



**Carrier Logistics Inc.'s
Annual Leadership Summit
September 27 – 29, 2006
Tarrytown House Estate / Tarrytown, NY**

Innovation Drives Change

Wednesday, September 27

5:00 pm	Registration Opens.....	Hotel Lobby
6:00 – 7:00 pm	Opening Cocktail Reception.....	King House Library
7:00 – 9:00 pm	Dinner.....	Biddle House Winter Palace

Thursday, September 28

7:00 – 8:00 am	Breakfast Buffet.....	Biddle House Winter Palace
8:00 – 8:45 am	Welcome & Introductions <i>Ken Weinberg, Vice President, and Don Adams, President, Carrier Logistics Inc.</i>	Sunnyside Room
8:45 – 9:45 am	Keynote: Process Innovation and Excellence <i>Stephen Shapiro, Founder, 24/7 Innovation Group</i>	Sunnyside
9:45 – 10:00 am	Break.....	Atrium Foyer
10:00 – 11:00 am	The Latest in Telephony <i>Lou Person, President, Traxi Technologies</i>	Sunnyside
11:00 – 12:00 pm	Innovation Through Shared Services <i>Jeff Keller, Principal, Keller Services, LLC</i>	Sunnyside
12:00 – 1:15 pm	Lunch.....	Biddle House Winter Palace
1:15 – 2:00 pm	Workshop: Speed InnoVating <i>Stephen Shapiro, Founder, 24/7 Innovation Group</i>	Sunnyside
2:00 – 2:30 pm	New Opportunities to Improve Productivity and Enhance Service <i>Spotlight on Partner Technology</i>	Sunnyside
2:30 – 2:45 pm	Break.....	Atrium Foyer
2:45 – 3:45 pm	A Lesson in the Power of Innovation: The FedEx Custom Critical Story <i>Jack Pickard, President, FedEx Custom Critical</i>	Sunnyside
3:45 – 4:00 pm	New Innovations in CLI's Systems	Sunnyside
	<i>Ben Wiesen, Sr. Transportation Consultant, Carrier Logistics Inc.</i>	
4:00 – 4:30 pm	RFID Update: What You Need to Know	Sunnyside
	<i>Andrew McCarthy, Principal Product Manager, Progress Software Corporation</i>	
4:30 – 4:45 pm	Day 1 Review	Sunnyside
	<i>Ken Weinberg, Vice President, Carrier Logistics Inc.</i>	
4:45 – 5:45 pm	Discovery Room	Riverview Room
6:00 – 7:00 pm	Reception.....	Biddle House Music Room
7:00 – 9:00 pm	Dinner featuring Jeff Fidacaro, Vice President/Transportation Analyst, Merrill Lynch	Biddle House Garden Room

-Continued on Back-

Innovation Drives Change

-Agenda Continued-

Friday, September 29

7:00 – 7:30 am	Breakfast Buffet.....	Biddle House Winter Palace
7:30 – 8:30 am	Discovery Room.....	Riverview Room
8:30 – 9:30 am	Building a Sustainable Innovation Capability..... Brian Christian, Founder, DASO Consulting (formerly Vice President of Global Product Development at Whirlpool Corporation) and Thomas Wright, Director, Supply Chain Management, Kohler Company	Sunnyside
9:30 – 9:45 am	Break.....	Atrium Foyer
9:45 – 10:45 am	Roundtable Discussions on Industry Topics..... Two 30-minute sessions, choose from 3 roundtables. Topics TBD.	Sunnyside
10:45- 11:15 pm	Results from the 2nd Edition LTL Industry-Wide Customer Value Benchmarking Report - Which carriers are providing the best value in the eyes of the customer..... Bart Thedinger, President, MASTIOGALE	Sunnyside
11:15- 12:15 pm	Innovative Programs to Lower Health and Safety Costs in the Trucking Industry Thomas A. Kempa, Vice President, CIGNA Healthcare	Sunnyside
12:15 - 12:30 pm	Wrap Up – Lessons Learned, Strategies Made..... Ken Weinberg, Vice President, Carrier Logistics Inc.	Sunnyside
12:30 – 1:30 pm	Lunch.....	Biddle House Winter Palace
1:30 – 3:00 pm	Optional Individual One-on-One Appointments	

*Topics, times & speakers subject to change.



