



## SPA Strategy Seminar

FRIDAY, JUNE 4, 2010

BELLAGIO HOTEL, LAS VEGAS NEVADA

### Strategic Pricing Associates

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Please come to SPA's upcoming Strategy Seminar, for owners and senior executives, to be held at the Bellagio Hotel, Las Vegas, Nevada, on Friday, June 4, 2010. Equal parts strategy and practical tactics, the seminar will address a broad cross-section of topics that are particularly relevant in these difficult times. This year's conference brings together an outstanding group of industry experts to offer strategies on managing in a tough economy. Tom Gale, Steve Deist, and Frank Hurte will lead best-practices presentations and panels with executives of leading distribution businesses; along with a distinguished panel of capital markets experts.

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

**Participation in this event will be free**



**To Register For This Free Seminar, please contact Sheri Morford** at [Sheri.Morford@strategicpricing.com](mailto:Sheri.Morford@strategicpricing.com) or call at 216.470.9748.

**Hotel reservations:** Bellagio Hotel, Las Vegas, Tel: 888.867.6667. [www.bellagio.com](http://www.bellagio.com). It is not necessary to stay at the Bellagio, and there are many other fine hotels in the area.

**About SPA:** [www.strategicpricing.com](http://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 to quickly and efficiently help companies convert their own invoice data into pricing architectures that optimize their pricing performance and competitive position. SPA has assisted hundreds of market-leading manufacturers and distributors. Our typical client applies our pricing architecture and improves profitability by two to four percent of affected sales: \$2 to \$4 million per \$100 million of affected revenue. The benefits are staggering; and they are typically accomplished in less than 90 days.



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Available only to owners and senior executives of distribution and manufacturing companies, the seminar will help you accelerate the value of your business in the marketplace and to shareholders. 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.

### 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.

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#### 8:00 am: Introduction: Driving Change That Matters in a Rebound Economy

##### David S. Bauders, President, SPA

Like never before, 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: value-driving analytics, process design, culture and training, and incentive systems. Companies that master this platform will enjoy faster growth, stronger customer relationships, market-leading profitability and superior capital markets opportunities.

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#### 8:10 am: Market Trends In The Current Economic Environment

##### Tom Gale, Publisher, Modern Distribution Management

Tom will present an overview of how the current and near-term economy is affecting industry; the changes that are required; and the approaches that are working

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#### 8:40 am: Rebound Strategy: The Pieces that Matter

##### Frank Hurtte, River Heights Consulting

Frank will discuss the most valuable components of Rebound Strategy

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#### 9:00 am: Driving Profitable Growth: Sales Force Planning That Matters

##### Steve Deist, Managing Partner, Indian River Consulting

*What five things should I drive in my sales force? 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?* Steve will discuss the following:

- Identifying the Drivers That Matter
- Performance by Design
- Incentives and Measurement
- Culture, Training, Coaching and Mentoring



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**10:00 AM: BREAK**

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**Moderated Panel Discussion:**

**10:15 am: Case Studies In Best Practices In Sales Force Traction**

**Steve Deist; and Frank Hurtt, River Heights Consulting**

**Dick Braun, Parker Hannifin; and Tim McCarthy, Rockwell Automation**

Industry experts Frank Hurtt and Steve Deist, along with operational leaders discuss how best-in-class companies drive execution around Strategic Pricing in a tough economic environment:

- Leadership in Action
- Sales Culture
- Lessons from the Trenches

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**11:00 am: Strategic Pricing Tools for Sales Force Execution**

**David Bauders, President, SPA**

David will discuss the integrated, actionable program that drives sustainable improvements in sales force pricing effectiveness:

- The SPA Pricing Cube™
- Flexibility with Discipline: SPA Pricing Bands™
- Aligning Sales Force Incentives
- Sales Force Culture & Training
- Best-Practices Pricing Processes
- Strategic Pricing Principles Applied in a Tough Economy

**12:00 PM: LUNCH**



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## 1:00 pm: The 2% Solution: Strategic Pricing In The Enterprise System

**Russ Mellott, VP; Activant Solutions**

Russ will present the IT foundation of Strategic Pricing success:

- An overview of the Activant-SPA Strategic Pricing Module
- How to lock down the gains from Strategic Pricing
- The Economics of 2%: How to Make Your Enterprise System a For-Profit Engine

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## 1:45 pm: Moderated Panel Discussion:

### The Strategic Pricing Journey: Execution Excellence

**Frank Hurtt and David Bauders**

**Mike Smith, COO, OneSource; John Wiborg, CEO, Stellar Industrial**

How do best-in-class companies succeed at defining and executing against pricing initiatives? How do they combine the vision and follow-through to master complex change-management? Our expert panel will discuss best-practices approaches to achieving implementation excellence:

- What are the key change-management issues that must be tackled?
- How does a company's culture support or hinder execution?
- How do you build a process with **discipline and flexibility**?
- How do you measure success and sustain the gains?
- What is Strategic Pricing worth in your business?

**2:30 PM: BREAK**



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### **2:45 pm: Moderated Panel Discussion: Capital Markets Trends In Distribution**

**Jim Hill, Executive Chair, Benesch, Moderator; Jon Skelly, Vetus Partners**

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 panel discusses the best capital markets opportunities now:

- Market Review
- Drivers of valuation
- Transactional Strategies and Capital Structure in Today's Market
- How to Prepare for Capital Market Opportunities
- Succession Planning Issues and Exit Strategies

### **4:45 PM: COCKTAILS**



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### ABOUT THE PANELISTS

#### **David S. Bauders, President, SPA**

David Bauders is President of SPA, a leading provider of pricing and business analytics; and related process and sales force training. David founded SPA in 1993, and since then has consulted to hundreds of leading manufacturers and distributors.

