



SPA Strategy Seminar

FRIDAY, NOVEMBER 7, 2014

HYATT REGENCY O'HARE, CHICAGO, IL



Please come to SPA's upcoming Strategy Seminar to be held at the Hyatt Regency O'Hare, Chicago, IL on Friday, November 7, 2014. Equal parts strategy and practical tactics, the seminar addresses key topics that are particularly relevant in a recovering economy. This year's seminar brings together an outstanding group of industry experts to offer strategies on driving shareholder value. David Bauders of SPA, Dolores Bauders of SPA, Jonathan Bein of Real Result Marketing and Frank Hurtle of River Heights Consulting will lead presentations and best-practices panels with executives of leading manufacturing and distribution businesses. In addition, there will be a presentation by capital markets expert, David Hallett, of Lazard Middle Market LLC.

Strategic Pricing Associates

2701 Park Drive
Cleveland, OH 44120
216-455.1540
info@strategicpricing.com

Space is extremely limited for this event. It is not necessary to stay at the Hyatt, as there are many other fine hotels in the area

Participation in the seminar is free.

[Register Now](#)



LAZARD

To Register for This Free Seminar, please contact Sheri Morford at Sheri.Morford@strategicpricing.com or call at 216.455.1544.

Hotel reservations: Hyatt Regency O'Hare, Chicago, IL, Tel: 800.233.1234 www.ohare.hyatt.com Discounted Group Code is CR23130. Please note prices are subject to change based on hotel availability. **It is not necessary to stay at the Hyatt, as there are many other fine hotels in the area.**

About SPA: www.strategicpricing.com

SPA is the leading provider of pricing analytics and comprehensive process and sales force training to complex companies of all types: manufacturing, distribution, equipment, services, and software/technology products. Since 1993, we've built a strong platform of proprietary analytics and related process and sales training to quickly and efficiently help companies convert their own invoice data into pricing architectures that optimize their pricing performance and competitive position.



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Program Description

This big-picture seminar is focused on strategic topics of importance to the owners, CEOs, CFOs, and general managers of distribution and manufacturing companies. Experts will address the topics essential to accelerating the customer value proposition, competitive positioning and market value of any distribution or manufacturing business. The seminar addresses the strategic, analytical, process and cultural issues that are fundamental to maximizing shareholder value. The seminar will focus on the high-level, strategic and structural issues that are easily neglected in the hustle and bustle of daily business demands. It will help you to re-focus your organization on the drivers of economic value.

9:00 AM: Introduction - Driving Change That Matters in a Rebound Economy

David S. Bauders, President of SPA

Like never before, strategy, process excellence and analytics can set the stage for truly transformational gains in shareholder wealth. David will present the comprehensive platform that drives real wealth creation: customer value proposition, value-driving analytics and training, process design, change management and sales culture, and incentive systems. Companies that master this platform will enjoy faster growth, stronger customer relationships, market-leading profitability and superior capital markets opportunities.

9:15 AM: Presentation on Capital Markets: How to Maximize Enterprise Value

David Hallett, Managing Director, Lazard Middle Market LLC

How do best-in-class companies find ways to improve shareholder value in tough times? How do you maximize your company's valuation? What are the pivot points of acquisition success? Our expert will discuss the best capital markets opportunities, focusing on Market Review, Drivers of Valuations, and Capital Markets Opportunities

10:15 AM: BREAK

10:30 AM: Strategic Pricing in a Rebound Economy: Best Practices Panel

David Bauders, President, SPA, and principals of leading manufacturing and distribution companies

David will present the integrated, actionable program that drives sustainable improvements in pricing effectiveness. A panel of SPA clients will share best practices in driving pricing excellence and sales traction. Topics include:

- The Inflationary Challenge: Opportunities and Risks
- The SPA Pricing Cube™
- Pricing Flexibility with Discipline: SPA Pricing Bands™
- Advanced Pricing Analytics: Gold and Platinum
- Aligning Sales Force Incentives
- Best-Practices Pricing Processes



