



# INSiGHT 2017

## Attendee Business Case

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# INSiGHT

## Topic Highlights

**INSIGHT 2017 is a balanced mix of networking events, plenary sessions, and industry and product focused breakout sessions. Attendees will learn about:**

- Strategies that led companies like Nintendo and Lawrence Merchandising to become some of Target's preferred partners
- Strategies used by retailers such as Petco to keep their brick-and-mortar stores competitive with the help of experiential marketing in an ever growing online market
- Best practices to leverage Natural Insight to enhance competitive advantages
- How to use integrated retail execution technology stacks to grow and stay ahead in a competitive market
- How companies such as Lego Systems, Inc. and Lindt & Sprungli Chocolate align field execution strategies to meet the needs of field teams to drive sales

# INSIGHT Speakers



**David Katz**  
EVP, CMO  
Randa Accesories



**Stefan Midford**  
President & CEO  
Natural Insight



**Jerry Wensack**  
CIO  
The InStore Group



**Shelly Connelly**  
Director, Petco Experience  
PETCO



**Aaron Sims**  
Senior Director  
Lindt & Sprüngli Chocolate



**Chris Herb**  
Director, National  
Merchandising  
Lego Systems



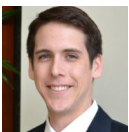
**Karen Mendoza**  
SMR Operations Manager  
Nintendo



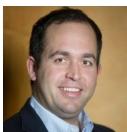
**Bill Sherman**  
Senior Director,  
Workforce Management  
Lawrence Merchandising



**Cattie Dos Santos**  
HR Technology Manager  
Match Marketing Group



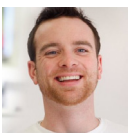
**Ryan Canto**  
Account Manager  
Natural Insight



**Rob Morton**  
Director Business  
Development  
CTL Global



**Rick Sterrett**  
VP of Operations  
Natural Insight



**Jon Herbert**  
Account Manager  
Natural Insight



**Eric Pfleckl**  
VP of Technology  
Natural Insight



**Andrew Baldwin**  
VP, In-Store Demonstration  
Blue Buffalo Co



**Megan Overton**  
Head of Product, SMB  
Snagajob

The logo for INSIGHT, with 'INSi' in black and 'GHT' in blue.

# Why attend INSIGHT 2017?

## Executives:

- Get strategic insight from top level executives from merchandising and marketing agencies, product companies, and retailers during our industry track sessions
- Learn about Natural Insight strategic vision to enhance its support to the retail execution industry
- Network with top executives from peers and partner companies

## Administrators of Natural Insight:

- Learn about best practices to realize efficiency gains using Natural Insight during our Natural Insight track sessions
- Network with peers and other Natural Insight users and build long-lasting connections to keep exchanging best practices over time
- Learn about the Natural Insight 2017-2018 roadmap and understand how it will create new possibilities



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# Why attend INSIGHT 2017?

## Merchandising and Experiential companies:

- Learn about the top execution strategies of brands, product companies and retailers in 2017
- Enhance your field team by learning about successful recruiting strategies
- Discover best practices to leverage Natural Insight in order to gain operational efficiencies and generate new business

## Retailers:

- Learn about key innovations in the retail execution staffing world to better understand and evaluate your partners
- Optimize performance of brick-and-mortar stores and compete with online sales by learning new strategies
- Gain insight into best practices to collaborate with brands and vendors to increase in-store sales
- Review the best ways to leverage Natural Insight to gain operational efficiencies during our Natural Insight track sessions





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# Why attend INSIGHT 2017?

## For Brands and Product companies:

- Become smarter about choosing the right partners for programs through learning about key innovations in the retail execution staffing world
- Gain insight into best practices to better collaborate with Retailers, Staffing and Marketing agencies to improve field execution and increase in-store sales
- Learn about Natural Insight best practices to gain operational efficiencies during our Natural Insight track sessions



# INSiGHT Agenda

## Monday, April 10 2017

**Check - in**

**4:00 pm - 6:30 pm**

**Welcome Reception**

**6:00 pm - 7:30 pm**

**Date** April 10th, 2017

**Location** Kennedy Ballroom

## Tuesday, April 11 2017

**Topic** Welcome Address

**9:00 am - 9:15 am**

**Location** Kennedy Room

**Type** General Session

**Presenters** Stefan Midford, CEO, Natural Insight

Natural Insight's President & CEO, Stefan Midford, will officially kick off IN-SIGHT 2017 and introduce all our speakers and sessions for the event.

**Topic** Keynote : Disruption is the Mother of Invention

**9:15 am - 10:00 am**

**Location** Kennedy Ballroom

**Type** General Session

**Presenters** David J. Katz, EVP, CMO, Randa Accessories

The retail industry is undergoing fundamental disruption from all directions. Disruption is both inevitable and essential. Just as forest fires create a space for new growth so does retail disruption create opportunities for new business models. Big data, big retailers, and big changes in consumer behavior create a growing need to engage consumers in new ways and in real time.



