

Sales and Operations Planning S&OP Training Course

31 May – 4 June 2027
San Diego

AGILE LEADERS
Training Center

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Ref: 2076_252179 **Date:** 31 May – 4 June 2027 **Location:** San Diego **Fees:** 16000 Euro

Overview

Sales and Operations Planning S&OP Training Course is a one-week practical course for demand, supply, production, finance, sales, operations, and process-management professionals. Participants build an S&OP Decision Cycle Pack connecting governance, calendar, assumptions, demand consensus, supply and capacity, inventory and service trade-offs, scenarios, financial reconciliation, executive decisions, actions, and KPIs. Agile Leaders Training Center develops a repeatable cross-functional planning cycle rather than detailed scheduling or software configuration.

Who Should Attend

- Demand planners who prepare baselines, assumptions, forecast accuracy, bias, and consensus demand
- Supply and production planners who test capacity, material, inventory, sourcing, and network feasibility
- Sales, marketing, and product leaders who contribute market intelligence, promotions, portfolio changes, and risks
- Finance partners who translate volume scenarios into revenue, margin, cost, cash, and working-capital effects
- Operations managers, S&OP coordinators, process owners, and executives who govern decisions and actions

Participants should understand basic demand, supply, inventory, capacity, and financial terms. The course does not teach transaction-level MRP, detailed production scheduling, statistical forecasting models, or configuration of a specific planning platform.

Departments and Industries

The course supports organizations that need one feasible and financially aligned cross-functional plan.

- Manufacturing, consumer products, food, pharmaceuticals, chemicals, and industrial products
- Retail, wholesale, distribution, logistics, and multi-site service operations
- Demand planning, supply planning, production planning, procurement, and inventory management
- Sales, marketing, product management, finance, strategy, and business performance
- Regional, business-unit, portfolio, and executive planning functions

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Learning Objectives

By the end of this course, participants will be able to:

- Design S&OP governance, roles, decision rights, calendar, planning horizon, and aggregation levels.
- Prepare a controlled data and assumptions pack and convert demand inputs into a consensus demand plan.
- Evaluate supply, capacity, inventory, service, sourcing, and constraint evidence against demand.
- Build scenarios that expose volume, value, service, inventory, cost, margin, and risk trade-offs.
- Run pre-S&OP reconciliation and prepare an executive meeting around decisions rather than reports.
- Track decisions, actions, performance, and process maturity across successive planning cycles.

Course Agenda

Day 1: Design the S&OP Decision Cycle

- S&OP Purpose, Scope, Planning Hierarchy, and Boundary Map
- Monthly Calendar, Cut-Offs, Reviews, and Decision Gates
- Role, Accountability, Escalation, and Decision-Rights Matrix
- Product Family, Geography, Channel, and Time Aggregation Design
- Data, Assumption, Version, and Single-Plan Governance

Day 2: Build the Demand Review

- Actuals, Baseline Forecast, Open Orders, and Demand Signal Pack
- Forecast Accuracy, Bias, Exception, and Assumption Review
- Sales, Marketing, Promotion, Price, Customer, and Market Inputs
- New Product, Phase-In, Phase-Out, and Portfolio Risk Register
- Consensus Demand Plan and Demand Gap Record

Day 3: Build the Supply and Capacity Review

- Supply Response, Capacity, Material, Labour, and Lead-Time Profile
- Inventory, Backlog, Service, Utilization, and Working-Capital Position
- Constraint, Supplier, Production, Distribution, and Network Risk Map
- Demand-versus-Supply Gap and Feasibility Assessment
- Mitigation Option, Cost, Timing, and Ownership Register

Day 4: Reconcile Scenarios and Financials

- Base, Upside, Downside, and Constraint Scenario Design
- Volume-to-Revenue, Margin, Cost, Cash, and Inventory Translation
- Service, Inventory, Capacity, Revenue, and Profit Trade-Off Matrix
- Pre-S&OP Reconciliation and Unresolved Decision List
- Executive S&OP Agenda, Option Paper, and Decision Pack

Day 5: Govern Decisions and Improve the Process

- Suggested Exercise: Build an S&OP Calendar and RACI
- Suggested Exercise: Reconcile Demand and Supply Gaps
- Suggested Exercise: Compare Operational and Financial Scenarios
- Suggested Exercise: Run an Executive S&OP Decision Meeting
- Capstone Exercise: Present an S&OP Decision Cycle Pack

Practical Exercises

The course uses suggested activities based on aggregate demand, supply, capacity, inventory, service, and financial evidence.

- Suggested activity: define the planning horizon, aggregation, data cut-off, review sequence, responsibilities, and decision rights for a monthly cycle.
- Suggested activity: challenge a baseline with commercial assumptions, measure bias, and create a signed consensus demand plan.
- Suggested activity: test supply feasibility, identify constraints, and compare mitigation options across service, inventory, cost, and timing.
- Suggested activity: convert scenarios into an executive decision paper and record decisions, owners, dates, dependencies, and follow-up evidence.

FAQs

Who suits sales and operations planning training?

Sales and operations planning training suits demand, supply, production, procurement, inventory, sales, marketing, finance, operations, and leadership personnel who contribute to one cross-functional plan.

How does S&OP differ from demand planning?

Demand planning develops a reasoned view of expected demand. S&OP reconciles that view with supply, capacity, inventory, service, financial goals, risks, and executive decisions across the business.

What belongs in an executive S&OP meeting?

The meeting should focus on unresolved gaps, quantified scenarios, trade-offs, risks, recommendations, and decisions that lower-level reviews cannot settle. Routine detail and data correction should be completed earlier.

Which S&OP KPIs should be reviewed?

Useful measures include forecast accuracy and bias, plan attainment, service performance, inventory, backlog, capacity utilization, working capital, decision closure, action ageing, data timeliness, and adherence to the process calendar.

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Conclusion

Participants leave with an S&OP Decision Cycle Pack for their organization. It combines governance, calendar, data controls, demand and supply reviews, gap analysis, scenarios, financial reconciliation, executive decisions, actions, KPIs, and a maturity roadmap. The pack changes disconnected functional plans into a repeatable basis for enterprise decisions.