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12:00 PM: The SPA Pricing Cube Reporting Tool

Dolores Bauders, Chief Operating Officer of SPA

Dolores will present an overview of the new SPA Pricing Cube™ Reporting Tool. This new tool will offer executive dashboards with intuitive visual indicators of performance as well as drill downs to actionable detailed data. This exciting new web based tool will allow users to:

- Understand achieved and potential impact from The SPA Pricing Cube™
- Uncover missed opportunities and lost pricing dollars
- Rank pricing performance of Sales Reps, Order Writers, Branches, Vendors and Product Categories
- Understand and manage their Pricing Methods Mix
- Highlight trends as well as monitor and manage performance over time

12:30 PM: LUNCH

1:30 PM: Moderated Best Practices Panel Discussion:

Change Management and Sales Culture: Execution on the Drivers That Matter

Frank Hurtte, Founding Partner, River Heights Consulting; David Bauders, President, SPA; and principals of leading manufacturing and distribution companies

How do you drive real change in sales force culture? How do you break the cycle of undisciplined pricing, and build a sales process based on customer value? What specific categories should sales forces be measured, managed, coached and incented upon? What are the metrics that matter? How do you tie in the incentive system? Industry expert Frank Hurtte and David Bauders present a case study on change management and sales culture; and moderate a panel of manufacturing and distribution executives who have mastered this process.

- Fostering a sales culture focused on customer value
- Overcoming cultural baggage and driving behavioral change
- How to design a sales force measurement and compensation plan that truly drives wealth creation
- The key drivers that need to be measured; and the management review process that drives performance
- Restructuring to get the most from your compensation plan

2:30 PM: BREAK

2:45 PM: Sharpening Your Value Proposition for a Global Economy

Jonathan Bein, Managing Partner, Real Results Marketing

How do you increase your company's ability to drive customer value, and therefore shareholder value? How do you sharpen your company's competitive positioning and pricing leverage? How do you quantify and communicate customer value? Industry expert Jonathan Bein presents an overview and case studies on the development, validation, and execution of Customer Value initiatives.



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- The Key Questions in Customer Value
- The Process of Identifying Value Leverage Points
- Competitive Benchmarking
- Quantifying and Communicating Customer Value
- Prioritizing Value Creation Action Plans
- Integrating Vendors
- Implementation
- Exploiting Pricing Leverage

3:45 PM: Conclusion: Execution Excellence in a Rebound Economy

David S. Bauders, President, SPA

In the rebound economy, Best-in-Class companies will define and execute the programs that maximize enterprise value. These companies will strategically combine analytical tools, change management process excellence, sharpened customer value propositions, and information excellence to dramatically increase enterprise value. David discusses the integrated approach to winning.

4:00 PM: COCKTAIL HOUR



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ABOUT THE PRESENTERS

David S. Bauders, President, Strategic Pricing Associates, Inc.

David Bauders is President of Strategic Pricing Associates, a leading provider of pricing and business analytics; and related process and sales force training. SPA was founded in 1993, and since then has consulted to over 500 manufacturing and distribution businesses.

SPA's work has been extensively covered in the media, including the Wall Street Journal, MDM, Inside Business, Crain's, iMark, TED, and other industry publications.

SPA provides pricing analytics and related training to clients on all ERP platforms, and is the exclusive provider of pricing analytics to Epicor's Wholesale Distribution ERP platforms, which serve thousands of distributors.

David graduated with a BA from Oberlin College and an MBA from the University of Michigan.

Dolores Bauders, Chief Operating Officer, Strategic Pricing Associates, Inc.

Dolores Bauders is responsible for the daily operations of Strategic Pricing Associates and leads their technical and implementation teams.

Dolores has 20+ years of experience in data analysis and execution of information based systems and initiatives.

Prior to joining Strategic Pricing Associates, she worked for a Fortune 500 Manufacturer where she managed multiple departments and initiatives including Marketing & Executive Information Systems, Sales Force Automation and Strategic Pricing.

