



*inspirage*<sup>®</sup>

# SALES AND OPERATIONS PLANNING CLOUD DEMO

Inspirage

September 2019

# INDUSTRY CASE STUDY

## Branded Business

Product  
Categories

Brands

Distribution  
Channels

Eye  
Correction

Eye  
Protection

Multiple  
Brands

Opticians

Online

# OBJECTIVES & CHALLENGES

## About Company

- Manufacturer of optical devices with multiple manufacturing plants distributing products to different markets with complex sourcing across supply chain network

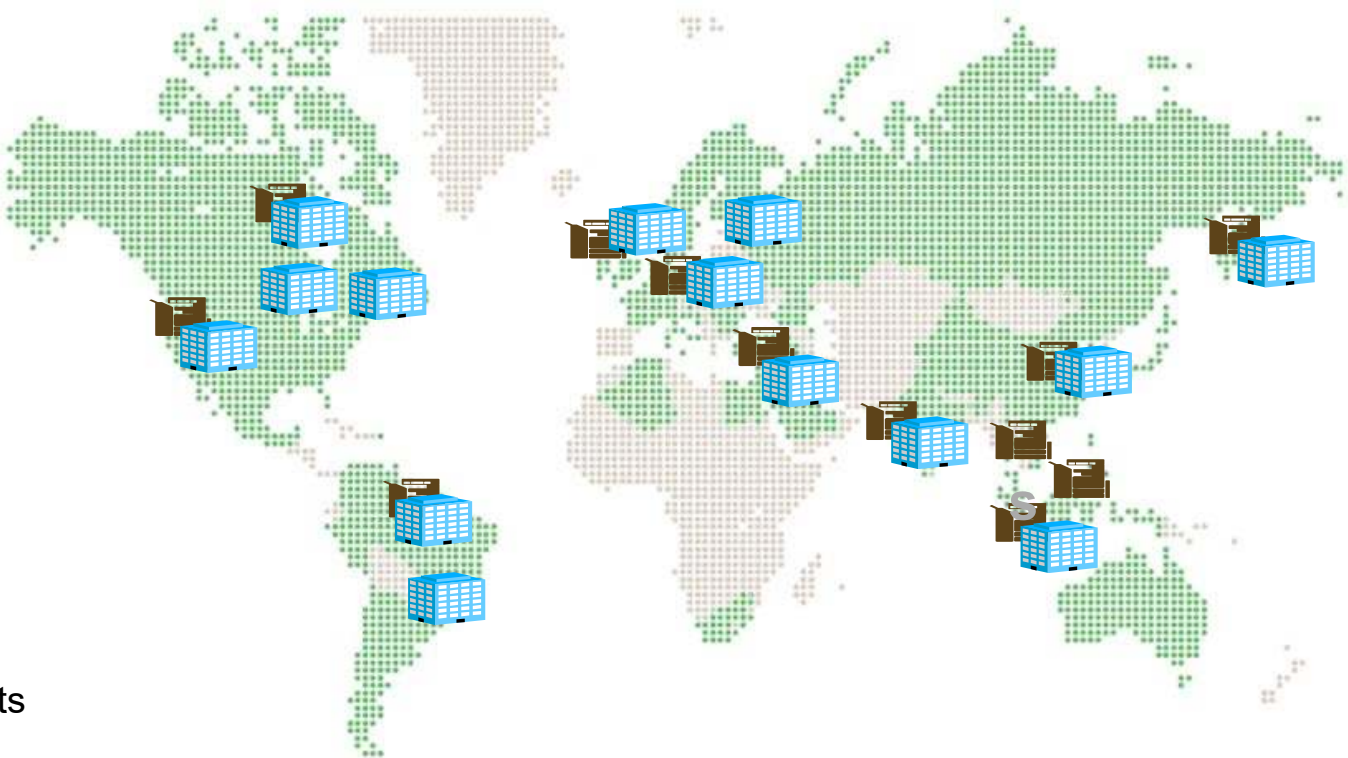
## Objectives

- Deploy an integrated Sales & Operations Planning solution which is accurate, efficient, and more agile

## Key Challenges

- Aggregated supply planning for all nodes in the supply chain
- Single platform with single source of truth for data
- Review supply requirements for different distribution centers & plants at one place
- Budget planning for factories
- Simulate scenarios for capacity changes

# SUPPLY CHAIN ENTITIES



 Plants

 Distribution Center

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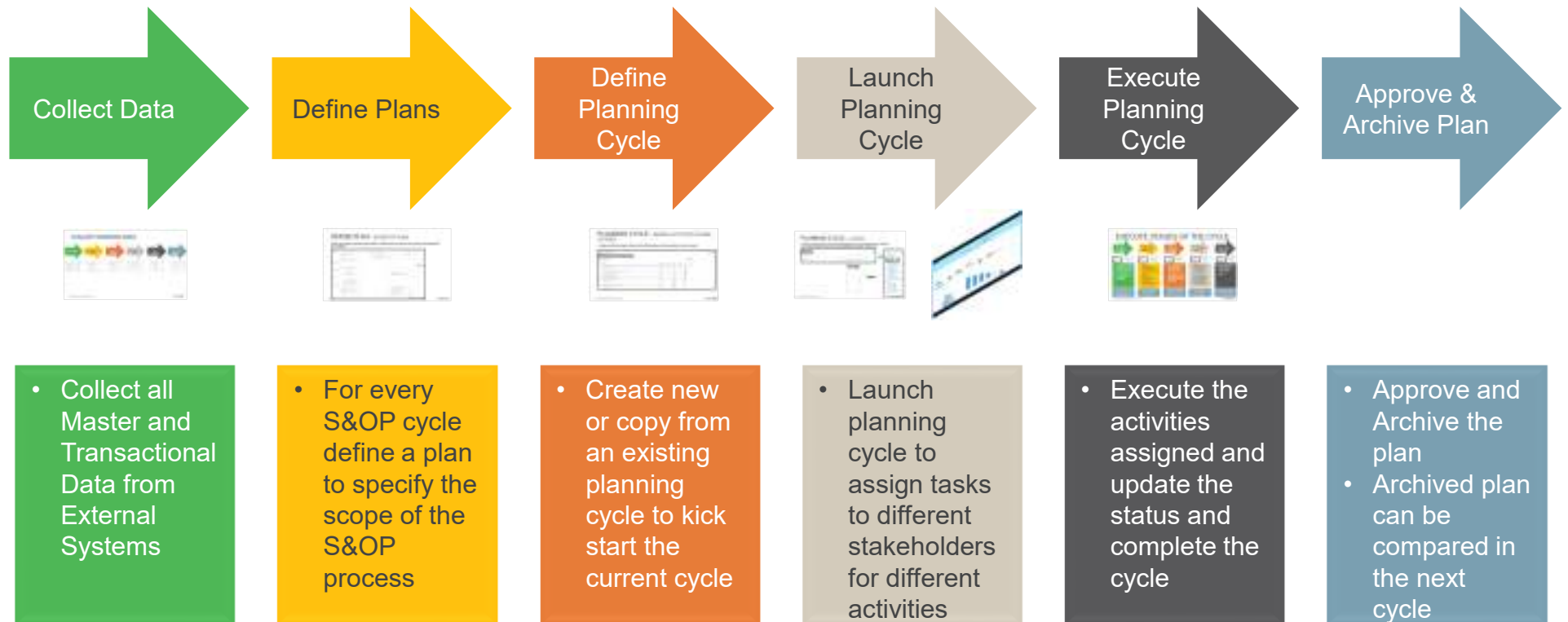
SOLUTION – SALES &  
OPERATIONS CLOUD

# ORACLE S&OP CLOUD

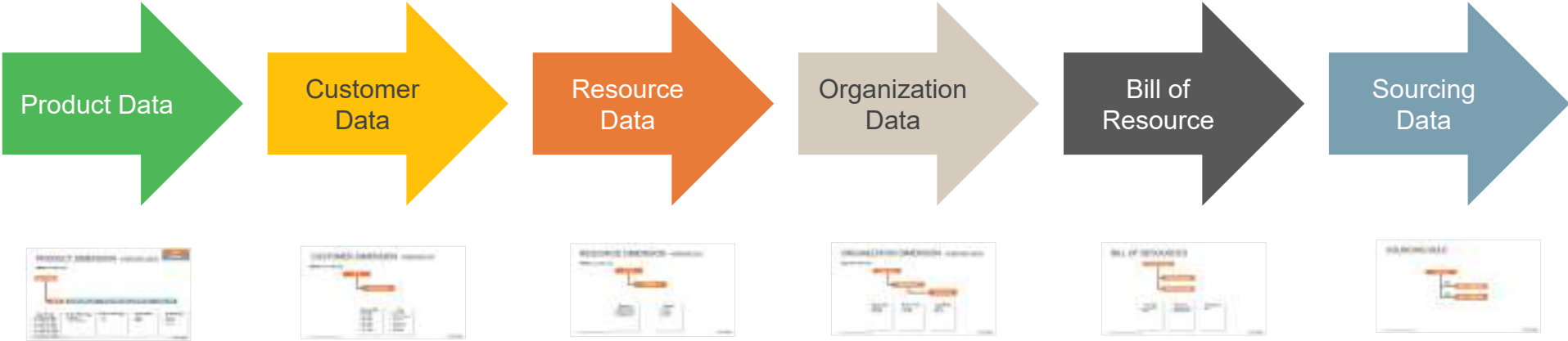
Consistently and profitably execute strategy with enterprise-wide alignment



# S&OP PROCESS



# COLLECT MASTER DATA





# COLLECT MEASURES DATA



# PLANNING CYCLE – LAUNCH

Launch the Planning Cycle that has been configured for the current S&OP cycle. Planning cycle will be executed in the context of an S&OP plan associated to the cycle



