



S&OP Assessment

Sometimes an outside set of eyes can “see things” that are invisible to inside eyes. And we can present findings to the management team in a non-threatening way that insiders often cannot. Since 1984, we have made it our job to know industry best practices and bring them to our clients. This assessment will:

- *Benchmark your company's Sales and Operations Planning performance and practices against similar best-in-class operations.*
- *Identify opportunities that could contribute significantly to improving your S&OP process for achieving more effective resource management, on-time delivery, and cost control.*

Typical Assessment Topics

<u>Process Discipline</u>	<u>Functional Areas</u>	<u>Mechanics & Tools</u>
General Knowledge	New Product Planning	S&OP Document
Process Steps	Sales Forecasting	Families & Coding
Process Calendar	Order Entry	Reporting Actuals
Who Does What	Customer Service	Date Management
Horizon and U/M	Inventory Management	Time Phased Inventory
Documentation	Production Planning	System Capabilities
Performance Metrics	Capacity Planning	S&OP/ERP Link

Methodology

- One month prior to the assessment:
 - Determine the topics, identify the people, and set the agenda.
 - Gather company information (organization chart, business plan, financials as appropriate, performance measures, improvement plans, S&OP info, and other meeting documents).
- The on-site assessment (typically three days):
 - Meet with the management team to understand your needs.
 - Interview personnel from related functional areas.
 - Attend an S&OP meeting and preparation meetings as appropriate.
 - Tour the facilities.



Deliverables

- Three-hour wrap-up meeting with the management team.
- Written report stating observations and recommendations.

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