

S&OP Implementation Success

The Executive Guide



ERIC J. TINKER

nexview 

Copyright © 2017 by Eric J. Tinker

All rights reserved.

Published by Nexview Consulting, LLC®
2800 Post Oak Boulevard, Suite 4100
Houston, Texas, USA 77056

nexviewconsulting.com

Contents

Introduction	5
ONE	
Select Your Team	11
TWO	
Train Your Team	13
THREE	
Conduct an Assessment	15
FOUR	
Hold a Kick-off Meeting	21
FIVE	
Define Your Vision	22
SIX	
Design Your Process	23
SEVEN	
Run a Pilot	28
EIGHT	
Enable with IT	30
NINE	
Roll-out Across the Business	34
TEN	
Sustain and Improve	36
ELEVEN	
Lead and Manage the Change	41
TWELVE	
Hire a Consultant?	50
Wrap-Up	53
About the Author	55
About Nexview Consulting	56



Preface

This eBook is the beginning of the book I've wanted to write for several years now. The bigger book is well in progress, but I wanted to release this shortened eBook informally while I finish the full book. That will still take me several months or perhaps a year as I'm doing it concurrently with running Nexview Consulting. It was hard for me to shorten the current draft to make this shorter eBook. I wanted to make it quick to read, but still make it substantial. In fact, I'm afraid it still may be too long for some readers, so I included many graphics and summary points in the boxes for people to skim. There are also links for more details if readers are interested in more information. I've purposely left case studies out for brevity, but examples will be part of the full book. The content is drawn from our training programs which are based on several implementations around the world over many years.

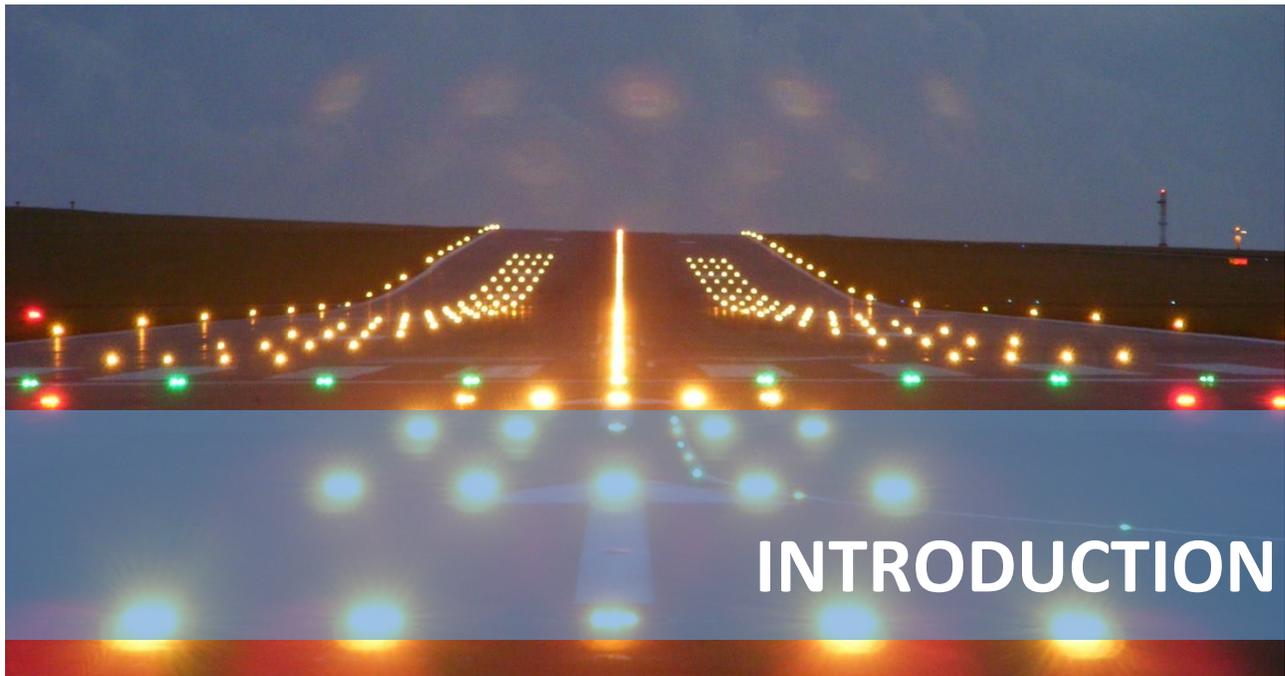
While I was very happy to get my first book, *Sales & Operations Planning RESULTS* out, I've wanted to write a very practical "how-to" book from the beginning. *Sales & Operations Planning RESULTS*, which has been received well and has even become a top seller in the category, is about one very important aspect of S&OP and supply chain improvement, achieving measurable results. There's much that goes into it though, if you want to achieve and sustain the results. That's the part I want to fill-in. S&OP excellence is a journey and continual work in progress for most companies.

If your company is embarking on an S&OP implementation or if you'd like to revisit areas of your current process, I hope this eBook can help make your project a success!

Best in your improvement efforts and please watch for more to come.

Eric J. Tinker





With the uncertainty and variability that exists in global markets today, the need for a well-functioning Sales & Operations Planning process to enable high-performing management teams is greater now than ever. Here's a few statistics from a recent Aberdeen study¹:

- Companies using S&OP are 3.2x as likely to forecast demand across multiple channels and had forecast accuracy 24% higher than non-users
- They were 3x as capable in optimizing inventory
- 3.1x as capable in optimizing their product portfolios
- 1.5x as capable in managing uncertainty by quantifying upside opportunities and downside risk

This eBook is going to give you a barometer of the sequence of steps to complete an S&OP implementation. It's written for leaders who may be familiar with the process, but who've never been through an implementation, and for those that want to sure-up or validate their current approach. The methodology was developed by developed by Nexview Consulting and is based on my 20 plus years



of experience with global clients through Nexview and other consulting firms that I've worked for.

The book starts with the importance of a grounding assessment, describes the key S&OP implementation steps that follow, and concludes with suggestions for project and change management. I'll also have a few words to say about consultants for you to consider. Much of the material has been taken from our commercial training course that we continue to teach in public and private formats. This eBook is not exhaustive, I want you to be able to read this guide quickly and improve your approach as applicable. I'll also provide some tips and traps and give you a sanity check on timelines, resources, etc. The major steps are here, but the detail in each step is not. In some cases, I'll include links where you can get more details if you're interested.

S&OP defined

S&OP is management's vehicle for communication, performance management, and intermediate-term decision making related to integrating, financial, sales, and operational planning to meet company objectives.

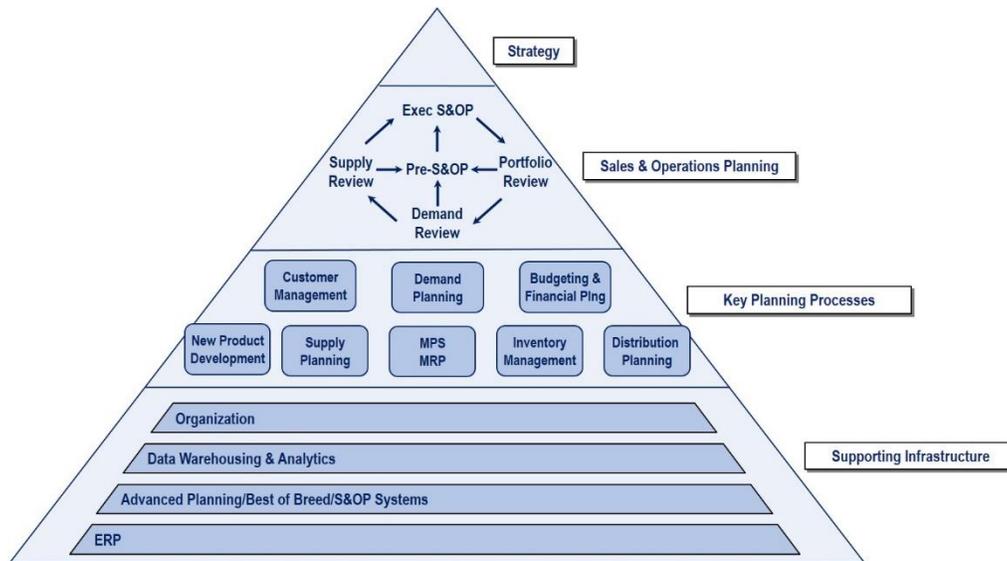
S&OP sits below corporate strategy, but above the supply chain and other planning processes. I often find that companies have a strategy and can execute the day-to-day with varying degrees of efficiency, but it's this middle layer of intermediate-term planning that is often missing or ineffective. I like to say that S&OP "operationalizes" the strategy.

This eBook briefly describes the major implementation steps in the management level planning and decision making process, called S&OP.

The middle layer that connects strategy with execution is often missing or ineffective.



Figure 0.1 Where S&OP Fits



Characteristics and benefits of S&OP include:

- A structured, repeatable, collaborative framework that provides clear accountability and results of underlying planning processes
- Led by senior management
- Exception-based discussions
- Consistent plans used throughout the organization
- Management of financial gaps while there is still time to do something about it
- Alignment of discussion and decisions across functions in accordance with the strategic direction of the company
- Business performance management across the enterprise
- Results typically delivered through more focused concentration in the underlying planning processes or supply chain execution
- Platform for continuous improvement in the company
- Leadership development and improved teamwork in the company

All sounds good and perhaps even like common sense, but it's often easier said than done.

8 Levers for S&OP performance

While the steps in this book are presented chronologically, we know that real life is non-linear. We've determined there are set of 8 key levers that interact to make or break S&OP. Some of these levers will have dedicated chapters written about them, while others will be addressed in one of the other chapters. When we work to evaluate or revitalize an existing process. We focus on these 8 levers and it's important to have these things in mind all the time as you're going through your implementation.

Figure 0.2 The 8 Levers for S&OP Performance



I'll discuss the center graphic more in Chapter 6, and I've shown the typical meetings, although each application is specific to company need. The basic idea is that Portfolio, Demand, and Supply Reviews are functional level meetings to align plans, raise issues and make decisions within the respective functions. Pre-S&OP and Executive S&OP are cross-functional meetings to bring plans together and make cross-functional decisions with the appropriate participants. The meetings are typically about one week apart, but the cycle is driven by when prior

The meeting and report structure is the heart of “operationalizing” the strategy.

month financials are available, and how long it takes for the outputs of one meeting to be processed by the next group in the cycle.