- Plans
  - Manage Plans
  - Load Measures from Other Plans
- Planning Cycle
  - Manage Planning Cycles
  - Open Planning Cycle
- Plan Inputs
  - Collect Planning Data
  - Load Planning Data from Files
  - Maintain Supply Network Model
  - Manage Assignment Sets
  - Manage Sourcing Rules
  - Manage Bills of Distribution
  - Manage Planning Source Systems
  - Manage Planners
  - Review Planning Calendars
  - Review Planning Calendar Shifts
  - Review Planning Calendar Associations
- Configuration
  - Configure Exceptions
  - Configure Exception Sets
  - Configure Planning Analytics
  - Manage Demand Classes
  - Manage Planning Measures
  - Manage Planning Profile Options



# PLANNING CYCLE – PLANNING CALENDAR

Track % Completion of stages

Worklist shows the list of activities assigned with due dates

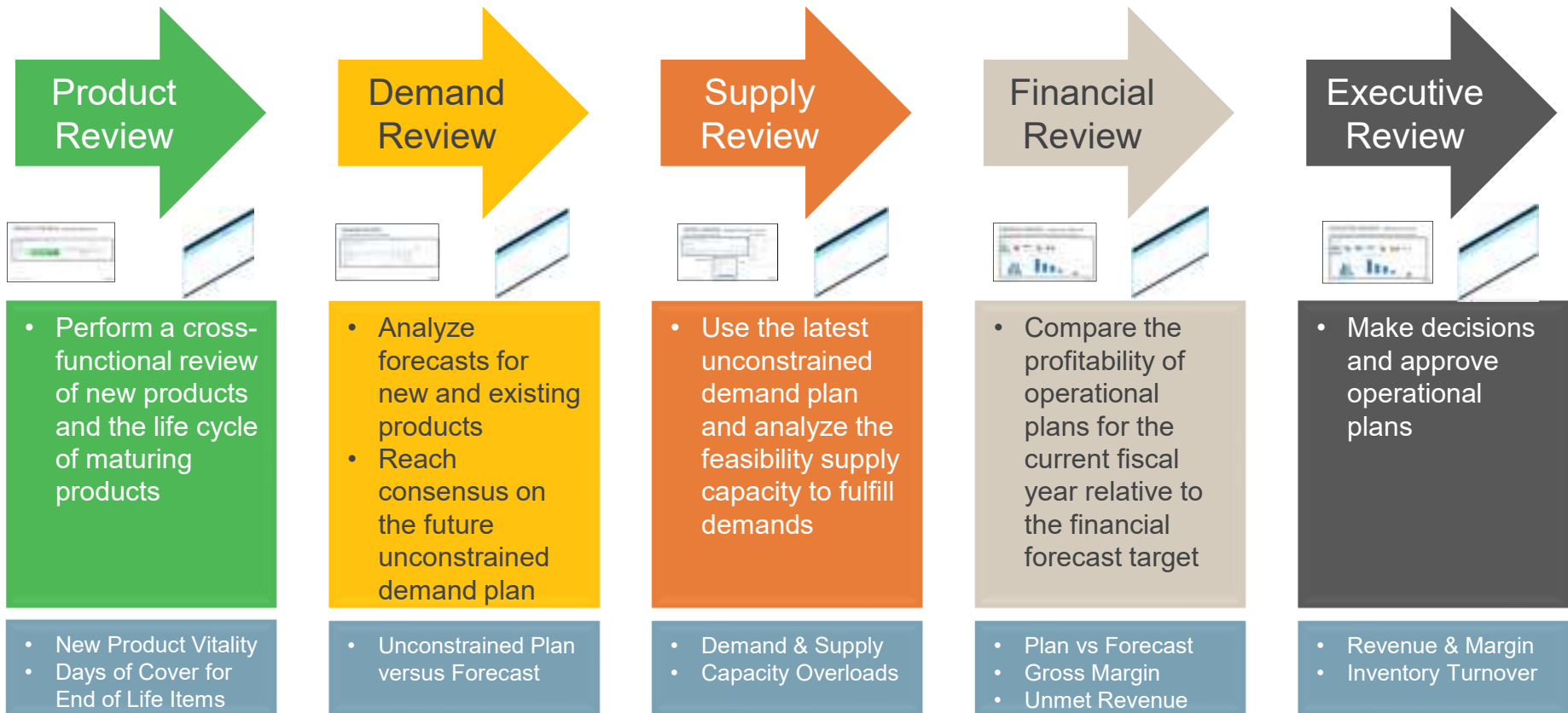
The screenshot displays the 'Edit Planning Cycle: DEM Demo S&OP Planning Cycle' interface. It features a 'Worklist (8)' table and a 'Timeline' Gantt chart.

Title	Assignee	Owner	Due Date	Category	Status
Review and adjust forecast demand	Bob Smith	Bob Smith	3/1/15	Forecast Review	Assigned
Review and adjust forecast revenues	Bob Smith	Bob Smith	3/31/15	Forecast Review	Assigned
Review and adjust operating plan	Bob Smith	Bob Smith	3/31/15	Forecast Review	Assigned
Review and adjust resource capacity constraints	Bob Smith	Bob Smith	3/31/15	Supply Review	Assigned
Review and adjust sales forecast	Bob Smith	Bob Smith	3/1/15	Forecast Review	Assigned

The Timeline view shows a Gantt chart with tasks plotted across a calendar from January to February. Tasks include 'Review product plan for new products', 'Review forecast revenues', 'Review forecast demand', 'Review operating plan', and 'Review resource capacity constraints'. Each task is assigned to a specific user and has a defined duration.

Overview of overall calendar with dates

# EXECUTE STAGES OF THE CYCLE



# PRODUCT REVIEW – REVIEW WORKLIST

**Edit Planning Cycle: DEM Demo S&OP Planning Cycle**

Overview (0%) | **Product Review (0%)** | Demand Review (0%) | Supply Review (0%) | Financial Review (0%) | Executive Review (0%) | Maps

### Planning Activities

Title	Due Date	Assignee	Link	Status
Update product plan for new products	1/30/19	Rob Smith	Go	Assigned
Review and adjust demand forecasts	1/30/19	Rob Smith	DEM Product Review Summary	

**Action Items**

Title	Assignee	Due Date	Status	Link
No data to display.				

**Decision Items**

Title	Owner	Creation Date	Status	Link
No data to display.				

