

# ***Strategic Planning for Specialty Sales and Marketing Organizations***

## **2002 IMDA Annual Management Conference and Manufacturers Forum**

**Omni Tucson National Golf Resort and Spa  
Tucson, AZ  
June 19-22, 2002**

### **Wednesday, June 19, 2002**

5:00 - 7:00pm                      Registration  
7:00 - 9:00pm                      Reception

### **Thursday, June 20, 2002**

8:00 - 9:30am                      ***Strategic planning for the person wearing many hats,  
like you. Ron Stephenson.***

As a business owner, you're responsible for thinking ahead and guaranteeing the success of your company's future. But as a small-business owner, you're probably involved in plenty of day-to-day activities too. Perhaps you're making sales calls, checking inventory levels or monitoring accounts receivable days outstanding. The challenge is to keep a long-range focus while dealing with short-term issues. In this kickoff session, distribution expert Ron Stephenson will show you how to do just that. You'll identify key issues affecting your business and those of other specialty distributors, as well as:

- How to set goals and move them forward.
- How pricing, customer mix and product mix can affect your plans.
- How to gauge the impact of major industry issues on your business.

9:30 - 9:45                              Break

9:50 - 10:50                              ***The dollars and cents of your strategic plan (Part 1).  
Ron Stephenson***

You've learned about the importance of strategic planning, and you've even established some goals for your business. Now you have to decide what kind of financial changes, if any, you must make in order to bring your goals to fruition. In this session (as well as Part 2), you will learn to analyze:

- The financial drivers of your business today.
- The financial drivers you'll need to bring your company into the future.
- How to monitor your progress.

11:00 - 12:00

## **Specialty breakouts**

By popular request, IMDA continues a tradition begun at last summer's Annual Conference. IMDA members will be grouped by specialty and, with the help of a facilitator, they will network and exchange ideas with their peers. Depending on how the discussions are going, they will flow into lunch. A great opportunity to strengthen old friendships and form new ones!

(Closed to manufacturers.)

12:00 - 1:00pm

Lunch

1:00 - 2:00

### ***The dollars and cents of your strategic plan (Part 2).***

2:00 - 2:20

Break

2:20 - 3:20

### ***Does your company need a board of directors? Jeff Beischel.***

Perhaps your family-owned company has done just fine without a formal board of directors. But many businesses have found that an outside board increases accountability and offers a fresh perspective on your market, your industry and your future. Joining IMDA members is Jeff Beischel, CEO of The Brewer Company, a family-owned manufacturer of medical furniture in Menomonee Falls, WI. Beischel is a non-family member who, together with an outside board of directors (including Ron Stephenson), runs the company. He'll talk about his experiences in this position, and how you can apply it to your business.

3:20 - 4:15

### ***Dealer Advisory Panels: The Manufacturer's 'Outside Board'***

IMDA members know that they are the "eyes and ears" of their manufacturer partners. They know the market, they know the customers, they know the technologies. Smart manufacturers tap into all that knowledge by forming dealer advisory panels. In this session, one manufacturer tells how his company uses a dealer advisory panel to help him make strategic decisions about the future. IMDA members can take this information and pass it on to their vendors as well!

4:15 - 4:45

### ***The Law and You. Mitchell Kramer.***

IMDA Legal Counsel Mitchell Kramer fills you in on recent legal developments that could affect you and your business.

(Closed to manufacturers.)

5:00 - 7:00

## Manufacturers Forum

The industry's only meeting place for manufacturers of innovative medical devices and specialty sales and marketing organizations! An opportunity to learn about new technologies and opportunities in a relaxed setting. Last year's Forum was IMDA's most successful. Don't miss the 2002 edition! [Click here for more information on the Forum.](#)

## Friday, June 21, 2002

7:45 - 9:45am

### ***TEC: Your 'Informal Board of Directors.'***

Several IMDA members regularly tap into the planning experience of executives and business owners outside the medical specialty distribution business through an organization called TEC International. Founded more than 40 years ago, TEC brings together on a monthly basis small groups of CEOs and senior executives from multiple industries to talk about their businesses. These monthly meetings feature dynamic speakers as well as frank exchanges among non-competing members. In fact, TEC calls itself an "informal board of directors." For the IMDA Conference, TEC has generously offered the services of one of its most popular speakers, as well as a representative to tell you more about the organization.

9:45 - 10:00

Break

10:00 - 11:45

### ***Implementing Your Strategic Plan. Ron Stephenson***

Having identified on Day 1 of the Conference some of the key issues affecting our businesses and our industry, IMDA members – with guidance from Professor Stephenson – formulate action plans to move forward. This highly interactive session will give you a chance to:

- Learn how to work with others to solve business challenges.
- Balance theoretical goals with hard-and-fast market and financial facts.
- Walk away with concrete plans for your business!

11:45

Adjourn

6:00pm

Dinner

## Saturday, June 22, 2002

8:00 - 9:00am

### **IMDA Business Meeting**

Your chance to voice your opinion about IMDA, its activities, and its role as your association.

(Closed to manufacturers.)

9:00 - 10:00

### ***Preparing for the worst. Mitchell Kramer***

Strategic planning demands that you be prepared for adversity: a natural disaster (fire, flood, earthquake), an act of malice (computer fraud or tampering) or adverse economic developments (government legislation, loss of a major vendor, loss of a star sales rep, etc). Do you know how you would respond to any of these? IMDA Legal Counsel Mitchell Kramer leads a panel of IMDA members who share how they turned adversity into opportunity. Member panels are always one of the most highly anticipated features of IMDA conferences. This one won't disappoint!

10:00 - 12:00

Wrapup by Ron Stephenson