Immediate gratification delivered

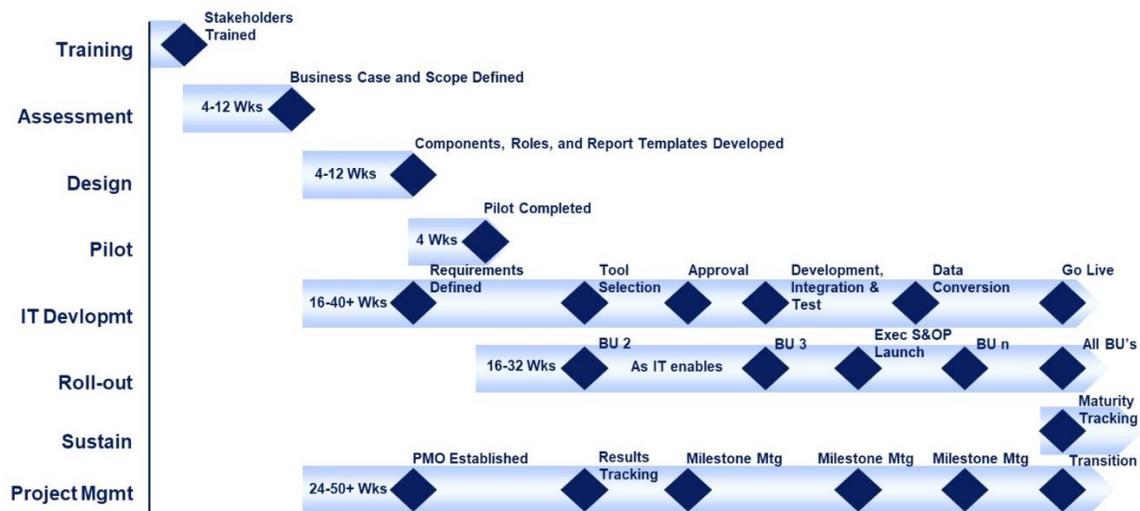
I'll start by borrowing a couple charts from our training course that give you the basic bottom line of the main intent of the eBook. The first is a graphical flow of the steps with some key bullet points for each step. We've omitted "Hold a Kick-off Meeting" from the figure, but will include a brief chapter on that (Chapter 4).

Figure 0.3 Overview of S&OP Implementation Steps



The next figure is generic high level Gantt chart of the basic implementation steps for those who prefer to look at it that way. Not all implementations are the same. What we do with a \$100MM company is not the same as what we'd do with a multi-billion dollar global corporation, but the basic steps aren't too different.

Figure 0.4 Basic S&OP Implementation Plan



If you have adequate supply chain planning processes underneath (e.g. demand planning, supply planning) and your IT is up to the reporting tasks, you should be able to pilot this within 2-3 months and roll-out to a meaningful part of the business within 6-8 months. It will likely take longer though if you're doing this across multiple geographies and rolling up business units (Global S&OP).

The following chapters are a few pages on each of the above steps. I've also included links for further information in some cases.

You can get S&OP up and running in a few months, but it takes several months to scale it to a complex business and even longer to get good at it.

For more information

See a video from our training course on the **8 Levers for S&OP Performance**



Reference

1. Integrated Business Planning (IBP): Capability Advantages for Users vs. Non-Users, Aberdeen Group, Bryan Ball, April 2016.





I'll talk about two teams here to correspond to different project phases. The first is an Assessment Team. The word Assessment also brings up the question of scope. I've just defined S&OP to be the higher-level management process, but when we talk about Assessments (Chapter 3), we need to determine if scope is going to involve the underlying planning processes too. If that's the case, I use the term Supply Chain Assessment for that. That's more involved, data intensive, and really should be done to produce the most solid business case for S&OP. The S&OP level assessment is what we call an S&OP Readiness ReviewSM. This is a quick review of your capability to implement and sustain S&OP. In the spirit of full disclosure, Nexview has been known to even give these away in a short visit over a few days or include it with a training engagement.

The focus of the assessment team is to find gaps and quantify opportunities. The implementation team has many of the same roles, but the focus there is on design, implementation, getting the business results, and of course change management.

The S&OP team depends upon the phase of the effort and the scope.



Table 1.1 Roles & Responsibilities

	Sponsor (5%)	Project Lead (50-100%)	Process Lead (20-60%)	Ad-hoc Team (5-20%)	IT (20-100%)	Finance (10 – 50%)
S&OP Readiness ReviewSM	<ul style="list-style-type: none"> Executive messaging Communicate vision, sense of urgency, and path forward Review results Direct ownership of business case areas to appropriate executives 	<ul style="list-style-type: none"> Complete assessment Communicate results Develop approximate business case Define next steps 	<ul style="list-style-type: none"> N/A 	<ul style="list-style-type: none"> Be interviewed Listen to results and next steps 	<ul style="list-style-type: none"> Be interviewed Listen to results and next steps 	<ul style="list-style-type: none"> Review high-level business case
Supply Chain Assessment	<ul style="list-style-type: none"> Include above items Allocate resources 	<ul style="list-style-type: none"> Plan, conduct, and lead studies Report results Develop business case Implementation plan 	<ul style="list-style-type: none"> Conduct studies in respective area Assist with the business case Implementation plan 	<ul style="list-style-type: none"> Share knowledge through interviews Be open to findings 	<ul style="list-style-type: none"> Provide requested data for Assessment team Participate in IT studies 	<ul style="list-style-type: none"> Confirm business case
Implementation	<ul style="list-style-type: none"> Include above items 	<ul style="list-style-type: none"> Project and change management Lead design, integration, implementation Train team and stakeholders Communicate progress Coordinate results tracking Implement maturity tracking system 	<ul style="list-style-type: none"> Lead and manage design, and implement in own area Project and change management in own area Track benefits Transition project to functional role 	<ul style="list-style-type: none"> Participate in workshops, interviews, training as directed by Core Team 	<ul style="list-style-type: none"> IT enablement leadership IT interface with Core Team Report generation 	<ul style="list-style-type: none"> Provide Core Team member for financial integration Track and certify benefits

Percent values refer to approximate time commitment depending on scale and phase.

For more information

For more on the role of the S&OP Sponsor, see the article from APICS Magazine, “Directing Success – 10 Tips for S&OP Sponsors”.





Training should occur in a few phases. I recommend you do it in this order:

- Core Team
- Management Team
- Other Stakeholders

Training will occur throughout the project, including roll-out, ad-hoc or structured communication, and for change management purposes too.

Some will grumble about “more meetings”. S&OP replaces the ad-hoc, inefficient, duplicative meetings that people have when they don’t have S&OP, so it should replace meetings, not add to them.

Training sessions have different audiences and are done strategically throughout the program.

Elements that should be covered in your training sessions include:

- Why we're doing this
 - What business impact will S&OP have (quantitative)
 - What is changing in the marketplace?
 - How most companies are now doing this and by not doing it, you're hurting your competitiveness
- Your developing Vision for the end state
- Basic best practices and typical S&OP components
- Findings from the Assessment or Readiness Review if you've done that first
- Who's on the team and governance structure
- Case studies from other companies and the results they achieved
- Your overall project plan
- Risks and mitigation strategies

We also work in exercises into our training programs designed to generate some momentum, ownership, and actual outputs going into Assessment and Design phases, but this should be considered in the context of the overall project plan and implementation strategy.

It's important that the Sponsor be a visible participant in the training (especially the "Why We're Doing This" part.) Also - If you prepare the training deck the night before, the slides are all long wordy paragraphs, and try to wing it unrehearsed, it'll show and undermine your credibility. Our 2-day S&OP course is over 250 slides and we have hundreds of hours into developing it.

For more information

See our course overview videos for more ideas for your agenda and training.

The sessions do much more than educate, they should create momentum for action and generate outputs that support next steps.





The need for an assessment

“We know we need to improve and we know we want S&OP, let’s just do it!”

An admirable outlook, but I say this is the same as saying, “Ready-Fire-Aim”. Even if you’re the boss and can push S&OP through, you want your team to be aligned, have ownership in the implementation process, and the outcome. If you’re in a role where you need to get others on-board, the Assessment is an objective way to do that. I will promise you that Assessments get done one way or the other. They get done before the implementation, or they get done during the implementation when someone in a high place isn’t supportive for whatever reason, and points to the effort required and possible lack of results from S&OP.

The Assessment serves four main purposes:

- Creates a common understanding of the as-is
- Steers the group towards a common vision and highlight the gaps
- Produces a quantifiable business case
- Invests stakeholders and creates momentum for change

Two levels of Assessment are usually considered

Supply chain assessment

This covers:

- S&OP readiness
- Planning processes
- Potentially other areas such as procurement, distribution, logistics
- Enabling IT
- Organization

This is a combination of qualitative and quantitative studies that tell the story of the current state, potential improvement areas, and financial opportunity. It is data intensive and fast-paced. It is both art and science. The skills and experience to lead a full supply chain assessment took me years to develop as a consultant and our sample deck of supply chain studies we show people and draw from is about 200 slides.

S&OP Readiness ReviewSM

This can be done in a few days for most applications (single geography) and is what we do when clients just need or want S&OP. We focus on:

- Sponsorship
- S&OP Core Team
- Burning platform

Unless you are the CEO or have the unconditional support from him/her (or GM in the case of a business unit scope), you will do an Assessment either by choice, or when S&OP priority and/or results are challenged.



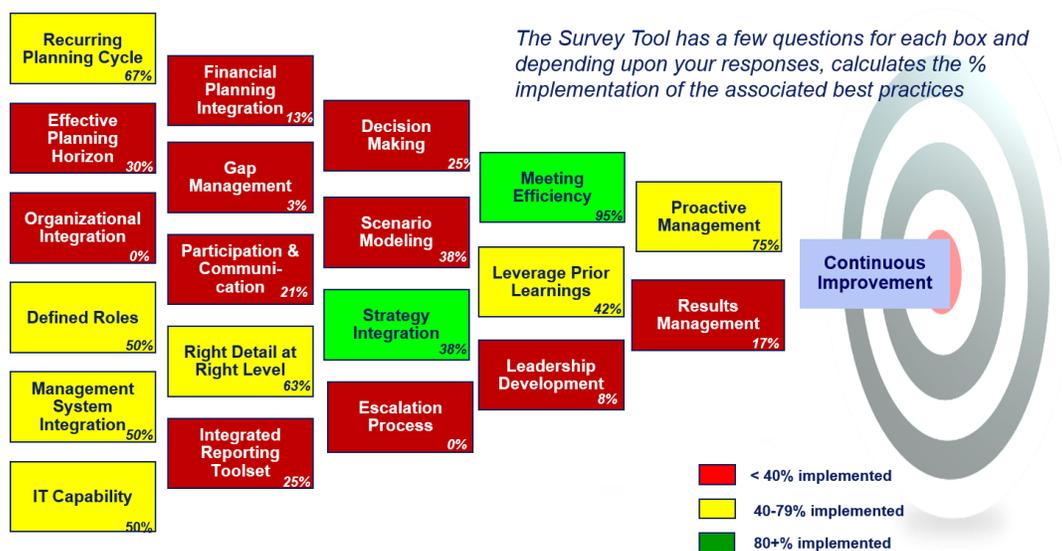
- S&OP knowledge in the organization
- Condition of underlying planning processes
- Defined product hierarchy
- Supporting IT capability
- Integrating or other current initiatives
- Change culture

We focus on the key items for S&OP implementation success and conduct a quick review that can be conducted with training or in a separate informal visit (no professional fees).

Evaluating an existing S&OP process

For those who have some level of existing S&OP process, we have a quick, handy visual tool we call the S&OP Best Practice Performance ArrowSM. We use this to quickly assess current state through interviews and observations. We've also automated this survey tool online, so we can survey large groups and cut the data as across groups where that makes sense. This is a good tool to quickly communicate and prioritize improvement areas and can be used to track progress over time.