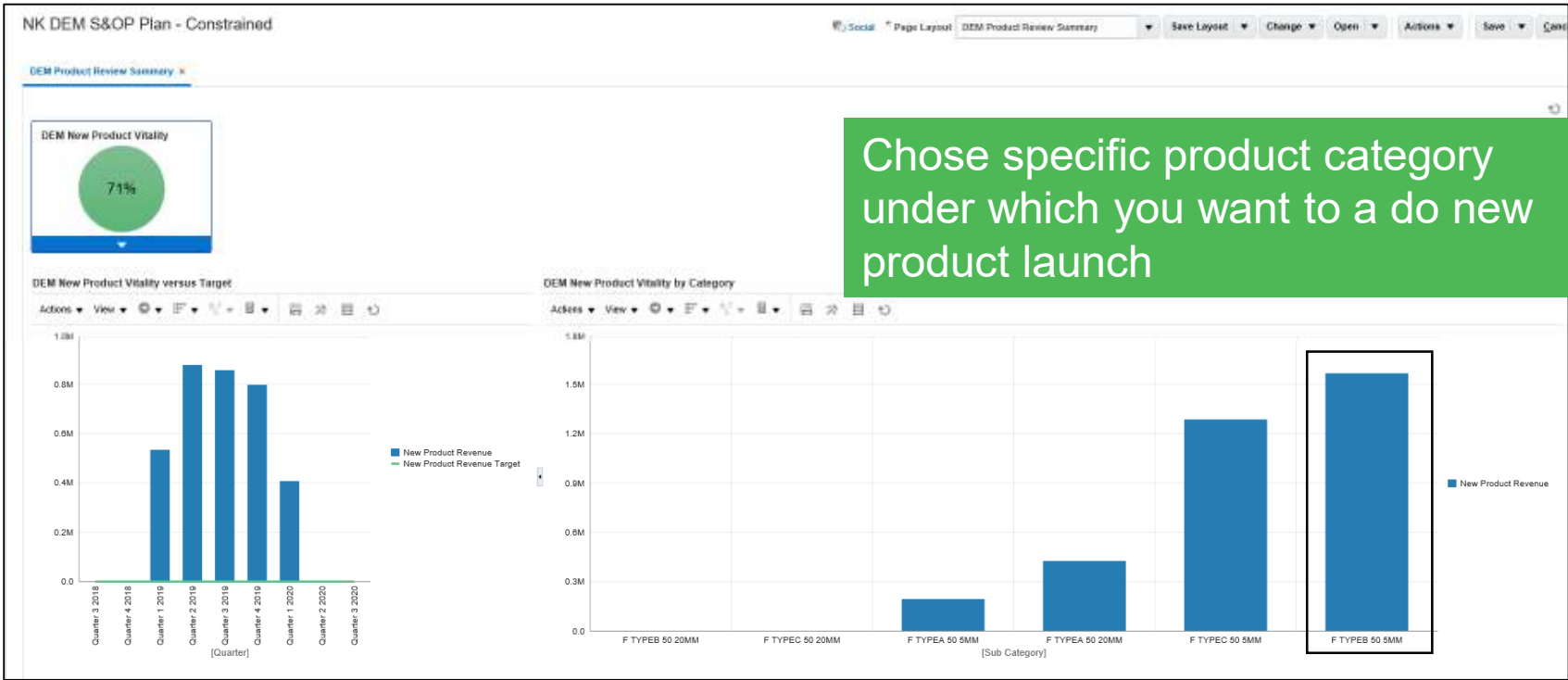
**Participants**

Name
Ethan Moore
NK DEM S&OP Plan - Constrained

**Review Worklist for the Product Review**

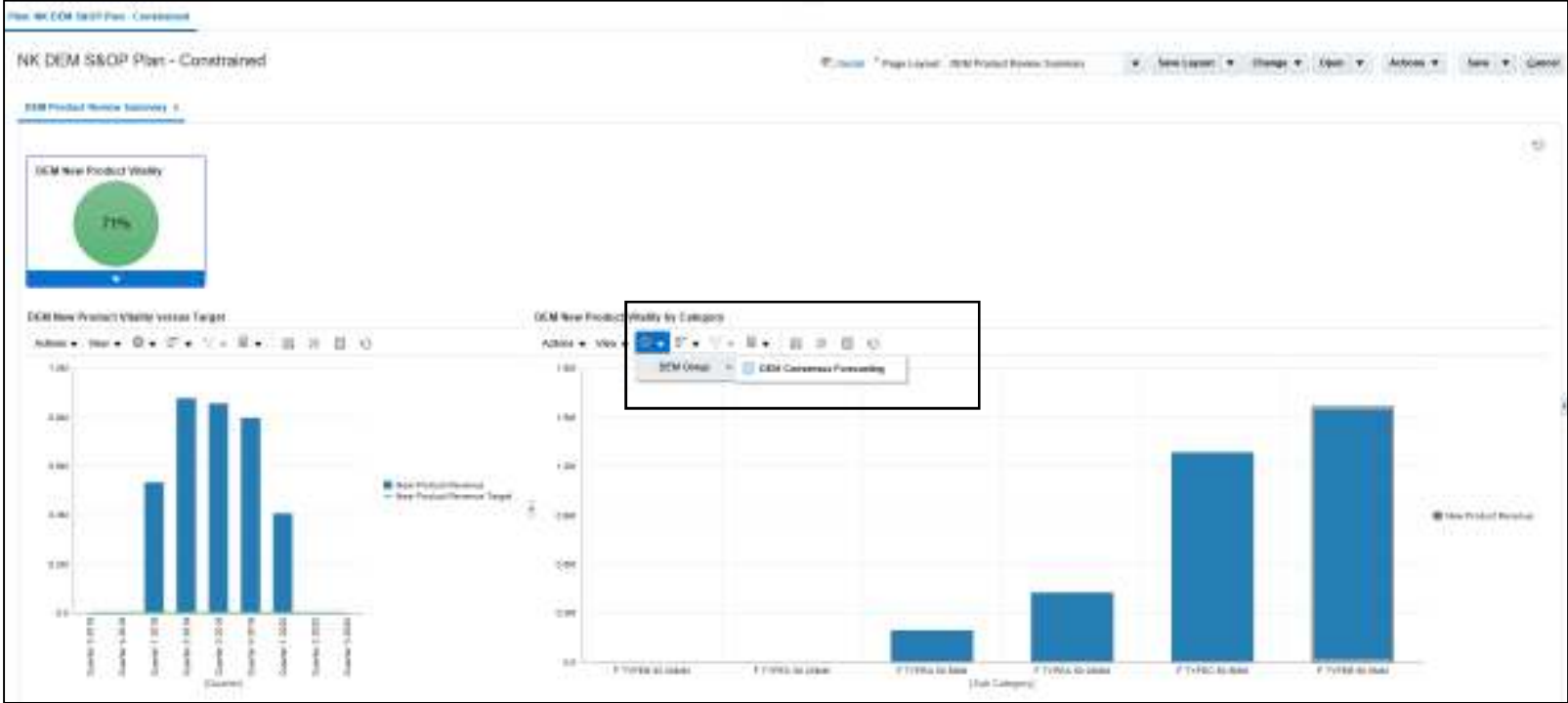
# PRODUCT REVIEW SUMMARY

Product Vitality provides revenue contribution of new launches to the overall revenue



# PRODUCT REVIEW – NEW PRODUCT VITALITY

Drill Further to review the forecast/history per category



# PRODUCT REVIEW – MANAGE PRODUCT LAUNCH

Chose the Product under the Product category and also review this history of source product

NK DEM S&OP Plan - Constrained

DEM Product Review Summary - DEM Consensus Forecasting

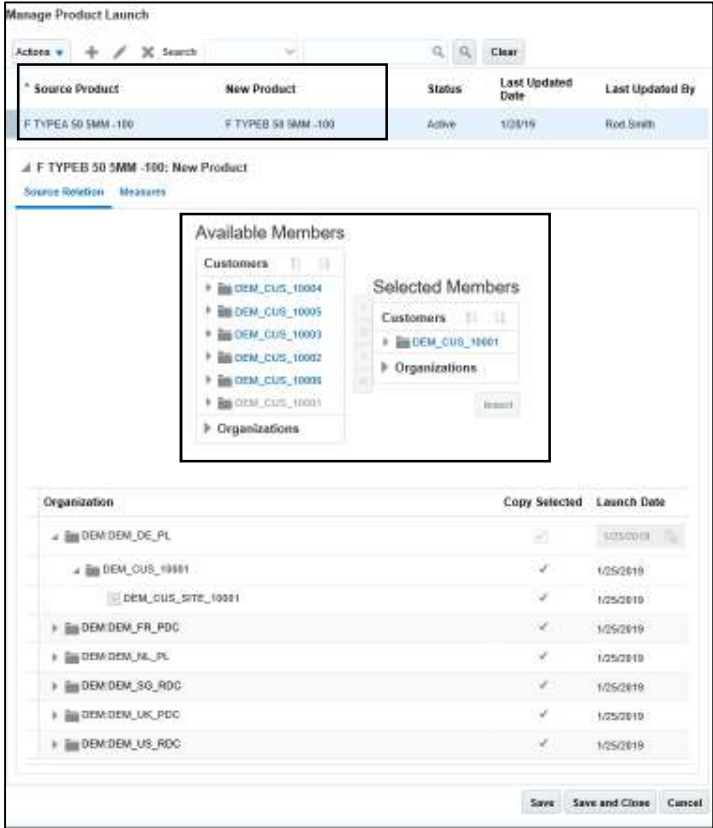
Filters: DEM\_CUS\_SITE\_1000, DEM\_DEM\_US\_RDC

Item	Year 2018				Year 2019				Year 2020
	Quarter 1 2018	Quarter 2 2018	Quarter 3 2018	Quarter 4 2018	Quarter 1 2019	Quarter 2 2019	Quarter 3 2019	Quarter 4 2019	1 2020
Shipments History 1 Year Ago									
Shipments History:									
Item by Shipped Date		100	100						
Final Shipments Forecast									
Final Sales Forecast					800	1,350	825	250	
Final Shipments Forecast Weight									
Final Sales Forecast Weight					180	100	193	180	
Weighted Forecast	0	0	0	0	782	1,337	817	248	0
Adjusted Consensus Forecast									
Consensus Forecast	0	0	0	0	782	1,337	817	248	0



# PRODUCT REVIEW – MANAGE PRODUCT LAUNCH

Chose the Members from each dimension from source product to be copied to target product



# PRODUCT REVIEW – MANAGE PRODUCT LAUNCH

- Chose the source and target measure and apply a factor while copying the measure value
- Different measures are available to chose from for copy

**Manage Product Launch**

Actions ▾ + ✎ ✕ Search

* Source Product	New Product	Status	Last Updated Date	Last Updated By
F TYPEA 50 5MM -100	F TYPEB 50 5MM -100	Active	1/28/19	Rod.Smith

▲ F TYPEB 50 5MM -100: New Product

Source Relation **Measures**

Apply Measure Copy Set Save as Measure Copy Set

Source Measure	Target Measure	Factor (%)
Shipments History: Requested Item by Shipped Date	Adjusted Shipments History	75

Save Save and Close Cancel

**Search and Select: Source Measure** ✕

Search

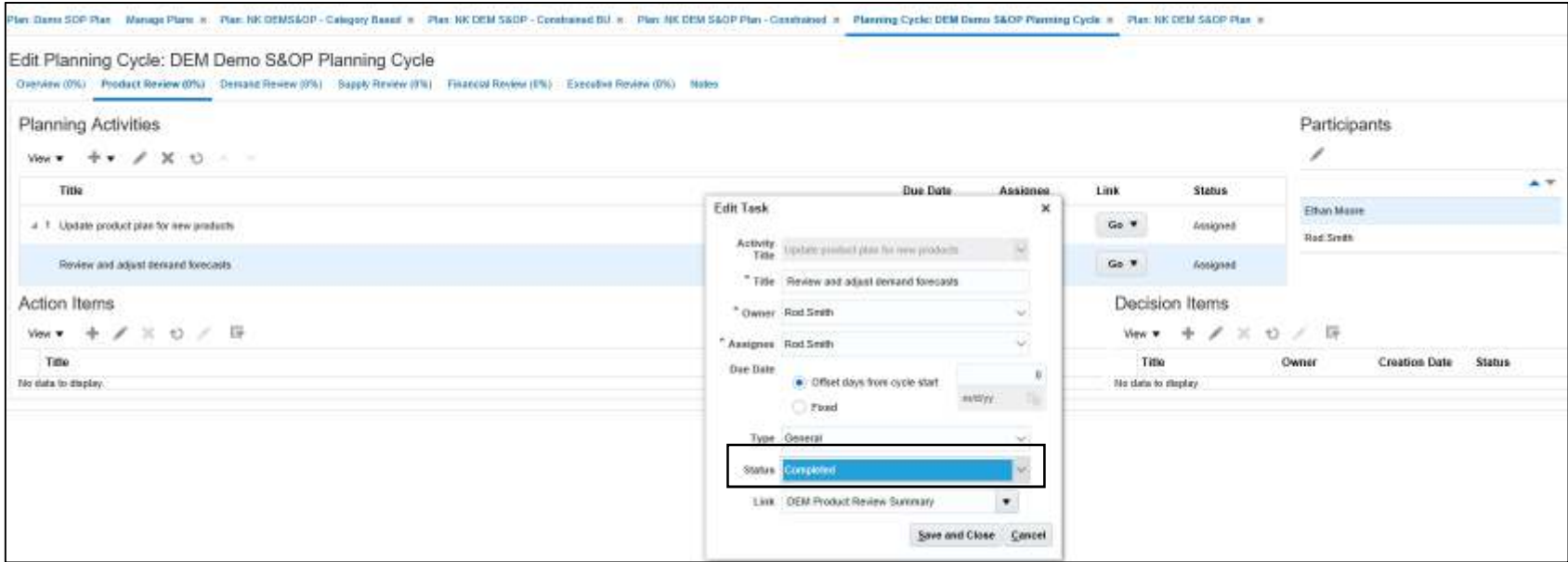
Name

**Name**

- Shipments Forecast
- In Transit
- Sales Forecast
- Dependent Demand
- Inventory History
- Adjusted Consensus Forecast
- Bookings History
- Budget Value
- Production History
- Resource Requirements

