



Sales & Operations Planning

Delivering balanced and efficient sales and budgets through improved communication and information flow

This 2 Day Course will explore how effective Sales & Operations Planning processes can provide alignment and integration of organisational functions to support the business strategy. We will also explore the tools and techniques required to make Sales & Operations Planning an intrinsic part of business planning, and how to deliver “best in class” performance across the whole organisation.

This is a practical course, using industry case studies and ‘take-home worksheets’ to enable participants to plan for and assess their own organisations.

This course aims to:

- Educate participants in the principles of sales and operations planning
- Provide a ‘how to’ framework to establish and fine tune the S&OP process to ensure it remains effective
- Explore and consider the data and KPIs required to support the meeting framework
- Discuss who should attend each of the framework meetings and their roles and responsibilities in and around the meetings.
- Learn about the right S&OP policies required to guide the entire S&OP process
- Discuss successful implementation approaches and how to get Executive support and buy in

Key Topics

- Integrated Business Planning using S&OP techniques
- S&OP Meeting Framework
- Meeting Input, Agenda, and Outputs
- Demand Planning
- Supply Planning
- Supply Chain Collaboration
- Performance Management and S&OP
- S&OP Policies
- How to get Executive Support
- Systems & Technology
- The Financial Link
- Implementation & Change – Making it Happen

Effective S&OP is a proven process to ensure the management of the business is effective, integrated and aligned with the organisation’s objectives and strategies

S&OP is a powerful, ongoing management & performance measurement process integrating business plans, financial budgets, operational planning & execution. The aim is to integrate ‘top-down’ & ‘bottom-up’ planning using a single set of numbers, perform gap analyses to identify where operational plans do not reach targets & enable fact-based trade-off decisions to be made that aligns to the business strategy. Industry case studies demonstrate the positive impact which the use of accurate data, governed by effective policies, presented in a useable format with a practical framework, breaks down the silos that form in most large organisations.

Key Learning Objectives

- Understand how to define the strategic and tactical aims of businesses and, in particular, participant’s businesses
- Discover the most suitable and context appropriate performance measures, policies and processes
- Learn how to structure S&OP processes (with S&OP manuals, meeting agendas and action checklists) that are aligned with the business’ requirements and goals. Practical exercises will enable participants to start the planning process for their organisation during the course
- Learn how to build the relevant S&OP policies required to support and manage the entire process
- Understand how to configure systems and improve data quality, to better support the S&OP process and performance measures
- Walk through a phased implementation approach during which a ‘pilot’ S&OP is used to test the efficacy of the process and to gain stakeholder buy-in
- Learn how to integrate training and education and other key change management processes in the S&OP to ensure it sticks
- Explore strategies to ensure sustainability through the use of executive level KPIs and techniques including coaching and mentoring once the S&OP process becomes operational.

WHAT DO YOU GET?

Practical tools you can take away and implement
Implementation tips & hints
Real world applications
Trainers who have walked the walk

WHO SHOULD ATTEND

Procurement/Purchasing/ Sourcing Managers	Demand Planners	Logistics Managers
Financial Controllers	Supply Planners	Supply Chain Managers
General Managers	Warehouse Managers	Production Planners
Chief Executive Officers	Inventory Managers	
	Distribution Managers	