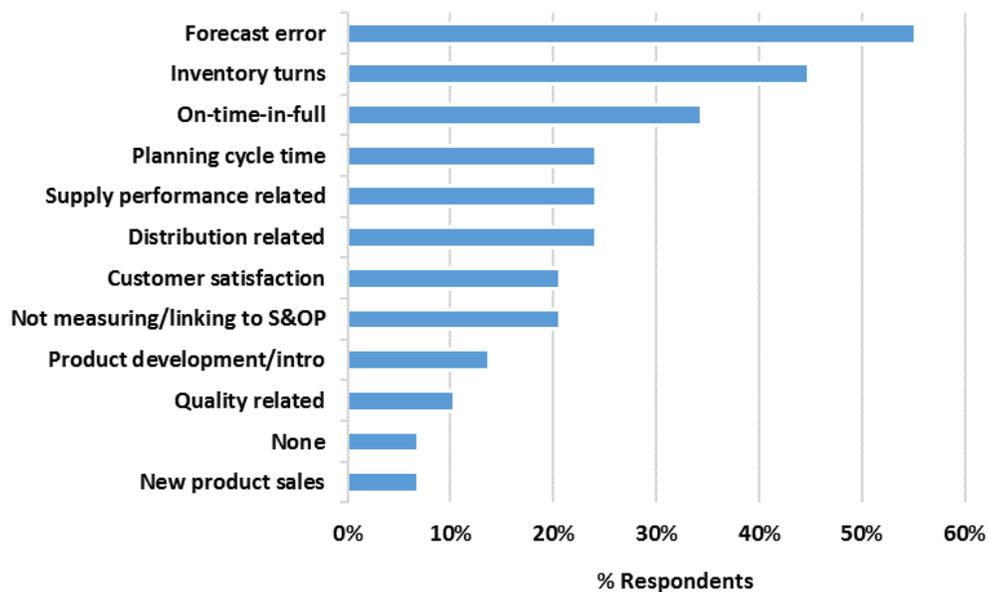
Figure 3.1 Nexview S&OP Best Practice Performance ArrowSM



You can take a middle ground

Choosing an S&OP Readiness ReviewSM or a full supply chain assessment doesn't have to be mutually exclusive. If your goal is S&OP implementation and not full-on supply chain overhaul, you could start with the readiness review (but get the targets in place!) and then refine the Assessment and targets if necessary as you go. The risk with this approach is that you never actually get to it or don't have the capabilities on the team. Here's a few charts from our 2017 Key Topics in S&OP survey that you can use a starting place to estimate some benefit areas and improvements that others are getting.

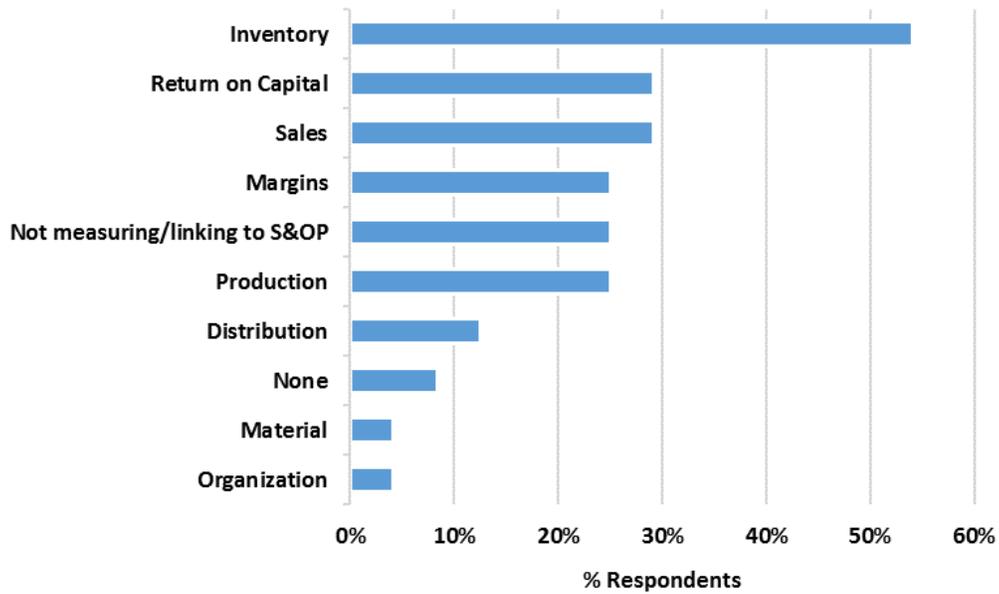
Figure 3.2 Operational Metrics Improved
(% of survey respondents who saw improvement in this metric)



Source: Nexview Key Topics in S&OP Survey, 2017

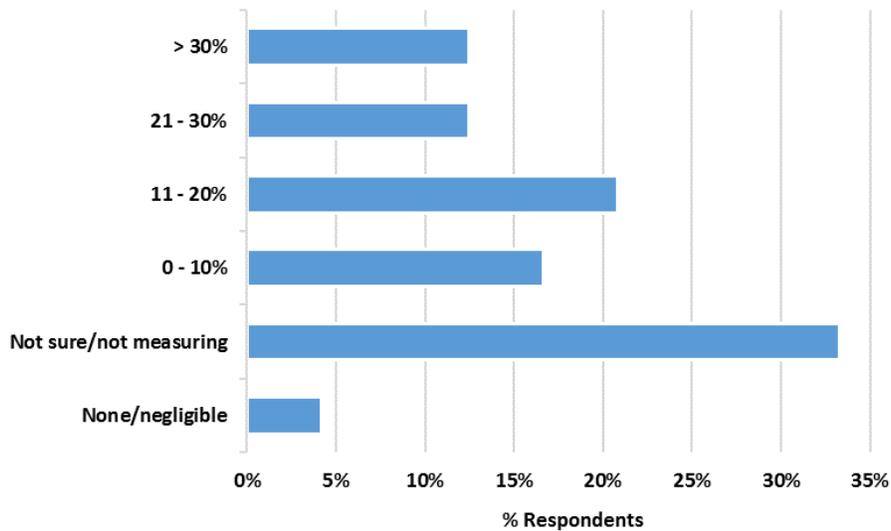


Figure 3.3 Financial Metrics Improved



Source: Nexview Key Topics in S&OP Survey, 2017

Figure 3.3 Percent of Overall Improvement Due to S&OP

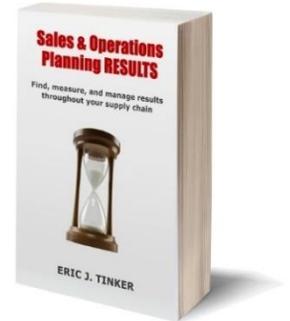


Source: Nexview Key Topics in S&OP Survey, 2017

Note that almost 40% of respondents reported that they were not measuring results or were not achieving results. This lack of results visibility is why so many S&OP processes struggle.

For more information

1. Tinker, Eric J. *Sales & Operations Planning RESULTS*. Boston: Pace Publishing Company. 2015.



S&OP Readiness: 7 Components for Success and Sustainability



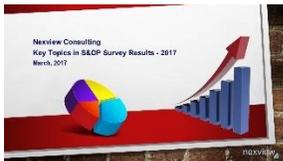
Four Reasons Why Assessments Are Important



Implement S&OP First or Fix the Underlying Processes First?



S&OP Readiness ReviewSM tool we use



Benchmark Your S&OP Process



Chapter Four

HOLD A KICK-OFF MEETING

Walk to the end of the diving board in front of everyone, take a deep breath, and jump. Even better, dive with style. A good Assessment and the steps outlined in this eBook will make the water deep enough.

There are some similarities between this chapter and Chapter 2 on training. The difference though is that training should be much more extensive. We have full day and two day versions of our S&OP training course, but a project kick-off meeting for S&OP, should be about half a day unless you want to bundle in some workshops or teambuilding too. A full supply chain project may go longer as well.

The kick-off meeting is about

- Visible executive support
- Communication
- Clarity of actions and expectations
- Education
- Motivation

The kick-off meeting is about:

- Visible executive support
- Communication
- Clarity of actions and expectations
- Education
- Motivation





A Vision is something that you can see, but it's a bit out of reach. It's aspirational. We've all seen those pie-in-the-sky statements that companies come up with. They have their purpose, this is different.

A Vision for S&OP is more tactical. It can still be aspirational, beyond the current state, but achievable within a reasonable amount of time (i.e. length of the project, plus some time afterward for maturity progress). Practical, tangible, measurable.

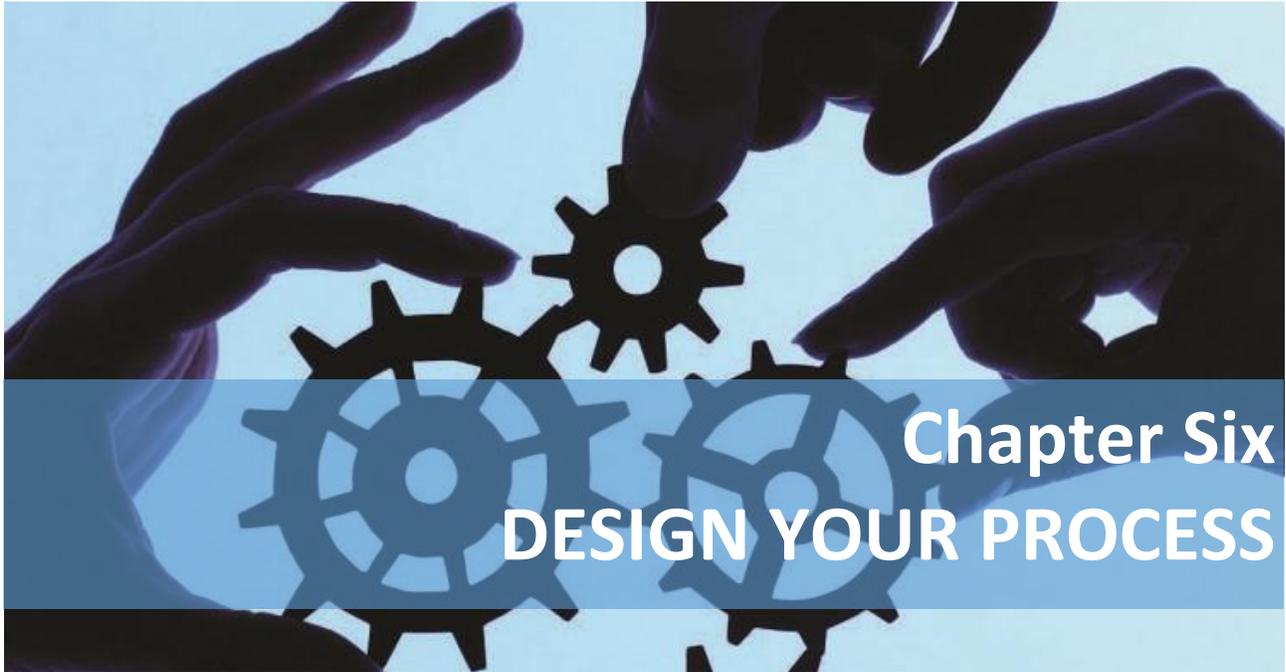
Why create a Vision for S&OP?

- Defines what the end state looks like
- Rallies the team around common goals and outcomes
- Set guidelines to set expectations and judge success
- Defines what S&OP is, and is not, it controls scope
- Communicates and helps others understand

We don't recommend trying to pack all the above into a long wordy statement, we use a tight set of 10-12 bullet points.

