



Global VisionMonday Summit
Leadership

SPONSORED BY

Transitions

HOYA

International **V**isionExpo

Welcome

In celebration of Vision Monday's 20th anniversary, we are pleased to welcome you to the first ever Optical Industry Global Leadership Summit.

This exclusive forum was designed as a special event for senior-level executives of major U.S. and international optical retailers, leading eye care professionals, and suppliers.

The summit is designed to create dialogue, thought-provoking discussion and guidance for decision makers within the optical community.

The theme of our conference is:

“Visioning The Future – Perspectives on Changing Consumer and Industry Dynamics”

- **How will consumers make decisions about purchases and vision correction choices in the future?**
- **What is technology doing to impact those trends and how are today's leading thinkers viewing strategies towards distribution, branding and retailing as a result?**
- **What are the plusses and minusses of public and private equity and what is the view of today's money markets towards investment goals?**
- **What new notions and capabilities are driving changes and how can decision makers adapt?**

*This unique and important industry event is presented by **Vision Monday** with the generous support of our event sponsors, **Transitions Optical, HOYA and International Vision Expo.***

***Vision Monday** is proud of its role as the leading business news provider within the optical industry, through our relationships with readers via our print publication's news and analysis, our monthly e-newsletters, VisionMonday.com and our regular e-mail news vehicle, VMail.*

It is our goal that the Optical Industry Global Leadership Summit will bring together leaders of the world optical market and provide insights, identify unique opportunities and pose solutions to challenges for leading players.

We welcome your comments.

*Bill Scott
Vice President/Group Publisher
Retail Optical Group
Jobson Optical Group
bscott@jobson.com
(212) 274-7131*

*Marge Axelrad
Sr. Vice President/Group Editorial Director
Retail Optical Group
Jobson Optical Group
maxelrad@jobson.com
(212) 274-7029*

SPEAKER BIOGRAPHIES



Alain Afflelou

Founder, President, Directeur General
Alain Afflelou

Born in Algeria, Alain Afflelou arrived in France in 1962. With a diploma from l'Ecole Supérieure d'Optométrie à Paris, he opened his first optical store, in Bordeaux. He invested heavily in advertising and communications that challenged conventions. In 1979, the Alain Afflelou franchise was born. The 100th store opened in 1985. After many customized programs and private-labeled products expanded in frames, sun and lenses, Alain Afflelou went public on the Paris Euronext exchange in 2002. With 721 stores by April 2005, the business continued to expand via openings, franchising and acquisitions, including the purchase of 142 Carrefour shops in France and Spain. In March 2006, Bridgepoint Capital acquired a major stake in Alain Afflelou's company; he remains CEO. As of today, Alain Afflelou operates close to 800 shops in France, Spain and other countries.



Al Bernstein

President
Nationwide Vision Laser and Eye Centers

Al Bernstein is a 14-year veteran in the optical industry. He entered the optical arena in 1993 when he joined Pearle Vision as Senior Vice President. He helped turn around the \$500 million optical company and prepared it for sale. In 1998, Pearle Vision was sold to Cole National. In 1998, Bernstein joined Arizona-based Nationwide Vision and has been instrumental in the company's growth. The company has tripled their store locations to 57, opened a Laser Eye Surgery Center, opened two laser vision screening kiosks, and recently opened the first Nationwide Vision Medical Eye Center to treat patients with ocular diseases. Today Nationwide Vision is the largest optical retailer in the state. Nationwide has created its own foundation, Nationwide Vision Kids Foundation. Bernstein is a board member for Pappas Schools. He also serves on the boards of Prevent Blindness America, Arizona Division, SightCare, Inc., and TEC, Phoenix Chapter.