# PRODUCT REVIEW – COMPLETE ACTIVITIES

Mark the assigned activity as complete to progress the cycle to next activity



# PRODUCT REVIEW – COMPLETE STAGE

Plan: DEMO S&OP Plan | Manage Plans | Plan: NK DEM S&OP - Category Based | Plan: NK DEM S&OP - Constrained BU | Plan: NK DEM S&OP Plan - Constrained | Planning Cycle: DEM Demo S&OP Planning Cycle | Plan: NK DEM S&OP Plan

**Edit Planning Cycle: DEM Demo S&OP Planning Cycle**

Overview (10%) | **Product Review (100%)** | Demand Review (0%) | Supply Review (0%) | Financial Review (0%) | Executive Review (0%) | Notes

Planning Activities

Title	Due Date	Assignee	Link	Status
1. Update product plan for new products	1/26/19	Rod Smith	Go	Completed
Review and adjust demand forecasts	1/26/19	Rod Smith	Go	Completed

Participants: Ethan Moore, Rod Smith

**% Completion of Cycle**

**Edit Planning Cycle: DEM Demo S&OP Planning Cycle**

Overview (100%) | Product Review (100%) | Demand Review (0%) | Supply Review (0%) | Financial Review (0%) | Executive Review (0%) | Notes

Worklist (0)

Title	Assignee	Owner	Due Date	Category	Status
Review and adjust operating forecast	Rod Smith	Rod Smith	2/1/19	Demand Review	Assigned
Review and adjust demand forecasts	Rod Smith	Rod Smith	1/26/19	Product Review	Completed
Review and adjust operating plan	Rod Smith	Rod Smith	2/6/19	Financial Review	Assigned
Review and adjust resource capacity forecasts	Rod Smith	Rod Smith	2/1/19	Supply Review	Assigned
Review and adjust sales forecasts	Rod Smith	Rod Smith	2/1/19	Demand Review	Assigned

Timeline

**Changed Status of the overall Cycle**

Planning Cycle: DEM Demo S&OP Planning Cycle | Plan: NK DEM S&OP Plan

Task: Review and adjust demand forecasts

Details

Assignee	Rod Smith	Due Date	2/1/2019
Parent Name	Rod Smith	Status	Completed
Planning Cycle	DEM Demo S&OP Planning Cycle	Type	Task
Category	Product Review		

# DEMAND REVIEW

Review assigned activities and open the linked table

Plan: Demo SOP Plan | Manage Plans | Plan: NK DEM S&OP - Category Based | Plan: NK DEM S&OP - Constrained BU | Plan: NK DEM S&OP Plan - Constrained | **Planning Cycle: DEM Demo S&OP Planning Cycle** | Plan: NK DEM S&OP Plan

Edit Planning Cycle: DEM Demo S&OP Planning Cycle Done

Overview (10%) | Product Review (100%) | **Demand Review (0%)** | Supply Review (0%) | Financial Review (5%) | Executive Review (0%) | Notes

### Planning Activities

View + - ↻ ✖ 🔍 📄

Title	Due Date	Assignee	Link	Status
1. Validate stakeholder forecasts	2/1/19	Rod Smith	Go	Assigned
Review and adjust sales forecast	2/1/19	Rod Smith	Go <span>⌵</span>	Assigned
2. Generate unconstrained, consensus forecast	2/1/19	Rod Smith	Go	Assigned
Review and adjust consensus forecast	2/1/19	Rod Smith	Go <span>⌵</span>	Assigned
Review stakeholder forecast weights	2/1/19	Rod Smith	Go <span>⌵</span>	Assigned

### Participants

✎

- Ethan Moore
- Rod Smith

### Action Items

View + - ↻ ✖ 🔍 📄

Title	Assignee	Due Date	Status	Link
No data to display.				

### Decision Items

View + - ↻ ✖ 🔍 📄

Title	Owner	Creation Date	Status	Link
No data to display.				

# DEMAND REVIEW

Open the table and enter sales forecasts based on market inputs. Historical sales is also available as reference

			January 2018	February 2018	March 2018	April 2018	May 2018	June 2018	July 2018	August 2018	September 2018	October 2018	November 2018	December 2018	January 2019	February 2019	March 2019	April 2019	May 2019	June 2019	July 2019	August 2019	September 2019	October 2019	November 2019	December 2019	January 2020	February 2020
DEM_CUS_SITE_10005 TYPEA 50 20MM	Shipments History 1 Year Ago																											
	Shipments History																											
	Sales Forecast															1,500	1,200	100	200	100	2,000	2,500	1,000	100	1,000	1,100		
	Adjusted Sales Forecast																											
	Change to Sales Forecast																											

Once sales forecasts are entered , mark the assigned activity as complete to progress the cycle

**Edit Task**

Activity Title: Validate subscriber forecasts

Title: Review and adjust sales forecast

Owner: Rod Smith

Assignee: Rod Smith

Due Date:  Offset days from cycle start (2)  Fixed (nWwy)

Type: General

Status: **Completed**

Link: DEM Sales Forecasting

Buttons: Save and Close, Cancel

# DEMAND REVIEW

Review next set of activities assigned and open the linked table

The screenshot shows the 'Edit Planning Cycle: DEM Demo S&OP Planning Cycle' interface. The 'Demand Review (50%)' tab is active. The 'Planning Activities' table lists several tasks, with the last one, 'Review stakeholder forecast weights', selected. A 'Go' button next to this activity opens a dropdown menu with the option 'DEM Consensus Forecasting', which is linked to the 'NK DEM S&OP Plan - Constrained' plan. The 'Participants' panel on the right shows 'Ethan Masse' and 'Red Smith' as participants.

Title	Due Date	Assignee	Link	Status
1. Validate stakeholder forecasts	2/1/19	Red Smith	Go	Completed
Review and adjust sales forecast	2/1/19	Red Smith	Go	Completed
2. Generate unconstrained, consensus forecast	2/1/19	Red Smith	Go	Assigned
Review and adjust consensus forecast	2/1/19	Red Smith	Go	Assigned
Review stakeholder forecast weights	2/1/19	Red Smith	Go	Assigned

# DEMAND REVIEW

Review /Edit weightage for each stakeholder forecast

DEM Consensus Forecasting

Access View [Icons]

Filters: DEM\_CUS\_SITE\_198L DEM\_DEM\_US\_RDG

	Year 2018				Year 2019				Year 2020
	Quarter 1 2018	Quarter 2 2018	Quarter 3 2018	Quarter 4 2018	Quarter 1 2019	Quarter 2 2019	Quarter 3 2019	Quarter 4 2019	Quarter 1 2020
Shipments History 1 Year Ago									
Shipments History: Requested Item by Shipped Date				298					
Final Shipments Forecast									
Final Sales Forecast					2,500	4,200	7,000	4,000	
Final Shipments Forecast Weight					20	20	20	20	
Final Sales Forecast Weight					80	80	80	80	
Weighted Forecast	0	0	0	0	2,000	3,360	5,600	3,200	0
Adjusted Consensus Forecast									
Consensus Forecast	0	0	0	0	2,000	3,360	5,600	3,200	0

Mark the assigned activity as complete to progress the cycle to next activity

**Edit Task**

Activity Title: Generate unconstrained, consensus forecast

\* Title: Review stakeholder forecast weights

\* Owner: Rod.Smith

\* Assignee: Rod.Smith

Due Date:  Offset days from cycle start  Fixed

Type: General

Status: **Completed**

Link: DEM Consensus Forecasting



# DEMAND REVIEW

Review next set of activities assigned and open the linked table

Edit Planning Cycle: DEM Demo S&OP Planning Cycle Done

Overview (20%) Product Review (100%) **Demand Review (50%)** Supply Review (0%) Financial Review (0%) Executive Review (0%) Notes

### Planning Activities

Title	Due Date	Assignee	Link	Status
1. Validate stakeholder forecasts	2/1/19	Red Smith	Go	Completed
Review and adjust sales forecast	2/1/19	Red Smith	Go	Completed
2. Generate unconstrained, consensus forecast	2/1/19	Red Smith	Go	Assigned
Review and adjust consensus forecast	2/1/19	Red Smith	Go	Assigned
Review stakeholder forecast weights	2/1/19	Red Smith	DEM Demand Review by Family, Org and Customer	IK DEM S&OP Plan - Constrained

### Participants

- Elton Moore
- Red Smith

### Action Items

Title	Assignee	Due Date	Status	Link
No data to display.				

### Decision Items

Title	Owner	Creation Date	Status	Link
No data to display.				

