



**INFORMS Roundtable Winter Meeting Agenda
February 27-28, 2011
Westin Verasa Napa
Napa, California
(707) 257-1800**

THEME: “Managing an OR Team”

Sunday, February 27

2:00 PM Outing: Robert Mondavi Winery Tour

Tour participants will assemble in the hotel lobby at 1:50 PM and will depart at approximately 2:00 PM. Evans Transport will provide shuttle service for Roundtable members. The tour will last 1.5 hours and includes tasting of three wines in a private tasting room. All tour participants must be 21 or older (by California Law).

In 1966, Robert G. Mondavi founded the Robert Mondavi Winery to create wines in California that belong in the company of the world's finest. The winery has embodied the Robert Mondavi family's commitment to excellence, innovation and the production of distinctive wines that define the very best of Napa Valley.

Robert Mondavi Winery is located in the heart of Napa Valley, California. The first major winery built in Napa Valley in the post-Prohibition era, Robert Mondavi Winery helped establish the foundation for the modern-day California wine business. Its mission-style architecture, with the expansive archway and bell tower designed by Cliff May, has become an enduring landmark that evokes California's winemaking history.

The Robert Mondavi Winery is recognized nationally and internationally as a leader in the wine industry. From the introduction of cold fermentation in stainless steel tanks and the use of French oak barrels in the late 1960's, to collaboration with NASA using aerial imaging to understand the health and vigor of the vines in the 1990's, the Robert Mondavi Winery has always been at the forefront of wine industry technology. Their innovations, such as gentle winemaking techniques to increase wine quality and natural farming to protect people and the environment, have led to fundamental changes in the industry's approach to winegrowing.

5:30 PM Reception

Amphora A

6:30 PM Roundtable Meeting Kickoff

Amphora B

Barbara Insel, President & CEO, Stonebridge Research

Abstract: Barbara will provide an overview of the business of wine, the changing structure of the market, demand, supply, pricing and the key challenges facing vintners in today's turbulent environment.

Barbara Insel was previously Managing Director, MKF Research LLC, having built that organization from a primarily single product research publishing operation to a widely respected advisor on all phases of the wine business. She is a member of the Market Development Task Force of the Wine Institute, the Planning Committee (and marketing co-chair) for the Unified Wine and Grape Symposium and the Steering Committee for 40th Anniversary of the Napa Agricultural Preserve and was formerly a Board member of the Napa Valley Economic Development Corporation.

Barbara is a leading speaker on the business of wine. She has been a featured speaker at the Unified Wine and Grape Symposium, the Free the Grapes Symposium, Viticulture 2007 and meetings of Napa Valley Vintners, the Wine Institute, California Association of Winegrape Growers, the National Association for Business Economics, Family Winemakers of California and numerous regional, national and international organizations. In addition to publishing in Wine Business Monthly, Business Economics and Foreign Affairs and contributing key articles to the forthcoming Encyclopedia of the Business of Wine, Ms. Insel has also been appeared on the Fox Business Network and NBC-11 and been quoted in a variety of media including the Wall Street Journal, the San Francisco Chronicle, Bloomberg, the Sacramento Bee, the Santa Rosa Press Democrat, the Associated Press and the Baltimore Sun. Having taught for several years at the University of California, Davis Wine Marketing Course, Ms. Insel is now a regular contributor to the Wine Business course at the Culinary Institute of America. Barbara has led key projects for the Wine Institute, the Napa Valley Vintners, the San Luis Obispo Economic Vitality Corporation, the New York Wine and Grape Foundation, Wine America and Family Winemakers of California, among others, as well as numerous individual businesses and investors in the industry.

Ms. Insel spent more than twenty years in international investment and finance and related research, having held senior positions at Salomon Brothers, Morgan Stanley Asset Management and Kleinwort Benson. Throughout her career, Barbara has been involved in wine-related investments and transactions from Latin America to Eastern Europe's wineries and vineyards. Originally from New York, she has worked there, London, Prague and Moscow. She was one of the founding staff of the European Bank for Reconstruction and Development, created to rebuild Eastern Europe and Russia after the fall of the Soviet Union. Early in her career she worked on financial institution restructuring and privatization with the World Bank and then became an International Affairs Fellow at the Council on Foreign Relations.

