
APICS Marketing Plan

APICS Organization Name: **APICS BOSTON CHAPTER #10**, Plan Year(s): **2007-2008**

Address:

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I. Current Customer Profiles

Customer profile #1:	Middle management professional seeking additional professional development in the Supply Chain Management Logistics and Operations Management fields.
Customer profile #2:	Supply Chain, Manufacturing, Operations, Purchasing and Operations Support associates (IT, Cost Accounting/Budgeting, Forecasting/Business Planning)) personnel seeking additional knowledge in Supply Chain, Operations Management, lean, continuous improvement concepts, enterprise resource management and related systems. (potential market for CSCP certification)
Customer profile #3:	Logistics, Materials and Operations personnel in career and/or employment transition.
Customer profile #4:	New personnel just entering the Operations Management profession.
Customer profile #5:	Top managers responsible for initiating change processes.
Customer profile #6	Project Managers (to reflect the market for the new project management educational offerings and certification preparation)
Customer Profile #7	Systems Consultants; pre sales and post sales who support or implement formal operational support systems like Enterprise Resource Planning (ERP), Maintenance Repair and Operating Supplies (MRO), Production Planning & Scheduling, Sales and Operations Planning (S&OP), Manufacturing Execution Systems (MES), Forecasting, Warehouse Management Systems (WMS), Incoming and In Process Quality and Machine Maintenance (PM)

II. Potential Customer Profiles

Customer profile #1:	Service professionals serving any enterprise for which inventory of any kind is involved, for example, restaurants and coffee shops, hospitals, hotels, the recreational service industry where equipment rental inventory control is critical. Any enterprise requiring a knowledge of Operations Systems, Supply Chain, Lean, Materials and Resource Management.
Customer profile #2:	Supply Chain, Materials and Operations Management personnel from large consumer product, biotech, high-tech, light manufacturing and management consulting firms.
Customer profile #3:	Unemployed Supply Chain, Materials and Operations professionals with funded skills retraining allocations.
Customer profile #4:	Professional seeking to attain or maintain APICS certification
Customer profile #5:	Upper management and HR personnel who are not yet aware of the value of APICS certification when hiring full time individuals or consultant agencies in the area of supply chain and operations management. Activities here may yield the greatest return on investment.
Customer profile #6:	APICS members (certified or not), a member of or leading a team involved with managing a formal Operations oriented project. For example, APICS associates are often impacted and or involved with teams charged with implementing, upgrading or improving formal ERP systems, introducing Lean initiatives, managing Supply Chain improvement processes and so on. Today, these activities are often driven by a cross functional team, assigned to the "Project". Formal Project Management skills will greatly enhance our members' opportunity for success.

III. Current and Potential Customer Needs Assessment

Trends: Manufacturing in the Boston area and the region has changed substantially over the last ten years. Total membership in APICS Boston has recently decreased, and interest in our Certification courses has also slowed. Membership now is 266 members – down from 445 in 2002. Providing educational programs to resource management professional and Boston area businesses is a requirement for continued growth and prosperity.

Competition: Though education offerings from local purchasing and quality groups are not viewed as competition, and local universities focus on general business education and not Supply Chain Management curriculum, the Chapter currently faces the following competitive challenges:

- New course/degree offerings by local universities (e.g. NEU Master of Supply Chain Management)
- Increased activity from independent consulting organizations and ERP/Supply Chain Management software firms looking to grow the education side of their business
- Limited "stable" of instructors, especially in the new program offerings (e.g. CSCP, Project Management, Lean)

The Chapter has the following competitive advantages:

- Successful track record of delivering quality education in the field of Operations Management
- Knowledge of our membership and instructors
- Price/performance delivery capabilities based on our pricing model

Opportunities: Partner with organizations that have the experience to deliver quality educational products (e.g. partner with NEU for CSCP courses, partner with AME for a Lean Purchasing seminar)

Products and Services:

Current APICS membership benefits:

- Monthly APICS Advantage magazine (free)
- Quarterly On Line P&IC Journal (free)
- APICS dictionary (free)
- APICS Extra e-newsletter (free)
- Bookstore discounts
- Discounts to the Annual International Conference (plus a free copy of the conference proceedings)
- Opportunity to join one of the APICS Learning Communities
- Online Webinars (both free and paid)

Current APICS Boston Chapter membership benefits:

- APICS certification courses
- Monthly Professional Development Meetings
- Annual NECON Seminar
- Plant/company tours
- APICS Boston Chapter's website (www.bostonapics.org)
- Chapter Job Bank
- Boston email distribution list

New offerings by the Boston Chapter:

- Collaborative Northeast Supply Chain Conference & Exhibition NECON
- Collaborative offerings with other Chapters like NS & NECON
- Collaborative offerings with Purchasing Management Association of Boston (affiliated with the Institute of Supply Management) and the Northeast Supply Management Group NECON
- CSCP curriculum in collaboration with NEU
- Project Management Professional Certification classes using Project Management curriculum from PMI
- Completely free membership to qualified academics.
- Text book donation to Library of Academic's choice of at least \$100 worth of books from the APICS bookstore/recommended readings.
- Clarification of retiree membership
- Active solicitation for student participants in the annual APICS Fogarty student paper competition

