



A.M.P.A.

Association For Merchandise Planning and Allocation

AMPA Meeting Summary

RS&S MP/CAO Seminars

November 22, 1996 - Orlando

The AMPA (Merchandise Planning Association) met in Orlando on November 22nd. In attendance were the following members:

- David Bradfield, Chief Merchandiser, Reeds Jewelers
- Terry J. Donofrio, President, Retail Systems & Services
- David Dumont, Project Leader, Sears Canada Inc
- Gene Eckles, Dir Mdse Control, Analysis & Reporting, Walt Disney Attractions
- Bill Luckert, VP Merchandise Planning, Service Merchandise
- Linda Morin, Manager Merchandise Info, Fedco Inc
- John O'Leary, Consultant, Retail Systems & Services
- Sydney Sale, Planning Manager, Heilig-Meyers Furniture
- Sally Struckell, VP Merchandise Planning, Heilig-Meyers Furniture
- Brian Veara, Manager Merchandise Planning Systems

Our overall agenda and discussions were as follows:

- Presentation by Bill Luckert, Operating Vice President at Service Merchandise: A New Merchandise Planning Process, System and Organization Implementation
- Developed discussion topics for the afternoon
- Open discussion in afternoon on several key topics:

- Managing change and expectations when a new planning process, system and organization is implemented
 - Issues and considerations for a planning organization
 - Issues and considerations for a planning process and planning organization
- Business Meeting Discussion
 - Next Formal AMPA Meeting (RS97 in May)
 - Informal meeting in January at NRF
 - Format for meetings --- drawing members to meetings
 - AMPA Database expansion - names and info
 - Vehicle for AMPA communications (e.g. EMail discussion group, web site etc.)
 - Publicity for AMPA
 - Survey on merchandise planning and merchandise planning implementations
 - Future finances

Meeting Highlights

- **Attendees:** an attendees list is available from RS&S when you join AMPA
- **Morning Presentation and Discussion:** The presentation by Bill Luckert was well received and provided a basis for a very lively discussion that continued throughout the morning. The success of this presentation and follow-up discussion was a good example of integrating a guest speaker and the follow-up discussion. This session serves as a model for the future where our speaker's topic continues as a group discussion afterwards.
- **Afternoon Planning Discussions:** In the morning each attendee prepared a list of key topics of interest (some ideas were provided) . The items were ranked and the three top items became the basis for the afternoon discussion. The afternoon discussion was very lively and informative. All participants felt the discussions were very worthwhile and the format serves as a basis for future meetings.
- **Next Formal Meeting/Meeting Format:** Most attendees felt that a strong guest speaker and a good agenda would help raise attendance. If attendance is very large breakout groups can be considered to discuss various topics in parallel. It was decided that the next formal full day AMPA meeting (guest speaker, discussion topics, etc.) would be at Retail Systems 97 (RS97) in Chicago (Navy Pier - 5/19 to 5/22). The full day Merchandise Planning Symposium is being held on Monday May 19th so May 20th was felt to be a good day for AMPA.