Barbara's education includes a BA from Barnard College, an MA in Economics from Brown University and an MBA from Stanford's Graduate School of Business.

Monday, February 28

7:00 AM Continental Breakfast Amphora A

8:00 AM Further Roundtable Introductions and Orientation Amphora B

8:30 AM Session 1: 'Managing an OR Team' Survey Results Amphora B

Brian Lewis, VP, Professional Services, Vanguard Software
Colin Kessinger, President, End-to-End Analytics

To set the stage for the meeting, this talk will present the results of the 'Managing an OR Team' member survey. We will discuss "the good, the bad, and the ugly" ways in which the Roundtable member companies manage their OR and analytics teams.

9:30 AM Session 2: Protecting Analytics – An Overview of Intellectual Property and Contract Law for Operations Research Organizations

Amphora B

Dan Reaume, PhD, PE, Esq, Staff Researcher, General Motors

Abstract: Different types of intellectual property protection -- patent, copyright, trademark, and trade secret -- vary significantly in usefulness by product, firm, and business model. For example, a small firm using OR techniques internally may wish to pursue a quite different strategy than a large firm selling OR-related products or consulting services. This talk first covers the types of intellectual property, the rights they protect, and the requirements for obtaining protection. It also addresses the key tradeoffs involved when deciding whether to pursue a given form of protection. The second part of this talk addresses the contractual transfer of intellectual property rights. In particular, it clarifies the fundamental differences between a non-exclusive license, an exclusive license, and an assignment of intellectual property. Finally, this talk briefly addresses current developments in intellectual property law that directly impact the OR community.

Dan Reaume's professional interests focus on integrating analytics with innovation in a business environment. He undertook his undergraduate studies in Mathematics and Computer Science as a Fessenden-Trott scholar at the University of Windsor. As both an NSERC 1967 and Rackham fellow, he then pursued graduate studies in Industrial and Operations Engineering at the University of Michigan for which he received his Ph.D. for work on randomized optimization methods. He later earned a master's degree in Technology Management from the University of Waterloo. Most recently, he graduated summa cum laude from the Thomas M. Cooley law school with a focus on Intellectual Property Law and Litigation. Dan is a licensed professional engineer and attorney in the state of Michigan.

Since receiving his Ph.D., Dan has worked for General Motors Research and Development on a wide variety of operations-research-related projects. He is a three-time recipient of GM's Charles L. McCuen award for extraordinary technical accomplishment for his work on spreadsheet visualization, maintenance planning, and revenue management. The latter two projects also earned the Boss Kettering Award, GM's most prestigious award for innovation. Dan is also an adjunct assistant professor at the University of Michigan, where he has taught classes in data processing, financial analysis, and product development and now leads the senior design practicum in Industrial and Operations Engineering

10:30 AM Break

Amphora A

11:00AM Session 3: Analytics in the Supply Chain – Creating a Competitive Advantage

Amphora B

Lance Solomon, Director, Analytics, Logitech

Abstract: It is nearly impossible to manufacture the right product, ship it to the right customer and at the lowest cost without ability to collect and leverage data within the supply chain. Advanced Analytics and Operations Research techniques are now commonly used in most supply chain operations and most large corporations have dedicated analytics teams throughout the organization. In order to get the most out of your analytical efforts, it is important to have a solid organizational foundation that complements the team's analytical capabilities. This includes everything from making sure that the team focuses on the right problems to creating appropriate career paths for analytical team members. Lance Solomon will present tips, strategies and considerations for leading highly successful analytical teams.

Lance Solomon is the Director of Supply Chain Analytics at Logitech where he manages analytics focusing on inventory planning, sales and operations planning and supply planning. Prior Logitech, Mr. Solomon managed analytics and decision support teams at both Cisco and Intel focusing on a variety of problems including: supply chain risk management, inventory planning, factory scheduling, equipment optimization and capacity planning. Mr. Solomon has over 15 years of experience applying simulation, math optimization and other analytical techniques in the high tech supply chain. Mr. Solomon holds a Master's degree in Operations Research from The University of Texas in Austin, Tx. and a Bachelor of Science degree in Mathematics from the Pennsylvania State University, State College, PA.