Erin Byrne

Global Chief Digital Strategist
Burson-Marsteller

Byrne has worked on web initiatives since 1993 for diversified clients encompassing online strategy and research, marketing communications, design/development, viral marketing and interactive advertising. She manages an award-winning global team of strategists, designers, programmers and copywriters. Byrne's clients have included McDonald's Corporation, Transitions Optical, HealthMarkets, Hormel Foods, Old Navy, Citibank, The Coca-Cola Company, Nestle Waters North America, Johnson & Johnson, US Airways, and Ginnie Mae. Byrne's team won the "Yahoo Purple Big Idea Chair" award for innovation in integrated marketing for the Bureau of Engraving and Printing's "New Color of Money" campaign. Byrne's work on the internet also includes association and campaign activities including The Salvation Army's online fundraising, Vision Council of America's Check Yearly program Web site, online community building for the U.S. Tuna Foundation, and work within the political arena.

SPEAKER BIOGRAPHIES



Darren M. Friedman

Partner
Citigroup Private Equity

With more than eleven years of private equity experience, Friedman has participated in the private equity industry in various capacities. Since joining CPE in 2001, he has made investments in numerous direct investments and private equity funds in both North America and Europe. Prior to joining CPE, Friedman worked in the Financial Entrepreneurs Group at Salomon Smith Barney, managing relationships with a number of private equity funds and their portfolio companies. His transaction experience includes various aspects of leverage finance, mergers and acquisitions, initial public offerings, secondary equity offerings, recapitalizations and the raising of private equity funds. Prior to working at Salomon Smith Barney, Friedman was a Commercial Banking Officer at LaSalle National Bank. Friedman received an M.B.A. from the Wharton School of the University of Pennsylvania and a B.S. in finance from the University of Illinois.



Robert C. Gray

Executive Vice President, Highmark Inc.
President and CEO of HVHC, Inc.
(Highmark's Vision Holding Company)

Robert C. Gray is an Executive Vice President for Highmark Inc. and is currently the President and CEO of HVHC, Inc. (Highmark's Vision Holding Company). In this position, he is responsible for overseeing (serving as Chairman) all three vision companies owned by Highmark which include, Davis Vision, VIVA International and ECCA (Eye Care Centers of America). He reports directly to Dr. Kenneth R. Melani, Highmark's President and Chief Executive Officer. Prior to becoming the President and CEO of HVHC, Inc. in 2006, Gray held various executive and management positions with Highmark and Pennsylvania Blue Shield. He served as Highmark's CFO and Executive Vice President of Finance and Subsidiary Services, Senior Vice President and Treasurer, as well as Vice President of Finance for Highmark. He also serves on the Board of Directors of several companies.



Andrea Guerra

Chief Executive Officer
Luxottica Group S.p.A.

Andrea Guerra is the CEO of Luxottica Group, S.p.A. the global leader in the design, manufacturing and distribution of eyewear. Guerra joined Luxottica in 2004. Guerra had previously spent ten years at Merloni Elettrodomestici, five of which as the company's CEO. At the time he was the youngest CEO of any Italian listed company. Under his leadership, Merloni, now Indesit Company, became Europe's number-three white goods manufacturer. Guerra's professional experience includes working for Marriott Italia, the Italian subsidiary of the Marriott corporation. Over the five years he spent with the company, Guerra held various positions in marketing and operations and played a key role in setting up Marriott's facility management division in Italy. Andrea Guerra is 41 years-old, holds an honors degree in economics from La Sapienza University in Rome.

SPEAKER BIOGRAPHIES



Robin Lewis

President
Robin Lewis Inc.

Robin Lewis is a strategic analyst and consultant, specializing in identifying strategic growth opportunities for major corporations in the retail and related consumer products industries. He also has a strategic affiliation with the Doneger Group, and is a partner of Lewis Gordon Partners LLC, a U.S. market entry consultancy. As author and publisher of the monthly ROBIN REPORTS, he provides strategic insight regarding major events in the retail industry. Most recently he was VP and Executive Editor of Women's Wear Daily and originator of Fairchild's Strategic Information Services. He serves on the Board of Governors for the Fashion Institute of Technology and the Board of Directors for the Fashion Group International and Unique Solutions.



Scott Olivet

Chief Executive Officer
Oakley, Inc.

