \$1.6B annual operation in 80+ countries. He spent the previous 15 years building technology companies, including Intuit, where he was the Director of Strategy/Mergers & Acquisitions when his team led acquisitions worth \$1.5Billion. He is a Sloan Fellow with a Masters in Business from Stanford University and a BS in Business Administration from California Polytechnic University San Luis Obispo.



Habitat for Humanity is a leader at leveraging volunteers to create real social change, and this unique approach to community building extends beyond just homes but also as a methodology for the creation of its 5-year strategic plan. We'll explore some unique ways that Habitat has crowdsourced this process, optimizing for innovation and creativity, and discuss which of these crowdsourcing ideas might be a good complement for your strategic planning process. Be prepared for an interactive conversation about how the 6th largest homebuilder in the US is attacking the problem of 1.6 BILLION people around the world living in sub-standard housing!

For more information, contact us at info@theiegroup.com



the presentations...

James Stikeleather, Chief Innovation Officer, Dell



Is Innovation the Only Strategy Left?

For more than 30 years, Jim Stikeleather has designed, developed and implemented award winning information and communications technologies that help businesses and institutions succeed. He has spoken and consulted internationally on digital infrastructures, evaluation of emerging technologies, and provided strategic guidance on their application to achieve business outcomes. He participates in international technology standards bodies, has multiple book and industry-article contributions to his credit and advises a number of technology incubators. Additionally, Jim holds two patents. Jim came to Dell via Perot Systems. Perot acquired a company he started, the Technical Resource Connection (TRC), in 1996.



Since before Sun Tzu and up until today, military strategy was dependent upon and constrained by Terrain. Likewise, business strategy leverages but is also bound by Economic Friction – scope, scale and reach. Technology has disrupted that in warfare, and likewise, with the Cloud, is disrupting that with the market. This session will explore how the Cloud changes the nature of business strategy, what innovation really is, how it can address the new strategic frame created by the Cloud, and how to innovate in a managed, sustained, repeatable manner.

Mark Achler, SVP, Strategy & Innovation, Redbox



Democratizing Entertainment, One Redbox Kiosk at a Time

As senior vice president of new business, strategy and innovation at Redbox, Mark Achler manages the Company's long-term planning and expansion into new business opportunities. Prior to joining Redbox in 2009, Achler co-founded one of the first personal computer retail stores in the country and participated in the launch of the IBM PC in Boca Raton in 1981. He then moved to Apple, where he was the worldwide introduction manager for the Apple. Achler is also a frequent speaker, resource and ardent champion for the entrepreneurial community; where he is a mentor for Excelerate Labs and the Chicago High Tech Academy.



Redbox revolutionized the entertainment industry ten years ago by democratizing access to movies with a simple, yet effective, business model: Give consumers convenient access to the hottest new releases at an incredible value. Today, Redbox kiosks are located within a 5-minute drive of 68 percent of the U.S. population and the company recently rented it's 2 billionth disc. Where does Redbox go from here? The industry-leading, fun and disruptive brand has established itself as a source for entertainment; what does the future hold by way of new entertainment in the box? The options are exciting and without fail, will deliver fun for consumers.

Todd Simpson, Chief Innovation Officer, Mozilla



Todd Simpson is the Chief of Innovation at Mozilla, the developers of the Firefox Web browser, where he is working with the Mozilla community to keep the Web open and accessible. Todd loves building products and businesses around leading edge technologies. He has founded, built, and run numerous companies. Call Genie went public in Canada, Worldplay Networks continues to push the boundaries of video, EZone Networks was sold to Clubcom, and Jasomi was sold to Ditech Networks, a Nasdaq company that Todd ended up running. Todd also led research and development efforts at QSound Labs and Zi Corporation. Todd lives hockey, loves the outdoors, and is enjoying life in Silicon Valley. He has a Ph.D. in Computer Science and has authored numerous patents and papers



the presentations...

Dan Gastel, Head of Group CIO Strategy, UBS



What Can We Learn From Ants?



Large scale corporate “change” programs involve collaboration and decision-making that is difficult to manage on a broad scale. Globalization compounds the problem by distributing the workforce and increasing variance in culture, language, and values. Traditional program structures aim to provide integration and alignment, but often prove unwieldy and break down at scale. The ideal program would federate work maximally but still maintain alignment to a central vision, strategy, and roadmap. Is there a better model for managing change at scale? Recent research into the behavior and decision making of certain insects suggests there might be. Ant, bee, and termite communities all make decisions of astounding complexity, communicate them effectively and align behaviors across thousands, even millions of members. What can we learn from them?

Daniel Gastel is head of Group CIO Strategy at UBS and has held similar positions at other major banks. He has helped structure and lead organization change programs in various industrial settings in both management and consulting assignments, in a career that spans nearly thirty years and began in software development. His interests include operations research, behavioral sciences, games theory, and macro-economics. He has a BA in Physics from Williams College and an MS in Computer Theory from New York University. He lives and works in New York City.

