



RS&S Capabilities and Activities Information

***Part 1 - RS&S Summary
Part 2 - Staff Summary***



A.M.P.A.

Association For Merchandise Planning and Allocation

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RS&S Capabilities and Activities Information

Part 1 - Summary of RS&S Capabilities and Activities

This document includes:

- General Background
- Major Capabilities and Activities
- Process and Training
- Seminar Programs
- Other Company Information Available
- Recent Clients
- Contact Information

General Background

Over the past twenty years, RS&S has addressed all aspects of Merchandise Planning and Allocation in the retail industry. Recently Advanced Integrated Planning (AIP) has evolved to include financial planning, assortment planning, store planning, store clustering, space planning, and allocation. We address all these areas as well as applying best practices, forecasting and optimization within AIP. Our main focus has been in **three key areas**:

- **Consulting** to support Merchandise Planning activities including: process development, organization development, systems utilization within the planning process, new systems implementation etc.
- **Training** including seminars, training sessions and user manual development to support new planning processes, organizations and systems. Please note for user manual development we do consider other systems besides merchandise planning such as transaction or merchandise management systems, POS systems etc.
- **Industry seminars and symposiums** run by our company or developed for larger trade associations (e.g. MoonWatch Media - the yearly Merchandise Planning Symposium).

We have developed a special expertise in training, planning process development and documentation as well as customized user manual development. Our degree of specialization in these areas encompasses all aspects of Advanced Integrated Planning.

Capabilities and Activities

Retail Systems and Services (RS&S) is a consulting and training firm specializing in Advanced Merchandise Planning and Allocation services for major Retail companies. We do also provide Computer Assisted Ordering services. Our expertise and focus has included:

- **Reviewing and evaluating the current planning process, methods and organization.** Providing an assessment for the company to help them evaluate their process and methods against best practices in the industry.

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- **Supporting planning process and system implementations** utilizing the RS&S 7 Step Implementation Methodology. This effort includes planning process reengineering, organization development, system definition, system utilization and training. **Planning process definition** has become an area of specialization for RS&S.
- **Training program development** including planning methods and concepts seminars, process presentations, customized user manuals, customized system reference manuals and hands-on training scripts. We are specialists in Merchandise Planning training and training seminars.
- **Evaluating and maintaining the status of the merchandise planning systems** available from major system vendors. RS&S advises companies selecting a merchandise planning system. We have worked closely with developers and vendors of Merchandise and Assortment Planning Systems.
- **On-site planning process workshops** to help companies develop new methods and concepts during their reengineering efforts.
- **Merchandise planning training and education seminars** - we have developed an extensive seminar program that includes both public and private in-house seminars.
- Supporting the development of **Assortment Planning** processes, methods and systems.
- Supporting the **Computer Assisted Ordering (Replenishment)** process and system development.
- RS&S has also worked closely with the MoonWatch Media (MWM) over the last several years to report on the capabilities and status of the major **Merchandise Planning Systems** available from leading software vendors. Several years ago in conjunction with MWM, we developed the **Merchandise Planning and Allocation Systems Survey and Report**. This report is the most comprehensive study undertaken to date and has been expanded to include assortment planning, store planning, space planning, store clustering and allocation. This 200+ page report was published in early 2000. This document is currently being updated
- RS&S has created and sponsored the **Annual Merchandise Planning Symposium** which is conducted as part of the Retail Systems Conference & Exhibition (now the leading retail industry trade show). This year we are sponsoring and developing the 8th Annual Merchandise Planning Symposium.
- RS&S has conducted a yearly Merchandise Planning Symposium in Europe at the **Global Retail Technology Forum**.
- Working in conjunction with MoonWatch Media and the Merchandise Planning Community Center (MPCC), RS&S also conducts a monthly Internet based **Merchandise Planning Forum** for retail companies.
- We conduct our Annual **Comprehensive Merchandise Planning Seminar** each year in Orlando. This is a 2.5 day event for retailers to discuss processes, organizations, systems and implementation in a workshop type format.
- **Computer Based Training** - we are developing a Computer Based Training program for Merchandise Planning. Our first application, Basic Merchandise

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Planning will be announced shortly. We also do customized CBT development for Merchandise Planning.

- RS&S played a leading role in the development of the **Association for Merchandise Planning and Allocation (AMPA)**. AMPA is a non-profit professional organization established to promote interaction among Merchandise Planners and Allocators. The group now includes over 150 members and includes 100 companies.

