



# **Nexview Consulting**

## Company and Training Overview

# Nexview Consulting

## VISION:

*Nexview Consulting is the boutique management consulting partner that firms seek to help them align their organizations, drive performance improvement, and generate business results.*

## MISSION:

*We leverage Sales & Operations Planning and supply chain improvement to help clients improve cross-functional planning, decision making, execution, and business performance management at business unit, regional, and global levels.*



# We've worked with many global corporations all over the world



## SERVICES

- S&OP and supply chain consulting
- Training and coaching
- Organization design & development
- Leverage leading edge technology solutions
- Growing on-line models through Nexview Online

## DIFFERENTIATORS

- Proven track record in S&OP and Integrated Supply Chain Optimization
- Clients are served by the Principals and experienced consulting/industry leaders only
- Sustainable Results – emphasize performance improvement, results management, behavior change, leadership development
- Leverage leading edge technology solutions

# We are led by three Principals and supported by a strong peer network of experienced consultants

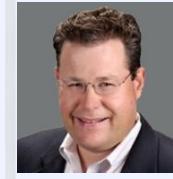
## Eric J. Tinker, Mng Principal

- 22 years in management consulting leading complex change in the US and internationally
  - Projects have delivered over \$500MM in benefits
  - Client experience ranges from start-ups to leadership of large, complex, multi-geography business transformation for global corporations
- Prior leadership roles at Deloitte Consulting, Celerant Consulting, Plan4Demand, Hughes Aircraft
- Qualifications
  - MBA – University of Southern California -Finance & Entrepreneurship
  - MS – Mechanical Engineering, California State University - Northridge
  - BS – Aerospace Engineering, Syracuse University
  - Certified Public Accountant



## Jonathan Gilbert, Principal

- 25 years improving service reducing cost, and improving efficiency
  - Versatile leader across the supply chain with differentiating expertise S&OP and logistics
  - Industry background in energy, chemicals, retail, manufacturing, and distribution
- Prior consulting roles at MTG, Corven, Denali Group
- Industry leadership and VP level roles in supply chain at BOC gasses and NuCO2
- Qualifications
  - MBA – Stern School of Business, New York University
  - BS – Krannert School of Business at Purdue University



## Roy Zerner, Principal

- 28 years as a consulting and industry supply chain leader
  - Projects have delivered over \$1.1B in benefits
  - Industry background in consumer products, high-tech, chemicals, and industrials
  - Strategic and tactical expertise throughout the supply chain
- Prior leadership roles at Ernst & Young/CapGemini, Accenture
- Industry leadership and Director level roles in supply chain Del Monte, H.J. Heinz, and Allied-Signal
- Qualifications
  - Ph.D. Candidate - UCLA
  - MBA – Indiana University
  - BS – Chemical Engineering, Virginia Tech



Our peer network model enables us to assemble the right senior level consulting team, as opposed to staffing who is on payroll.

## We've found that organizations can often improve in the following areas

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- Groups and functions often do not communicate consistently and effectively
- Roles & responsibilities within and across functions are not always clear
- The “right” work is not always done at the “right” level in the organization
- Processes are not well-defined and have “formed” due to an absence of definition or changes in personnel
- Key Performance Indicators are not used effectively to drive business performance, root cause analysis, and accountability
- The results of improvement initiatives are uncertain
- Meetings are not results-focused, and often waste peoples' time
- Management reports are outdated
- Information is difficult to obtain or not available to make the best decisions
- The organization is not developing leaders as fast as it could be

Sales & Operations Planning will structure the value chain to correct these gaps.