Scott Olivet joined Oakley, Inc. in October 2005 as its Chief Executive Officer and as an Oakley director. From August 2001 to October 2005, he served as Nike Inc.'s Vice President, Nike Subsidiaries and New Business Development where he led, developed and executed the company's branding strategy including the Cole Haan, Converse, Hurley, Starter and Bauer-Nike Hockey brands. Prior to Nike, Olivet served as Gap, Inc.'s Senior Vice President of Real Estate, Store Design and Construction, responsible for the Gap, Banana Republic and Old Navy brands from 1998 to 2001. He worked with Bain & Company from 1984 to 1998, serving as a partner and head of the firm's worldwide practice in organizational effectiveness and change management from 1993 to 1998.

“Visioning The Future – Perspectives on Changing Consumer and Industry Dynamics”

8:30am-9:30am Registration and Continental Breakfast

9:30am-9:45am WELCOME

9:45am-10:30am **Session: “The World Beyond Optical”**

“The Third Wave: Retail’s Moment of Redefinition”

The drivers of change are globalization, technology and over-capacity on the supply side and consumer power on the demand side. The convergence of these factors drives five major economic trends, which in turn is driving how businesses must compete to grow.

Speaker: Robin Lewis, Strategic Analyst and Consultant

Publisher of Robin Reports

PRESENTED WITH THE
GENEROUS SUPPORT OF

LUXOTTICA'S ‘WORKING TOGETHER’ PROGRAM

LUXOTTICA
GROUP

10:30am-10:45am BREAK

10:45am-11:45am **Session: “The World Within Optical”**

Presentations by top executives from leading optical retail companies about their unique approach to tap into consumer attitudes, challenge conventional ideas and generate change and profits.

Followed by panel and Q&A.

Speakers: Al Bernstein,

President Nationwide Vision & Laser Surgery, U.S.

Alain Afflelou,

President/Director General, Alain Afflelou, France

11:45am-12:30pm **Session: “It’s All About the Money”**

Private Equity or Public Equity?

What are the various methods and yardsticks used by executives to run businesses and fuel growth. What are the plusses and minusses of public/private equity, what is the view of today’s money markets towards investment goals? What are the characteristics of the eyewear/optical market that are most/least attractive to investors?

Speaker: Darren M. Friedman, Partner,
Citigroup Private Equity, NY

SPONSORED BY

Transitions

HOYA

International
VisionExpo

12:30pm-2:00pm

LUNCH (The Rainbow Room)

2:15pm-3:00pm

**Session: "Technology's New Frontier"
The Consumer and The Internet**

Direct access to information, the development of 'communities,' the creation of content and 'virtual worlds' is permanently changing the notion of 'channels,' the distribution of consumer products and marketing in major ways. This session will explore the coming trends online and implications for all businesses

Speaker: Erin Byrne, Global Chief Digital Strategist, Burson-Marsteller

3:00pm-3:15pm

BREAK

3:15pm-4:45pm

Session: "Vertical Integration: How New Business Models are Responding to Consumer Change"

Integration in the eyewear and sunwear industry is moving at a rapid pace. Leaders who have globally integrated retail, manufacturing, distribution and healthcare will speak on their strategies and what the future holds. How does Luxottica's integrated approach address and influence consumers' decision-making about eyewear and eyewear around the world? What is the view of leading insurance company Blue Cross/Blue Shield towards the industry and what are the factors that led towards the company's integrated approach to vision care, eyewear supply and retailing? What is the perspective on diversifying a brand approach in today's sunwear market and how is Oakley moving towards a new stance within the optics world? Followed by panel and Q&A.

Speakers: Robert Gray, President/CEO, Highmark Vision Group
Andrea Guerra, CEO, Luxottica Group
Scott Olivet, CEO, Oakley

4:45pm

END

Global Vision Monday Summit
Leadership



Global **VisionMonday** Summit
Leadership



SPONSORED BY

Transitions

HOYA

International **V**isionExpo