Gabe Vehovsky, EVP, Digital Strategy & Emerging Business, Discovery Communications



Entrepreneurship From Within: Innovation In a Large Organization



Entrepreneurship within a large organization, like Discovery Communications, can be challenging. In many cases, the most talented people in the organization are laser focused on specific business challenges, reaching predetermined milestones and staying on task to achieve related goals. In the process of managing those responsibilities, the typically circuitous path that leads to true innovation is often directly competitive with managing mature businesses. Contrast this with the culture of a healthy start-up where efforts are opportunistically focused, time is spent creating new value as opposed to nurturing existing value and pivoting plans are the norm rather than the exception.

Gabe Vehovsky - Executive Vice President, Digital Strategy & Emerging Businesses, Discovery Communications: As Executive Vice President, Digital Strategy & Emerging Businesses, Gabe Vehovsky is responsible for managing a carefully selected pipeline of new digital initiatives, working in conjunction with Discovery’s leadership. The Digital Strategy & Emerging Businesses team is part think tank and part product and partnership development with an entrepreneurially minded approach to identifying and nurturing business opportunities.

Steven Krawciw, Director, Private Banking, Credit Suisse



Planning In The Wealth Management Industry



Not long ago mutual funds were an innovation to stocks and bonds. The pace of change from regulation, technology, and demographics is such that clients of wealth management firms would not recognize their old firms today. Though people age, your strategy should not. This presentation will look through the lens of wealth management at topics such as blurring products lines, the importance of client experience, the tools to translate your value proposition into a meaningful client impact and achieving results through true collaboration.

Steven Krawciw is an executive at a top-tier global private bank. Over his career, Krawciw has managed private banking products and advised executives, heads of multinational companies, and government leaders while working for CIBC Wealth Management, McKinsey and Co., and Monitor Company. Among his most memorable past projects is facilitating infrastructure development of the then-nascent South African government of Nelson Mandela. Krawciw holds an MBA (Finance) from the Wharton School of the University of Pennsylvania and a Bachelor of Commerce with Distinction degree from the University of Calgary. He is co-author of Quant Investor’s Almanac 2011: A Road Map to Investing.

the schedule...

May 17 Day One

08.30 - 10.00	Session One
10.00 - 10.30	Coffee Break
10.30 - 12.00	Session Two
12.00 - 13.30	Lunch
13.30 - 15.00	Session Three
15.00 - 15.30	Coffee Break
15.30 - 17.00	Session Four
17.00 - 19.00	Networking Drinks

May 18 Day Two

08.30 - 10.00	Session One
10.00 - 10.30	Coffee Break
10.30 - 12.00	Session Two
12.00 - 13.30	Lunch
13.30 - 15.00	Session Three
15.00 - 15.30	Coffee Break
15.30 - 17.00	Session Four
	End of Summit



the information...

Chief Strategy Officer Summit

Date: May 17 & 18, 2012
Location: San Francisco, CA
Hotel: [Hyatt Regency](#)

Registration Pricing

Early Bird Price:

Silver Pass: \$1395
Gold Pass: \$1695
Diamond Pass: \$1895

Regular Price:

Silver Pass: \$1595
Gold Pass: \$1895
Diamond Pass: \$2095

Pass Descriptions:

Silver Pass: Access to all sessions & networking events

Gold Pass: Access to all sessions, networking events & annual subscription to IEG membership worth \$800

Diamond Pass: Access to all sessions, networking events, annual subscription to IEG membership & Strategic Analysis Report

Group Discount Offers

3 tickets: \$3600 (\$1200 per attendee)

5 tickets: \$5500 (\$1100 per attendee)

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Three Ways to Register

Phone +1 415 692 5514

Fax +1 323 446 7673

Website <http://strategy.theiegroup.com/cso-sanfrancisco/registration>

Before March 16th only:

Silver Pass - \$1395

Gold Pass - \$1695

Diamond Pass - \$1895

For registration or more information on the program, please call Sean on +1 415 692 5514, or fax this registration form to +1 (323) 446 7673

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Early Registration Gold Pass: \$1695 Attendees _____

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3 Tickets \$3600 (\$1200 Per Attendee)

5 Tickets \$5500 (\$1100 Per Attendee)

Prices are exclusive of VAT. Places are transferable without any charge to another Summit occurring within 12 months of the original purchase. Cancellations before April 20th, 2012 incur an administrative charge of 50%. If you cancel your registration after April 20th, 2012 you will be charged the full fee. You must notify IE Group in writing of a cancellation, or you will be charged the full fee. IE Group reserve the right to make changes to the program without notice. NB: FULL PAYMENT MUST BE RECEIVED BEFORE THE EVENT.

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Chief Strategy Officer Summit
April 26 & 27, 2012
London, UK

Chief Strategy Officer Summit
October, 2012
Hong Kong, HK

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