

**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

Imagine the possibilities,  
realize the potential



# 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**  
Instructor



**Pete Alle**  
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 it 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 courses available from Oliver Wight

Demand Labs

Demand Management

Integrated Scenario Planning

Integrated Supply Chain Management

Integrated Tactical Planning

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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