Carrier Logistics Inc.
220 White Plains Road
Tarrytown, NY 10591
914-332-0300
clis@carrierlogistics.com
www.carrierlogistics.com



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**Innovation Drives Change
Session Descriptions**

Thursday, September 28

BUSINESS PERFORMANCE: Process Innovation and Excellence

Steven Shapiro, Founder, 24/7 Innovation

In today's competitive world, it is not enough to benchmark against a peer group and then match what they do best. Market leading companies lead the way in product and process innovation. Shapiro will present the 7Rs, a powerful tool for reinvigorating your company's processes. Loaded with examples. [Click here to learn more about the 7Rs](#)

The Latest in Telephony

Lou Person, President, Traxi Technologies

Communications can be a major expense for transportation companies. Not just land lines but wireless and internet all contribute to the expense. In the rapidly changing world of telecommunications the choices and changes can be confusing. Find out from an expert in the industry, what options are available and just how reliable is VoIP.

Innovation Through Shared Services

Jeff Keller, Principle, Keller Services

An innovative look at new business models, this discussion will focus on how you can save a lot of money in expenses by combining your back office services. Yes, it requires thinking outside of your normal parameters, but are you losing out while your competitors embrace this new way of thinking? The session leader will look at various outsourcing options as well.

The FedEx Custom Critical Story

Jack Pickard, President, FedEx Custom Critical

Talk about Innovative: FedEx Custom Critical provides expedited shipment services throughout North America and internationally. Among its divisions are Surface Expedite, for exclusive-use shipping and time-definite services; Air Expedite, for an array of expedited air solutions to meet customers' critical delivery times; and White Glove Services, for shipments that require extra care in handling, temperature control or specialized security. Learn the lessons from the President on the importance of creating an Innovative culture at a company that offers such unique shipping services.

RFID Update: What You Need to Know

Andrew McCarthy, Principal Product Manager, Progress Software

You may not need it today but will you know enough about it when tomorrow comes? An expert in the technology talks about how RFID continues to evolve and is being used in innovative ways. He'll explain the technology and its advantages over traditional bar code scanning, where he thinks it is going, and the wide variety of uses, including case studies.

Friday, September 29

Building a Sustainable Innovation Capability

Thomas Wright, Director, Supply Chain Management, Kohler Company and Brian Christian, Founder, DASO Consulting (formerly Vice President of Global Product Development at Whirlpool Corporation)

This is your chance to hear from the “other side of the fence” – learn from and meet with a customer. Tom & Brian will be speaking on the culture of Innovation that is necessary to establish to really begin to see the benefits of Innovative thinking. Tom is currently very creatively addressing Kohler’s wide variety of shipping needs. He will share his insights into how he sees changes to the transportation industry in the coming years. Brian, basing comments on his years of experience at Whirlpool, will discuss the necessary steps to take to become a truly Innovative organization.

Results from the 2nd Edition LTL Industry-Wide Customer Value Benchmarking Report - Which carriers are providing the best value in the eyes of the customer
Bart Thedinger, President, MASTIOGALE

Bart will discuss the latest results of their groundbreaking LTL survey work. In brief, they conduct telephone interviews with LTL customers and speak with the individual who makes the decision on which LTL carrier(s) to use. These decision makers then rate their carrier(s) on approximately 20 attributes important to customer satisfaction, loyalty and the value they perceive their LTL carriers provide.

How does your organization match up? The priceless information they have gathered by taking this industry-wide approach is that the benchmarks will be current and you will know if your performance is better, average or worse than any other LTL carrier whether they have subscribed or not.

Innovative Programs to Lower Health and Safety Costs in the Trucking Industry
Thomas A. Kempa, Vice President, CIGNA Healthcare

Tom will share a case study of a transportation company that approached CIGNA and needed help. Their healthcare costs were skyrocketing and they needed a way to control costs. Through some innovative thinking and revolutionary actions they were able to save \$8 million in one year. In addition to this example, Tom will share the five “Learning Points” that were a result of this partnership and how they can be applied to your own organization to create savings.

In addition to these sessions, there will be roundtables, workshops, a spotlight session on technology and a special dinner speech by the Transportation Analyst Vice President for Merrill Lynch. Couple all of this with industry networking at an outstanding location and this program is not to be missed.

For registration information contact Craig Lis at 914-332-0300 or clis@carrierlogistic.com