



Sales & Operations Planning

Workshop Outline

Objectives

- Present a common knowledge base of S&OP terminology, concepts, fundamentals, process steps, keys to success, and implementation methodology.
- Provide a forum for the team to gain a common understanding of related business issues.
- Create a preliminary action plan for getting started or revitalizing your S&OP process.

Who Should Attend?

Anyone who participates in the S&OP process or uses the output ... the president, direct reports, vice presidents, directors, managers, and staff. Functional areas include sales, marketing, production, materials, inventory, scheduling, purchasing, finance/accounting, information systems, engineering, the demand manager, and human resources. We work with you to determine the appropriate attendees.

Methodology

The course is a combination of lecture, interactive discussions, team group activities, and team group reports. Specific deliverables are a preliminary action plan, an issues list, a decisions list, and a parking-lot list.

Day One

Introduction and Objectives
S&OP Overview
Player Introductions
Manufacturing Strategy
S&OP Fundamentals

- Definitions and Mechanics
- Product Families

The Eight Process Steps

- Step 1 – Period Actuals
- Step 2 – Sales Data Input
- Step 3 – Data Aggregation
- Step 4 – Sales Review Meeting
- Step 5 – Pre S&OP Analysis

Day Two

Day One Review
The Eight Process Steps

- Step 6 – Pre-S&OP Meeting
- Step 7 – S&OP Meeting
- Step 8 – Communication and Feedback

Linking S&OP with the ERP System
Date Management
Keys to Success
Implementation Steps
Team Group Work Sessions
Team Group Reports
Wrap-up and What's Next?

Content, Length, and Size

The specific course content can be tailored to your specific needs. The outline above is a typical 2-day agenda. An optional 3-day format allows for more specific company application via expanded team group work sessions. Class size is limited to 30 attendees.

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