Quantifiable Objectives:

1. Achieve a net increase of one fully qualified instructor each year.

2. Recruit, grow, and retain several new board members.
3. Increase total membership by additional 20 members by executing the programs outlined in this plan.
4. Reengineer our education program by outsourcing and partnering to mitigate the competitive challenges outlined above.
5. Conduct at least eight Professional Development events during the year. Increase average attendance at all PDM events from 10-12 to 15-20.
6. Communicate with senior management of smaller companies and or their representatives about our programs.
7. Educate 200 (+-20) people through the various educational product offerings
8. Institute a “minimum instructor qualification standard”.
5. Revitalize and redefine our Company Coordinator program.
6. Develop a mailing list comprising non member companies within the regional area we serve and utilize free glossies from HQ in combination with home-grown PDF documents explaining our strengths.
7. Utilize new training facility at Advantix our new Bookkeeping service in Woburn MA

Needs assessment by customer profile:

Customer	Customer Needs
1. Middle management professional seeking additional professional development in Supply Chain, Logistics and Operations Management fields	Current Need: Certification, continued educational resources Potential Need: Tailored APICS BOK In-house training CSCP and CPIM certifications
2. Supply Chain and Operations management personnel seeking additional knowledge in Lean and Continuous Improvement concepts	Current Need: PDMs Potential Need: One to three day Lean / Continuous Improvement seminars, and workshops
3. Supply Chain and Operations management personnel in career and/or employment transition	Current Need: CSCP, CPIM Certification, career assessment workshops, training in Lean and Continuous improvement techniques Potential Need: ERP and TOC review course
4. New personnel just entering the Supply Chain and Operations Management profession	Current Need: Basics certificate, CSCP, CPIM Certifications, Fundamental Courses, continued educational resources Potential Need: In-house training, job specific resource management education and training
5. Top managers preparing to initiate a change process	Current Need: ERP, TOC, and Just-in-Time/ Lean courses Potential Need: Workshops relevant to managing change management initiatives
6. Experienced Supply Chain Personnel	Current Need: Provide accelerated CPIM review classes over two or three afternoons. Potential Need: One to three day Lean / Continuous Improvement seminars and workshops

7. Project Managers, and Project team members

Current Need: To develop education material/courses towards PMI's PMP (Project Management Professional) certification

Potential Need: One to three day course and including into our market Project Team Members (vs Managers) using PMI's Certified Associate in Project Management (CAPM) curriculum.

IV. Delivery Methods and Tools

Product Description: APICS Certification Classes - CPIM/CSCP and related education

Intended Market Segment: Companies and individuals needing Supply Chain and Operations Management education.

The Need Satisfied: Realizing we have an extremely limited instructor base, we will satisfy the need for education in a number of ways:

1. Outsourcing: Where Boston APICS selects a provider to deliver a “turnkey” Seminar. Costs and profits will be shared based on unique agreements made at that time subject to approval of the Boston APICS BOD.

Example:

August 10, 11, 2006 Lean Purchasing Seminar run by the Association for Manufacturing Excellence (AME)

2. Partnering: Where Boston APICS utilizes services of another organization, and that Organization utilizes services of Boston APICS. Costs and profits will be apportioned based on the unique agreement, subject to the approval of the BOD.

Example:

- Northeastern University's CSCP program: 12 week formal class where NEU advertises and delivers the course using instructors of their choosing from Boston APICS and other sources, where discounts to Boston APICS members and chapter rebates are involved. Additional intangible benefits concerning instructor development, and PDM support, and possibly classroom space will be available. Agreement contains unique elements, approved by Boston APICS BOD.
- NECON The annual October 3-day Supply Chain Seminar where Boston APICS is partnering with North Shore APICS, PMAB and others to deliver this quality Seminar. Agreement contains unique elements approved by Boston APICS BOD.

3. Small Class or traditional

Boston has developed a small class option for 1-4 students in addition to the traditional 5 or greater with companies sending six or more gets the sixth attendee at no charge. Boston has developed a comprehensive cost/fee schedule for all alternatives: Daytime and evening, CPIM, CSCP, Project management course delivery.

4. In House: (Utilizing Boston APICS resources)

Example:

The Project Management Institute (PMI) Project Management Professional (PMP) Fall 2006 Certification: Course is going to be instructed by Neeraj Sha, our current Director of Education.

In House CPIM Review full traditional 24 hour class or Small Class options. Example: Conduct a two or three afternoon session class for experienced professionals who need an overview of the topic, vs. a full complete 8 to 10 week class.

Summary of Potential Benefits:

- Agreement with NU and other organizations will provide a nominal stream of income and supply of new members to the Chapter.

- Access to experienced, quality instructors (later they could teach in-house)
- Experience on how to deliver cost effective, quality education for members which will translate into potential growth in membership and healthy treasury balance.

