

# 2 – DAY INTEGRATED SALES AND OPERATIONS PLANNING



## 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.

## Course Objectives

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

- Obtain a holistic understanding of Integrated Supply Chain Management and the core activities
- Identify the key factors to be considered when designing a distribution network
- Analyse the supply chains they work in and their roles from customer's viewpoint
- Minimise costs and enhance your customer value through effective development and management of supply chain network hence practicing strategic cost management, .
- Consider the networks of relationships, sustainability and product design, as well as the logistics of procurement, distribution and fulfilment
- Examine the tools, core processes and initiatives that ensure businesses gain and maintain their competitive advantage.
- Understand the major drivers of supply chain performance and Supply Chain Operations Reference (SCOR)
- Balancing demand and supply with an effective integrated sales and operations plan
- Understand the importance of creating a sustainable supply chain management system
- Understand risk management and build a resilient supply chain - Lessons from Covid-19
- Understand supply chain analytics (Big Data) by using data-driven intelligence to your business, reducing overall cost to serve and improve service levels
- Improve supply chain performance; benchmark against Best Practices

## Methodology

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

## 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

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## Course Outline

### 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