Define your Vision right away. You'll need it for training, expectations definition, and scope management throughout the project.





Chapter Six

DESIGN YOUR PROCESS

The basic principles of S&OP aren't too hard to understand. There's a flow of meetings that are the culminating steps of underlying processes, some cross-functional meetings, and each component has a plan to look at. We also manage some KPIs and make some decisions. Sounds like common sense.

What adds complexity and is often glossed over in the literature are answers to real world design questions like:

- How does my design integrate with the executive management system above S&OP and the executional meeting structure below it?
- How many of each type of meeting should we have to accommodate our business? (e.g. how many demand reviews, supply reviews?)
- Should I lump different business units into a single meeting flow or have parallel processes for each one?
- What if some of my business is make-to-stock and some make-to-order?
- What if the organization structure is in flux or the structure has inefficient elements?

The fundamental design concepts are simple, the applications often are not.



- We're a single plant with a tactical focus, but with our own P&L, what does that mean for us?
- How does the business unit or regional S&OP design integrate with Global S&OP?

Yes – real world questions to be faced by the design team. Company situations and design needs are different. We discuss all this in our training course and a long chapter is in development for the full book. We'll just be able to acknowledge the questions and hit a few highlights here.

The quick design overview

S&OP is a continuous process which I why I draw the S&OP cycle as in Figure 6.1. While there's a linear sequence within any one monthly cycle, the teams are continually working their areas, including preparing for the next cycle when their part in the current one finishes.

Figure 6.1 The Continuous S&OP Cycle

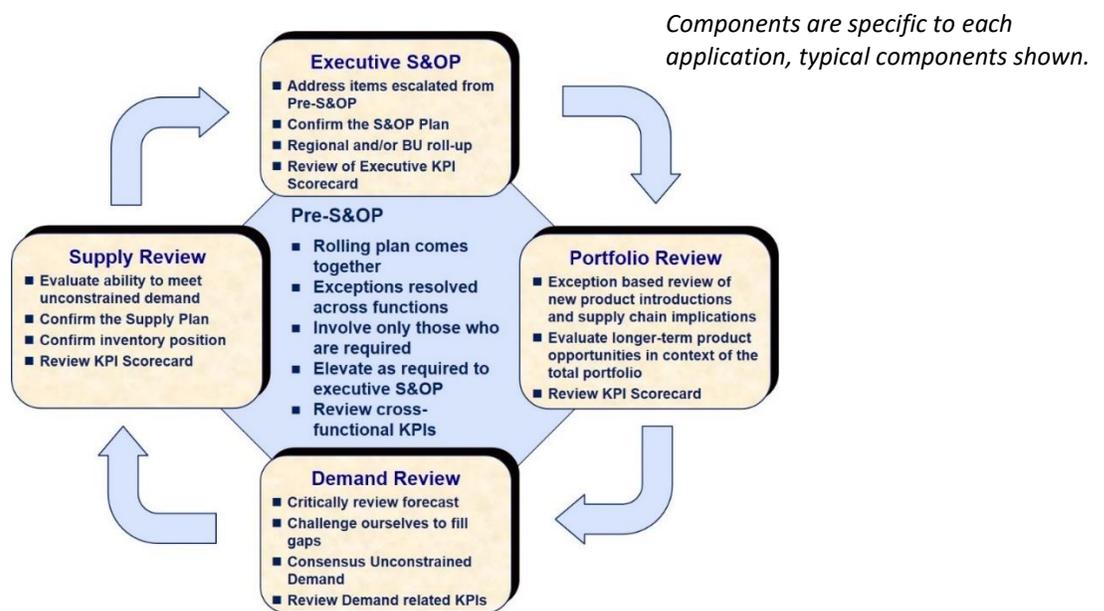


Table 6.1 Summary of Typical S&OP Components

Item	Portfolio Review(s)	Demand Review(s)	Supply Review(s)	Pre-S&OP(s)	Executive S&OP
Typical Timing	Week 1	Week 1	Week 2	Week 3	Week 4
Objectives	<ul style="list-style-type: none"> ■ New products ■ Discontinuances ■ Profitability ■ Promotions ■ Manage budget & KPIs 	<ul style="list-style-type: none"> ■ Confirm Demand Plan ■ Manage budget & KPIs ■ Identify issues 	<ul style="list-style-type: none"> ■ Confirm Supply Plan ■ Identify constraints & issues ■ Manage budget & KPIs 	<ul style="list-style-type: none"> ■ Confirm Operating Plan ■ Resolve cross-functional issues ■ Manage budget & KPIs 	<ul style="list-style-type: none"> ■ Confirm Operating Plan (enterprise view) ■ Resolve executive cross-functional issues ■ Strategic decisions ■ Manage budget & KPIs
Owner and Facilitator	<ul style="list-style-type: none"> ■ VP Marketing ■ Product Mgmt 	<ul style="list-style-type: none"> ■ VP Sales ■ Demand Mgr(s) 	<ul style="list-style-type: none"> ■ VP Operations ■ Supply Planner 	<ul style="list-style-type: none"> ■ S&OP Sponsor ■ Director of SC 	<ul style="list-style-type: none"> ■ CEO/GM ■ S&OP Sponsor
Outputs	<ul style="list-style-type: none"> ■ New product demand ■ Info for supply chain 	<ul style="list-style-type: none"> ■ Confirmed unconstrained Demand Plan ■ Issues for Pre-S&OP 	<ul style="list-style-type: none"> ■ Confirmed Supply Plan ■ Issues for Pre-S&OP 	<ul style="list-style-type: none"> ■ Confirmed Operating Plan ■ Decisions ■ Issues for Executive S&OP 	<ul style="list-style-type: none"> ■ Confirmed Operating Plan (enterprise view) ■ Decisions
Participants	<ul style="list-style-type: none"> ■ Marketing ■ Demand Mgmt ■ Finance 	<ul style="list-style-type: none"> ■ Sales ■ Demand Mgmt ■ Finance 	<ul style="list-style-type: none"> ■ Supply Mgmt ■ Operations ■ Procurement ■ Finance 	<ul style="list-style-type: none"> ■ Directors and Managers 	<ul style="list-style-type: none"> ■ Management Team

Design guidelines

As you think about your design, remember that S&OP sits below strategy and above tactical planning and execution (Figure 0.1). Consider these points:

- S&OP will be layered into the organization structure through a series of meetings
- It will integrate financial planning
- It must have a corresponding underlying data structure to produce plan views for each component



Figure 6.2 The Three-Legged S&OP Stool



Note that many organizations do not always have these three legs synchronized. If this is the case for you, it will become evident in your design effort and pose an obstacle or an opportunity to fix things.

Table 6.2 S&OP Design Guidelines

Guidelines That Apply in Most Situations
<ul style="list-style-type: none"> ■ The rolling planning horizon should generally be 12-24 months long, driven by longest lead time item, financial planning requirements, and the horizon required to make most operational strategy decisions
<ul style="list-style-type: none"> ■ Each component has an executive sponsor (owner) and a facilitator (heavy-lifter)
<ul style="list-style-type: none"> ■ Discussion should be about months 2-3 and beyond, not this month
<ul style="list-style-type: none"> ■ Product family/brand level discussions and that roll up to business unit and enterprise levels for Executive S&OP
<ul style="list-style-type: none"> ■ Layout the month on a calendar diagram, when the meetings occur and what happens between them (i.e. supply chain planning process steps)
<ul style="list-style-type: none"> ■ Plans generally show monthly buckets of sales, production, inventory for make-to-stock and orders, production, and backlog for make-to-order. Shows key planning drivers that vary together.
<ul style="list-style-type: none"> ■ Volume and currency versions of plans
<ul style="list-style-type: none"> ■ KPIs in each meeting specific to function and rolled up in the higher-level meetings (Pre-S&OP and Executive S&OP)
<ul style="list-style-type: none"> ■ Develop meeting charter for each component to train and keep the meeting on track
<ul style="list-style-type: none"> ■ Define typical strategic issues that should be discussed through S&OP. The Sponsor should make sure these topics are on S&OP meeting agendas rather than resolved in ad-hoc meetings.
<ul style="list-style-type: none"> ■ Record actions and key decisions, so design a good action/decision log
<ul style="list-style-type: none"> ■ Involve IT early, S&OP plans and KPI scorecard formats are the first basic IT requirements



Design complexities

Dealing with the complexities highlighted at the beginning of the chapter are extended topics. For right now, I recommend that the commercial elements are aligned with the way the business faces the market, the supply components with how demand is supplied, and the higher-level S&OP components with the financial statement roll-up.

For more information



Does Your S&OP Process Need Portfolio Review?



Five Suggestions to Improve Pre-S&OP



S&OP Isn't Just for Manufacturing Companies Anymore



Designing an Effective Supply Chain Organization



We've likely all done pilot or test programs for new things we're implementing. We want to test things out in a limited and controlled way before deploying them full-scale. S&OP is no different. We've got new meetings, reports, and likely new KPIs too. We recommend two levels of pilots.

Core Team pilot

- Core team runs through a mock series of meetings using roleplay
- Complete all in one week to save time

Organization pilot

- Simulates meeting cadence over the month with actual participants
- Mostly a training meeting



Tips for a successful pilot

- Pick an area of the business that is visible, significant, but supportive
- Use manually prepared excel versions for the plans (“mock-ups”). IT should be well on-board by now, but you’ll likely still have some changes.
- Use a VERY LIMITED data set, the group will be focusing on plan formats, KPI definitions, meeting objectives, etc. Too much data will overwhelm them and be a distraction.
- Leave Executive S&OP out for now, you’re not ready for that group yet. More on this in Chapter 9.

Pilots need to find the balance between being impactful and being low risk.

Pilot debrief

I’m sure you don’t need me to tell you to have a debrief, I just thought I’d share some typical items that can come up. Here’s a quick list:

- KPI definitions weren’t clear
- Someone thought the planning horizon should be different
- Someone wants quarterly summaries or other change on the plan
- Reports were time consuming to assemble and IT horsepower will need to be added
- Someone says “We’ll never get through all our product families in this meeting”. It gets smoother after the learning ramp-up.
- Someone pointed out data inaccuracies
- Some were missing from the meeting and need a circle back around, or more focused change management

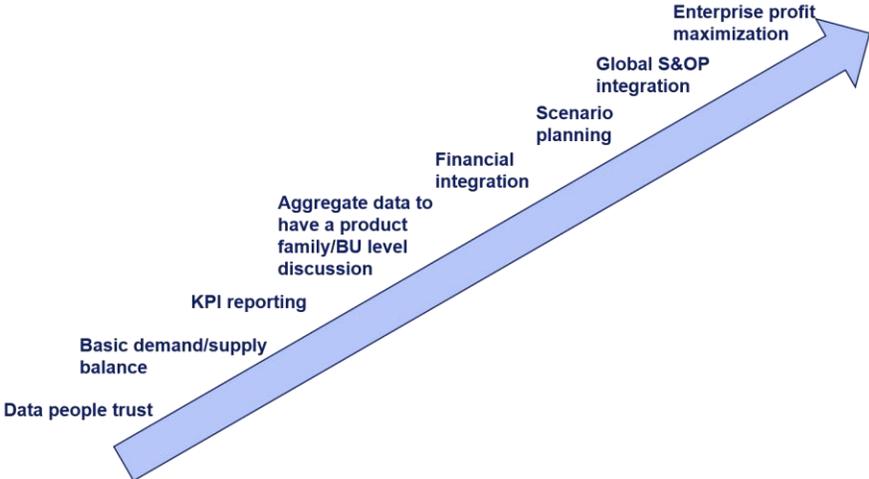
Just keep working it, it’ll take at least 3 cycles to get productive and 8-12 for the group to get good at it.





