Strategic S&OP and Inventory Alignment for Leaders Training Course



28 Dec 2026 - 01 Jan 2027

Boston

7500 € (Per Person)

Ref: #IM9825_159234

Course Introduction / Overview:

This intensive training course is designed to equip executive leaders with the strategic competencies required to master Sales and Operations Planning (S&OP) and achieve seamless inventory alignment. In today's volatile market, the ability to integrate demand, supply, and financial planning is no longer a competitive advantage but a necessity for survival and growth. This program moves beyond the procedural aspects of S&OP to focus on its role as a core executive decision-making process. As pioneering author Thomas F. Wallace outlines in his foundational work, "Sales & Operations Planning: The How-To Handbook," a successful S&OP process is the key to balancing supply and demand to achieve business objectives. BIG BEN Training Center has developed this curriculum to address the critical link between strategic S&OP, inventory optimization, and financial performance. Participants will explore advanced concepts such as integrated business planning (IBP), managing supply chain risk, and leveraging performance metrics to drive accountability and continuous improvement, ensuring their organizations are agile, resilient, and profitable. This course provides a comprehensive roadmap for transforming S&OP from a tactical meeting into the engine of strategic execution and value creation.

Target Audience / This training course is suitable for:

- Chief Executive Officers (CEOs) and Chief Operating Officers (COOs).
- Vice Presidents and Directors of Supply Chain and Operations.
- Heads of Finance, Sales, and Marketing departments.
- General Managers and Business Unit Leaders.
- Strategic Planning and Business Development Executives.
- Senior managers involved in the S&OP or Integrated Business Planning (IBP) process.
- Leaders responsible for inventory management and working capital optimization.

Target Sectors and Industries:

- Manufacturing and Industrial Production.
- Fast-Moving Consumer Goods (FMCG) and Retail.
- Pharmaceuticals and Healthcare.
- Technology and Electronics.
- Automotive and Aerospace.
- Logistics and Distribution.
- Governmental agencies and public sector organizations.

Target Organizations Departments:

- Executive Leadership and Corporate Strategy.
- Supply Chain Management.
- Operations and Production.
- Finance and Accounting.
- Sales and Marketing.
- Procurement and Sourcing.
- Product Management and Development.

Course Offerings:

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

- Develop a strategic S&OP framework that aligns with corporate objectives.
- Master advanced techniques for demand forecasting and consensus planning.
- Implement sophisticated inventory optimization strategies to reduce costs and improve service levels.
- Integrate financial planning and analysis directly into the S&OP cycle.
- Lead cross-functional teams to achieve alignment and drive effective decision-making.
- Establish robust performance metrics (KPIs) to monitor and improve S&OP effectiveness.
- Manage supply chain risks and enhance organizational resilience through proactive planning.
- Champion a culture of collaboration and accountability across the organization.
- Evaluate and leverage technology to support a mature S&OP process.

Course Methodology:

The training methodology at BIG BEN Training Center is designed to be highly interactive, experiential, and directly applicable to the challenges faced by executive leaders. We believe that adult learning is most effective when it combines conceptual knowledge with practical application. This course utilizes a blended approach, incorporating expert-led presentations on core S&OP and inventory alignment principles with dynamic group discussions that allow participants to share experiences and insights. A significant portion of the program is dedicated to analyzing real-world case studies from various industries, enabling participants to dissect complex business scenarios and formulate strategic solutions. Interactive workshops and business simulations will provide a hands-on environment to practice decision-making, consensus building, and financial impact analysis. Participants will work in teams on practical exercises, fostering collaboration and mirroring the cross-functional nature of S&OP. Continuous feedback from the facilitator and peers is a key component, ensuring a rich and developmental learning journey. The focus is on translating strategic theory into actionable plans that can be implemented immediately within the participants' own organizations for tangible results.

Course Agenda (Course Units):

Unit One: The Strategic Imperative of S&OP and IBP

- The evolution from S&OP to Integrated Business Planning (IBP).
- Aligning the S&OP process with corporate strategy and financial goals.
- The role of executive leadership in championing the S&OP process.
- Understanding the five-step S&OP cycle in depth.
- Assessing your organization's S&OP maturity level.
- Key principles of cross-functional collaboration and accountability.
- Common pitfalls in S&OP implementation and how to avoid them.

Unit Two: Mastering Demand and Supply Planning

- Advanced demand forecasting techniques and statistical models.
- Building a consensus-based demand plan with sales and marketing.
- Effective product portfolio management within the S&OP framework.
- Strategic capacity and resource planning.
- Supply planning strategies for a volatile environment.
- Supplier collaboration and supply chain visibility.
- Balancing the demand and supply plan for optimal outcomes.

Unit Three: Strategic Inventory Alignment and Optimization

- The direct link between S&OP decisions and inventory levels.
- Advanced inventory segmentation strategies (e.g., ABC, XYZ analysis).
- Setting strategic inventory targets and safety stock levels.
- Techniques for optimizing working capital and cash flow.
- SKU rationalization and its impact on supply chain complexity.
- Managing excess and obsolete inventory through the S&OP process.
- The role of inventory in enhancing customer service levels.

Unit Four: Financial Integration and Performance Measurement

- Translating operational plans into financial projections (P&L, Balance Sheet).
- Conducting gap analysis between business plans and financial targets.
- Scenario planning and financial modeling for decision support.
- Developing a balanced scorecard of S&OP and inventory KPIs.
- Measuring the total cost to serve and customer profitability.
- Linking executive incentives to S&OP performance metrics.
- Communicating S&OP outcomes effectively to the board and stakeholders.

Unit Five: Leadership, Change Management, and S&OP Execution

- The executive's role in driving the monthly S&OP cycle and meetings.
- Leading change and overcoming resistance to S&OP implementation.
- Fostering a culture of data-driven decision-making.
- Evaluating and selecting S&OP and inventory management technologies.
- Building a continuous improvement roadmap for your S&OP process.
- Managing global S&OP processes across different regions and business units.
- Capstone exercise: Developing a strategic S&OP implementation plan.

FAQ:

Qualifications required for registering to this course?

There are no requirements.

How long is each daily session, and what is the total number of training hours for the course?

This training course spans five days, with daily sessions ranging between 4 to 5 hours, including breaks and interactive activities, bringing the total duration to 20 - 25 training hours.

Something to think about:

How can an organization's culture, rather than its processes or technology, become the biggest bottleneck to achieving S&OP maturity, and what is the executive's role in reshaping it?

What unique qualities does this course offer compared to other courses?

This course distinguishes itself by focusing squarely on the strategic and leadership dimensions of Sales and Operations Planning, rather than merely its technical or procedural aspects. While many programs teach the "what" and "how" of S&OP, this curriculum is designed for executives, emphasizing the "why" and "so what" for the business. Its primary unique quality is the deep, integrated focus on aligning operational planning with financial outcomes and strategic inventory management, a critical nexus often overlooked. The content moves beyond basic balancing of supply and demand to explore advanced topics like financial scenario modeling, risk mitigation, and the direct impact of S&OP decisions on working capital and the P&L. Furthermore, the course is built around leadership and change management, recognizing that the success of S&OP is less about software and more about people, culture, and executive sponsorship. Participants will not just learn a process; they will learn how to lead a fundamental business transformation, foster cross-functional collaboration, and instill a culture of accountability. The use of executive-level case studies and strategic simulations ensures that the learning is highly relevant and immediately applicable to the complex challenges leaders face.