Planning Process and Training

In our experience, two key factors in a Merchandise Planning process and system implementation are the development of the **new planning process** and the **training effort**. RS&S has worked with many companies to help them establish a new planning process and organization, prior to their installation of a new automated planning methods and systems. We are also specialists in the **training** area and have provided numerous seminars and presentations to support implementation activities. We help companies develop a complete **training program** including: merchandise planning concepts/methods seminars, planning process overview presentations, system utilization presentations, customized user manuals and scripts and support material for hands-on training. We have worked with companies who are either addressing automation in the future, or have taken a step back when their use of a new systems did not provide the results intended. We help companies develop customized merchandise planning user documentation in both hardcopy and browser based formats. Customized CBT Training can also be developed.

Seminar Programs/Symposiums

Our main **seminar program** includes:

- Comprehensive Merchandise Planning (2-1/2 days) – Yearly in Orlando in November as part of **Orlando Retail Planning Week** (together with CPFR and Promo Planning)

Other **seminars available include:**

- Basic Merchandise Planning (beginning course: 1-2 days)
- Comprehensive Merchandise Planning (more advanced: 2-3 days)
- Assortment Planning (1 day)
- Advanced Planning: Assortment Planning, Store Planning, Store Clustering, Space Planning and Allocation (1 day)
- Merchandising Methods and Procedures (1 - 2 days)
- Merchandise Planning Symposium (1 day)

An Internet based CBT style training program is being developed for Basic Merchandise Planning.

The Association for Merchandise Planning and Allocation (AMPA) is a trade association dedicated to Merchandise Planning and Allocation within the retail industry.

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Company Information Available

Other information that can be provided to help you further evaluate our programs and our company, are as follows:

- **Seminars/AMPA:** our latest seminar brochure; AMPA Registration Form
- **Training:** training approach document;
- **Merchandise Planning:** several support documents including:
 - a brochure summarizing our planning activities
 - descriptions of our public and in-house seminars/training programs
 - summary of planning and training projects
 - several recent articles written about Merchandise Planning
 - our evaluation of planning systems
 - articles, presentations and seminars
- **Staffing Information:** bios of key personnel (available on request)

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Partial List of Recent Clients

During the scope of various consulting, training and systems activities RS&S personnel have worked with the following companies:

Retailers

- CVS Corp.
- Belk Inc.
- Polo Ralph Lauren
- Stride Rite
- Dollar Tree
- Odd Job
- Charming Shoppes (Fashion Bug)
- Catherines (Added Dimension/Modern Woman)
- Disneyland

- The Disney Stores
- Caldor
- Lechters
- Express
- The Limited Inc.
- Saks Fifth Avenue

- J Crew
- Brooks Brothers
- Mitchells Formal Wear
- Service Merchandise
- Baptist Book Stores
- Tristan and America

- Starbucks
- Hallmark
- Bobs Stores
- Melville
- LensCrafters
- Phillips Van Heusen

- Half Price Stores
- Duty Free Shoppers Group Limited
- REI
- ShopKo
- Dylex
- Laura Ashley

Vendors

- MoonWatch Media
- IT Resources
- AIS/Parascript
- GERS
- Retek
- Spotlight Solutions
- Marketmax
- JDA/Comshare
- STS/MMS
- IBM
- ACI
- NeoVista
- Mitech/DEC
- Forseon

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Contact Information

Consulting, Training, CBT

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 - Fax: 201-447-2099
 - e-mail: tdonofrio@compuserve.com
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Seminars, AMPA

- Regina Beischer
 - Title: Seminar and AMPA Coordinator
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Part 2: Staffing Summary and Sample Bio (Terry J. Donofrio)

RS&S Staff and Associates:

- Terry J. Donofrio - President, RS&S
- John O'Leary - Senior Retail Consultant, RS&S
- Stephen Hull - Senior Retail Consultant
- Regina Beischer - Seminar and AMPA Coordinator, RS&S
- Priscilla Hanf - Seminar and Documentation Specialist, RS&S

- Barbara Anderson - Associate, BVAC, Inc. (CAO and Data Mining)
- Bob Amster - Associate, Retail Technology Group (Enterprise Systems, POS, Warehousing)
- Samon Hong - Associate, Varentas (Optimization and Forecasting)

- Gary Johnson - Training Technology Corp - RS&S CBT Partner

A sample Bio is provided for Terry Donofrio with qualifications and company project activities.