# We work with clients throughout the areas that have become competitive differentiators in supply chain



## Product Development

- Product portfolio & lifecycle management
- Cycle time reduction
- Product profitability analysis
- Launch and SCM integration



## Customer and Demand Management

- Drives investment and all downstream activity
- Financial planning integration
- Macro factors
- Segmentation & service levels
- Profitability by customer
- Statistical forecasting
- Sales force input
- CPFR
- Promotions optimization



## S&OP is the overarching leadership and integrating process

- Cross functional leadership & decision making process
- Operationalize the business strategy
- Integrated plan of record
- Platform for performance management and continuous improvement



## Supply Management

- Plant networks
- Regional vs. focused plants
- Outsourcing vs. capital investment
- On-shore vs. off-shore
- Make-to-order vs. Make-to-stock
- Inventory strategies
- Delayed differentiation
- Lean and kanban



## Procurement

- Total cost/value focus
- Strategic sourcing
- Global vs. regional
- Joint cost reduction
- Transactional integration



## Distribution & Logistics

- Channel strategy
- Inventory strategy practices, and visibility
- Cost vs. lead time optimization
- 3PLs
- Preferred carrier programs
- Transactional integration
- RFID



## High performing supply chain team

- Center of Excellence (COE)
- SCM breadth with functional depth
- Shared across BUs
- Independent view
- Consistent best practices
- Growth path to executive management
- Process vs. people dependent



## IT Enablement

- Data availability and integrity
- Transactional and planning integration, internal and external
- Visibility and reporting
- Analytics
- Scenario modeling



# We offer large-scale experience with the advantages of a boutique firm

## Energy Major - Downstream

- **Complexity:** Multi-country/business unit
- **Scope:** S&OP, demand management, customer segmentation, pricing models/policies, inventory, procurement, distribution, divestiture of non-core assets
- **Results:** >\$100MM in earnings improvement and \$64MM in reduced working capital, [READ CASE STUDY](#)

## Plastics/Chemicals

- **Complexity:** Multi-business unit, US
- **Scope:** S&OP, demand management, customer segmentation, inventory, supply management, procurement, distribution, re-org
- **Results:** \$15MM in cost reduction and \$8MM reduction in working capital, [READ CASE STUDY](#)