S&OP is a data intensive process and an IT plan needs to be in place or your process will likely not be sustainable, especially for large companies. The good news is that reporting and S&OP systems have become much cheaper and easier to implement with cloud-based models. Corporate IT departments no longer have to be resistant because of the fear of more work for them. In Chapter 10, we'll discuss S&OP maturity, but I'd suggest that your IT have a maturity plan too.

Figure 8.1 S&OP IT Maturity Progression



Basic IT requirements

To have a basic functioning and sustainable process, we recommend the following basic requirements:

- Data of high integrity that people trust
- A product and financial hierarchy data structure and the ability to report (e.g. sales, production, inventory) at any level in the hierarchy
- Report historical actuals and forward plans on a monthly rolling basis
- Exception reporting (e.g. deviation from budget, constraints, negative inventory)
- Capability to monetize volume plans
- Capability to make changes at higher levels in plan and have the changes cascade through the hierarchy and business systems
- KPI reporting

It's possible to work on these items concurrent with the design effort, but if you short-change the resources, or try to rollout across a complex business with gaps in the above areas, you're on borrowed time.

We always advocate seeking to improve the use of current systems first and the basic IT functionality can be accomplished with ERP and a reporting tool. To grow to the later stages of S&OP maturity (e.g. automated scenario simulation), you'll probably need something smarter. You also may want to employ an interim solution to integrate with longer-term corporate IT plans. I wouldn't wait too long for corporate though, the clock is ticking on your need to move your KPIs. Table 8.1 shows our view of the IT landscape for S&OP, followed by some results on IT use captured in our most recent study.

You need to pay the IT entry fee if you want to keep your guests at the S&OP party.



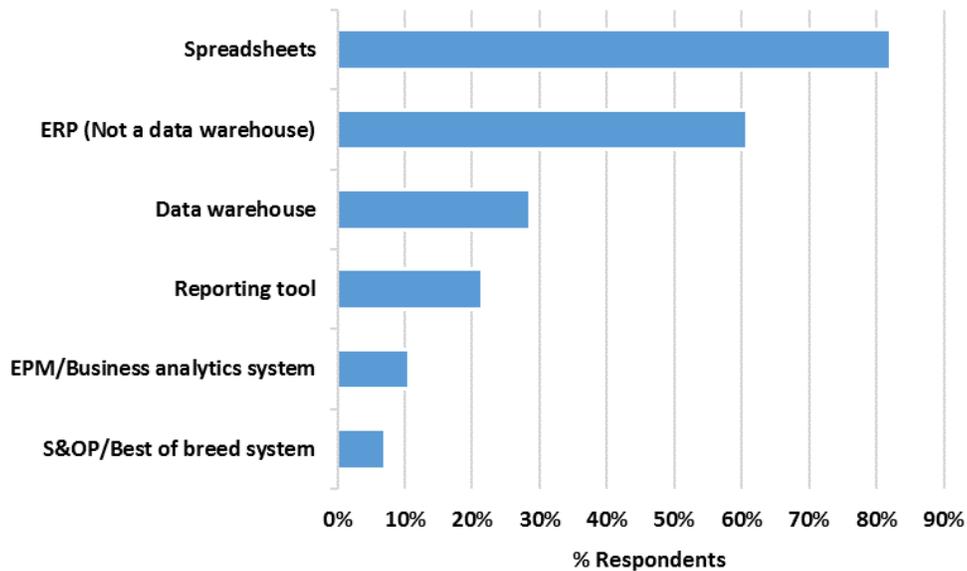
There are different approaches to take

Table 8.1 IT Approaches to Enable S&OP

Spreadsheets	ERP with Reporting Tool	Best-of-Breed/S&OP System
<p>Spreadsheets manually prepared based on data extracts from ERP systems</p>	<p>A commercial reporting tool is used to interface with ERP systems and prepare plans in an automated way</p>	<p>A commercial S&OP/Supply Chain planning tool that interfaces with ERP systems and provides planning intelligence</p>
<ul style="list-style-type: none"> ■ Create report mock-ups ■ Gets the process going/pilot ■ No upfront cost ■ No implementation or training ■ Time consuming and difficult to prepare reports ■ People dependent ■ Likely not sustainable 	<ul style="list-style-type: none"> ■ Leverage existing tools if available, cheaply add report tool if needed ■ Requires some set-up and “power-user” support ■ Beware of marketing hype and potentially overstated “what-if” capability, many report creation tools are now advertised as “S&OP” tools ■ Include enterprise performance management/budgeting tools in this group, but these may offer improved data structure/hierarchy capabilities 	<ul style="list-style-type: none"> ■ Robust and growing simulation/analytical capability ■ Report module included ■ Familiar spreadsheet and graphical interfaces ■ Workflow capability ■ Becoming easier and cheaper with cloud-based models ■ Requires ERP integration and some potential of functionality duplication
<p>Verdict</p>	<p>Verdict</p>	<p>Verdict</p>
<p>Poor man’s approach if using permanently. Okay for design/pilot effort, or possibly for a small business without many products or much complexity.</p>	<p>May be adequate for basic S&OP reporting and early maturity stages</p>	<p>Worth investigating for best practice application and achievement of higher maturity stages</p>

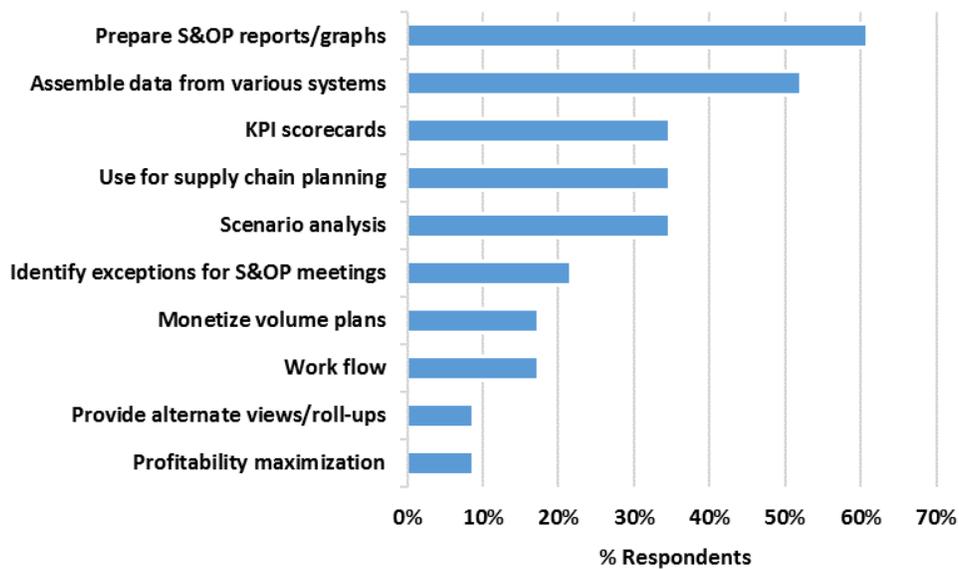


Figure 8.2 IT Tools in Use to Support S&OP



Source: Nexview Key Topics in S&OP Survey, 2017

Figure 8.3 IT Capabilities of Systems Supporting S&OP



Source: Nexview Key Topics in S&OP Survey, 2017





With the tweaks from our pilot, tested plans, and KPI scorecards in hand, we're now ready to scale the S&OP process to the business. This involves ramping up all product families, business units and/or regions as applicable.

Your roll-out strategy and plan should depend on:

- Business need – Align with benefit identification
- Matching the roll-out with the capability of the IT infrastructure
- Required change management - Receptive business units are always a good thing
- Similarities of the businesses and supply chain structures
- Organization and team bandwidth – Can you do roll-outs in parallel or does a single team need to do this serially? Can business units handle a ramp-up to all product lines in a couple months or will it take them longer to absorb the data and focus on the exceptions?

Roll-outs are planned and depend on a variety of factors in a complex business.



Figure 9.1 Typical S&OP Meeting Ramp-up to Effectiveness



Other considerations

- A big bang roll-out is rarely done, but perhaps you can do it if your scope is a single site/business unit and you don't have very many product families. I've done it this way a couple times with success in specific situations with limited scope.
- Launch Executive S&OP when you have incorporated enough of the business to have a meaningful roll-up. If your roll-out takes too long, the executive group will become impatient or your project will lose support.
- Don't let a re-org slow you down. Even if one of your component meeting sponsors changes and you must revise something, 80% of what you do will be fine. Your business needs results now.

The phased roll-out delays launch of the Executive S&OP component. They'll entertain this for a month or two. Further delay will cause you to lose momentum.



Now that your S&OP process is rolled out, you have a decision to make:

Is this the beginning of the end, or the end of the beginning?

S&OP excellence is a journey. I'm going to suggest you go with the latter half of the question above, but improvement takes work and if you're not careful, it could go the other way.

Here are some reasons why S&OP processes go south:

- The conversations degrade to “this month” issues and tactical execution
- Failure to prepare properly, issues get worked in the meeting, and the meetings are just too long
- Gaps in the underlying processes and people ask detailed questions about what the underlying process is



- Absence of separate demand and supply reviews and teams try to do it all in one monster meeting, with disagreements on the plan occurring within a single function while the other functions present roll their eyes
- IT is underpowered and reports become too onerous to prepare, or the report guy quits and no one is left to do it
- Meetings are scheduled as you go (as opposed to monthly for the full year) and people can't make it
- Leadership changes and the new leader doesn't get it
- A business unit says "We're different" and is allowed to opt-out
- The major issues of the business are decided upon through ad-hoc meetings and the process degrades to something too tactical (shame on your Sponsor)
- KPIs don't improve, perception of lots of meetings and reports, but no results

I've seen all of these in client situations, and they can all take the ship down. Things like an assessment, vision, training, core team, overall and component meeting sponsors, project and change management (next chapter) all prevent the above from happening.

You need to demonstrate the value each month by:

- Making the S&OP meetings the place for communication of key items in the business, and where the important operational strategic decisions are made
- Ensuring the meetings don't drag on, they are effective and exception-focused
- Storing the plan (the single version of the truth) in an easily accessible location for those who need it

Many S&OP processes fail.

Demonstrate value in every meeting.



- Showing progress on KPIs and bringing root causes of shortfalls to the meetings (perhaps a team worked this offline)
- Developing a maturity program, communicating it, and reporting against it (Sounds like more project work, but is intended to be continuous improvement.)
- Giving credit for achievements to others and holding people accountable for expectations
- Making S&OP the most visible platform for continuous improvement in the company

This is a significant task and typically a large part of a Director of Supply Chain's role.