Other Staff Bios are available in request.

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Terry J. Donofrio (Bio and Project Summary)

Terry J. Donofrio has served the retail industry as a consultant, trainer, lecturer and systems specialist for 20 years. Mr. Donofrio's experience includes discount, department and specialty stores around the world. Particular areas of expertise include: Merchandise Planning, Assortment Planning, Automatic Replenishment, Allocation and Distribution, Space Utilization, Merchandise Reporting, Inventory Management and Other Decision Support Systems.

Mr. Donofrio's efforts on behalf of retail companies have included Planning Process Reengineering, Training Programs, Organization Development, Planning System Implementation, Cost/Benefit Studies, System Selection, Overall Systems Requirements Definition, Inventory Control Reviews, General Systems Implementations, Merchants Training Programs and Presentations to Management on a wide variety of retail subjects.

Mr. Donofrio is a industry specialist in Merchandise Planning methods, procedures, systems and training. He has given numerous training classes, presentations, and seminars on Merchandise Planning and related topics. He has worked with merchants and merchandising personnel from department, discount and specialty chains throughout the United States and around the world to develop their Merchandise Planning techniques and methods.

Mr. Donofrio has given numerous lectures, presentations, and seminars for major retail trade associations in the United States and the United Kingdom on a wide variety of retail subjects. He is currently on the editorial board for Retail Systems Alert, a systems oriented trade journal. He has written numerous articles which have been published in major trade journals. He has authored "Merchandise Planning Systems, An Insiders Guide to Selection and Implementation" which was published by Retail Systems Alert. He has sponsored and coordinated two Merchandise Planning Symposiums conducted at the annual Retail Systems trade show in 1996 and 1997.

Mr. Donofrio developed a Merchandise Planning Seminar Series which he has been conducted 3-4 times a year since 1989. The program includes Basic Concepts, Comprehensive Methods and Implementation seminars.

His consulting experience includes the following:

- For Dollar Tree Stores he supported the definition of a new planning process to support the implementation of a new merchandise planning systems. He conducted management and user level reviews and training sessions to support the transition to the new approach.
- For Charming Shoppes, a major Women's specialty retailer, he supported the transition to a streamlined and modified planning process as well as the documentation of all processes. Training material was developed and training sessions were conducted for the modified processes. He supported the development of customized user manuals for all aspects of Merchandise Planning. Process and training material was also developed for the Merchandise Analysis via the Data Warehousing System.

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- For a major footwear retailer he supported the development of merchandise planning requirements and the selection of a systems vendor.
- For Disneyland, a major theme retailer, he supported the analysis and development of a new planning process and organization along with the integration of the systems approach. He also supported the development of customized training materials and a training presentation for users.
- For a housewares and home specialty retailer he supported the definition of a new planning process and new organization. He supported the transition plan to the new process and organization.
- For a specialty discount retailer he supported the analysis of the existing allocation methodology and the development of a new allocation methodology.
- For the Disney Stores, he supported the definition and development of a new planning process and the implementation of an automated planning system. He helped define the overall systems utilization and final system design.
- For SAKs Fifth Avenue he helped developed an Automated Assortment Planning capability for the Shoe Division.
- For a major bookstore chain, he developed and presented an in-house merchandise planning seminar and merchandising procedures training. This effort included the design, development and presentation of all training materials.
- For two major planning system software vendors, he conducted a Merchandise Planning product review. This effort included an assessment of the overall product strengths and weaknesses and relative position in the marketplace.
- For J. Crew, a Softlines specialty retailer, he helped develop recommendations for a new merchandise planning process and organization. He facilitated a management workshop to finalize the new process and resolve the issues. This new process and organization addressed store, assortment and store-assortment planning.
- For SAKs Fifth Avenue he evaluated the existing Merchandise and Assortment Planning methods, procedures and systems and developed recommendations for the future. He also helped develop a methodology for future Assortment Planning.
- For Belks, a major department store chain, he helped evaluate and reengineer the merchandise planning process and organization. He developed presentations to management and facilitated a "process workshop" addressing alternative approaches and major issues.
- For Service Merchandise, a major showroom catalog retailer, he developed a merchandise planning training program to support their implementation of a new automated planning system. He also helped analyze and document the planning process to support the training program development. Customized user documentation to follow the planning process was also prepared.
- For Express, a major specialty retail chain, he helped develop a complete training program and customized user documentation for several major automated systems including: merchandise planning, store planning, assortment planning and allocation. He assisted in conducting several training sessions for management and end-users.