## Chemicals/Consumer Products

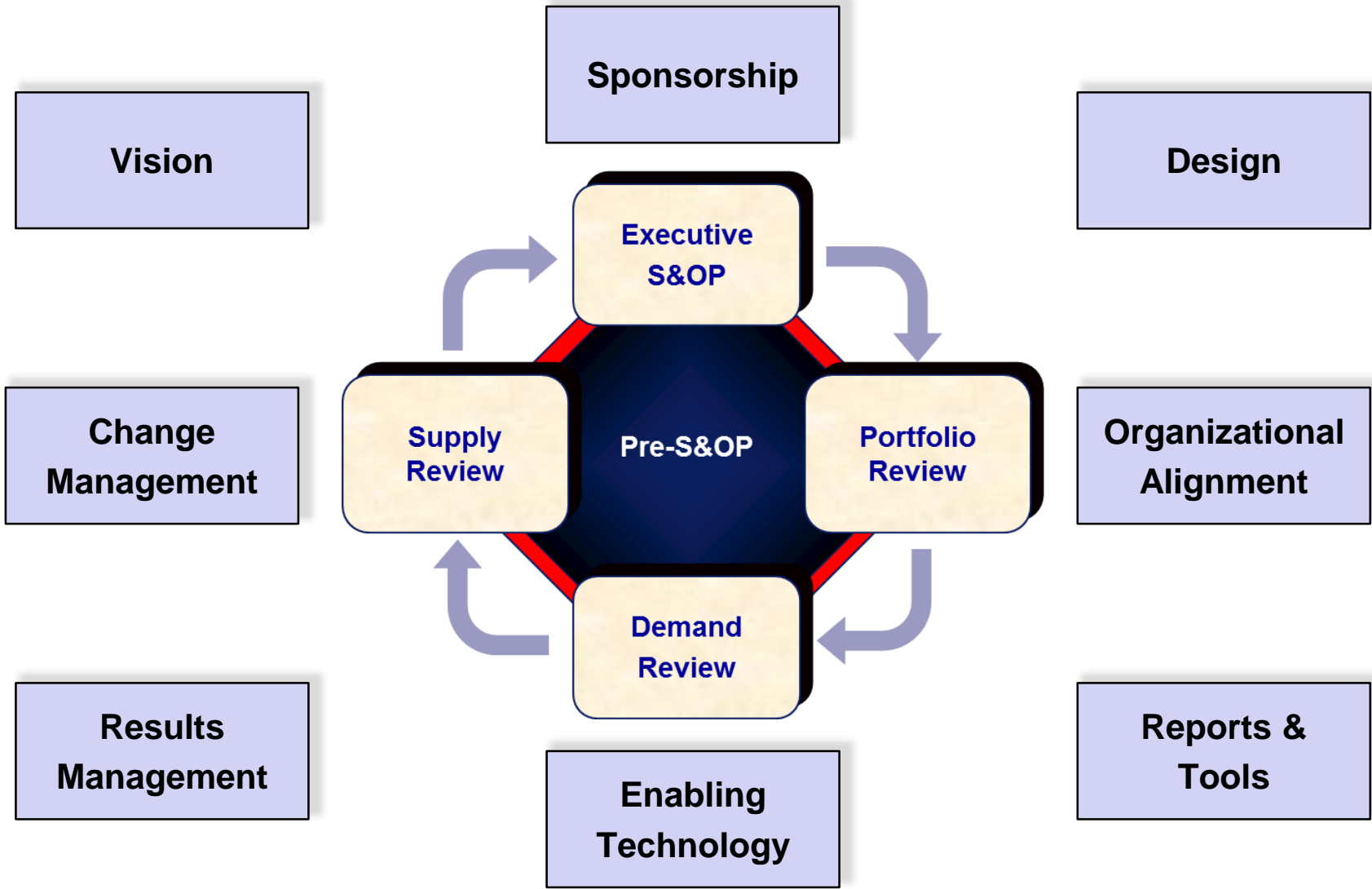
- **Complexity:** 4 continents/multi-business unit
- **Scope:** S&OP, demand management, supply management, inventory reduction, distribution, re-org, enabling technology
- **Results:** \$3MM distribution cost savings, improved forecast accuracy (50%), improved inventory turns (9%), [READ CASE STUDY](#)

## Consumer products

- **Complexity:** Multi-business unit, US & Canada
- **Scope:** S&OP, demand management, supply management, inventory reduction, organizational changes, enabling technology
- **Results:** Improved forecast accuracy and on-time-in-full, reduced obsolete inventory, [READ CASE STUDY](#)

You get a senior team that is focused entirely on your project without any internal distractions.

# Much of our S&OP methodology and training material is based on our “8 Levers” framework for S&OP performance improvement