# DEMAND REVIEW

Review / Adjust consensus forecast which was arrived by assignment of weightage to different stakeholder forecasts

NK DEM S&OP Plan - Constrained

DEM Consensus Forecasting > DEM Demand Review by Famil, Org and Customer >

Filters: F TYPEA 50 20MM, F TYPEA 50 20MM-100, DEM DEM\_50\_RDC, SAULA LIMPUR

	Year 2019				Year 2020
	Quarter 1 2019	Quarter 2 2019	Quarter 3 2019	Quarter 4 2019	Quarter 1 2020
Sales Forecast	1,350	295	2,750	1,100	
Adjusted Sales Forecast					
Final Sales Forecast	1,350	295	2,750	1,100	
Final Sales Forecast Weight	00	00	00	00	
Consensus Forecast	1,333	088	2,710	1,080	0
Adjusted Consensus Forecast					
Adjusted Price	75	75	75	75	75
Final Price	75	75	75	75	75
Consensus Forecast Value	101,000	14,015	203,704	81,401	0
Financial Forecast Value	175,000	125,000	125,000	150,000	

Mark the assigned activity as complete to progress the cycle to next activity

Edit Task

Activity Title: Generate unconstrained, consensus forecast

\* Title: Review and adjust consensus forecast

\* Owner: Rod.Smith

\* Assignee: Rod.Smith

Due Date:  Offset days from cycle start (2)  Fixed (m/d/yy)

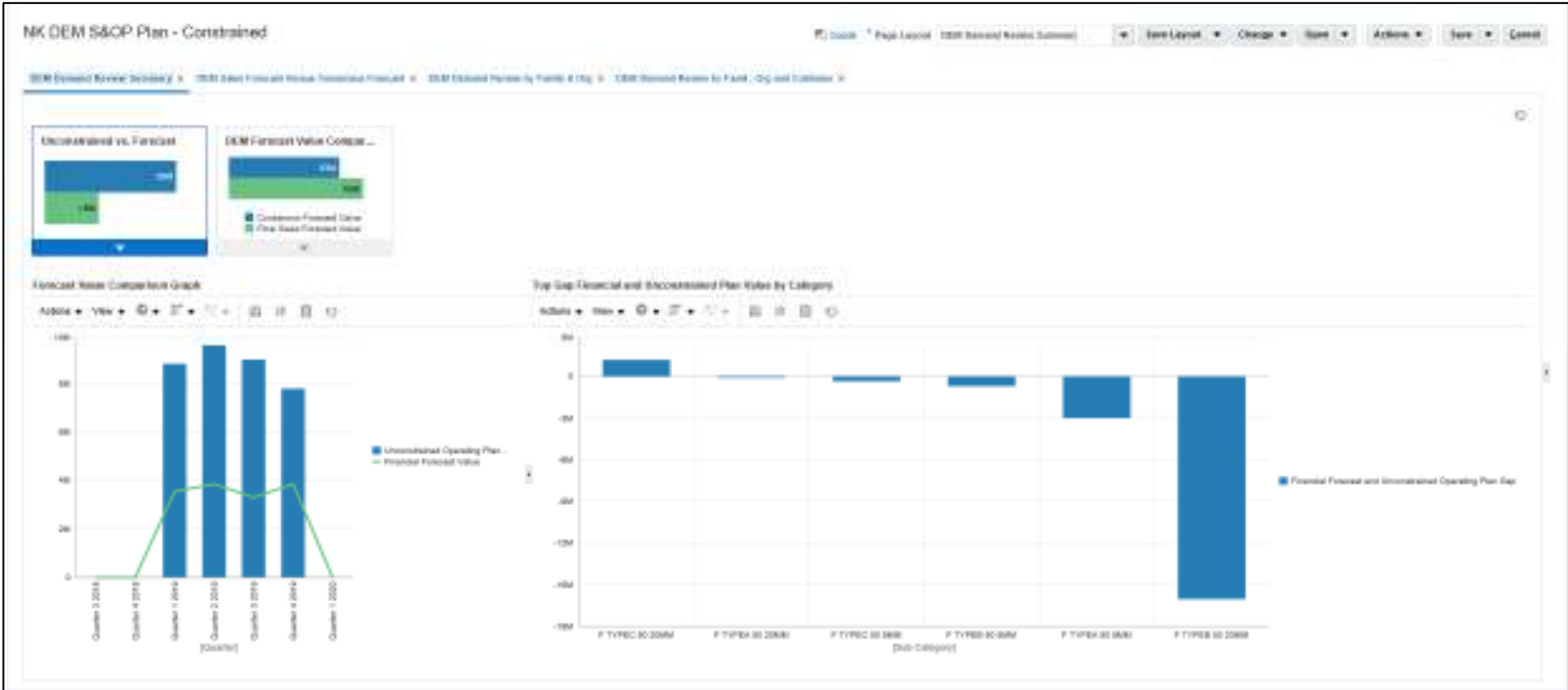
Type: General

Status: Completed

Link: DEM Demand Review by Famil , Org and C

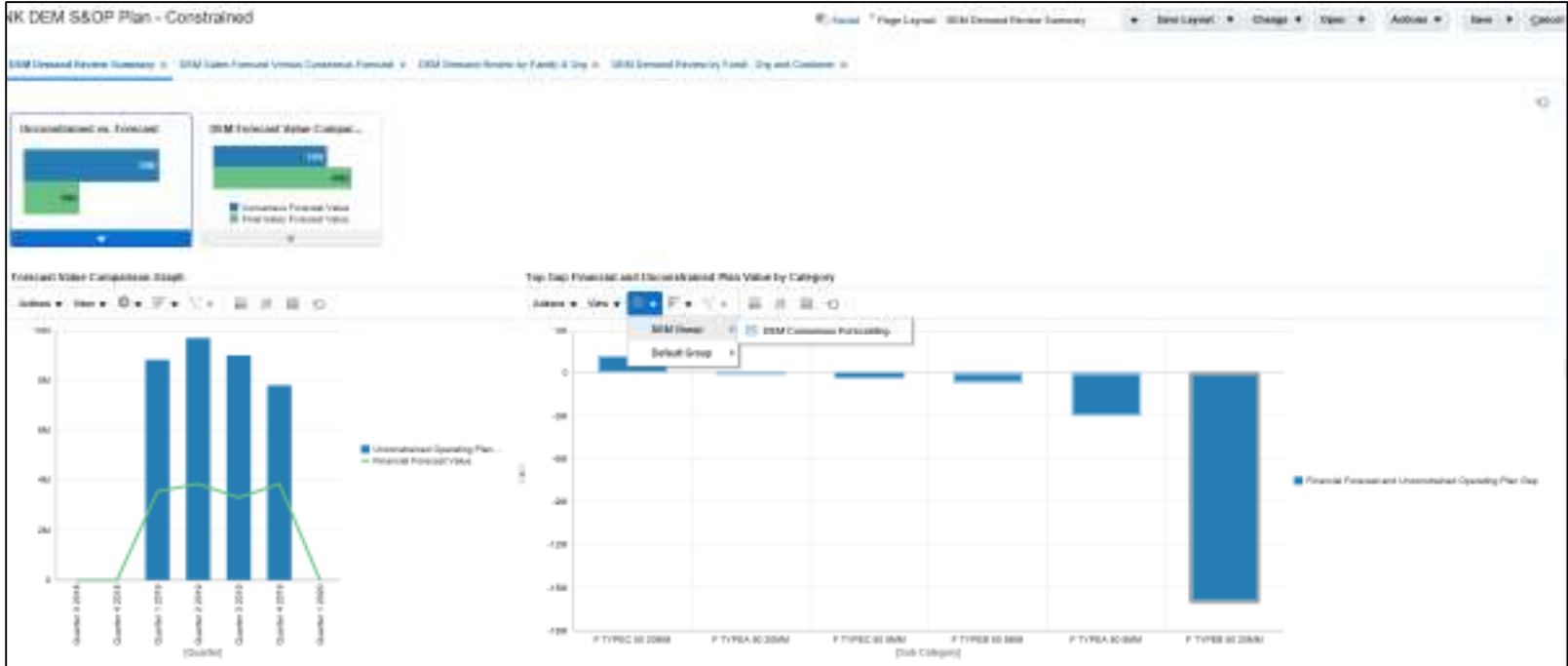
# DEMAND REVIEW – DEMAND REVIEW SUMMARY

Compare against financial forecasts by period and product categories



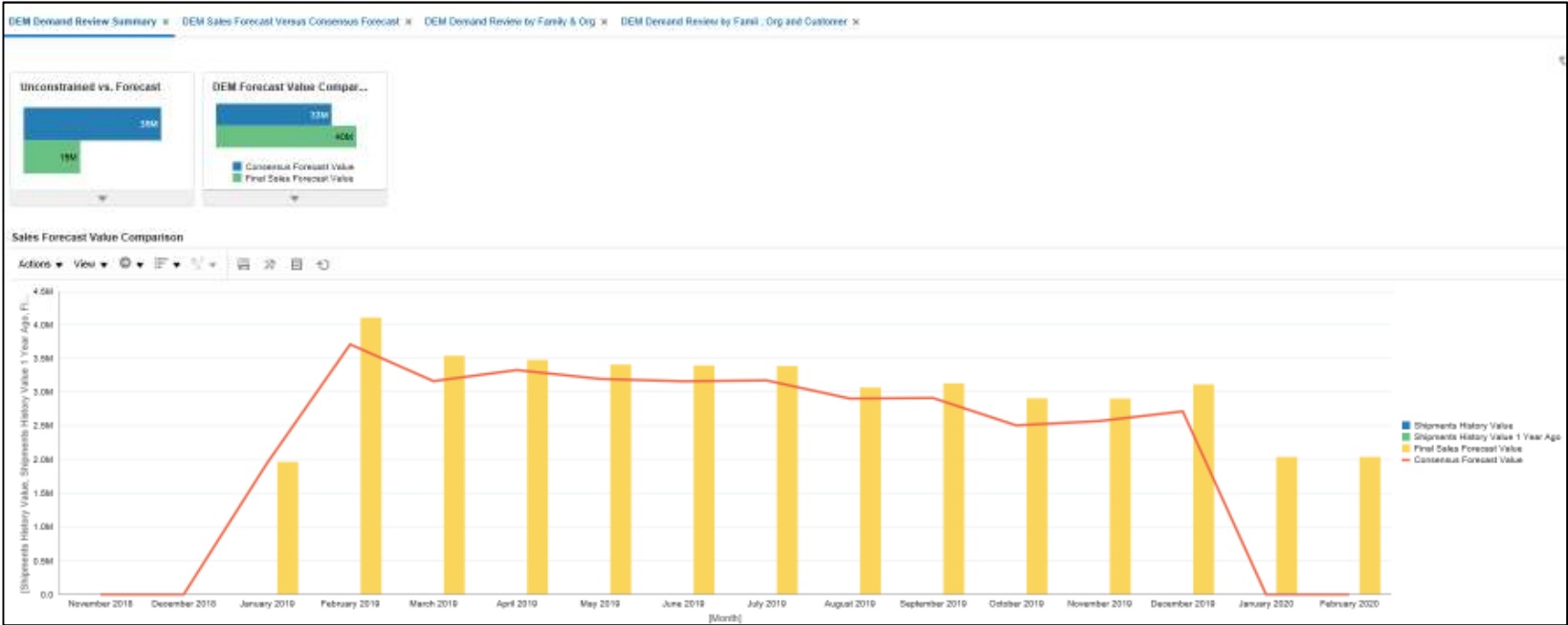
# DEMAND REVIEW – COMPARED STAKEHOLDER FORECASTS