Score your meetings for efficiency and effectiveness

Periodically you should score your meetings for effectiveness (reached the objectives) and efficiency (good use of time and resources). We use an S&OP meeting effectiveness scorecard that scores along the lines of:

- Behaviors
- Meeting efficiency
- Decision making
- Use of supporting materials (e.g. plans, KPI scorecards)
- S&OP best practices (e.g. discussion level and horizon)
- Results focus/KPI management



Measure results and make progress visible

This one topic was the subject of my first book, *Sales & Operations Planning RESULTS – Find, Measure, and Manage Results Throughout Your Supply Chain*. It's also one of the 8 Levers for S&OP Performance, mentioned in the Introduction. Nothing will generate more support for S&OP than generation of results through the process. I'll just give you a bullet-point list for our purposes here.

- KPIs and monetary results need to be measured and recorded in a tracking tool during a project and transition to scorecards when the project ends
- KPIs should be linked top to bottom throughout the organization
- Finance should track the results, they are not only skilled, but also independent
- Baseline and calculation methodologies need to be documented and signed off by finance and the appropriate owner
- Leaders of relevant functions speak to results at Steering Team meetings during projects and S&OP meetings after the project ends
- S&OP is the place to integrate, monitor, and drive results throughout the supply chain on an on-going basis

Develop a maturity model

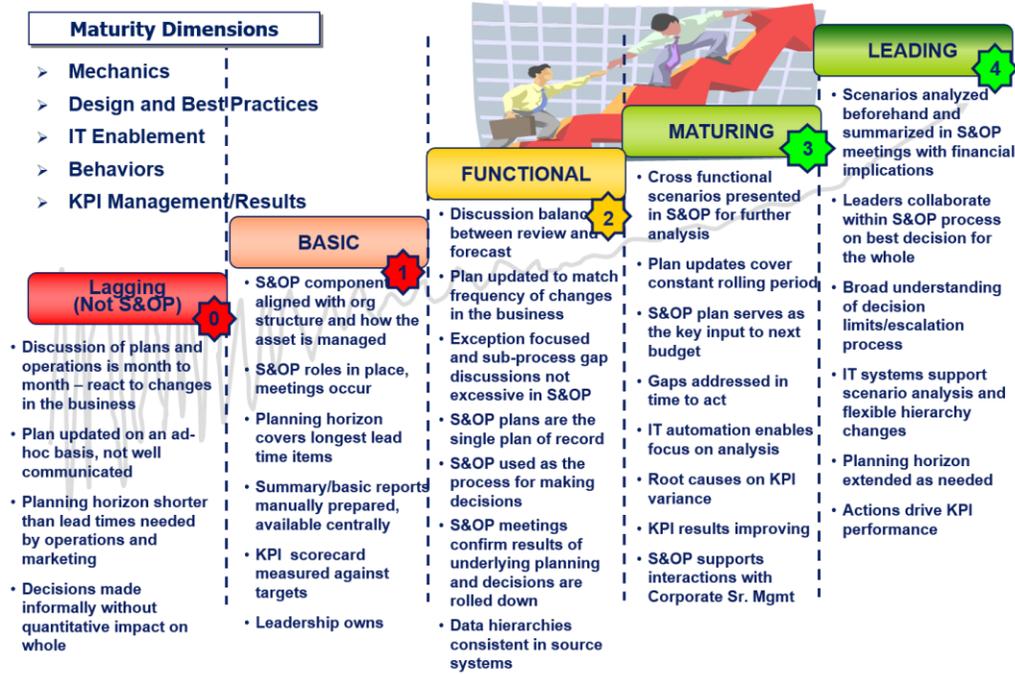
Earlier I called the conclusion of the formal project the end of the beginning. If you've done a thorough job, you're on your way to a functioning S&OP process. This is a great start and will help the company immensely, but it's still far from what companies that are really good at this do. We have a baseline maturity model based on best practices that we use with clients, but we tailor it to steps that make sense for their individual situations and industry in some cases.

Without demonstrated results, your process is at risk.

Define and make progress on a maturity model to keep momentum going for continuous improvement.



Figure 10.1 Baseline Maturity Model



Maturity characteristics can be put in a tracking model and tracked over time.

For more information



Why S&OP Initiatives Fall Short – Interview by Supply Chain Brain



S&OP Meeting Effectiveness Scorecard



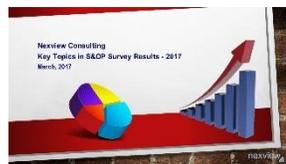
Five Suggestions for Effective S&OP Meetings



The Use of a Maturity Model for S&OP is Critical – Interview by Kinaxis



Revitalize Your S&OP



Benchmark Your S&OP Process

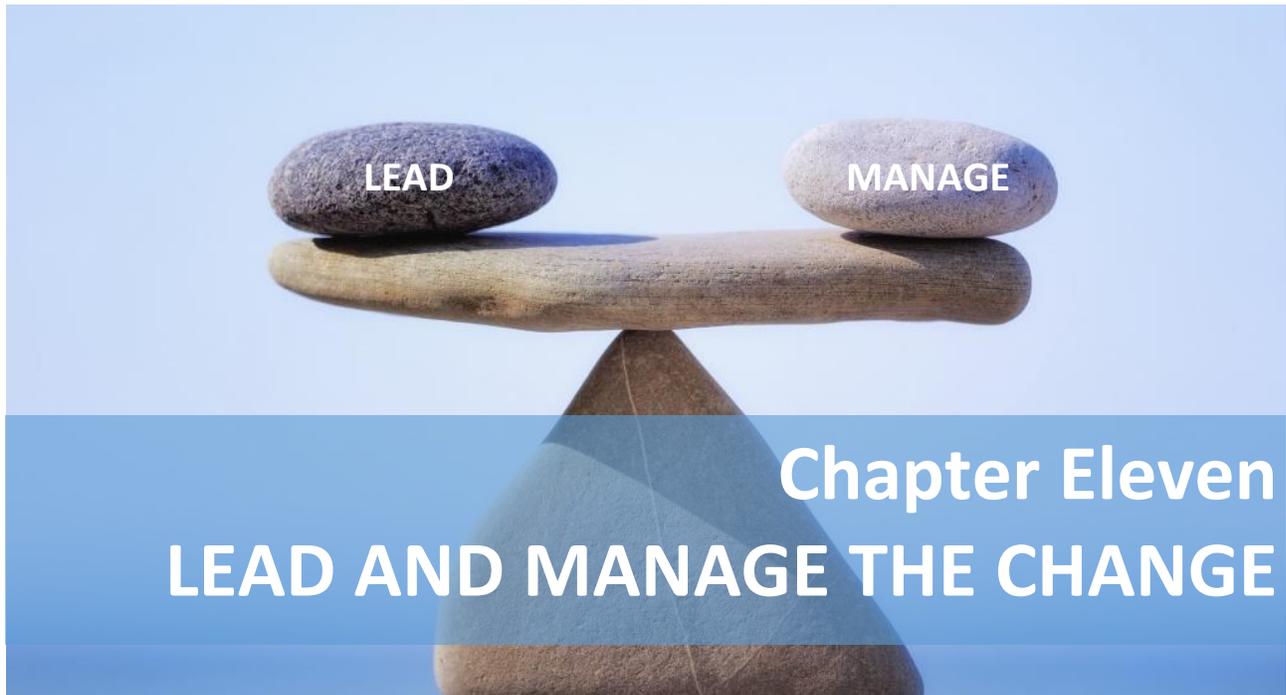


Five Ways to Excite Your Executive Team About S&OP



The Increasing Impact of Finance on S&OP





S&OP projects can be complex, especially in large organizations with multiple business units, geographies, disparate IT systems, and complex product portfolios. These projects and potentially aligning the 3 legs of the stool (Figure 6.2) are high profile. Even if your situation is not complex, some level of change and project management is still required to ensure accountabilities are distributed and people aren't left behind.

In the last few years, I've been addressing change management and project management together. While some may say one is "soft" and the other is "hard" or tactical, I'd offer that project management is a subset of change management, and they both work together.

Leading vs. managing

Warren Bennis and John Kotter have written much on this subject. It was Bennis who said "Managers do things right. Leaders do the right thing." Here's my list for both.

S&OP projects can be complex. They need project and change management that fits the individual situation.



Table 11.1 Leading vs. Managing

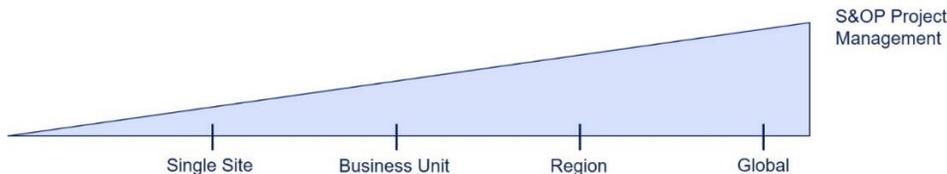
LEADING	MANAGING
<ul style="list-style-type: none"> ■ Creates a vision and mobilizes others in the right direction ■ Motivates others to “want to” and grow in the process ■ Wants others to achieve their best ■ Makes time for others ■ Empowers others through delegation ■ Supports the existence of multiple view points within the team, but demands consensus ■ Decisive using rationale, experience, and intuition ■ Optimistic in the face of adversity and portrays positive outlook to team ■ Realistic, will say no when needed ■ Aware of own emotions and uses them effectively depending upon the situation, but always for achieving the team objective ■ Resourceful ■ Takes calculated risks ■ Does what is right, even if it’s harder ■ Has failed at something before or is willing to, to reach full potential ■ Fair ■ Speaks candidly, but knows what can be shared and when ■ Passionate, but also objective ■ Listens and learns from others ■ Knows own strengths and weaknesses ■ Seeks to surround themselves with talented people, especially to supplement weaker areas ■ Demands results ■ Admits mistakes ■ Cuts losses when necessary and moves on ■ Puts the objective first, team second, self last 	<ul style="list-style-type: none"> ■ Breaks the strategy down into specific tasks ■ See and manages the integration points ■ Good judge of time and resources required to complete complex, integrated tasks ■ Identifies and manages risks ahead of time ■ Asks for help when needed ■ Relates at all levels ■ Doesn’t blame the team for missteps ■ Recognizes individual contributions and recognizes/rewards accordingly ■ Demands performance from team, but also jumps in to help in the short-term as required ■ Manages by outcomes, not activities, aware, but doesn’t micro-manage ■ Organized and efficient ■ Uses resources responsibly ■ Measures actual vs. plan ■ Reports and communicates progress and issues ■ Seeks alternate solutions, but also controls dissent to achieve consensus ■ Listens to team ■ Leverages team skills to greatest extent possible ■ Uses positional power with discretion ■ Makes time for others ■ Gives timely feedback ■ Admits mistakes

If both roles sound hard, they should. They’re both hard jobs. The punchline is that both roles are required in complex situations.

Section 1 - Manage the project with the level of project management required

By this, I mean fit the degree of project management to the size and complexity of the project. You don't need the same level of project structure and control for a single site project as you'd need for a global project.