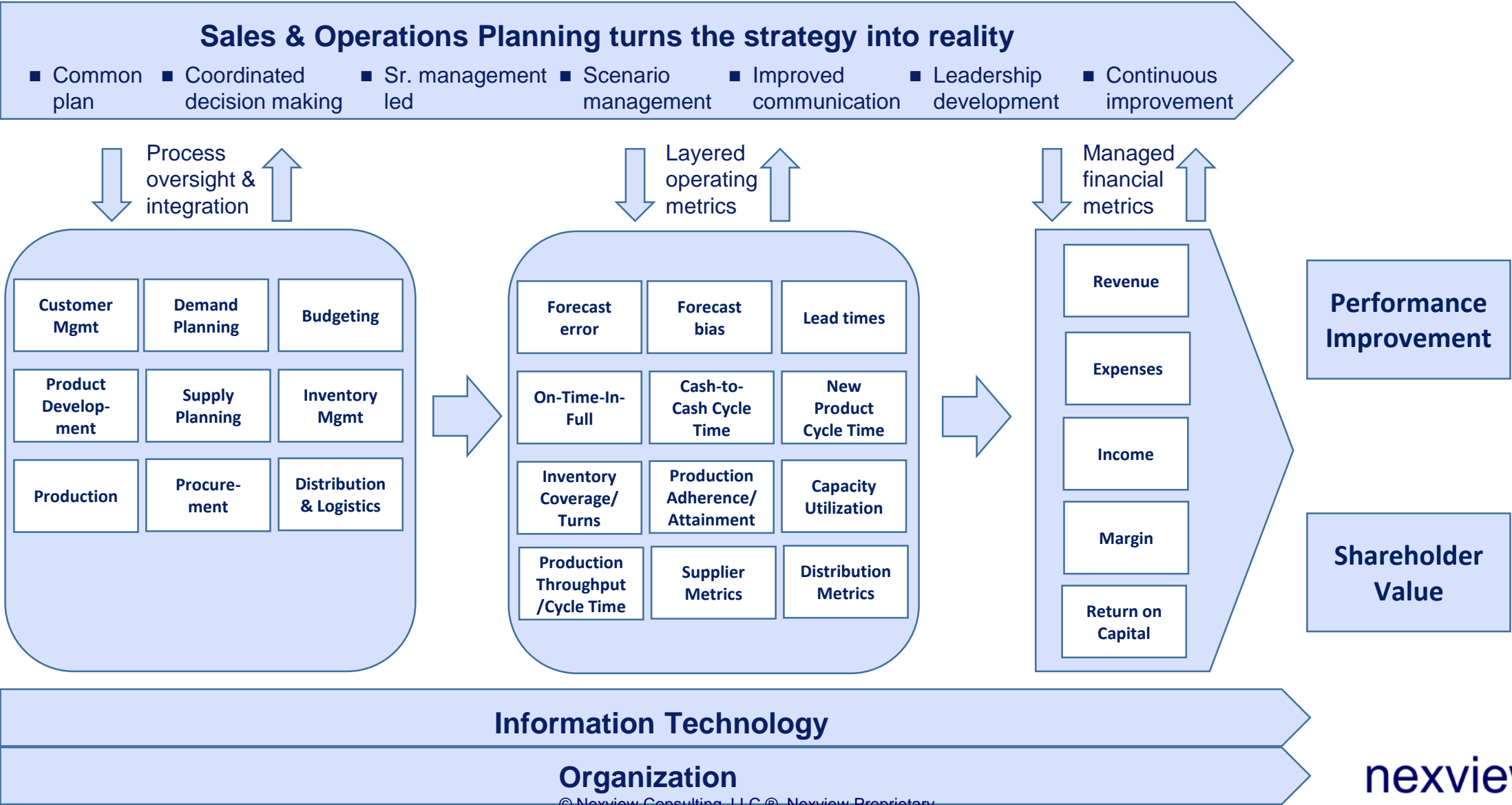


*See more on the 8 Levers on this extended video (material from the training course)*





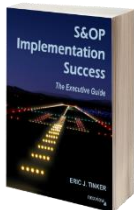
# We help clients use S&OP to drive process integration which can be measured through a layered system of operating and financial metrics



