

The Oliver Wight Public Course Portfolio

Integrated Business Planning (Advanced S&OP) Course

Detailed Description

Using the Integrated Business Planning Process to Create One
Company Agenda



Integrated Business Planning (Advanced S&OP) Course

What is this course about?

Often referred to as Advanced Sales and Operations Planning, Integrated Business Planning is increasingly the business management process of choice for organizations all over the world. Integrated Business Planning represents the transition of Sales and Operations Planning from its production planning roots into the fully integrated business management and integrated strategy and financial planning process it is today.

This interactive course provides an overview of the Integrated Business Planning process and what it takes to implement it successfully. It shows how to align your planning processes with the business strategy over a 24 to 36 month horizon, with full product portfolio management and financial integration, to ensure the organization is working to a common agenda and single set of numbers. The instructors describe how the model can

be applied equally effectively to single site organizations as it can to multi-site, multi-national matrix structures in companies large and small. You will learn how Integrated Business Planning can be used to identify gaps in business performance far enough ahead for the business to re-optimize in light of the changing circumstances, using scenario modeling to deliver the best result for the business.

Who is it for?

Senior executives and all members of the leadership team who are involved in elements of the Integrated Business Planning process as well as, people who are charged with implementing the process or improving an existing process, should attend this course. It is an excellent opportunity for a team to ensure that the senior management to whom it reports understands what is being done and the benefits to them.



“ Before the class, I thought our business was doing S&OP - we are not. There is a lot more involved - particularly the integration of finance. ”

course participant



Ben Sellers, Lead Instructor

Course Contents

The instructors will explain how the Integrated Business Planning process works to provide the latest view of the business and enable re-optimization in light of changing circumstances. They will provide an overview of the supporting processes of Product Management, Demand Management, and Supply Management and will describe the process of Integrated Reconciliation with Operational and Financial Projections leading to the Management Business Review. They will show how the Oliver Wight Proven Path assures successful implementation including the role of facilitated, structured workshops to accelerate its introduction.

Objectives and benefits

It is vital that the leadership team and all other senior players understand how the Integrated Business Planning process works and their role in making it effective in the business. At the end of this course, participants will be able to:

- Play a significant role in the entire Integrated Business Planning process for their company, from implementation to sustained performance
- Interpret the outputs from Product Management, Demand Management, and Supply Management, see their implications on the business, and develop the best forward plan for the company
- Understand the critical Integrated Reconciliation element of the process taking the outputs from the process reviews and building a picture of the company position using one integrated plan
- Conduct and support management reviews to identify gaps against the business plan and recommend steps to close the gaps
- Implement this continuous review process instead of the traditional business budgeting process in order to achieve the company's strategic and competitive priorities

Participants will Learn:

- How Integrated Business Planning has evolved into an integrated process for the entire business
- How to replan and optimize the company in the face of changing business conditions
- How to assess demonstrated performance as the realistic basis for forward projections
- How to integrate operational and financial factors to enable fully effective business assessment at all stages in the process
- The importance of the Management Business Review, its inputs, and how it is conducted to tackle the real issues in the company
- About the Oliver Wight “Proven Path” for implementation of the process throughout the company and the use of facilitated workshops to accelerate implementation
- How best practices published in the Oliver Wight Class A Checklist are used to drive performance
- Using a case study approach, experience the types of information, work process, and decisions made at each step of the process.

Course Content - day one

Oliver Wight – who we are

- Class Introductions

Perspective

- Definition of Integrated Business Planning (Advanced S&OP)
- Symptoms of a Non-Integrated Process
- Key Characteristics of an Integrated Business Planning Process
- Value Potential From an Integrated Process

Integrated Business Planning

Industry Best Practices

- Models
- Key Behaviors
- Principles
- Coordinators' roles
- Aggregate and Detail Planning - Enterprise Wide
- The Difference between Sales and Operations Planning and Integrated Business Planning
- Self-evaluation

Product Management Review

- Product Management Defined
- Managing the Pipeline
- Synchronize phase in/phase out
- Resource Capacity Planning
- Running a Class A Product Management Review
- Performance Metric
- Product Review Output
- Workshop

Demand Review

- Demand Management Defined
- Agenda
- Dashboard
- Key Principles
- Participants and Roles
- Running a Class A Demand Review
- Examples
- Workshop

Course Content - day two

Supply Review

- Worksheets
- Best Practice Attributes
- Supply Plan Development
- Rough-cut Capacity Planning
- Running a Class A Supply Review
- Agenda and Output
- Dashboard
- Workshop

Reconciliation Review

- Agenda
- Dashboard
- Gap closing
- Scenario Planning
- Key Principles
- Participants and Roles
- Examples
- Running a Class A Integrated Reconciliation Review
- Workshop

Financial Review

- Issues
- Agenda

- Performance Measures
- Output
- Examples
- Running a Class A Financial Appraisal
- Workshop

Management Business Review

- Business Leaders' Expectations
- Best Practice Attributes
- Running a Class A Management Business Review
- Agenda and Output
- Discussion

Implementation

- Typical obstacles
- Oliver Wight "Proven Path"
- Process Design Workshops
- FastTrack Methodology
- Stages of Maturation

We will finish by discussing the Proven Path to success, who to include on the project team, steering committee, and spin-off task groups, the foundation of successful implementation, the key role of education, action items that will immediately improve your competitive position, and how to ensure that your company gains and keeps its competitive edge. Discussions will include how to implement the process across a single site and how to implement in complex multi-business, multi-plant, and multi-national operations. You will also learn about the proven Oliver Wight "FastTrack" implementation for shortening the time to benefit.

Other public courses available from Oliver Wight

Integrated Supply Chain Management

Demand Management

Master Scheduling

Please scan QR
code to book online.



About Oliver Wight

Oliver Wight has a 40-year track record of delivering business improvement to some of the world's best-known organizations. We believe that sustainable improvement can only be made through your own people. So unlike other consultancy firms, we transfer our knowledge to you, which means you can achieve performance levels and financial results that last.

At the leading edge of management thinking and practice, our Integrated Business Planning (IBP) model lies at the heart of our clients' journey to outstanding business performance. Oliver Wight originated Sales and Operations Planning in the 1970s, and Integrated Business Planning can most simply be described as advanced S&OP; evolving from its production planning roots over 40 years ago into the fully

integrated management and supply chain collaboration process it is today. Integrated Business Planning allows the senior executive to plan and manage the entire organization over a 24-month horizon, aligning tactical and strategic plans each month and allocating critical resources to satisfy customers in the most profitable way.



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