Figure 11.1 The Scale of the Project Management System Should Fit the Scale of the Project

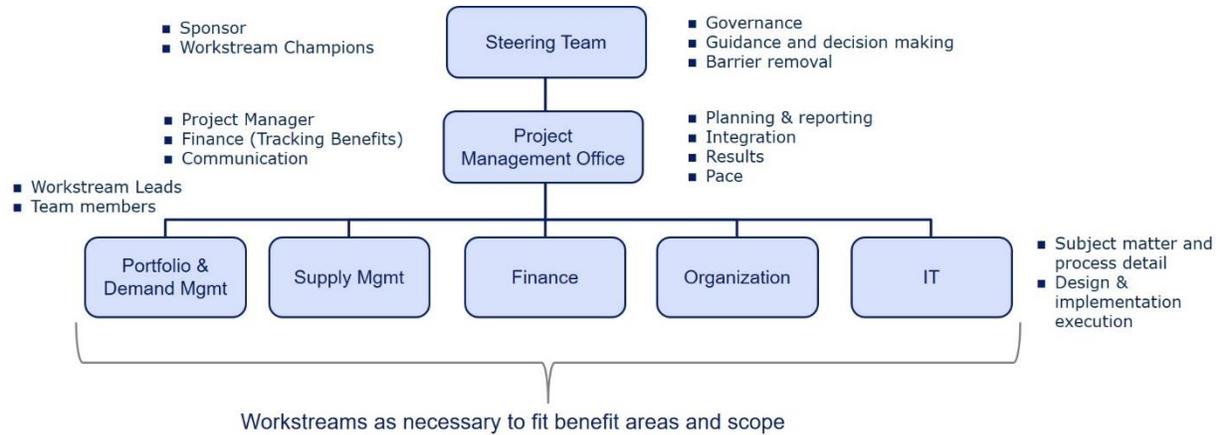


All projects need some form of control mechanisms to set expectations, manage scope, measure progress and results. We use varying degrees of the items listed in Table 11.2.

Table 11.2 Project Management System Elements

Success Element	Characteristics
■ Scope and charter defined	■ Written charter for each area of the project
■ Sponsor	■ Named executive that leads a Steering Team ■ Visible and accountable
■ Steering Team	■ Named executives who each champion a part ■ Accountable for benefits in respective areas
■ Team roles assigned	■ Project manager, workstream leads, team members
■ Resources allocated	■ Percent time commitment specified for all project roles ■ Other duties off-loaded as required
■ Business case	■ Defined, agreed, quantitative, on a time line, visible ■ Came from an assessment ■ Tracking tool in place
■ Project plan and milestones	■ Written, communicated, managed
■ Communication plan	■ Encompasses different types (newsletter, website, all hands meetings, training, sessions planned one-on-ones) ■ Likely overlaps with planned change management and the project meeting schedule
■ Project structure and management system	■ Defined roles as mentioned above ■ Regular meeting schedule

Figure 11.2 Project Structure for a Large S&OP Project



You can see from Figure 11.2 for a large S&OP project perhaps covering multiple business units (potentially global business units), there can be some project management needs here. This is even more necessary for a supply chain transformation program where you’re working on processes, IT, the organization, and possibly the physical the structure of the supply chain too. A project meeting structure should also be implemented to support the project structure and includes meetings such as Steering Team, Milestone, Integration (across workstreams), Workstream, and one-on-ones. I’ll again emphasize to fit the structure to the scope and complexity, don’t overdo it!

An opinion on the monster project plan

While I advocate a higher-level integrated project plan that can be explained easily to someone, some large, 1000-line project plan can become unwieldy. I suggest teams manage their own details, with the Project Manager managing by outputs (results and milestone completion), while ensuring integration of plans and milestones. In the full book, I’ll describe another higher-level, output oriented, dashboard tool we use called “Steps to Milestones”.

Section 2 - “Softer” techniques for change management

Even with the project management items we’ve talked about that structure accountabilities, set expectations, and measure progress and results, it doesn’t mean everybody actually wants to change, or do it the way the team has designed. More techniques for change management are required.

Reasons for resistance to change

Perception of more work

Most new things are more work in the beginning and S&OP is no exception. More work quickly translates to, “I have enough to do and more things may hinder my ability to be successful.”

Reduce work with S&OP

S&OP leaders need to MAKE SURE THE AD-HOC IS ELIMINATED. No more duplicate meetings held, no more custom S&OP-like reports generated because someone higher-up asked for it. No more. The answer is, “We do that in the S&OP process now.” Reduced work right there. Do it and tell everybody that you reduced work. Demanding the elimination of the old way might be the single most important thing the Sponsor can contribute to the entire process.

Eliminate the uncertainty

Demonstrate how S&OP makes people better at their jobs. They’re better informed, have the plan, know where the business stands. I say that S&OP is a process that forces the truth. Some people who’ve become successful by being the hero or by winging it, may not like the visibility that comes with S&OP. If your

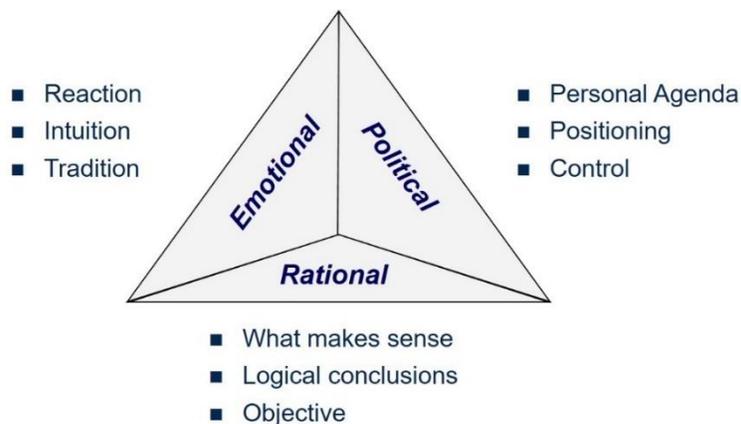


Sponsor can't swing this person (or worse, is this person), it's unlikely you'll ever get there.

A few models to consider

We normally emphasize the following models in our change management methods and training. Classic stuff and referenced accordingly. In the interest of brevity, I'll let the figures speak for themselves.

Figure 11.3 Dynamics of Change in Play



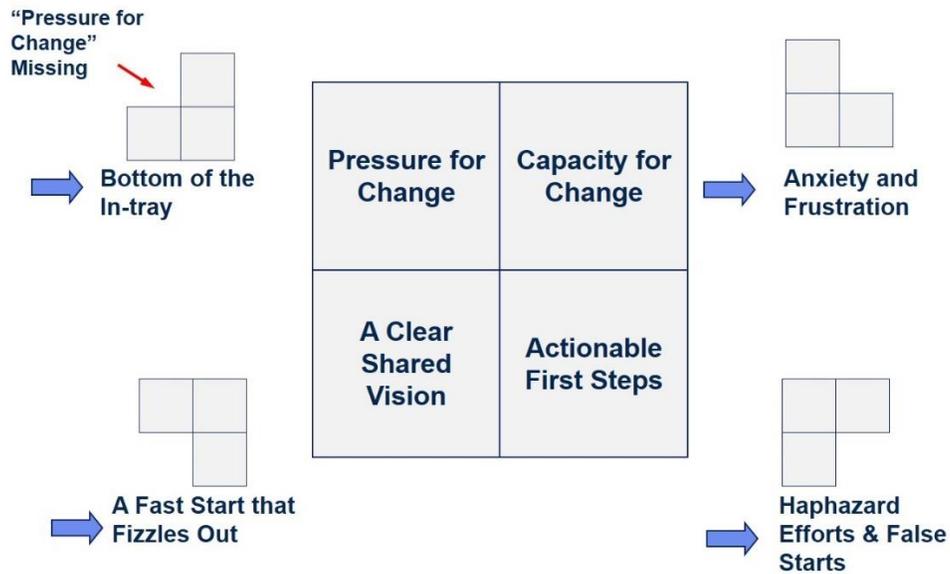
The Trust Equation

There's a couple versions of this out there. One developed by David Maister and Charles H. Green³ and the second of unknown origin (to me anyway). Intimacy refers to your ability to safeguard confidential information and the willingness of others to share it with you.

$$\text{Trustworthiness} = \frac{\text{Credibility} + \text{Reliability} + \text{Intimacy}}{\text{Self} - \text{Orientation}}$$

$$\text{Trust} = \frac{\text{Credibility} \times \text{Intimacy}}{\text{Risk}}$$

Figure 11.4 Successful Change Requires 4 Key Components⁵

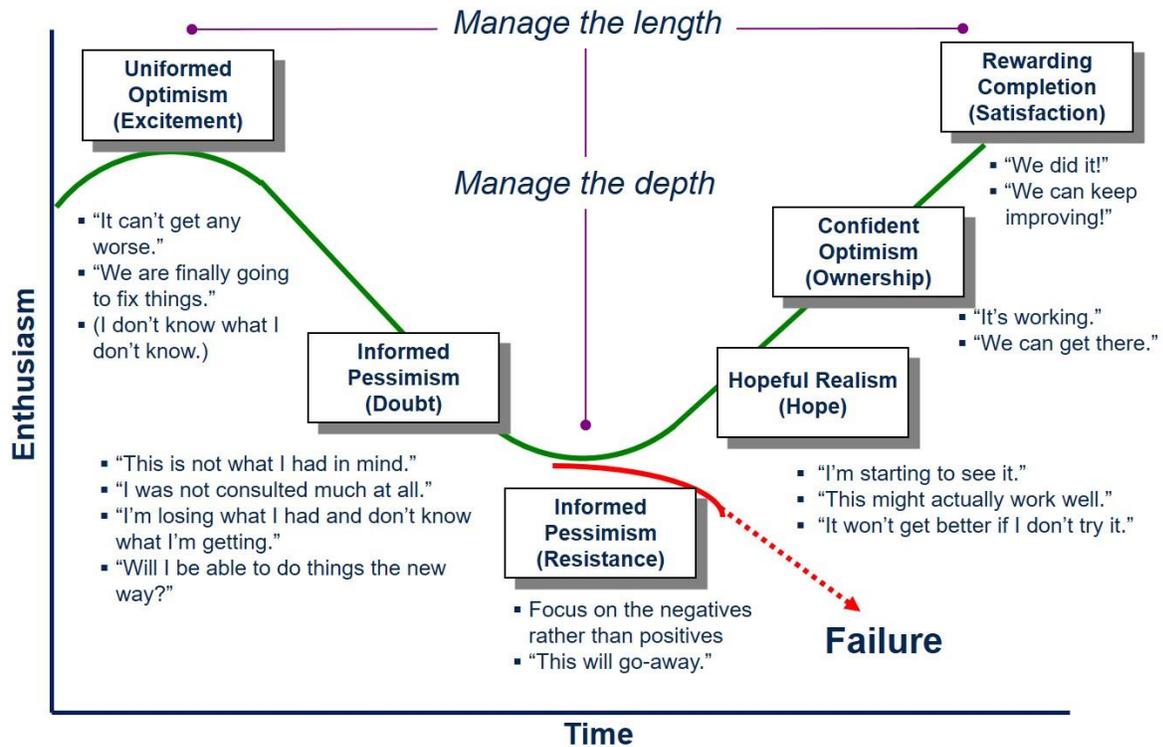


If one of the four boxes is missing, we get the corresponding negative outcome shown. Let’s just pause for a moment with Figure 11.5 and summarize a few things we’ve talked about in this eBook to make sure the four boxes prevail.

