



S&OP Introductory On-Site Visit

Objectives

The Introductory On-Site Visit provides an opportunity for J. E. Boyer Company to become acquainted with your products, processes, and people. It also allows me to introduce the S&OP capabilities and methodologies of J. E. Boyer Company, Inc.

More importantly, the visit is a forum for your management team to share specific S&OP problems, opportunities, and improvement needs. Having a good understanding of your needs is essential for me to outline a preliminary action plan.



Pre-Visit Preparation

To help ensure the visit is productive, preliminary information (as appropriate) is gathered prior to the visit and may include: an annual report, a product catalog, an organization chart, current S&OP process information, financial information, a business plan, and key performance measures.

Typical Agenda

7:30 – 8:00	Check in with the host and review the agenda.
8:00 – 9:00	Tour the facility.
9:00 – Noon	Review your current S&OP process with selected people as appropriate.
Noon – 1:30	Lunch break and prepare the afternoon meeting.
1:30 – 3:30	Make a brief presentation about J. E. Boyer Company, Inc. and a brief presentation about S&OP. Then, have an open discussion with the team about your S&OP needs. This meeting includes the President and his/her staff, plus others interested in S&OP.

What Next?

At the conclusion of the wrap-up meeting, we will collaboratively determine if there is any interest in working together. If so, I will prepare a specific proposal containing project objectives, work steps, schedule, resources, team composition, and costs. This proposal will be presented to the management team in a follow-up meeting another day.

Cost

Reduced daily rate of \$2,400/day plus travel expense for this one-day visit.

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