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- For Hallmark he helped develop a training seminar to support the implementation of a new merchandise planning system, process and organization. The effort included evaluating and documenting the merchandise planning process.
- For a major national discount chain he helped evaluate their present planning process and reengineer a new process to support the implementation of an automated merchandise planning system. He facilitated a management workshop and supported the follow up effort to design the overall system. He also provided guidance on training approaches.
- For Bobs Stores, he helped develop a complete training program and customized user documentation to support the implementation of a new planning system, process and organization.. He also supported the earlier effort to reengineer their planning process to support automation.
- For Half Price Stores, a discount department store, he supported the implementation of a new automated merchandise planning system. This effort included developing a new planning process and facilitating a management workshop to address the reengineering effort. He also supported the training effort by developing and conducting user training seminars as well as developing customized user documentation.
- He developed a Merchandise Planning seminar program that has provided training to retail executives from all over the world. This program features public seminars given four times a year and customized in-house seminars for retail companies. The seminars include Basic and Comprehensive Merchandise Planning, Assortment Planning and Planning System Implementation.
- He worked with several major specialty retail chains to re-engineer their planning processes and methods to prepare for the installation of automated systems. He has project managed the implementation of various automated planning systems and provided training support to merchants and planners.
- He worked with Comshare, a major software vendor, to develop an Implementation Methodology for their automated Merchandise Planning software product ARTHUR.
- He developed the requirements and functional specifications for an automated Allocation and Distribution system.
- He acted as lead facilitator in the development of a Computer Based Training program for a major specialty retailer, supported their development efforts to produce training materials, and performed initial training at several major divisions around the world.
- He acted as the lead designer for a major Merchandise Planning System developed in conjunction with Advanced Cybernetics, a major retail software developer. This system, MAPS, was installed at over 15 discount, department and specialty retailers across the country Mr. Donofrio also participated in the marketing, installation and training efforts for this system.
- He supported the design, development, implementation and training of a Merchandise Planning, Assortment Planning and Automated Replenishment System for a worldwide specialty retail chain.

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- He performed a market survey for Peter R. Johnson & Associates, a major retail software vendor to guide their product development efforts and help them remain competitive in the retail marketplace.
- He provided product design support for a major Merchandise Management System software vendor. His efforts included product review and modification recommendations to meet the needs of today's retail marketplace.
- For Carson Pirie Scott, a major department store chain, Mr. Donofrio supported the implementation of their new Merchandise Management and Inventory control system.
- He participated in the design, development and implementation of a large Merchandise Management and Inventory Control System for Fred's, a then 270 store discount chain.
- He worked with Dennison TRG, a major retail software vendor as Director of Client Services managing a group of consultants responsible for implementation of their Merchandise Management and Inventory Control system.
- At Dennison TRG, he acted as Program Director and lead designer for the IBM product development of a comprehensive Merchandise Management and Inventory Control System. The system was designed based on comprehensive studies of the requirements of major retail companies across the country.
- For G.C. Murphy, a major discount chain, Mr. Donofrio performed a cost-benefit analysis to justify their POS and Merchandise System expenditures. He developed the requirements for several modules of the system and participated in the overall design.
- He supported The Batus Retail Group in re-engineering their systems approach for several of their major department store divisions.
- He reviewed the Merchandise Planning product line for a major software vendor and supported their development of product demos.

Prior to his career in retailing, Mr. Donofrio spent 10 years with the RCA Corporation in the application of simulation and modeling techniques to business and industrial problems.

Mr. Donofrio holds a Ph.D. in Systems Engineering from Polytechnic Institute of New York, an MS in Systems from Northeastern University and a BSEE from Pratt Institute. He is on the editorial board of Retail Systems Alert, a major trade publication. He is a senior member of the AIIE, a member of the IEEE, , the Society for Computer Simulation, and a past Director and Program Chairman for the Retail Division of the Institute of Industrial Engineers. Mr. Donofrio has published numerous articles and given seminars on Merchandise Planning and related topics in the US and abroad.

Note: Other staff bios can be furnished on request.