

2 – DAY

INTEGRATED SALES AND OPERATIONS PLANNING

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INTRODUCTION

Sales and Operations Planning is a process to develop tactical plans that provide leadership the ability to strategically direct its businesses to achieve competitive advantage on a continuous basis by integrating customer-focused marketing plans for new and existing products.

This process brings together all of the plans for the business (sales, marketing, development, manufacturing, sourcing, and financial) into one integrated set of plans. It is performed at least once a month and is reviewed by management at an aggregate (product family) level.

Reconciliation must happen for supply, demand and new-product plans at the detail and aggregate levels and tie to the business plan. It is a definitive statement of the company's plans for near to intermediate term. Learning how to properly execute the Sales & Operations Planning (S&OP) is part of this instruction. The process will link the strategic plans with its execution and reviews of the performance measurements for continuous improvement.

The presentation involves improving communication and how to integrate the various departments and respective processes including gathering and analysing information. In addition, the instruction will identify what is necessary to facilitate high performing S&OP.

METHODOLOGY

This stimulating program will maximise understanding and learning through Interactive Lectures, Course notes, Videos, Learning Assessment

COURSE OBJECTIVES

By the end of this course, you will be able to:

- Understand what is 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 recognise the appropriate people to be involved in each phase
- Ensure that top management realise S&OP is their process; they are responsible for making it work for them
- Realise that it is the preparation performed by people below the top level that allows the process to work effectively and efficiently
- See the need to develop the big picture, and allow top management to review it each and every month in a structured process.
- Know how to measure, monitor and improve the S&OP process/ results
- 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

WHO SHOULD ATTEND?

- General Managers, Directors
- Senior Managers and Professionals who are in:
 - Supply Chain/ Planning/ Procurement/ Inventory
 - Operations/ Manufacturing Plants
 - Sales and Marketing Executives
 - Finance Managers
 - Demand Management Professionals

PROGRAM OUTLINES

MODULE 1: INTRODUCTION TO EXECUTIVE S&OP

- Understanding End to End Supply Chain
- What is Sales and Operations Planning (S&OP)?
- What are S&OP Objectives
- How does S&OP – Connect the Pieces
- Roadblocks to the development of S&OP
- Process, Structure and Logic of S&OP
- Overview of the 5 step S&OP process
- What are the benefits that can be achieved?

MODULE 2: INPUTS TO EXECUTIVE S&OP

- What are the inputs?
- Who does What
- Data Requirements
- The Demand Planning Process
- Supply and Capacity Planning Process
- Resource Requirements Planning
- Demand/ Supply Strategies
- New Products Planning

MODULE 3: THE MONTHLY EXECUTIVE S&OP MEETING

- Objective of Monthly Executive S&OP Meeting
- Pre-S&OP Meeting
- Executive Monthly Meeting
- The agenda for the S&OP meeting
- The review of the overall financial numbers
- Identifying gaps between the budget and the S&OP numbers
- KPIs to measuring performance
- Decisions to be taken

MODULE 4: WHERE DOES EXECUTIVE S&OP FIT?

- How does Executive S&OP Interact with ERP?
- How does Executive S&OP Support Supply Chain Management?
- How does Executive S&OP Support Lean Manufacturing?
- Integrating Route to Market with S&OP
- What is the Role of Finance in S&OP

MODULE 5: UNDERSTANDING DEMAND AND INVENTORY PLANNING

- Definition of Demand Planning
- Why Demand Planning
- Demand Forecasting
- Inventory Planning
- Replenishment Planning
- Summary of Benefits from Integrated Demand Planning

MODULE 6: COURSE SUMMARY – DEVELOPING YOUR ACTION PLAN

- Best Practices in Sales and Operations planning
- Lessons learnt and Program Wrap Up
- Identifying Critical Initiatives and Developing Key Action Plan [®]
- Formulating Participants Personal Next Steps

(CO. No. 199801010558)