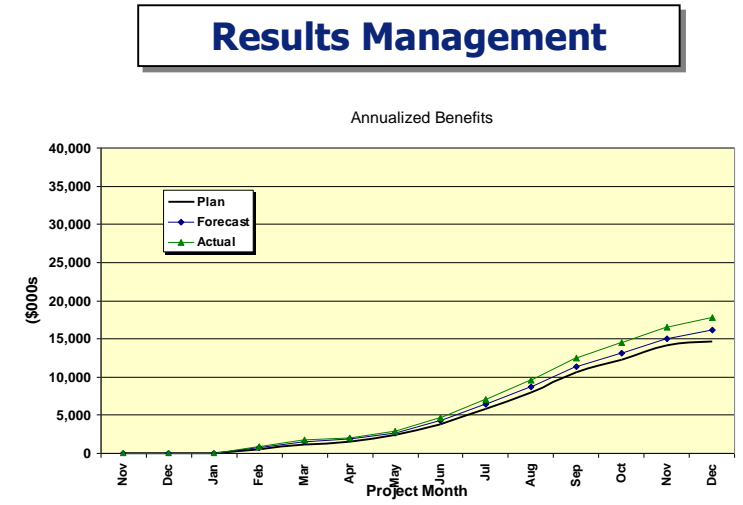
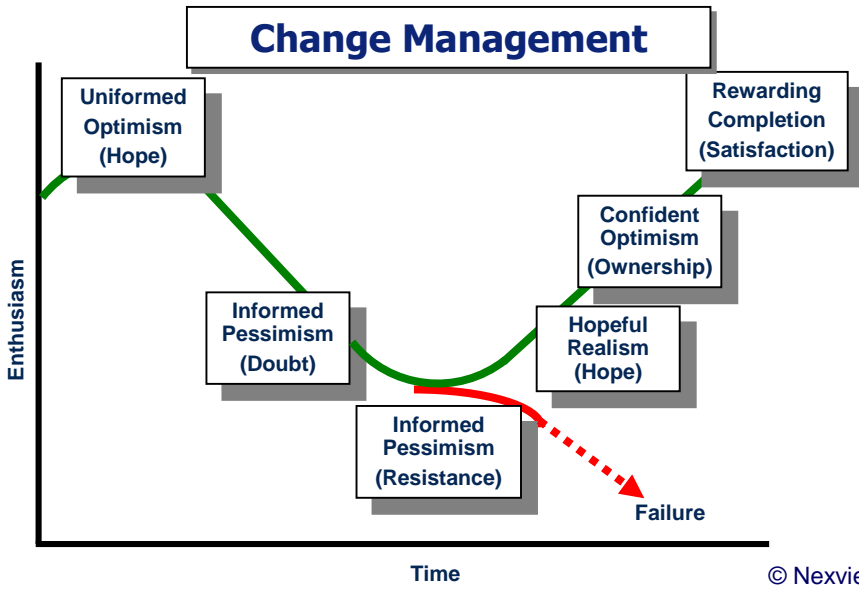
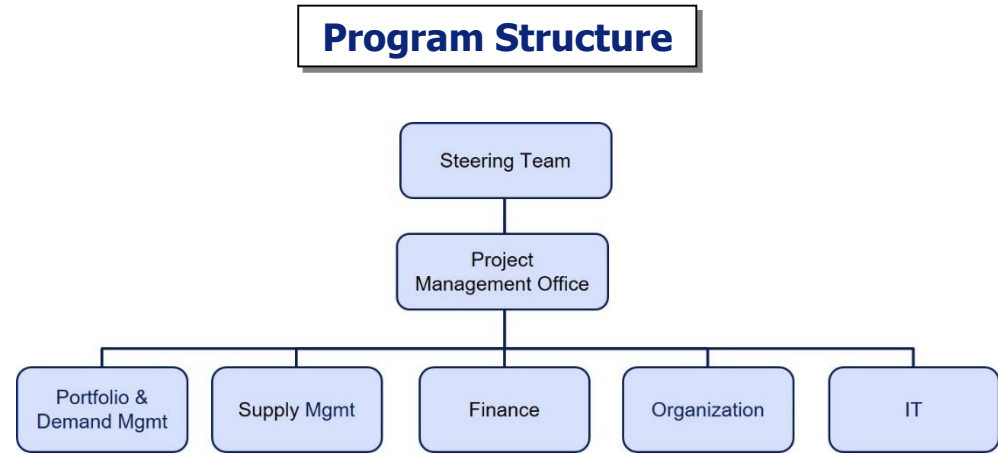
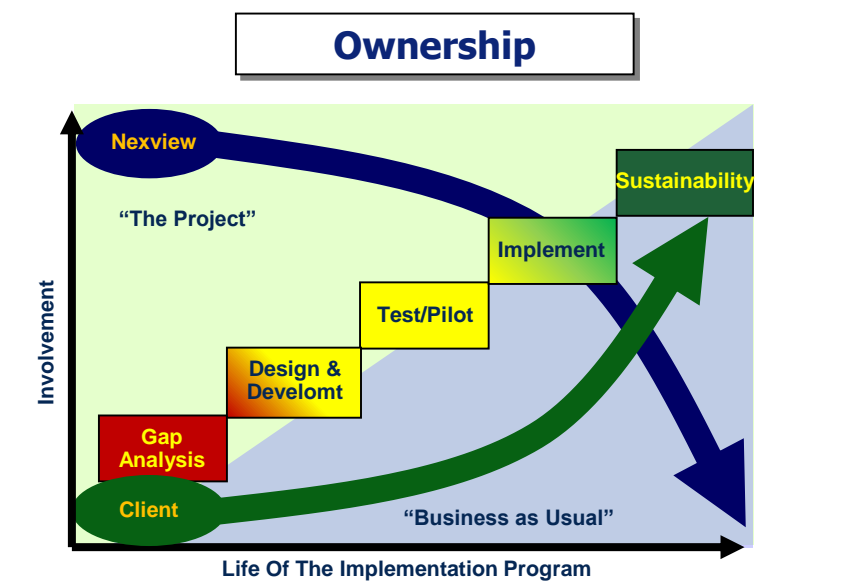
# We work with clients in the way that best suits their needs (e.g. training, assessment, design, coaching, and/or fulltime on-the-ground support for full implementation)