For over 10 years, Dolores has been focused primarily on strategic pricing and has personally worked with hundreds of distributors and manufacturers to improve their profitability through strategic pricing management.

Dolores has a BA in Marketing & International Business as well as an MBA in Management Information Systems.

Jonathan Bein, Managing Partner, Real Results Marketing

Jonathan Bein is Managing Partner of Real Results Marketing, a corporate strategy and execution firm. He is known for getting very good things done quickly rather than perfect things slowly. He has successfully led and been part of executive management for software product and services companies in information technology, healthcare, and communications. His recent work has focused on price optimization and economic value modeling.

Bein has been CEO of several companies including:

- SkyeTek - grew revenues and valuation four-fold of RFID manufacturer in seven months.
- IGS, Inc. - delivered 100 software solutions for companies such as AT&T, Comcast, Verizon, and Lucent.
- Bolder Heuristics, Inc. - achieved Inc 500 ranking with software services for telecommunications, healthcare, and IT.

Bein earned his Ph.D. in Computer Science at the University of Colorado with a focus in Data Intensive Expert Systems and a BA in Computer Science at Indiana University. He has published articles in database management, neural networks, information retrieval, expert systems, healthcare informatics and communications network management.



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David Hallett, Managing Partner, Lazard Middle Market

Mr. Hallett is in his 31st year of merger and acquisition transaction execution. He is a Managing Director in the Lazard Middle Market Industrials Group and leads its Transportation, Logistics & Distribution Practice. Mr. Hallett has advised a variety of transportation, logistics and distribution clients: NSC Minerals, a portfolio company of TriWest Capital Partners, on its sale to Wynnchurch Capital; ITS Technologies & Logistics, LLC on its sale to Carlyle Infrastructure Partners; Fleetgistics, a portfolio company of Atlantic Street Capital, on its sale to Harbour Group; SUPERVALU on its sale of Total Logistic Control to Ryder; and Active Aero Group, a portfolio company of Berkshire Partners and Greenbriar Equity, on its sale to Platinum Equity.

Mr. Hallett serves on the Advisory Boards of Marquette Capital Partners, a provider of mezzanine financing, and Solar Plastics, Inc., a rotational molder of a wide range of plastic products. He is on the Board of Directors of the American Automobile Association (AAA) Minneapolis and serves on its Finance & Investment Committee and Audit Committee (Chairman). He is a member of the St. Thomas Academy Board of Trustees and serves on its Finance and Investments Committee. Mr. Hallett is a member of the Mergers & Acquisitions Committee of the American Bar Association's Business Law Section.

Before beginning his career in investment banking in 1994, Mr. Hallett was a partner at Lindquist & Vennum, a Minneapolis-based law firm, where he spent approximately 10 years. He provided clients with legal counsel in the areas of corporate and tax law, including mergers and acquisitions.

New York University School of Law, *Master of Laws in Taxation*, **Gonzaga University School of Law**, *J.D.*, **University of Wyoming**, *B.S. in Accounting*.

Frank Hurtte, Founding Partner, River Heights Consulting

Frank Hurtte, the President and Founding Partner of River Heights Consulting packs a unique down to earth attitude and 28 years of in the trenches distribution experience. Since founding River Heights Consulting in 2005, Hurtte has worked with distributors and their partners on four continents. Hurtte has written three books around topics in distribution including the NAW Institute for Distribution Excellence's Offering – The Distributor Specialist: Customer Champion, Profit Generator. His work regularly appears in trade publications serving knowledge-based distribution channels. Frank also hosts a linked in group called "Target Driven Distributor Sales" which is dedicated to further refining the science of Target-based selling in Distributors.

Frank claims his universe revolves around five North Stars:

- Measuring Value – Understanding the value you provide to customer and vendor alike
- Getting paid for your Value – It costs more to do things right so you need to get paid for it
- Using a process in your sales effort – Process drives execution and efficiency
- Having fun and making money with my clients – There is no such thing as "too much fun"

Frank has over fifty free distributor resources at www.RiverHeightsConsulting.com