Compare against different stakeholder forecasts and drill down to validate how the forecasts were arrived



# DEMAND REVIEW – DEMAND REVIEW SUMMARY

Compare consensus forecast versus historical shipments





# SUPPLY REVIEW – BASELINE SUPPLY PLAN

Review Activities in Supply Review Stage

Run Supply Plan

Plan: DEMO S&OP Plan | Manage Plans | Plan: NK DEM S&OP - Category Based | Plan: NK DEM S&OP - Constrained BU | Plan: NK DEM S&OP Plan - Constrained | Planning Cycle: DEM Demo S&OP Planning Cycle | Plan: NK DEM S&OP Plan

Edit Planning Cycle: DEM Demo S&OP Planning Cycle

Overview (30%) | Product Review (100%) | Demand Review (100%) | **Supply Review (2%)** | Financial Review (0%) | Executive Review (0%) | Notes

Planning Activities

Title	Due Date	Assignee	Link	Status
1 Generate baseline supply plan	2/6/19		Go	
Run baseline supply plan	2/6/19	Rod Smith	Go	Assigned
2 Resolve exceptions or bottlenecks, make recommendations, and propose alternatives	2/7/19	Rod Smith	Go	Assigned
3 Update supply plan	2/6/19		Go	



Run Plan

Process Name: Run Plan | Schedule: As soon as possible

Description:

Submission Rules:

Parameters | Schedule

Name: NK DEM S&OP Plan - Constrained | Type: Sales and Operations Plan

Details

Data Refresh Options

Do not refresh with current data

Refresh with current data

Scope Options

Plan demand

Plan supply

Inventory plan

Demand Plan Run Options

Include Forecast Profiles

Use data to display:

Supply Plan Run Options

Interactive

Batch

OK Cancel

Complete Activity

Edit Task

Activity Title: Generate baseline supply plan

Title: Run baseline supply plan

Owner: Rod Smith

Assignee: Rod Smith

Due Date:  2/6/19

Offset days from cycle start

Fixed

Type: General

Status: **Completed**

Link:



# SUPPLY REVIEW





# SUPPLY REVIEW – REVIEW SUPPLY SUMMARY

Review supply summary dashboard

**Edit Planning Cycle: DEM Demo S&OP Planning Cycle**

Overview (30%) | Product Review (100%) | Demand Review (100%) | **Supply Review (8%)** | Financial Review (0%) | Executive Review (0%) | Notes

**Planning Activities**

Title	Due Date	Assignee	Link	Status
1. Generate baseline supply plan	2/6/19		Go	
Run baseline supply plan	2/6/19	Red Smith	Go	Completed
<b>2. Resolve exceptions at bottlenecks, make recommendations, and propose alternatives</b>	2/7/19	Red Smith	Go	Assigned
Review and adjust resource capacity constraints	2/7/19	Red Smith	Go	
Review and adjust sourcing allocations	2/7/19	Red Smith	Go	
Review supply exceptions	2/7/19	Red Smith	Go	
3. Update supply plan	2/8/19		Go	

**Participants**

- Ethan Moore
- Red Smith

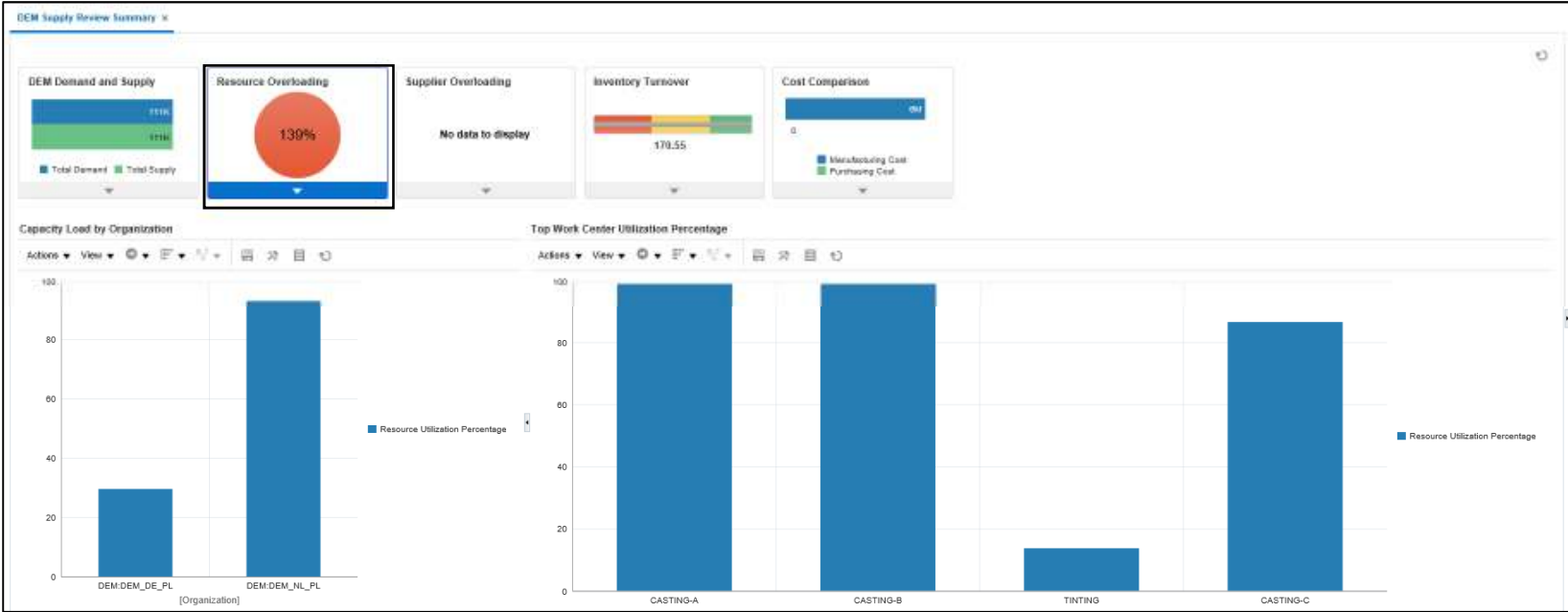
# SUPPLY REVIEW – DEMAND/SUPPLY

Review total supply and demand for different periods and product categories



# SUPPLY REVIEW – CAPACITY OVERLOADS

Review capacity overloads by work centers and facilities and arrive at bottleneck resources/facility