Location: We hold most courses at the sites of volunteer companies. The typical volunteer company will avoid payment for at least one of their employees to attend the course. We have a new Bookkeeping service in Woburn MA where we will be running future classes.

Budget Assumptions: All activities will be carried out using careful budget processes with breakevens determining go no go break points. No activity should return less than its cost unless all involved agree to the activity's worthiness.

Mode of Product Delivery: Whenever possible, the instructor will use the standard APICS course materials, and additional materials deemed appropriate by the instructor. All instructors meet the Chapter's minimum requirements, and are formally evaluated along with the evaluation of the effectiveness of the courses. We provide APICS brochures and information to the attendees. A non-instructor member of the Chapter Board of Directors visits one session of each class to monitor instructional quality and promote APICS.

Promotion Methods: We publicize our activities through our monthly professional development meetings, the APICS Boston website (www.bostonapics.org), the National APICS Magazine, and focused mailings to target companies.

Promotional Materials: Utilize free promotional materials (glossies) from APICS, combine with in house developed PDF's advertising our services.

Product Description: Monthly Professional Development Meetings and Seminars

Intended Market Segment: Individuals needing supply chain and operations management education and networking.

The Need Satisfied: We help keep our members up to date, effective, and marketable. We satisfy the need for supply chain and operations management education and networking. Provide quick methods to learn about APICS in the chapter.

Pricing: \$25 for members and \$30 for non-members, 15 for students, and unemployed, 0 for BOD members.

Location: We conduct most professional development meetings at a centrally located location.

Budget Assumptions: The price of the professional development meeting covers the cost of the dinner. When necessary, we pay the qualified speakers only for their expenses. Our goal is to break even on the professional development meetings each year. An honorary donation is made to the E & R foundation.

Mode of Product Delivery: We typically hold professional development meetings on the second Wednesday of the month, but may adjust the schedule to accommodate unusually good speakers or joint meetings with other professional societies. Meetings open with chapter announcements and dinner followed by a speaker and discussion period.

Promotion Methods: We publicize our monthly professional development meetings through local newspapers, certification courses, , the Boston NETcast email distribution list, company coordinators, networking, and the APICS Boston website (www.bostonapics.org).

Product Description: Potential "In House" Products

1. Certification Based:

- *CPIM:*
Basics of Supply Chain Management *

Master Planning of Resources
Detailed Scheduling and Planning
Execution and Control of Operations
Strategic Management of Resources

- CSCP: Self contained Curriculum

2. Certificate Based: Basics of Supply Chain Management

*Although part of the CPIM “suite” of courses required for CPIM, passing the APICS formal “Basics” certification exam provides the candidate with the rights to a formal certificate from APICS Headquarters.

3. Courseware (Informal Certificate Awarded by Boston APICS Only)

- *APICS Fundamentals*
Fundamentals of Inventory Control
Fundamentals of Planning
Fundamentals of Manufacturing Control
Fundamentals of Operations Management
Fundamentals of Materials and Operations Management
- *Introduction to Enterprise Resources Planning (ERP)*
- Just In Time

4. Workshops

- *Basics of Inventory Management*
- *Cycle Counting*
- *Distribution Inventory Management*
- *Materials Requirement Planning and Bills of Material*
- *Physical Inventory*

5. Project Management

Two programs from Project Management Institute (www.pmi.org)

- Certified Associate in Project Management (CAPM)
- Project Management Professional (PMP)

Intended Market Segment: Supply Chain Management, and Operations Management individuals requiring education in any of the above areas.

The Need Companies have a need to provide basic Operations management and Supply Chain education to their employees. These educational products are well suited for in-house training.

Pricing: To be determined

Location: Most courses will be conducted at sites of local volunteer companies. The typical volunteer company will avoid payment for at least one of their employees to attend the course

Budget Assumptions: All will be managed to a break-even budget; none will be conducted at a loss unless special agreements are obtained.

Mode of Product Delivery: Source of qualified instructor to be determined. The instructor will use standard APICS course material. We formally evaluate the effectiveness of all the courses and the all instructors. We provide APICS brochures and information to the students. A non-instructor member of the Chapter Board of Directors visits one session of each class to monitor instructional quality and promote APICS.

Promotion Methods: We publicize our courses through our monthly professional development meeting, the monthly Boston Forecast Newsletter, the APICS Boston web site at (www.bostonapics.com), and focused mailings to senior management at target companies. Upon completion of the course we offer discount prices of two APICS monthly Professional Development meetings, and one free Professional Development meeting for passing the fundamentals exam.

V. APICS Boston Chapter Marketing Plan Revision History

- a. Version 1 11/25/95
- b. Version 2 03/15/97
- c. Version 3 03/05/98
- d. Version 4 05/27/99
- e. Version 5 03/15/00
- f. Version 6 02/12/01
- g. Version 7 08/01/02
- h. Version 8 03/01/03
- i. Version 9: 06/18/05
- j. Version 10: 07/06/06
- k. Version 11: 06/20/07