

€ TRAINING

Sales and Operations Planning Integrating
the Business



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Introduction:

This course is focused upon better business performance, through better planning and control of the business by top management. Sales & Operations Planning S&OP is the traditional name for the process, although some have tried to introduce alternative titles, such as Integrated Business Management and SOFplan - Sales, Operations and Financial Planning. The process is about ensuring that the top-level plans in the business - covering product management, sales, marketing, operations, resources, finance, engineering, human resources, IT - are all balanced to achieve the strategic plans of the organization, in the medium to long term.

Course Objectives:

At the end of this course the participants will be able to:

- Ensure that participants understand what Sales & Operations Planning.
- Explain the objectives of the process and the benefits that can be achieved.
- Describe the 5 phases of the monthly S&OP process, and to ensure that participants can recognize the appropriate people to be involved in each phase.
- To ensure that top management realizes S&OP is their process; they are responsible for making it work for them.
- Realize that it is the preparation performed by people below the top-level that allows the process to work effectively and efficiently.
- Prepare people to go back to their companies, ready to implement S&OP.
- Plan for those implementations to be a success in achieving improved business performance.

Targeted Audience:

- Managers among all managerial levels
- Supervisors
- Team leaders
- Also, the course is suitable for all the staff among all levels or departments

Course Outlines:

Unit 1: Introduction to Sales & Operations Planning:

- Why do organizations need S&OP?
- Where does it fit in the hierarchy of ERP and Supply Chain systems?
- What are the benefits that can be achieved?
- Who does what?
- An introduction to the 5 step Sales & Operations Planning process.
- Step 1 of the process.
- Managing the product or service portfolio.
- New product introduction, phasing out old products.

Unit 2: The Demand Planning Phase:

- What is the overall objective of demand planning?
- The essential difference between forecasting and demand planning.
- The inputs to the demand planning process.
- The logic of demand planning.
- The outputs from demand planning - the data required to be passed on.
- Demand planning exercise.
- Demand planning & demand management.
- The demand planning meeting.

Unit 3: The Supply & Resource Planning Phase:

- What is the overall objective of supply and resource planning?
- The inputs to the supply planning process.
- The logic of supply planning.
- The outputs from supply planning - the data required to be passed on.
- The inputs to resource planning.
- The logic of resource planning.
- The outputs from resource planning - the data to be passed on.
- A supply and resource planning exercise.
- The supply & resource planning meeting.

Unit 4: The Integration and Reconciliation Phase:

- What must be integrated?
- What must be reconciled?
- Who must be involved?
- What is the agenda for the pre-S&OP meeting?
- The importance of the financial numbers.
- Identifying gaps between the budget and the S&OP numbers, and discuss potential action plans to close the gaps.
- Planning the agenda for the executive S&OP meeting.
- Publishing the information for senior management.

Unit 5: The Executive Sales & Operations Planning Meeting:

- Who must be involved? Who runs the meeting?
- The agenda for the S&OP meeting.
- The review of each family to consider the balance of demand and supply.
- The review of the overall financial numbers.
- Decisions to be taken, the minutes of the meeting.
- Identifying what can be improved in the next cycle.
- Beyond plant level S&OP.
- Software advances to support the process.