



SM025: Sales and Operations Planning Integrating the Business

Training Description:

This intensive course is focused upon better business performance, through better planning and control of the business by top management. Sales & Operations Planning (S&OP) is the traditional name for the process, although some have tried to introduce alternative titles, such as Integrated Business Management and SOFplan – Sales, Operations and Financial Planning. The process is about ensuring that the top-level plans in the business – covering product management, sales, marketing, operations, resources, finance, engineering, human resources, IT – are all balanced to achieve the strategic plans of the organisation, in the medium to long term.

The Benefits

- ✓ s&OP will help participants develop better, more realistic medium to long term plans
- ✓ Allowing them to better plan your acquisition of resources, across your planning horizon
- ✓ Thus, they will have better plans that will be executed closer to plan, which will improve customer service and increase profitability. Plans will be genuinely achievable, and customer demand will not just be a wish list
- ✓ Top management will have a clear, recognised monthly process with which to plan and control the business
- ✓ Top management will be better integrated to create and maintain one plan for the business, driving towards becoming a 'one number company'
- ✓ Delegates will have more control over your inventory, lead times and order book levels
- ✓ They will achieve your financial numbers more consistently

Training Objectives:

By the end of the training, participants will be able to:

- ✓ Recognise their roles within the S&OP process
- ✓ Be able to better carry out their roles within the S&OP process
- ✓ Support each other in the development of realistic plans
- ✓ Realise that people must be integrated across the business to achieve success
- ✓ Have awareness of the need to reconcile each of the plans will become obvious
- ✓ See the need to develop the big picture, and allow top management to review it each and every month in a structured process

Training Designed for:

This course is for Top management of business units, people directly reporting to the top management of business units, those who will participate in the 5 phases of the S&OP process – those responsible for product management, sales and marketing, operations, purchasing, finance, human resources and IT, anyone else who will 'touch' S&OP and people from many differing types of organisation, that need to reconcile sales, operations, resources and finance

Training Requirement:

"Hand's on practical sessions, equipment and software will be applied during the course if required and as per the client's request."

Contents can be adapted to your specific wishes. It is therefore possible to focus on specific modules of the training course as per client's learning needs and objectives. Further, it should be forwarded to us a month prior to the course dates.

Training Program:

DAY ONE:

- ❖ PRE-TEST
- ❖ Introduction to Sales & Operations Planning
 - Why do organisations need S&OP?
 - Where does it fit in the hierarchy of ERP and Supply Chain systems?
 - What are the benefits that can be achieved?
 - Who does what?
 - An introduction to the 5 step Sales & Operations Planning process
 - Step 1 of the process
 - Managing the product or service portfolio
 - New product introduction, phasing out old products

DAY TWO:

- ❖ The Demand Planning Phase
 - What is the overall objective of demand planning?
 - The essential difference between forecasting and demand planning
 - The inputs to the demand planning process
 - The logic of demand planning
 - The outputs from demand planning – the data required to be passed on
 - A demand planning exercise
 - Demand planning & demand management
 - The demand planning meeting

DAY THREE:

- ❖ The Supply & Resource Planning Phase
 - What is the overall objective of supply and resource planning?
 - The inputs to the supply planning process
 - The logic of supply planning
 - The outputs from supply planning – the data required to be passed on
 - The inputs to resource planning
 - The logic of resource planning
 - The outputs from resource planning – the data to be passed on
 - A supply and resource planning exercise
 - The supply & resource planning meeting

DAY FOUR:

- ❖ The Integration and Reconciliation Phase
 - What must be integrated?
 - What must be reconciled?
 - Who must be involved?
 - What is the agenda for the pre-S&OP meeting?
 - The importance of the financial numbers

- Identifying gaps between the budget and the S&OP numbers, and discussion potential action plans to close the gaps
- Planning the agenda for the executive S&OP meeting
- Publishing the information for senior management

DAY FIVE:

❖ The Executive Sales & Operations Planning Meeting

- Who must be involved? Who runs the meeting?
- The agenda for the S&OP meeting
- The review of each family to consider balance of demand and supply
- The review of the overall financial numbers
- Decisions to be taken, the minutes of the meeting
- Identifying what can be improved in the next cycle
- Beyond plant level S&OP
- Software advances to support the process

❖ Course Conclusion

❖ POST-TEST and EVALUATION

Training Methodology:

This interactive training course includes the following training methodologies as a percentage of the total tuition hours:

- 30% Lectures, Concepts, Role Play
- 70% Workshops & Work Presentations, Techniques, Based on Case Studies & Practical Exercises, Gamification, Software & General Discussions
- Pre and Post Test

Training Certificate(s):

CMCT Internationally recognized certificate(s) will be issued to each participant who completed the course.

Training Fees:

TBA as per the course location - This rate includes participant's manual, hand-outs, buffet lunch, coffee/tea on arrival, morning & afternoon of each day.

Note: The 5% VAT (Value Added Tax), will be effective starting 01st of January 2018 as per the new regulation from the UAE Government. The VAT applies for all quotation both for local and abroad.

Training Timings:

Daily Timings:

07:45 - 08:00	Morning Coffee / Tea
08:00 - 10:00	First Session
10:00 - 10:20	Recess (Coffee/Tea/Snacks)
10:20 - 12:20	Second Session
12:20 - 13:00	Recess (Prayer Break & Lunch)
13:00 - 14:00	Last Session

For training registrations or in-house enquiries, please contact:

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