

# € TRAINING

Sales and Operations Planning Business  
Integration





# Sales and Operations Planning Business Integration

## Introduction:

This training program provides participants with a thorough understanding of how S&OP integrates business functions. Through exploring key concepts and real-world case studies, participants will learn to align sales forecasts with production plans and financial objectives. Emphasis is placed on cross-functional collaboration to optimize operations and drive business growth. The program equips participants with strategies to enhance customer satisfaction and maximize profitability through effective S&OP implementation.

## Program Objectives:

By the end of this program, participants will be able to:

- Ensure understanding of Sales & Operations Planning S&OP.
- Explain process objectives and benefits.
- Describe 5 phases of monthly S&OP, identify involved personnel.
- Stress top management ownership and responsibility for S&OP success.
- Highlight the importance of lower-level preparation for process efficiency.
- Prepare participants for S&OP implementation in their organizations.
- Plan for successful S&OP implementation to improve business performance.

## Targeted Audience:

- Operations Managers.
- Supply Chain Managers.
- Sales Managers.
- Inventory Managers.
- Finance Managers.
- Business Analysts.
- Cross-functional team members involved in S&OP processes

## Program Outlines:

## Unit 1.

### Introduction to sales and operations planning:

- Understand the importance of S&OP in business integration.
- Overview of the 5 phases of the monthly S&OP process: Data Gathering, Demand Planning, Supply Planning, Pre-S&OP Meeting, and Executive S&OP Meeting.
- Explore how S&OP fits within ERP and supply chain systems.
- Discuss the benefits of implementing S&OP.
- Identify key stakeholders and their roles in S&OP.
- Introduce step 1 of the S&OP process, focusing on managing product portfolios.

## Unit 2.

### Demand planning phase:

- Define the objective of demand planning within S&OP.
- Differentiate between forecasting and demand planning.
- Outline the inputs, logic, and outputs of demand planning.
- Engage in a demand planning exercise to understand practical applications.
- Highlight the importance of demand management in S&OP.
- Discuss the demand planning meeting as part of the S&OP process.

## Unit 3.

### Supply and resource planning phase:

- Outline the objective of supply and resource planning in S&OP.
- Discuss the inputs, logic, and outputs of supply planning.
- Examine the inputs, logic, and outputs of resource planning.
- Conduct a supply and resource planning exercise for hands-on learning.
- Describe the supply and resource planning meeting within the S&OP process.
- Emphasize the importance of aligning supply with demand.

## Unit 4.

### Integration and reconciliation phase:

- Discuss the need for integration and reconciliation in S&OP.
- Identify what needs to be integrated and reconciled in the S&OP process.
- Determine the key stakeholders involved in integration and reconciliation.
- Outline the agenda for the pre-S&OP meeting.
- Analyze financial considerations and gap analysis in S&OP.
- Plan the agenda for the executive S&OP meeting.

## Unit 5.

### Executive sales and operations planning meeting:

- Define the purpose and participants of the executive S&OP meeting.
- Outline the agenda for the executive S&OP meeting.
- Review demand and supply balances during the meeting.
- Analyze overall financial numbers and performance.
- Make decisions and document minutes of the meeting.
- Identify areas for improvement in the next S&OP cycle.