# INSiGHT Agenda

## Topic How to Become a Retailer's Favorite Brand?

10:15 am - 10:55 am

**Location** Potomac Suite

**Type** Breakout Session

**Presenters** Karen Mendoza, Operations Manager, Nintendo of America  
Bill Sherman, Sr. Director of Workforce Management, Lawrence Merchandising

In this session, Karen Mendoza, NMI Operations Manager at Nintendo of America and Bill Sherman, Senior Director of Workforce Management at Lawrence Merchandising will discuss how they use innovative strategies and retail execution best practices to build strong relationships with the country's top retailers.

You will learn about:

- Tactics that led both Lawrence Merchandising and Nintendo to join the list of Target's preferred vendors
- How strong partnerships with retailers can drive increased sales
- Top field execution elements that influence retailers satisfaction

## Topic How to use Natural Insight for Fulfillment

10:15 am - 10:55 am

**Location** Lindens Suite

**Type** Breakout Session

**Presenters** Rob Morton, Director of Business Development, CTL Global  
Ryan Canto, Account Manager at Natural Insight

To deliver perfect execution, all materials need to be shipped to retail locations at the right time. Materials such as displays, tasting ingredients, and work supplies need to be in-store when field employees arrive to complete work. Rob Morton, Director of Business Development, CTL Global, and Ryan Canto, Account Manager at Natural Insight, will explain how to use Natural Insight's Full-Service Fulfillment solution to expedite and track fulfillment shipping based on accepted assignments.





# INSiGHT Agenda

**Topic** Integrated field execution stack: Make best-in-class platforms work together to deliver outstanding results 9:15 am - 10:00 am

**Location** Potomac Suite

**Type** Breakout Session

**Presenters** Jerry Wansack, CIO, The InStore Group

In this breakout session, Jerry Wansack, CIO at the Instore Group, will explore best practices for integrated technologies to deliver best-in-class results. Jerry will share some of the most efficient ways to make the best of your technology stacks, from using Natural Insight and POS technologies to optimize fulfillment to integrating multiple data sources to get better insights about field and retail execution.

**Topic** Build It with the End in Mind: Structuring Surveys for Better Reporting 11:00 am - 11:40 am

**Location** Lindens Suite

**Type** Breakout Session

**Presenters** Jon Herbert, Account Manager, Natural Insight

With the release of Reveal Analytics, it is now easier than ever to build powerful reports and get insights in seconds. We will take a deeper look at the data collected by our customers and subsequent reports built around brands, retailers, merchandisers and experiential data. In this session, Jon Herbert, Account Manager at Natural Insight, will share best practices to get better insights and reports from the field.

In this session, you will learn:

- How to structure questions to get better data sets
- How to streamline questions to get consistent and comparable responses
- What pictures to request for verification based on types of projects
- How to use Reveal Analytics to uncover trends relevant your business



# INSiGHT Agenda

**Topic** A Look Back and a Look Ahead

1:00 pm - 1:45 pm

**Location** Kenedy Ballroom

**Type** General Session

**Presenters** Stefan Midford, President & CEO, Natural Insight

As the role of brick-and-mortar continues to be re-shaped, players of the retail execution industry will need to be more innovative, forward-thinking, and versatile to stay ahead of the game. Fast access to complete data sets and advanced reporting is critical to improving field execution and driving increased sales. Taking advantage of the millions of data points already captured daily in the retail execution space can generate significant competitive advantages.

Stefan Midford, President and CEO at Natural Insight, will present the Natural Insight vision for a more inclusive, integrated, and automated access to field data will allow the brick-and-mortar and execution space to catch up to the data proficiency of the online retail space.

He will also highlight how Natural Insight's recent releases, including Capture, Reveal Analytics, and Workforce Health, can play into the development of retail execution of the future.

**Topic** 2017 Roadmap - Innovation for All

2:00 pm - 2:45 pm

**Location** Kennedy Room

**Type** General Session

**Presenters** Rick Sterrett, VP of Operations, Natural Insight  
Eric Pfleck, VP of Technology, Natural Insight

The session will cover product enhancement and development plans for the Natural Insight platform for 2017 and early 2018, and it will describe significant additions to the Natural Insight Workforce Health initiative, Reveal Analytics, and other core functions.

The session will also explore planned changes to the cloud infrastructure on which the Natural Insight platform performs. Finally, the session will provide a glimpse into new business areas that Natural Insight is exploring in order to provide more business value to its customers.





# INSiGHT Agenda

**Topic** Take Your Recruiting Up a Notch: Find the Right People, Faster 3:00 pm - 3:45 pm

**Location** Potomac Suite

**Type** Breakout Session

**Presenters** Catherine Dos Santos, HR Technology Manager, Match Marketing Group  
Viyas Sundaram, Chief Revenue Officer, Snagajob

Effective staffing strategies are requisite to successful retail execution.

