

The Oliver Wight Public Course Portfolio

# Integrated Tactical Planning Course

## Detailed Description

Best Practice Integrated Tactical Planning

Imagine the possibilities,  
realize the potential



# Integrated Tactical Planning Course

## What is the purpose of this course?

This three-day course covers the fundamentals of Integrated Tactical Planning, including:

- Managing changes inside the execution time horizon
- Common roles, responsibilities, accountabilities required
- Daily vs. Weekly vs. Monthly Activities and the audiences that these processes serve
- Short term integration with Long Term planning (IBP)
- Performance Measures that drive improvement
- Change Management insights and techniques



## Who should attend?

- Customer Service Managers
- Demand Planners/Managers
- Sales Managers, Directors
- Master Schedulers, Supply Planners
- Logistics Supervisors
- Financial Controllers



**Todd Ferguson**  
Instructor



**David Goddard**  
Instructor

## Integrated Tactical Planning Course

The course agenda fosters learning and collaboration among participants, including hands-on practice. Small team breakouts are interwoven throughout the session. Attendees will leave confident, armed with proven techniques, principles and a framework to be used as a starting point for your company's ITP Journey.

### Course Content

#### Who Is Oliver Wight?

- Class Introductions
- Warm-Up Exercise

#### Perspective

- The Case for ITP
- Symptoms of Fire Fighting
- Company Examples
- Integrated Business Planning and ITP
- The Key roles of ITP
- Best Practices, Examples, and Principles

#### Product Execution

- Execution of portfolio and life cycle management strategies
- New Product Launch Plan management
- Portfolio Management and monitoring End of Life
- Resource Management
- Role of Product Planning Manager

#### Demand Execution

- Abnormal Demand
- Demand Monitoring
- Forecast Consumption
- Order Entry and Promising
- Management of the 'Vital Few'
- Role of Demand Execution Manager

#### Supply Execution

- Master Data and Grid
- Impact on Inventory positioning (safety stock, MTS, MTO etc.)
- Disaggregate the Supply Plan
- Master Schedule
- Capacity Planning (RCCP vs. CRP)
- Inventory Planning
- Logistics transport and warehousing
- Role of Supply Manager

#### Performance Measures

- Hierarchy and Behaviors
- Data quality
- Dashboarding
- Root Cause Analysis

#### Roles and Responsibilities, Behaviors

- Time Fences as Decision Points
- Understanding of Key Roles, including Senior Leadership
- Focus on 'what matters'

#### Weekly Process

- Linkage of Planning and Execution Processes
- Execution of IBP assumptions
- Daily and Weekly Cadence
- Issue identification and escalation criteria

#### Sample ITP Meeting

- Agenda
- Performance Measures
- One Page Summary

#### Improvement/Change Process

- Improvement Methodology
- Critical Issues to Consider

### Other courses available from Oliver Wight

Demand Labs

Demand Management

Integrated Business Planning (Advanced S&OP)

Integrated Scenario Planning

Integrated Supply Chain Management

Master Planning and Scheduling

Product & Portfolio Management



## About Oliver Wight

At Oliver Wight, we believe sustainable business improvement can only be delivered by your own people. So, unlike other consultancy firms, we transfer our knowledge to you; knowledge that comes from over 50 years of working with some of the world's best-known companies.

The Oliver Wight Class A Standard is recognized by organizations and industry commentators, as the definitive measure of business excellence. We have a long-standing reputation for innovation; we continually challenge the industry status quo, so you get the latest in fresh thinking around core business processes and their integration with people and technology.

Your Oliver Wight partners will coach, guide and inspire your people to drive change throughout your organization, allowing you to create a culture of continuous improvement and innovation that simply becomes for you 'the way we do things'. We call our approach to change management, the Proven Path; it's a proven, sustainable approach that will transform your business performance and deliver results straight to the bottom line.



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