

Scandinavian Academy
Training Center

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Riyadh - Al Khaleej District - Sheikh Abdul Aziz Bin Abdul Rahman Bin Bishr Street - 13223 - Office No. 5 | P.O.BOX : 13224

Course: Sales and Operations Planning & Integrating the Business

Code	City	hotel	Start	End	price	Language - Hours
SM-359SA	Al Baha	Hotel Meeting	2027-03-28	2027-04-01	10950 SR	En - 25

The Course

This course is focused upon better business performance, through better planning and control of the business by top management. Sales & Operations Planning (S&OP) is the traditional name for the process, although some have tried to introduce alternative titles, such as Integrated Business Management and SOFplan – Sales, Operations and Financial Planning. The process is about ensuring that the top level plans in the business – covering product management, sales, marketing, operations, resources, finance, engineering, human resources, IT – are all balanced to achieve the strategic plans of the organisation, in the medium to long term.

On successful completion of this workshop delegates will be able to:

- Improved customer service
- More consistent achievement of budget and business plan
- Reduced inventory and/or better control of lead times
- Becoming a ‘one number’ company, where everyone works to the same set of numbers
- Improved communication throughout the organisation; it has been suggested that S&OP is all about communication, communication, communication

The Goals

- To ensure that participants understand what Sales & Operations Planning is
- To explain the objectives of the process, and the benefits that can be achieved

- To describe the 5 phases of the monthly S&OP process, and to ensure that participants can recognise the appropriate people to be involved in each phase
- To ensure that top management realise S&OP is their process; they are responsible for making it work for them
- To realise that it is the preparation performed by people below the top level that allows the process to work effectively and efficiently
- To prepare people to go back to their companies, ready to implement S&OP
- To plan for those implementations to be a success in achieving improved business performance

The Delegates

- Top management of business units
- People directly reporting to the top management of business units
- Those who will participate in the 5 phases of the S&OP process – those responsible for product management, sales and marketing, operations, purchasing, finance, human resources and IT
- Anyone else who will 'touch' S&OP
- People from many differing types of organisation, that need to reconcile sales, operations, resources and finance

The Process

The course will explain the inputs to, the logic of, and the outputs from the S&OP process. Traditional slide presentations will be utilised. Exercises will be used to show how the logic of the spreadsheets works. There will be role plays to make people think about how they would react to specific circumstances. We encourage discussion at all times to ensure practical issues from individual organisations are exposed, discussed and perhaps resolved. We will gradually develop the main critical issues that create an environment in which S&OP will succeed.

The Benefits

- S&OP will help you develop better, more realistic medium to long term plans
- Allowing you to better plan your acquisition of resources, across your planning horizon
- Thus you will have better plans that will be executed closer to plan, which will improve customer service and increase profitability. Plans will be genuinely achievable, and customer demand will not just be a wish list
- Top management will have a clear, recognised monthly process with which to plan and control the business
- Top management will be better integrated to create and maintain one plan for the business, driving towards becoming a ‘one number company’
- You will have more control over your inventory, lead times and order book levels
- You will achieve your financial numbers more consistently

The Results

- Individuals will recognise their roles within the S&OP process.
- People will be able to better carry out their roles within the S&OP process.
- They will be able to support each other in the development of realistic plans.
- They will realise that people must be integrated across the business to achieve success.
- Awareness of the need to reconcile each of the plans will become obvious.
- People will be able to see the need to develop the big picture, and allow top management to review it each and every month in a structured process.

The Programme Content

Day One

Introduction to Sales & Operations Planning

- Why do organisations need S&OP?

- Where does it fit in the hierarchy of ERP and Supply Chain systems?
- What are the benefits that can be achieved?
- Who does what?
- An introduction to the 5 step Sales & Operations Planning process
- Step 1 of the process
- Managing the product or service portfolio
- New product introduction, phasing out old products

Day Two

The Demand Planning Phase

- What is the overall objective of demand planning?

- The essential difference between forecasting and demand planning
- The inputs to the demand planning process
- The logic of demand planning
- The outputs from demand planning – the data required to be passed on
- A demand planning exercise
- Demand planning & demand management
- The demand planning meeting

Day Three

The Supply & Resource Planning Phase

- What is the overall objective of supply and resource planning?
- The inputs to the supply planning process
- The logic of supply planning
- The outputs from supply planning – the data required to be passed on
- The inputs to resource planning
- The logic of resource planning
- The outputs from resource planning – the data to be passed on

- A supply and resource planning exercise
- The supply & resource planning meeting

Day Four

The Integration and Reconciliation Phase

- What must be integrated?
- What must be reconciled?
- Who must be involved?
- What is the agenda for the pre-S&OP meeting?
- The importance of the financial numbers
- Identifying gaps between the budget and the S&OP numbers, and discussion potential action plans to close the gaps
- Planning the agenda for the executive S&OP meeting
- Publishing the information for senior management

Day Five

The Executive Sales & Operations Planning Meeting

- Who must be involved? Who runs the meeting?
- The agenda for the S&OP meeting
- The review of each family to consider balance of demand and supply
- The review of the overall financial numbers
- Decisions to be taken, the minutes of the meeting
- Identifying what can be improved in the next cycle
- Beyond plant level S&OP
- Software advances to support the process

The Scandinavian Academy for Training Center adopts the latest scientific and professional methodologies in training and human resource development, aiming to enhance the efficiency of individuals and organizations. Training programs are delivered through a comprehensive approach that includes:

- Theoretical lectures supported by PowerPoint presentations and visual materials (videos and short films).
- Scientific evaluation of participants before and after the program to measure progress and knowledge acquisition.
- Brainstorming sessions and practical role-playing to simulate real-life scenarios.
- Case studies tailored to align with the training content and participants work nature.
- Assessment tests conducted at the end of the program to evaluate the achievement of training objectives.

Each participant receives the training material (both theoretical and practical) in printed form and saved on a CD or flash drive. Detailed reports, including attendance records, final results, and overall program evaluations, are also provided.

Training materials are prepared professionally by a team of experts and specialists in various fields. At the end of the program, participants are awarded a professional attendance certificate, signed and accredited by the Scandinavian Academy for Training Center.

Program Timings: 9:00 AM to 2:00 PM

The program includes:

- A daily buffet provided during the sessions to ensure participants comfort.
- A closing ceremony on the final day to distribute certificates and celebrate participants achievements.
- **Note: All prices are exclusive of 15% Value Added Tax (VAT).**

Our Success Partners

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