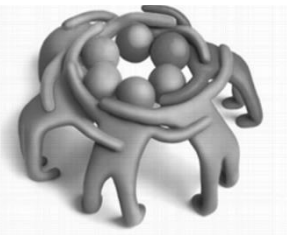
See the free eBook on our S&OP implementation methodology



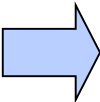
# Our implementation approach emphasizes ownership with your team, a defined structure, change management, and measurement of results



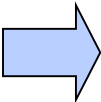
# Measuring results is not easy and takes time, Nexview brings a mature methodology for this



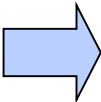
Teams are working on process improvements, management systems, and focusing on results



We define and measure indicators to demonstrate our success



The numbers and tracking tools are owned by the client



We review actuals vs. plans, celebrate success, and discuss actions required to address shortfalls

See where companies are getting results from S&OP as well as associated magnitudes.

**2017 S&OP Survey Results**



How does your company compare? [See it now](#)

**nexview**

## The process of implementing a Results Management System

Analyze & define the opportunity, begin to define the end state

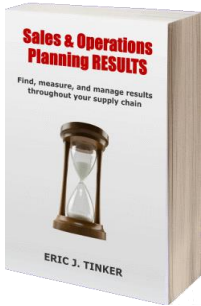
Define the project, and benefit levers

Set baselines and determine how to measure benefits

Implement tracking tools

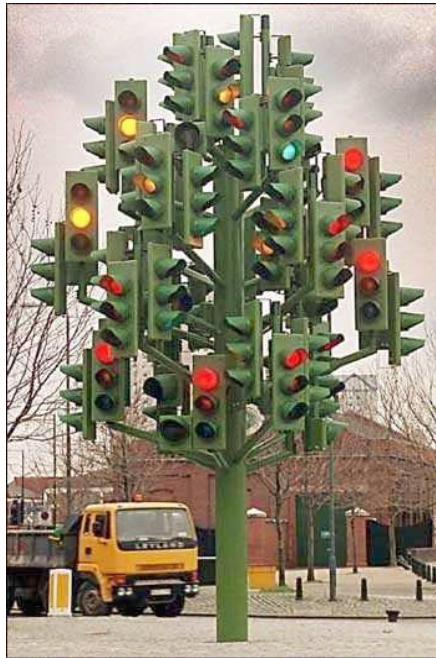
Review results and refocus as necessary

This approach is discussed in the highly-rated book, *Sales & Operations Planning RESULTS – Find, Measure, and Manage Results Throughout Your Supply Chain*