Adjusting for seasonality, sudden increases in workload, location specificities, and controlling for quality can be challenging. In this panel session, Catherine Dos Santos, HR Technology Manager at Match Marketing Group, and Megan Overton, Head of Product, SMB at Snagajob, will discuss strategies to match workload to merchandising workforce.

They will discuss strategies and tactics around:

- Hiring a large, on-demand workforce
- Balancing application volumes with quality of candidates
- Developing realistic budgets
- Adjusting for specificities of some locations, regions, and countries
- Leveraging different channels to find and recruit talent
- Re-engaging past hires
- Staying competitive in the uberized workforce market



# INSiGHT Agenda

**Topic** Is Your Workforce in Good Health? Use Natural Insight to Build a Team of a Players

4:00 pm - 4:45 pm

**Location** Lindens Suite

**Type** Breakout Session

**Presenters** Rick Sterett, VP of Operations, Natural Insight

With the release of Workforce Health, it is easier than ever to select the right people for the right jobs.

Each worker in Natural Insight is assigned a 1-to-5 star rating based on their past assignments and work performance. The algorithm used by Natural Insight includes Activity, Reliability, Quality, and Exceptions.

In this session, you will learn how to:

- Promote work to high performing workers
- Understand your worker engagement rate
- Understand your workforce health and compare yourself to peers
- Develop techniques to improve overall staff rating
- Use workforce health ratings to improve staff engagement

**Flagship Dinner**

7:00 pm - 9:00 pm

**Date** April 11th, 2017

**Location** Colonnade Room





# INSiGHT Agenda

Wednesday, April 12 2017

**Topic** Achieving Field Execution Nirvana

9:00 am - 10:00 am

**Location** Potomac Suite

**Type** Breakout Session

**Presenters** Aaron Sims, Senior Director, Lindt & Sprüngli Chocolate  
Chris Herb, former Director, LEGO Systems Inc.

Achieving excellence in execution demands carefully aligning the needs of the teams developing in-store strategies and the needs of the field team that will ultimately execute in-store. In this interactive presentation, Chris Herb, former Director at LEGO Group and Aaron Sims, Senior Director of Lindt & Sprungli Chocolate will propose a framework on aligning field strategies to execution.

In the second part of the session, the floor will be opened to the audience to share their thoughts around:

- Similarities and differences with their processes across channels and industries
- Key considerations, techniques & takeaways to implement in your own upcoming projects

**Topic** The Art of Making Everybody Win: How to Boost Sales by Working Together

10:15 am - 11:15 am

**Location** Potomac Suite

**Type** Breakout Session

**Presenters** Shelly Connelly, Director of Demo & Sample Program, PETCO  
Andrew Baldwin, Vice President, In-Store Demonstrations, Blue Buffalo

In this Session, Shelly Connelly, Director, Petco Experience will discuss how Petco works together with vendors to develop strategies that enhance the in-store experience, as a way to differentiate the pet specialty shopping experience from online and other non-pet specialty retailers. Shelly will also be joined by Andrew Baldwin, Vice President, In Store Demonstrations at Blue Buffalo Company for a panel discussion.

You will learn:

- How Petco leverages experiential marketing strategies to drive sales and foster loyalty
- How Petco works with their vendors to drive sales and build additional value for specific brands



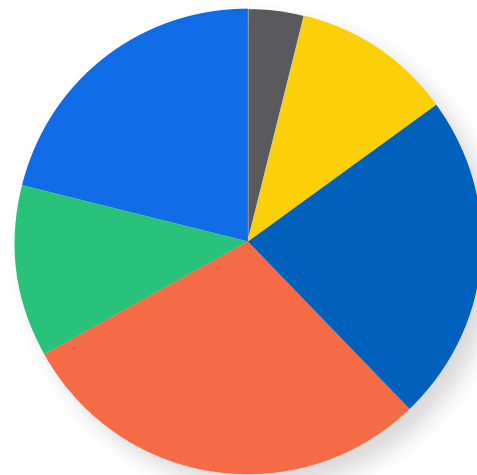
# INSiGHT Attendees

## Companies

ActionLink  
Ascension Retail Consulting  
Blackhawk Network  
Blue Buffalo  
CACI Limited  
CTL  
Ex-Sell Sales and Merchandising  
Lawrence Merchandising  
LEGO Systems  
Lindt & Sprüngli Chocolate  
Market Connect Group (MCG)  
MarketSource  
Match Marketing Group  
Nintendo  
Nulo  
Petco  
Randa Accessories  
RGIS  
Signature Retail Services

Snagajob  
The InStore Group  
Waks Studio  
WIS International

## Attendees By Job Titles



■ 4% Analyst      ■ 12% Other  
■ 11% C Level Executive      ■ 21% VP  
■ 23% Director  
■ 29% Manager