SPA has consulted to market leaders in a variety of industries, including:

- ExxonMobil, GE, Parker Hannifin, Rockwell Automation, Mitsubishi/Caterpillar, Pella, St. Gobain, Imperial Chemical Industries Ltd. (ICI), Dover Corporation, Newell Rubbermaid, and other leading manufacturers
- Grainger, ThermoFisher Scientific, Industrial Distribution Group, Famous Supply, Boundtree Medical, Embarq, Finning Caterpillar, OneSource Distributors, Windward Petroleum, Petroliance, and other leading distributors

SPA is the exclusive provider of pricing analytics to Activant Solutions' Wholesale Distribution ERP platforms, which serve thousands of distributors.

#### **Frank Hurtte, President, River Heights Consulting**

Frank E. Hurtte Jr., founder of River Heights Consulting, brings 28 years of distribution industry experience and a lifetime in sales. Frank grew up in a family owned business where he was selling car and truck tires wholesale before he turned 14. During his career, Frank has gone through nearly every aspect of the wholesale business. He served as manager of a rapidly growing start-up location, ran a cluster of branches where he worked to develop future leaders and was called on to build a winning team after the merger of two companies with dissimilar cultures. Frank successfully established sales strategies in emerging markets and coordinated the efforts of a diverse group of product managers to establish a corporate-wide blueprint for success. In his role as VP Technical Sales, Frank developed and implemented a model for tracking and measuring the value-adds provided to customers.

After graduating from the University of Illinois with a degree in Computer Engineering, Frank decided to pursue a career in the business side of Automation. After joining the Allen-Bradley (now Rockwell Automation) Engineering Training Program, Frank served in Sales Management roles supporting distributor efforts. In 1991 Frank joined Van Meter Industrial first as Branch Manager/VP and then as full time Vice President of Technology.



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### **Steve Deist, Managing Director, Indian River Consulting Group**

Steve Deist has over 20 years of experience in the wholesale distribution and supply chain arenas. Steve is co-author of the new NAW sales management bible *The Five Fundamentals for the Wholesale Distribution Sales Manager*. He is a highly rated speaker, an instructor at the University of Industrial Distribution and a distribution company board director.

Steve is IRCG's strategic planning specialist and manages the firm's channel consulting projects for manufacturers who sell through distribution. He advises strategic buyers and private equity groups on investments in the distribution space. By applying his process skills and industry knowledge, Steve has helped hundreds of companies achieve lasting competitive advantage.

At IRCG, Steve has managed large-scale consulting projects in areas including marketing, channel design, strategy, sales management and information technology. He led the design of IRCG's ground-breaking Sales Effectiveness Process. He has helped distributors and manufacturers become class leaders in operational efficiency and customer service. Steve's thought provoking articles appear frequently in premier industry publications such as *Progressive Distributor* and *Modern Distribution Management*.

### **Tom Gale, Publisher, Modern Distribution Management:**

Tom Gale is president of Gale Media, Inc., publisher of *Modern Distribution Management*, a specialized information service for wholesale distribution executives. Content focuses on industry-specific strategy, operational best practice, M&A activity and trend analysis.

### **Jim Hill, Executive Chair, Benesch**

Jim Hill is the Executive Chairman of Benesch, Chair of the firm's Private Equity Group and an active and practicing member of its Corporate and Securities Practice Group. Mr. Hill also served as Benesch's Managing Partner from 1999-2007 and is a member of the firm's Executive Committee. He focuses his active practice on publicly and privately held growth companies in addition to representing mezzanine finance providers and equity participants. He primarily handles mergers and acquisitions, public and private offerings of equity, and public and private offerings of debt. Mr. Hill was again selected by his peers for inclusion in *The Best Lawyers in America*® 2009 (Copyright 2009 by Woodward/White, Inc., of Aiken, SC). Mr. Hill has published numerous articles and has been a keynote speaker on the subjects of mergers and acquisitions and dealing with the formation and ongoing operations of private equity funds and their subsequent acquisitions and dispositions of portfolio companies.

### **Frank Heenan, Director of Product Management and Marketing, Activant Solutions**

**Frank Heenan** has been with Activant for over 10 years. Responsible for the setting the direction of the more than 10 products Activant offers distributors, Frank works closely with distributors to discover what features and functionality will help them prosper well into the future.



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### **Jon Skelly, Vetus Partners**

Jon Skelly is a skilled M&A and capital markets professional with corporate development and investment banking experience. He has transaction experience with public, private, and private equity owned companies. Previously Jon served as Director of Strategic Business Development for the HD Supply subsidiary of The Home Depot with responsibilities for completing strategic acquisitions in the wholesale distribution industry. Prior to The Home Depot, Jon served as Director of Mergers & Acquisitions for Hughes Supply, Inc with responsibilities for strategic acquisitions and divestitures across all businesses within Hughes Supply's wholesale distribution portfolio. While at The Home Depot and Hughes Supply, Jon completed acquisitions and divestitures with over \$4.0 billion in total transaction value. Prior to Hughes Supply, he served as an investment banker with Robert W. Baird & Co. with a focus on the wholesale distribution industry. Transaction work included buy-side and sell-side M&A advisory, initial public offerings, secondary offerings, PIPE offerings and fairness opinions.