# Managing change on a large scale is complex, we have many tools and methods to help



## Methods for Leading and Managing Change

- Coaching at all levels – “WIFM”
- Celebrate wins, root-cause missteps
- No surprises
- Communicate the vision
- Communication plans
- Stakeholder analyses
- Defined roles & responsibilities
- Project structure (e.g. team charters, milestones, project plans)
- Project reviews
- Results management
- S&OP meeting effectiveness reviews
- Action logs
- Team effectiveness reviews
- Change implementation schedule

## Desired Outcomes

- People are communicated to
- People are bought in
- People know what to do
- People got what they thought they were going to get
- People feel successful
- The “old way” disappears
- Results
- Sustainability
- Culture change

Our change programs are designed to strengthen your capabilities.

**Our training courses are taught with passion and are based on 20+ years of experience consulting and training across the world, they are a blend of**

- Subject matter material
- Exercises with tangible outputs
- Case studies of leading companies
- Current market survey data
- Performance improvement and change methodologies we use with clients
- Tools to support process improvement and change implementation

**The training session will:**

- Align your team
- Create momentum for change
- Leave you with best practice tools and templates
- Provide tips and traps
- Provide reference material to guide your efforts and train others in the future

**See course videos, what prior participants have said, and how they rated us!**



*We are committed to transfer as much as we possibly can in the shortest amount of time possible.*

# Our 3 day course in Demand Planning and S&OP includes a dedicated 3 hour executive summary session

*REPRESENTATIVE SAMPLE – We typically work a specific agenda with clients.*

## Agenda Highlights

### Day 1 – Executive Briefing and Demand Planning Foundation

- Executive Briefing
  - Why Do We Need to Do Anything Differently?
  - S&OP and Demand Planning Overviews
  - Exercise 1: Identify Planning Gaps
  - Change Management & Implementation Tips
- Demand Planning Key Elements
- Exercise 2: Benchmark Your Demand Planning process
- Forecast Modeling and Quantitative Methods
- Exercise 3: Forecasting with MS Excel

### Day 2 – Demand Planning for Performance Improvement and S&OP Foundation

- KPIs – Measuring Forecast Accuracy
- Exercise 4: Compute Forecast Error and Bias
- Integrate Demand Management with Your Trading Partners
- Improve Your Forecast Accuracy – 6 Sigma Methods
- Exercise 5: Determine Your Root Causes of Forecast Accuracy
- Roles and Organizational Considerations
- The S&OP Process, Key Roles, and Design Checklist
- Exercise 6: Benchmark Your Planning Process vs. S&OP Best Practices
- S&OP Report Formats – What to Include

### Day 3 – S&OP for Performance Improvement

- S&OP Technology Requirements and Systems in the Marketplace
- Exercise 7: Gaps in Existing IT Systems to Support S&OP
- S&OP KPIs and Using Them Effectively
- Globalizing S&OP – Regional vs. Global
- S&OP Maturity
- Case Studies – S&OP Practices of Leading Companies
- Exercise 8: Develop a Vision for S&OP
- Running Effective S&OP Meetings
- Results Management
- Positioning Your Project for Success
- Techniques for Change Management
- Exercise 9: Overcoming Barriers to Change

## We suggest arriving a day or two early to interview a few key stakeholders

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- Understand their business issues and priorities
- Gauge their initial understanding of the training topics
- Enables us to steer conversations and have context during the training sessions
- Allows us to get to know a few leaders before the session



We'll work with you to determine a few people to interview before the training session.