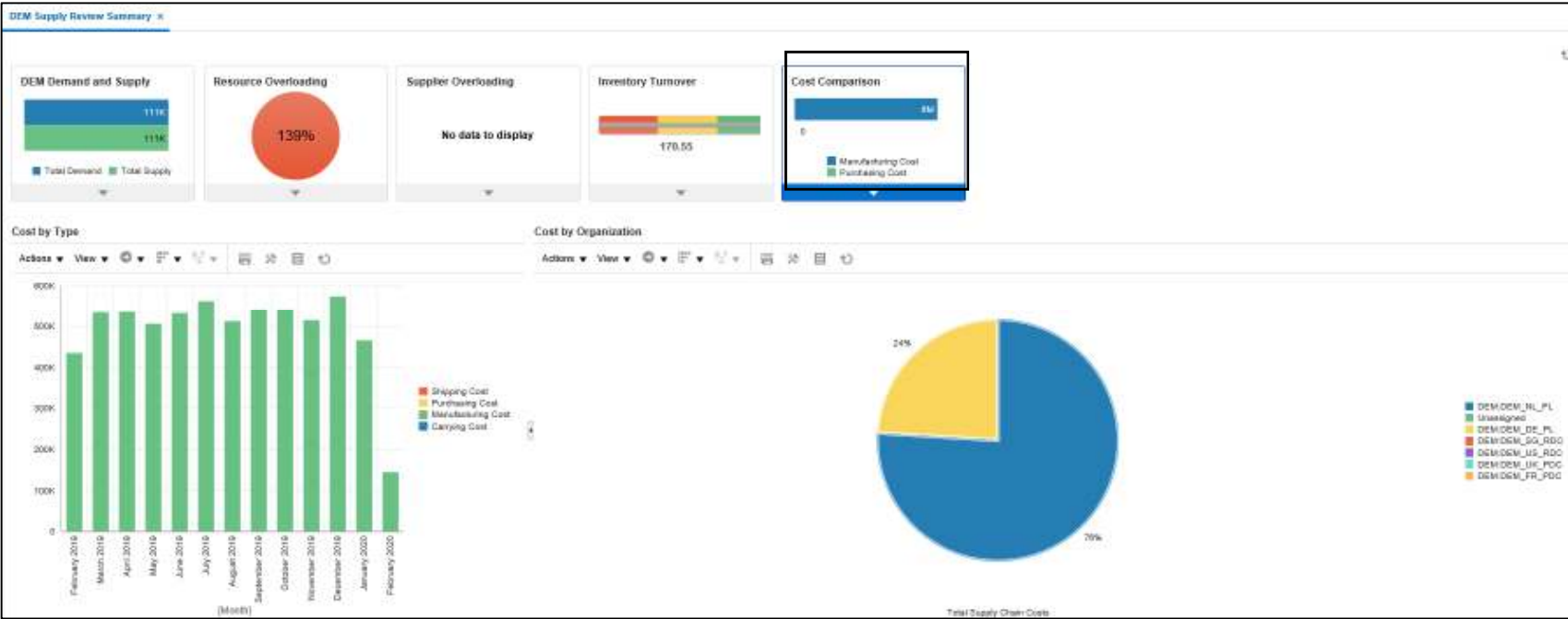
# SUPPLY REVIEW – INVENTORY TURNS

Review inventory turns based on projected available balance



# SUPPLY REVIEW – OPERATING COSTS

Review operating costs based on the production /operating plan generated



# SUPPLY REVIEW – REVIEW EXCEPTIONS

Review demand exceptions

NK DEM S&OP Plan - Constrained

Executive Review Summary | Exceptions

Sales and Operations Planning Exceptions

- Consensus MAPE Exceeds Threshold (3)
- Demand Quantity Not Satisfied (12)**
- Items Below Safety Stock (1)
- Items with a Shortage (3)
- Lead Time Compression (117)
- Resource Overloaded (11)
- Significant Deviation Between Current and Prior Consensus Forecast
- Significant Deviation Between Current and Prior Operating Plan Value
- Significant Deviation Between Final Marketing Forecast and Consensus
- Significant Deviation Between Final Sales Forecast and Consensus
- Significant Deviation Between Financial Forecast and Operating Plan
- Significant Deviation Between Financial Forecast and Unconstrained
- Significant Deviation Between Last Year Shipments and Operating Plan
- Significant Deviation Between Shipments History and Consensus For
- Supplier Capacity Overloaded (0)
- Supplier Category Capacity Overloaded (3)
- Work Center Overloaded (9)

### Demand Quantity Not Satisfied

Search

Search Results

Item	Organization	Quantity	Threshold Value	Generated On	Last Updated Date	Last Updated By	From Date	To Date	Notes
F TYPEB 50 20MM-100		4,052.63	0	2/5/19	2/5/19	Red.Smith	2/1/19	12/1/19	
F TYPEB 50 5MM -100		4,009.901	0	2/5/19	2/5/19	Red.Smith	2/1/19	12/1/19	
F TYPEC 50 5MM -200		1,235.747	0	2/5/19	2/5/19	Red.Smith	2/1/19	12/1/19	
F TYPEB 50 5MM -200		4,009.901	0	2/5/19	2/5/19	Red.Smith	2/1/19	12/1/19	
F TYPEA 50 20MM -100		3,333.579	0	2/5/19	2/5/19	Red.Smith	2/1/19	12/1/19	
F TYPEC 50 5MM -100		1,137.707	0	2/5/19	2/5/19	Red.Smith	2/1/19	12/1/19	
F TYPEB 50 20MM-200		20,022.891	0	2/5/19	2/5/19	Red.Smith	2/1/19	12/1/19	
F TYPEA 50 5MM -200		2,046.894	0	2/5/19	2/5/19	Red.Smith	2/1/19	12/1/19	
F TYPEA 50 5MM -100		2,948.544	0	2/5/19	2/5/19	Red.Smith	2/1/19	12/1/19	

# SUPPLY REVIEW – REVIEW EXCEPTIONS

Review capacity exceptions

NK DEM S&OP Plan - Constrained

Executive Review Summary | Exceptions

Work Center Overloaded

Search

Search Results

Work Center	Organization	Quantity	Threshold Value	Generated On	Last Updated Date	Last Updated By	From Date	To Date	Notes
CASTING-B	DEM Germany Manufacturing...	100	100	2/6/19	2/6/19	Rod Smith	2/1/19	2/1/20	
CASTING-C	DEM Germany Manufacturing...	100	100	2/6/19	2/6/19	Rod Smith	2/1/19	12/1/19	
CASTING-A	DEM Netherlands Manufactur...	100	100	2/6/19	2/6/19	Rod Smith	2/1/19	1/1/20	
TBITNG	DEM Netherlands Manufactur...	100	100	2/6/19	2/6/19	Rod Smith	2/1/19	4/1/19	
TBITNG	DEM Netherlands Manufactur...	100	100	2/6/19	2/6/19	Rod Smith	7/1/19	7/1/19	
TBITNG	DEM Netherlands Manufactur...	100	100	2/6/19	2/6/19	Rod Smith	11/1/19	1/1/20	
CASTING-A	DEM Germany Manufacturing...	100	100	2/6/19	2/6/19	Rod Smith	2/1/19	2/1/20	
CASTING-C	DEM Netherlands Manufactur...	100	100	2/6/19	2/6/19	Rod Smith	2/1/19	12/1/19	
CASTING-B	DEM Netherlands Manufactur...	100	100	2/6/19	2/6/19	Rod Smith	2/1/19	1/1/20	

# SUPPLY REVIEW –RESOURCE SUMMARY

Review resource summary

Edit Planning Cycle: DEM Demo S&OP Planning Cycle

Overview (38%) Product Review (100%) Demand Review (100%) **Supply Review (8%)** Financial Review (8%) Executive Review (8%) [Notes](#)

### Planning Activities

View + - ✎ ✕ ↺ ↻

Title	Due Date	Assignee	Link	Status
1. Generate baseline supply plan	2/6/19		<a href="#">Go</a>	
Run baseline supply plan	2/6/19	Rod Smith	<a href="#">Go</a>	Completed
2. Resolve exceptions or settlements, make recommendations, and propose alternatives	2/7/19	Rod Smith	<a href="#">Go</a>	Assigned
Review and adjust resource capacity constraints	2/7/19	Rod Smith	<a href="#">Go</a>	
Review and adjust sourcing allocations	2/7/19	Rod Smith	<a href="#">Go</a>	
Review supply exceptions	2/7/19	Rod Smith	<a href="#">Go</a>	
3. Update supply plan	2/8/19		<a href="#">Go</a>	

### Participants

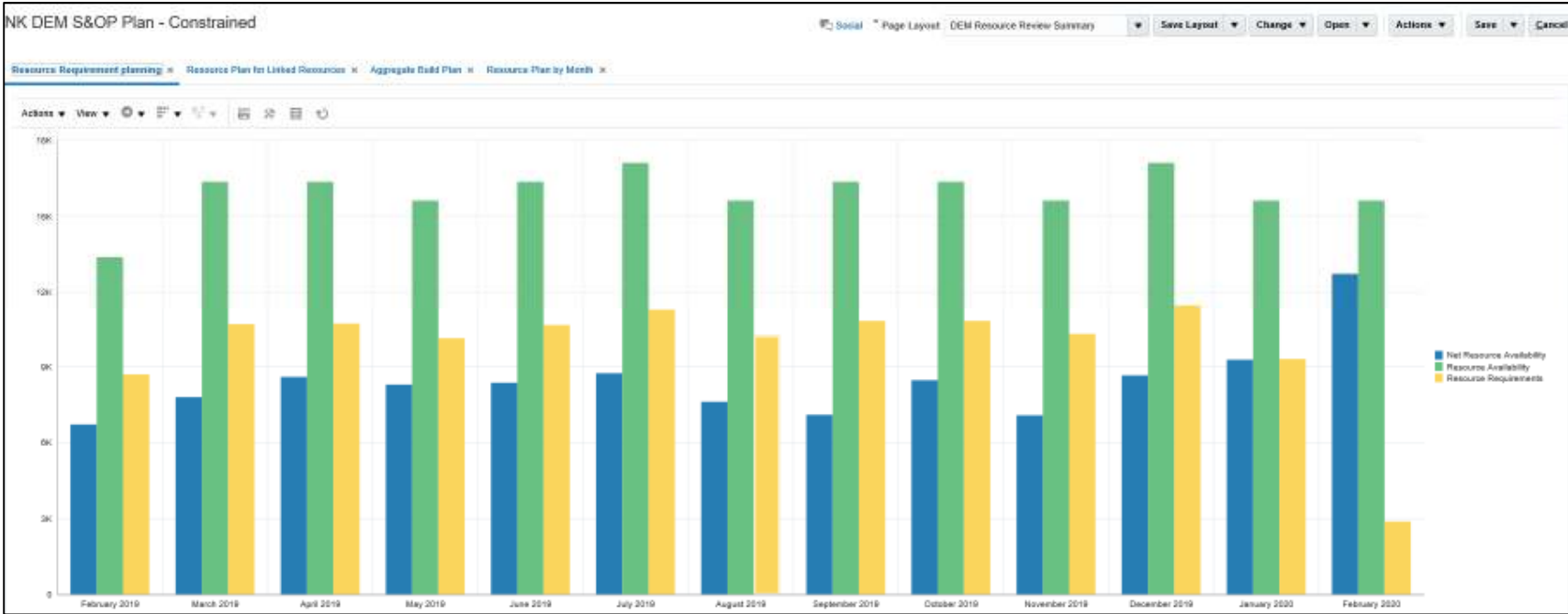
- [Ethan Moore](#)
- [Rod Smith](#)

DEM Resource Review Summary - NK DEM S&OP Plan - Constrained



# SUPPLY REVIEW – RESOURCE SUMMARY

Review Time Phase Resource Availability Versus Resource Requirements



# SUPPLY REVIEW – RESOURCE SUMMARY

## Review Resource Loading for Non Bottleneck Resources

NK DEM S&OP Plan - Constrained

Resource Requirement planning × Resource Plan for Linked Resources × Aggregate Build Plan × Resource Plan by Month ×

