



# Sales & Operations Planning Checklist

Analyze, Evaluate & Consistently Improve Your S&OP Process



## Data Prep

Is there consensus on how products will be grouped into S&OP families for review in the S&OP process?

YES  NO

Do you have a manageable number of S&OP families (ideally 10 - 25)?

YES  NO

Have you harvested the additional data that you will need for S&OP reporting (which might not be in your forecasting system:)

- Business Plan / Budget
- Flex Plan / Latest Estimate
- Production plan
- Capacity
- On Hand
- Dependent Demand
- Planned Orders
- In-Process / In-Transit items
- Customer Orders
- Sales Days per Month
- Work Days per Month

Have all products been assigned to their specific families?

YES  NO

Have you imported S&OP family codes and S&OP family descriptions?

YES  NO

Has the S&OP Flag been set to "Y"es for S&OP records (and only for S&OP records)?

YES  NO

Have you updated the Description fields for your S&OP

YES  NO

Have you verified the Cost, Price and (if necessary) the Equivalent Unit Multiplier for your Aggregate records?

YES  NO

## Data Processing

Are data exchanges & Import parameters in place to routinely update the above-mentioned data

YES  NO

Has Aggregation been run (to create or update product family totals)?

YES  NO

Has S&OP data been validated?

YES  NO

## Other Considerations

- Custom Views
- User-Defined Labels
- User-Defined Rows
- Custom Calculations
- Custom Workspaces
- Print Reports
- Scenario Planning
- Deviation Filters
- Alternate Units of Measure
- Rough-Cut Capacity
- Planning
- Notes

## The Process

- Pre-S&OP data prep
- Pre-S&OP communication
- S&OP meeting materials prep
- S&OP meeting
- S&OP meeting assessment & followup