- **Informal AMPA Meeting at NRF in January:** An informal AMPA meeting was planned for those members who will be attending the January NRF Trade Show (NYC Javitts Center - Jan 12-15th). At that meeting we could review our progress, past meetings and solicit ideas on the future. The suggested date and time was Monday January 13th at 4:30pm. A one to two hour meeting was planned. On an informal basis those attendees at the meeting might go out for dinner together.
- **Database Expansion:** Several tasks will take place to help expand our AMPA database and get new members. These tasks include:
 - Each present AMPA member will be providing Terry Donofrio with a list of potential members to consider. Participants in Orlando felt they could provide additional names that would be of value. It was felt that other AMPA members also could provide names or database lists to help solicit new members. All names or lists should be sent to Terry J. Donofrio at RS&S.
 - We will provide questions for AMPA members to help expand our database of information. Key questions might be: company information, merchandise management system, planning system, allocation system, who does planning etc. This information could be communicated among AMPA members.
- **AMPA Communications:** In addition to our formal meetings, AMPA also needs vehicles for on-going exchange of information. CompuServe is our medium for EMail at this point in time. Ideas for future communication capabilities include:
 - Internet or EMail Discussion Group: Have questions posed to a "bulletin board" type format and various members could respond with comments, answers etc. CompuServe is quite expensive to set up a discussion group but other Internet alternatives are possible and will be investigated.
 - All AMPA members on EMail: We need everyone on an email network so we can use EMail/Internet as a vehicle for communication. Once this occurs we can set up various types of information exchange. We will advise all AMPA members to try and get their companies to provide some EMail access: either CompuServe or internal company systems.
 - Web Site for AMPA: To help us advertise and support our electronic communications a web site is being considered. The AMPA name has been registered (Garr Larson - Hot Topic Inc) so we are ready. Initially RS&S has offered to make AMPA an additional but separate page on the RS&S web site (up and running at this time). Members could go directly to the AMPA page, but the monthly fee for storage etc. would fall under the RS&S existing web site costs. This approach would get us started initially until we have a budget.

- Links to Other Web Sites: We want to consider links to and from other web sites such as Microsoft, RSA etc. Terry Donofrio will also investigate possibilities. Other suggestions or contacts are most welcome.
- **Publicity for AMPA:** We will investigate getting publicity for AMPA through various trade associations, journals and companies. Retail Systems Alert, Microsoft etc. could be helpful in this area. Terry Donofrio will contact RSA, Microsoft and other trade associations. Other suggestions, ideas and contacts are welcome.
- **Survey on Merchandise Planning:** It was felt that the AMPA members could benefit from a full Merchandise Planning survey. This survey would be structured and organized to cover all aspects of Merchandise Planning in the retail industry. To get this started Bill Luckert volunteered to provide a previous survey he developed for Inventory Management. The members can then provide input and we will develop a complete survey.
- **Groups to Sponsor AMPA Meetings/Dinners etc:** Various planning system vendors and other technology companies have offered to sponsor dinners, meetings, events etc. We will investigate these possibilities in the future.
- **Future Finances:** to hold meetings and have an on-going organization, it may be necessary to consider dues for AMPA members and/or Company Sponsorship. Right now RS&S and other members are providing AMPA support. We will need to consider the AMPA financial situation at some point in our development.

Future Plans

We have several people working on various tasks associated with AMPA and our future plans: (TD = Terry Donofrio; RB = Regina Beischer; GE = Gene Eckels; BL = Bill Luckert; GL = Garr Larson; note we welcome any additional help on any tasks)

- Prepare memo summarizing our Orlando meeting and future efforts - DONE (TD/RB)
- For the January NRF Informal Meeting:
 - Prepare flyer and contact members - Done (TD/RB)
 - Get meeting room (TD/RB)
 - Respond to flyer - quickly !!! (AMPA Members)
 - Interact with attendees on logistics (meeting room, restaurant)
- Prepare for Retail Systems 97 Meeting: (TD/RB)
 - tasks to be defined
- EMail/Internet Communications

- Investigate various electronic communications vehicles and report to members (GL/TD)
 - All members on EMail (ALL MEMBERS)
 - other tasks to be defined
- Publicity for AMPA
 - Work with trade associations, trade journals and various companies on AMPA publicity (TD/GE/BL/RB)
 - other tasks to be defined
- Database Expansion
 - Contribute names to Terry Donofrio for AMPA database expansion - ALL MEMBERS
 - Provide general questions for AMPA members to expand the database (ALL MEMBERS)
 - Expand AMPA database and communicate to members (RB)
- Begin survey on Merchandise Planning
 - Send out initial survey - DONE (BL)
 - Come up with questions for survey (ALL MEMBERS)
 - Develop survey (BL/TD/GE/RB)
- Investigate groups to sponsor AMPA events (TD/GL)

Other tasks and to-dos will be developed as we move into the new year. The key tasks required at this point should be included in the above list.