12:00 PM Lunch Buffet

Amphora A

1:00 PM Session 4: U.S. Army Analysis – The World's Largest OR Program

Amphora B

Michael Bauman, Director, U.S. Army TRADOC Analysis Center

Abstract: The U.S. Army maintains a significant operations research (OR) capability, perhaps the largest in the world. It is unlike any other in the Department of Defense (DOD). This capability is widely distributed to support decisions throughout the Army's functional enterprises (technology, acquisition, logistics, networks, intelligence, programming and budgeting, etc.) and at all levels of the Army, for both the Generating Forces and the Operating Forces deployed around the world. The intellectual capital making up this capability includes military officers qualified in Functional Area 49, Operations Research/Systems Analysis (ORSA) and civilians in Series 1515 Operations Research Analyst (ORA). This presentation will describe the Army's OR program, the decision points it serves, its organization and make-up, how it is managed and sustained, career management of military and civilian analysts, and the key challenges facing the Army to sustain its viability and relevance to Army decision-making.

Michael Bauman serves as the Director of the TRADOC Analysis Center (TRAC), headquartered at Fort Leavenworth, Kansas. He leads the program of military operations research and analysis that informs vital decisions about new concepts and capabilities for the

Army's Operating Force in current and future operations. Mr. Bauman was appointed to SES in 1988 and assigned as the Deputy of TRAC until his promotion to Director in 1993.

CAREER CHRONOLOGY:

- 1988 – Present: Deputy, then Director of TRAC.
- 1983 – 1988: Technical Director, Studies & Analysis, Headquarters, TRADOC, Fort Monroe, VA.
- 1981 – 1983: Staff Analyst, Office of the Secretary of Defense (Manpower, Research Affairs, and Logistics), The Pentagon, Washington, DC.
- 1976 – 1983: Operations Research Analyst, U.S. Army Armor Center, Fort Knox, KY.
- 1973 – 1976: Mechanical Engineer, U.S. Army Armament Command.

COLLEGE:

- BS, Aeronautical Engineering, Wichita State University, KS, 1971.
- MS, Industrial Engineering (Operations Research), Texas A&M University, TX, 1973.

SIGNIFICANT TRAINING:

- Reliability and Maintainability Engineering, Army Intern Training Center, Texarkana, TX, 1972.

AWARDS AND HONORS:

- Vance R. Wanner Award, Military Operations Research Society, 2002.
- Wilbur B. Payne Award for Excellence in Analysis, U.S. Army, 2003.
- Saint George Medal, U.S. Armor Association, 2003.
- Fellow of the Military Operations Research Society, 2004.
- Presidential Rank Award, Meritorious Executive (1993).
- Presidential Rank Awards, Distinguished Executive (1997, 2002, and 2007).

2:00 PM *Session 5: Obtaining More without Spending More – Developing and managing a Capabilities Based Analysis team with OR/Analytics capabilities that can implement the Secretary of Defense's Efficiency Initiatives.*

Amphora B

Steve Soules, Senior Vice President, Booz Allen Hamilton

Abstract: The Secretary of Defense, Robert M. Gates, has recently directed a number of initiatives to reduce the overhead costs of the Department of Defense (DOD) while at the same time wanting to transfer those savings into acquiring increased defense capabilities. Simply put, the Secretary wants to take funds from the “Tail” of the tiger and put them into the “Teeth”. To achieve this goal the Department will have to employ the services of analysts who are capable of using techniques and tools that can provide the analytical rigor required to make critical decisions on what to cut, keep and buy in order to acquire the capabilities necessary to defend Americans in these uncertain and threatening times. This presentation is an overview on how Booz Allen and Hamilton is building and managing the people, processes and tools that are included in their Capabilities Based Analysis team within their Analytics division to meet these challenges.

Steve Soules is a recognized leader in capability-based assessments and architecture analysis, and as Senior Vice President, Mr. Soules leads the modeling, simulation, war gaming and analysis services at Booz Allen Hamilton in support of the Department of Defense (DOD) markets.