Figure 11.5 Change Components Covered

<p>Pressure for Change</p> <ul style="list-style-type: none"> ■ Burning Platform (from the Readiness Assessment) ■ Business case ■ Milestones and project timeline commitment 	<p>Capacity for Change</p> <ul style="list-style-type: none"> ■ Defined team roles with time allocations ■ Prioritized projects ■ Roll-out plan ■ IT enablement plan
<p>A Clear Shared Vision</p> <ul style="list-style-type: none"> ■ Developed and documented vision ■ Culture goal summary ■ S&OP training ■ Communication plan 	<p>Actionable First Steps</p> <ul style="list-style-type: none"> ■ Defined accountabilities ■ Kick-off meeting ■ Charter ■ Project plan ■ Milestones ■ Steps to Milestones

Figure 11.6 The Emotional Cycle of Change⁶



On the Emotional Cycle of Change, for now I’ll just mention that

- It’s helpful to train people on this, so they better recognize it when it happens to them and others
- People are at different points on the curve at different times

Other methods and tools we use are shown in Figure 11.8

Figure 11.8 Navigating Complex Change Requires a Toolkit



References consulted or cited directly

1. Bennis, Warren. *On Becoming a Leader*. New York: Basic Books, 1989.
2. Kotter, John. *Leading Change*. Boston: Harvard Business School Press, 1996.
3. Maister, David; Green, Charles, H; Galford, Robert, M. *The Trusted Advisor*. New York: Simon & Shuster. 2001.
4. Origin unknown.
5. Smith, Steve. *Create That Change!*. Kogan Page Business Books. 1997
6. Kelley, Don and Conner, Daryl. *1979 Annual Handbook for Group Facilitators*. 1979



Based on my occupation, you may think that I'll provide you with an obviously biased answer. With Maister's Trust Equation in mind, I'll try to minimize the "self-orientation" in the denominator! I'm happy to provide a perspective.

Management consulting continues to evolve

It seems the market has become more specialist driven. Clients often want the person who has done it a hundred times in their industry. Even the larger firms usually don't have inventories of people to meet narrow requirements. To respond, many are now hiring and firing by the project or use contractors. Continuity and consistency is not always a given. It matters who you get. Firms that keep staff on payroll are under pressure to staff who is not currently billing. They may talk about having the experience you're after, but that person may not be available, or the ones who actually delivered the case studies they refer to, may not even be with the firm anymore. The sales team is often different from the delivery team. It's a very fluid and fragmented industry, not always perfect.

The market for management consulting services has changed in the last few years.

Having said all that, consultants help generate results every day, and partnering with a firm or independent may be a good choice for you. Here's a few thoughts for you to consider.

Table 12.1 Considerations for Partnering with a Consultant

CONSIDER IF YOU
<ul style="list-style-type: none">■ Lack the expertise and experience within your organization to execute effectively■ See cross-functional issues, but don't have the jurisdiction to make changes in interfacing areas■ Are expecting change management issues■ Need help building a business case■ Are short on time to deliver results■ Don't want to reinvent the wheel (i.e. you want a defined methodology, developed training material, and a developed set of tools/templates from the get-go)■ Need a task master to keep everyone on track and on time. Many companies struggle with project execution.■ Have an idea of what's wrong, but need an impartial party to confirm, and put data and a story around it to communicate, and generate momentum across the organization■ Need integration with, or action in another geography or business unit, and can't be there yourself■ Desire to share risk (Yes – part of our job is to have fingers pointed at us when there are challenges!)



Table 12.1 Pros and Cons of Hiring a Consultant

PRO	CON
<ul style="list-style-type: none"> ■ Smart, hard-working, comes with a plan ■ Brings experience, tools, samples from related situations ■ Takes their clients' challenges personally, wants your success ■ Are heavily depended on, under pressure, and gets results ■ Shortens time to results ■ Listens to clients, wants to share knowledge, but enjoys learning too ■ Will often say what needs to be said and to whom, when an internal person can't ■ Adapts quickly to new industries ■ Motivated to do well for you, especially those not on a salary 	<ul style="list-style-type: none"> ■ Cost. Especially in non-ROI situations. Complete internally? Resources capable? Available? Senior enough? ■ Use funds to hire someone. Senior enough to implement change? Will a new employee trying to establish them self be effective? Could be better in long run if the new hire is successful. ■ Disruption to the organization. Consultants take your team's time and ask for things (e.g. data, time in workshops, meetings). Fast pace due to budget constraints. Could be a PRO too to depending on situation. ■ Visibility. Egg on your face if the investment fails. ■ Will your boss or others think this should be your job? ■ Uncertainty. Will the consultant actually deliver? ■ Risk of dependency. Avoid putting consultants into operating roles. ■ Sales pressure. Consultants are under pressure to sell more and are rewarded accordingly. ■ Consultant roles not always clear. New ones can show up, extra management overhead drops in. Who are these people? Am I paying for their time? Their expenses? What did that one contribute?

Table 12.3 Tips for Selecting and Working with a Consultant

TIPS
<ul style="list-style-type: none"> ■ Make sure it is clear what you are getting. What is the end result you are buying? ■ Do not become dependent or minimize dependency to the extent possible, develop and involve your people. ■ Look for an ROI to take the focus off consulting fee levels. ■ Consider fixed fees for fixed deliverables and results. It will allow you to focus on the project, not on the clock every week. ■ Challenge the value. Seek cheaper ways of accomplishing supporting, but lower level tasks (e.g. IT, administrative) ■ Seek a consultant that will challenge, but also enhances and leverages all the good things your team has already accomplished. ■ Avoid arrogance and a canned approach that doesn't seem right for your situation. ■ Know who you're getting for your project. The firm name may be nice to say around the meeting table, but what really matters is who you get. The consulting team you meet in the sales process is often not who shows up on your project. ■ Trust that whomever you select will do their best for you.





Each S&OP implementation is different and none are easy. The uninitiated may believe that it's just putting a few meetings together, so what's the big deal? If that's the case, why do so many processes fail or degenerate to tactical executional meetings? It doesn't have to be this way. Use the methodical approach and techniques we've discussed and you'll be on your way to S&OP success!

Summary of takeaways

- Your Sponsor, S&OP Lead, and Core Team are the heart of S&OP and likely your supply chain. Support each other, have each other's back.
- Everything in the book, whether tactical, soft, strategic, or whatever, is part of change management and the change process. The components triangulate, support, and build on each other. You might be able to cut a corner here and there, but we've all played the game Jenga too.
- At a minimum, complete the S&OP Readiness ReviewSM, you can fix gaps while you're designing S&OP, but I don't recommend a full rollout while there are gaping holes here. It will fail.



- The lack of a real business case or pressure for KPI improvement will threaten the sustainability of your process. If S&OP isn't generating a business result that can be measured, I wouldn't show up at the meetings either.
- Start your process with a bang - a visible, uplifting, engaging, and committing kick-off meeting. Tell them "We're gonna take this hill."
- The Vision is one of the four key components of change (recall the others?). It's not some ethereal, pie-in-the-sky, mumbo-jumbo though. For us, it's a tight set of bullet points that will keep S&OP tangible and people focused.
- Remember the stool when designing your process. S&OP should create alignment of organization, P&L structure, and data structure. Aligning these can ruffle feathers.
- Align the commercial elements with the way the business faces the market, the supply components with how demand is supplied, and the higher-level elements with the financial statements.
- The pilot is a good test. Pick something that will be successful. After the pilot, you'll really know what you're dealing with.
- Roll-out as fast as you can, but at a pace that can be absorbed by the organization and supported by your IT. On the flip side, if you take too long to launch a rolled-up Executive S&OP, your management team will get bored and move on.
- Develop a maturity criteria and track it over time. Set expectations for getting better.
- Leading and managing change are both important. A variety of techniques are needed and should be sequenced in a calculated manner. Different people need different things.
- Consultants will speed things up. If you go with the mercenary, make sure you know what and whom you're really getting, and then go knock it out of the park!

Receive notification when the full book is published, target is 2018

Join our community for access to all our available media

Contact us if you'd like to discuss a free S&OP Readiness ReviewSM



About the Author



Eric Tinker leads Nexview Consulting and has spent over 20 years in management consulting helping clients achieve large-scale change within their organizations. His projects have resulted in over \$500 million in operational improvements. These results have been achieved through a combination of improving business processes, management systems and tools, information systems, organizational effectiveness, and by helping clients achieve sustainable behavioral change. His client experience spans several countries and ranges from helping start-ups to leadership of large, complex, multi-geography business transformation. Eric focuses on Sale & Operations Planning as well as improving the supporting processes, information systems, and organizations to help clients leverage S&OP to be the platform for continuous improvement. He has taught and consulted across 5 continents, has published several articles, and is the author of *Sales & Operations Planning RESULTS*. His industry experience includes Consumer Goods, Energy, Chemicals, Life Sciences, and High Tech among others.

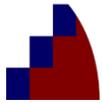
Prior to founding Nexview Consulting, Eric worked for organizations such as Celerant Consulting, Deloitte & Touche, Plan4Demand, and Hughes Aircraft. He is a CPA and holds a B.S. in Aerospace Engineering from Syracuse University, an M.S. in Mechanical Engineering from California State University-Northridge, and an MBA from the University of Southern California.

In addition to helping clients be successful, Eric enjoys training, supporting, and speaking at industry events. He has spoken at Institute of Business Forecasting, IE Group, APICS, Institute for Supply Management, and other public events as well as numerous private events.

Please feel free to connect with Eric on [LinkedIn](#) and follow the [Nexview company page](#).



About Nexview Consulting



Nexview Consulting is a boutique management consulting firm that specializes in Sales & Operations Planning and Supply Chain improvement. We leverage S&OP to be the platform for continuous improvement and profitability in client organizations. We also work with clients to improve organizational performance, structure, and enabling supply chain technology.

Consulting methods promote sustainability of performance improving behaviors, tangible results, and development of client team members. Our consultants are highly-experienced business and consulting leaders with track records of delivering results for clients across the world, typically with larger more well-known consulting firms. We are based in the Boston area and Houston, but we travel worldwide to conduct training seminars, speak at conferences, and work with clients on high-impact, performance improving initiatives.

Why Nexview?

- Results focus, \$1.5B+ in benefits delivered for clients thus far and looking for more
- You get the firm leadership to actually work on your project
 - We are senior level consulting leaders who have led integrated change projects all over the world, but we're hands on, and offer detailed experience and success in implementing S&OP and supply chain improvement
- Strong global experience with partners and network of experienced consultants from larger consulting firms and industry
- Emphasize ownership with your people, behavior change, results, and change management along with the technical/best practice elements of our work
- Flexible service model to provide the level of service appropriate for your situation with no internal distractions
- Recognized thought leadership across several continents with visible contributions in the media

Our values are:

Optimism

Resourcefulness

Collaboration

Candor

Confidence

Results

We invite you to join our developing community, [Nexview Online](#)



Blog Posts



Articles



eBooks



Surveys



Conference Presentations



Videos and Audio



Infographics



Tools & Templates

Nexview Consulting, LLC
info@nexviewconsulting.com
800.631.4842

2800 Post Oak Boulevard
Suite 4100
Houston, TX, 77056 USA

55 Crystal Avenue
Suite 241
Derry, NH, 03038 USA

