



# Sales & Operations Planning 1-Day Course Specification

## 1 Objective

This workshop is designed to provide the participants with:

- A clear understanding of how S&OP should work
- Practical tips and checklists for guidance on getting started with S&OP
- The confidence and vision to mature the process over time

## 2 Key Learning Points

The following points will constitute the basis for the course messages:

- One of the key purposes of S&OP is to look ahead for any gaps in the projected situation (demand, capacity) with where we thought we might be (budget). This enables the business to propose corrective actions to avoid issues or to maximise opportunities.
- S&OP must provide everyone involved with a clear picture of where the business is and where it is heading.
- S&OP is a way of working, not just a process. Everyone must accept that the process will evolve and mature over time.
- The S&OP process needs formality, discipline and clear roles. This will provide your business with flexibility and responsiveness to changes in demand and circumstances.
- The horizon over which the S&OP plans must cover the gap between short-term planning (1-8 weeks) and long-term business planning (2 years plus).
- Well established contingency planning is a sign of a mature S&OP process.

## 3 Deliverables

By the end of the workshop, the participants will have created the following outputs:

- A set of ground rules for the new S&OP process
- A roadmap of prioritised actions
- A draft list of roles and responsibilities

#### 4 Duration

This will be a 1-day course with the following timings:

- Day 1 = 09h30 to 17h00

#### 5 Audience

This is a public course, so we expect the level of knowledge of the S&OP subject to vary widely. The course content will reflect this. It will cover both basic principles and more advanced methodologies.

People from the following functions will all take benefit greatly from this workshop.

- Finance
- Operations
- Commercial (Sales)
- Operations
- Procurement
- Manufacturing
- Logistics

#### 6 Course Content

We have listed below the confirmed content of the course.

Teaching methods used:  Debate  Exercise  Game

##### Introduction

We start the S&OP workshop with real energy in order to focus the mind and set the interactive style of the session.

##### The DNA of S&OP

We use the analogy of a flight crew to highlight what lies at the heart of S&OP and what it aims to achieve within the overall supply chain.

##### S&OP: Why and How

Here we explore how S&OP actually works in practice. We provide some real-life examples for inspiration and draw out a checklist that will act as a concrete guide for quality checking the process.

##### The Art of Communication

This short exercise is a reminder that S&OP is a process heavily based on effective communication.

## Case Studies

We will share some good S&OP stories from current clients. It is a healthy opportunity to discuss the good practices and lessons learnt.

## S&OP Roles & Responsibilities

Here we focus on the specific roles and responsibilities of the people involved in the S&OP process. It is an ideal opportunity to define:

- The process chairperson
- The core contributors and S&OP meeting attendees
- Who manages which process inputs/outputs

From this discussion, the participants will draw and document rules that form the foundation of the new process (e.g. "Trust the data to tell us enough to make a decision").

## The S&OP meeting

The S&OP meeting is the culmination of the entire S&OP process. There are some useful things to learn in this section about how to conduct and structure the meeting.

## S&OP structure and maturity

This is an important part of the workshop. The participants will get to explore how all the planning processes (demand planning, capacity planning, inventory planning, supply planning) come together into the S&OP. We will also look at the maturity steps so that everyone understands where they currently are and where to focus their improvement efforts. Clarifying the overall picture should lead them to understand:

- The horizon and levels of detail involved at all stages
- The key process steps of each monthly cycle
- The integration with existing processes and meetings

## Dashboard and KPIs

Here we will discuss the use and purpose of an S&OP dashboard as well as the potential content, relating to the KPIs.

## Roadmap of actions

At the end of the workshop, we will review the various actions and ideas captured throughout the session. This roadmap is one of the key outputs from the workshop.

### Energiser videos

We will use short videos to provide some moments of light relief in between the workshop tasks.

## 7 Participants Preparation

CEO Consulting will email a welcome message to all participants that will include:

- A letter with the session agenda, content and practicalities
- A preparation questionnaire to ask the participants about their objectives
- A *Reflection* (a cameo-type exercise used to introduce the participants to each other)

The participants will be requested to email their preparation questionnaire back to Hughenden in advance. We will then use the answers to understand better the profile and expectations of the audience.