With over 30 years of professional experience in operations research and analysis, Mr. Soules designs automated tools that assist in conducting architecture analysis of integrated systems and capabilities-based portfolios. He and his team provide operations, technical, programmatic and performance analysis of integrated architectures and systems. Mr. Soules co-authored the book, *Using Architectures for Research, Development and Acquisition*.

Mr. Soules and his team were awarded Booz Allen's Professional Excellence Award, the firm's most prestigious honor for customer support, for their contributions to the capabilities review program for the US Air Force headquarters.

Prior to joining the firm in 1999, Mr. Soules held a number of senior operations research and analysis positions supporting the Chairman of the Joint Chiefs of Staff and the Office of the Assistant Secretary of Defense for Command, Control, Communications and Intelligence Systems, among others. Mr. Soules also served as the first Director of the Joint C4ISR Decision Support Center, an independent research and analysis center directly assisting senior leaders in the DOD in making investment decisions for integrated command, control and intelligence systems.

Mr. Soules holds a Master's degree in Business Administration from National University in San Diego, Ca. and a Bachelor of Science degree in Operations Research and Analysis from the U.S. Naval Academy, Annapolis, Md. He is a member of the Military Operations Research Society (MORS) and the armed Forces Communications and Electronics Association (AFCEA).

3:00 PM *Break* *Amphora A*

3:30 PM *Session 6: Perspectives on Growing an Analytics Team and IP Strategies* *Amphora B*

Paritosh Desai, Director, Advanced Analytics, Gap Inc Direct

Abstract: Analytical applications are seeing a huge surge in the last 10-15 years due to availability of a variety of datasets and advancements in computing technologies. Two key components for long term success of such applications are around guarding the core intellectual property and building appropriate analytics teams.

With many of analytics applications embedded in software, it is relatively easy to copy or steal the core intellectual property. Planning and obtaining patents should be one of the ways to ensure that competitive advantage due to IP is retained for the long term. We will talk about the patent process and some of the recent changes that require a change in thinking around patent applications.

Success for most enterprises is driven by the people and analytics teams are no exception. Recognizing the needs of these individuals and appropriately structuring work leads to higher retention rates and continued productivity gains. We will talk about some of our personal experiences and industry trends.

Paritosh Desai has over 10 years of experience successfully designing and delivering decision support system using various advanced analytics algorithms, primarily for the retail industry and its ecosystem.

In his current role as a director of advanced analytics at Gap Inc Direct, the focus is on applying various analytics algorithms to help solve supply and demand side problems; understanding and optimizing customer experience with the website interaction. On the personnel side the charter is to expand and train a team of analytics professionals that can rapidly deliver results by using appropriate techniques from Operations Research, Statistics, and Machine Learning sciences.

Prior to joining Gap Inc Direct, Paritosh was with DemandTec in various roles, where he most recently led a team of scientists and software architects. His work includes design and productization of various retail pricing optimization engines, predictive models for demand and sales forecasting, scalable and distributed algorithms, and various analyses around consumer behavior. In this role he has worked with a number of leading retailers and consumer goods manufacturers including WalMart, Target, BestBuy, Safeway, General Mills, Kellogg's, Pepsico etc.

Paritosh holds a Ph.D. in Operations Research and M.S. in Mathematics from Stanford University. His current interests include scalable and distributed analytics, combining online and offline data for better insights, and designing operational decision support systems.

4:30 PM *Session 7: Panel Discussion/Roundtable Q&A* *Amphora B*

All Speakers/All Topics

This session is a roundtable discussion about the meeting topics. Roundtable members are encouraged to ask questions and provide comments to the Roundtable itself and the speakers.

5:15 PM *2010 Pulse Taking Summary led by Kathy Lange* *Amphora B*

Kathy Lange, Director, Americas Business Analytics Practice, SAS

This talk will review results of the 2010 INFORMS Roundtable pulse taking survey.

5:45PM *Meeting Adjourned*

7:00PM *Informal Networking Dinner (Dutch Treat) – Fume Bistro*

Dutch Treat participants will assemble in the hotel lobby at 6:40 PM and depart at approximately 6:45 PM. We will carpool to the restaurant. Please find a carpool during the meeting.

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Westin Verasa Napa – Floor Plan