# Our time on-site for a training visit could look something like this

Day/Activity	Objectives	Outputs
<b>Prior to Visit</b> Calls/emails	<ul style="list-style-type: none"> <li>■ Discuss current state, issues, and objectives</li> <li>■ Finalize agenda/emphasis points</li> </ul>	<ul style="list-style-type: none"> <li>■ Agenda and plan</li> <li>■ Interview schedule</li> <li>■ Finalized training material</li> </ul>
<b>Day 1</b> Work one-on-one with Sponsor	<ul style="list-style-type: none"> <li>■ Learn more about your current processes, issues, and goals</li> <li>■ Understand organizational structure</li> <li>■ Discuss strengths/and improvement capabilities needed for the organization</li> <li>■ Discuss anticipated change management issues</li> <li>■ Provide on-the-spot suggestions</li> </ul>	<ul style="list-style-type: none"> <li>■ Understanding of your organization, and hi-level S&amp;OP and supporting processes</li> <li>■ Understanding of KPIs/business issues that are driving a need for improvement</li> <li>■ On-the-spot suggestions based on Nexview experience related to process, information systems, and organization</li> </ul>
<b>Day 2</b> Interviews with key leaders and training course participants	<ul style="list-style-type: none"> <li>■ Understand perspectives, priorities, and business needs of key leaders and participants</li> <li>■ Start to share best practices with them throughout the conversations</li> </ul>	<ul style="list-style-type: none"> <li>■ Summarized observations and priorities (anonymous/summary format, to share during the training course)</li> <li>■ Items to further discuss in the training/workshops</li> </ul>
<b>Days 3 – 5</b> Training/ Workshops	<ul style="list-style-type: none"> <li>■ Convey best practices to participants</li> <li>■ Align team around priorities</li> <li>■ Align team around improvement areas</li> <li>■ Produce outputs to use immediately</li> </ul>	<ul style="list-style-type: none"> <li>■ Completed benchmarking exercise relative to best practices for S&amp;OP</li> <li>■ Best practices sample tools/templates for reports, meeting designs, etc.</li> <li>■ All slides and materials used in training sessions (digital copies)</li> <li>■ Other specific outputs we would plan prior to the visit, could be items such as: <ul style="list-style-type: none"> <li>- S&amp;OP Vision, KPIs, Results areas</li> </ul> </li> </ul>
<b>Follow-up</b> On-site or Off-site	<ul style="list-style-type: none"> <li>■ Debrief and action plan for moving forward as desired</li> </ul>	<ul style="list-style-type: none"> <li>■ Summarized recommendations for next steps</li> </ul>

# Deliverables from our seminars are tangible and often support improvement initiatives

*Samples – Specific deliverables would be based our agenda, but we will leave you with items that help!*

- All course materials in electronic format
  - Slides
  - Tools & templates
    - Demand Planning and S&OP best practice review tools
    - Sample report formats (KPI scorecard, S&OP reports)
    - S&OP meeting design documents
    - S&OP design checklist
    - S&OP meeting scorecard
  - Exercise outputs
    - Summary of planning gaps
    - Demand Planning baseline best practice review
    - Root causes of forecast error in your organization
    - S&OP baseline best practice review
    - Summary of IT gaps
    - S&OP vision
    - Summary of barriers to change and mitigation strategies



We invite you to see our extensive content archive on the website and join our developing community, Nexview Online



Blog Posts



Articles



eBooks



Surveys



Conference  
Presentations



Videos



Tools & Templates

Here are a few representative items that may help you



***“Revitalize Your S&OP”***  
Journal of Business Forecasting



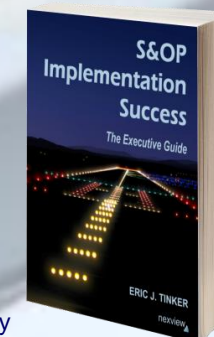
***“Directing Success –  
10 Tips for S&OP Sponsors”***  
APICS Magazine



***“26 Ways to Get Sales On Board  
with Demand Planning”***  
Supply Chain Quarterly



***Sales & Operations Planning RESULTS***  
Full Book on Amazon.com  
(eBook still available free on the website for a very limited time)



***S&OP Implementation Success***  
eBook pre-release of next book  
Our implementation methodology  
and tips



# 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



## 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.*

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