Actions View

Filters

				February 2019	March 2019	April 2019	May 2019	June 2019	July 2019	August 2019	September 2019	October 2019	November 2019	December 2019	January 2020	February 2020			
DEM	DEM_NL_PL	TINTING	TINTING	DEM TINTING > 5 MM	Resource Utilization Percentage	174.722	163.337	11.278	11.424	175.894	163.584	175.857	145.640	11.884	44.484	12.222	103.811	7.889	
					Resource Requirements	4,717,567	5,408,665	372,188	358,852	5,909,944	6,332,944	5,365,155	4,839,361	392,166	1,398,722	421,673	4,108,198	223,311	
					Resource Availability	2,799	3,398	3,398	3,158	3,398	3,458	3,158	3,360	3,360	3,158	3,458	3,158	3,158	3,158
					Net Resource Availability	0	0	2,920	2,790	0	0	0	0	2,988	1,751	3,628	0	2,927	
				DEM TINTING < 5 MM	Resource Utilization Percentage	25.278	36.193	103.723	103.371	26.982	16.436	29.943	53.353	100.110	100.998	100.770	6.689	7.385	

Review Resource Loading for Bottleneck Resources

Resource Requirement planning × Resource Plan for Linked Resources × Aggregate Build Plan × Resource Plan by Month ×

Actions View

Filters

					February 2019	March 2019	April 2019	May 2019	June 2019	July 2019	August 2019	September 2019	October 2019	November 2019	December 2019	January 2020	February 2020	
	CASTING-C	CASTING-C	DEM CASTER -C	Resource Utilization Percentage	100	100	100	100	100	100	100	100	100	100	100	100	81.324	0
				Resource Requirements	432	528	528	504	528	552	504	528	528	504	552	594	389.072	0
				Resource Availability	432	528	528	504	528	552	504	528	528	504	552	594	594	594
				Net Resource Availability	0	0	0	0	0	0	0	0	0	0	0	0	195	594
	CASTING-A	CASTING-A	DEM CASTER -A	Resource Utilization Percentage	100	100	100	100	100	100	100	100	100	100	100	100	100	82.388

# SUPPLY REVIEW – SUPPLIER CAPACITY

DEM Supplier Plan by Month x

Actions View [Icons]

Filters

	Supplier		February 2019	March 2019	April 2019	May 2019	June 2019	July 2019	August 2019	September 2019	October 2019	November 2019	December 2019	January 2020	February 2020
F TYPEC 50 5MM - 100 - C1	▶ DEM SupplierA	Supplier Capacity Available	190	310	300	310	300	310	310	300	310	300	310	310	290
		Supplier Capacity Required	60	131	85	144	81	94	94	53	53	75	75	0	0
		Net Supplier Capacity Available	130	179	215	166	219	216	216	248	257	225	235	310	290
		Supplier Capacity Utilization Percentage	31	42	28	46	27	30	30	18	17	25	24	0	0

# SUPPLY REVIEW – REVIEW MATERIAL PLAN

Edit Planning Cycle: DEM Demo S&OP Planning Cycle

Overview (30%) Product Review (100%) Demand Review (100%) **Supply Review (8%)** Financial Review (0%) Executive Review (0%) Notes

### Planning Activities

View + - ✎ ✕ ↺ ↻

Title	Due Date	Assignee	Link	Status
4.1 Generate baseline supply plan	2/6/19		Go <span>▼</span>	
Run baseline supply plan	2/6/19	Red Smith	Go <span>▼</span>	Completed
4.2 Resolve exceptions or bottlenecks, make recommendations, and propose alternatives	2/7/19	Red Smith	Go <span>▼</span>	Assigned
Review and adjust resource capacity constraints	2/7/19	Red Smith	Go <span>▼</span>	
Review and adjust sourcing allocations	2/7/19	Red Smith	Go <span>▼</span>	
Review supply exceptions	2/7/19	Red Smith	<a href="#">DEM Material Allocation Summary</a> <span style="float: right;">NK DEM S&amp;OP Plan - Constrained</span>	
5.3 Update supply plan	2/8/19		Go <span>▼</span>	

### Participants

✎

- Ethan Moore
- Red Smith

# SUPPLY REVIEW – REVIEW MATERIAL PLAN

NK DEM S&OP Plan - Constrained

Sourcing Allocation: DEM Material Plan by Month by Org | Aggregate Build Plan

Filters: F TYPEA 50 20MM | F TYPEA 50 20MM-100

	February 2018														March 2018																
	Total Demand	Net Demand	Dependent Demand	Unmet Demand	Total Supply	Production Plan	Purchases	In Transit	On Hand	Safety Stock	Projected Available Balance	Constrained Forecast	Sales Orders	Adjusted Consensus Forecast	Consensus Forecast	Total Demand	Net Demand	Dependent Demand	Unmet Demand	Total Supply	Production Plan	Purchases	In Transit	On Hand	Safety Stock	Projected Available Balance	Constrained Forecast	Sales Orders	Adjusted Consensus Forecast	Consensus Forecast	
DEM:DEM_FR_PDC	0				0			264.55	0	0	0					0				0			0	0	0	0					
DEM:DEM_DE_PL	0				344	343.915			0	0	0					0				0	0			0	0	0					
DEM:DEM_SG_RDC	661			-661	0			661.376	0	0	0	661		4	745	0			0	0				0	0	0	0		0		
DEM:DEM_US_RDC	0			0	0			0	0	0	0	0			1,388	0			0	0				0	0	0	0		0		
DEM:DEM_UK_PDC	0				0			396.625	0	0	0					0				0			0	0	0	0					
Unassigned	0	1,935		1,935	0								0		0	1,938		1,938	0												0
DEM:DEM_NL_PL	0				317	317.48			0	0	0					0				0	0			0	0	0					

# SUPPLY REVIEW – REVIEW AGGREGATE BUILD PLAN

Review Aggregate Build Plan for a Product/Category and the Bill of Resources needed

NK DEM S&OP Plan - Constrained Social \* Page Layout DEM Material Allocation Summary

Sourcing Allocation x DEM Material Plan by Month by Org x **Aggregate Build Plan** x

View [icon] [icon] [icon] [icon] Criteria DEM Layout Application Default

			February 2019	March 2019	April 2019	May 2019	June 2019	July 2019	August 2019	September 2019	October 2019	November 2019	December 2019	January 2020	February 2020
F TYPEA 50 5MM -100	DEM:DEM_NL_PL	Total Demand	405	2,025	395	2,008	2,112	2,123	23	0	0	0	2,208	78	0
		Total Supply	405	2,025	395	2,008	2,112	2,123	23	0	0	0	2,208	78	0
DEM CASTER - A	DEM:DEM_DE_PL	Resource Requirements	432	528	528	504	528	552	504	528	528	504	552	504	504
DEM CASTER - A	DEM:DEM_NL_PL	Resource Requirements	432	528	528	504	528	552	504	528	528	504	552	504	465.231
DEM TINTING < 5 MM	DEM:DEM_NL_PL	Resource Requirements	682.493	1,191.395	6,227.812	5,940.148	660.056	567.056	914.845	1,760.639	6,207.834	4,901.278	6,478.327	191.802	232.615
DEM TINTING < 5 MM	DEM:DEM_DE_PL	Resource Requirements	132.276	504.965	602.352	464.013	481.76	578.777	443.273	579.243	649.324	382.535	820.571	168.831	252

# SUPPLY REVIEW – SOURCING SIMULATION

Sourcing Allocation view provides the sourcing split from different facilities (Warehouses/ Suppliers)

NK DEM S&OP Plan - Constrained Social Page Layout DEM Material Allocation Summary

Sourcing Allocation x DEM Material Plan by Month by Org x Aggregate Build Plan x

Actions View [Icons]

Filters

Sub Code				February 2019	March 2019	April 2019	May 2019	June 2019	July 2019	August 2019	September 2019	October 2019	November 2019	December 2019	January 2020	February 2020
F TYPEA 50 20MM	F TYPEA 50 20MM -100	DEM:DEM_FR_PDC:FEDEX:Air2nd day air	DEM:DEM_SG_RDC	40	0	40	0	0	0	40	0	0	40	0	0	0
			DEM:DEM_US_RDC	0	0	0	0	0	0	0	40	0	0	0	40	0
		DEM:DEM_NL_PL	DEM:DEM_NL_PL	100	0	100	0	0	0	100	100	0	100	0	100	0
		DEM:DEM_SG_RDC:DHL:TruckLoad:Ground	DEM:DEM_SG_RDC	100	0	100	0	0	0	100	0	0	100	0	0	0
			Sourcing Allocation Percentage													

# SUPPLY REVIEW – RESOURCE CAPACITY SIMULATION

Simulate resource capacity change by adjusting the availability

NK DEM S&OP Plan - Constrained

Resource Requirement planning | Resource Plan for Listed Resources | Aggregate Build Plan | Resource Plan by Month

				February 2019	March 2019	April 2019	May 2019	June 2019	July 2019	August 2019	September 2019	October 2019	November 2019	December 2019	January 2020	February 2020	
CASTING-C	CASTING-C	DEM CASTER -C	Resource Utilization Percentage	100	100	100	100	100	100	100	100	100	100	100	100	100	
			Resource Requirements	432	528	528	504	528	552	504	528	528	504	552	552	389,072	0
			Resource Availability	432	528	528	504	528	552	504	528	528	504	552	504	504	504
			Net Resource Availability	0	0	0	0	0	0	0	0	0	0	0	0	195	504
CASTING-A	CASTING-A	DEM CASTER -A	Resource Utilization Percentage	100	100	100	100	100	100	100	100	100	100	100	100		

**Edit Measures**

Measure	Source Measure	Action	Value
Resource Availability	Resource Availability	Increase by percentage	30%





# SUPPLY REVIEW – RESOURCE SUMMARY

Chose Specific Resource and add them to a simulate set to make changes and re-run the plan

# SUPPLY REVIEW

Calendar provides stages and due dates/statuses of activities in the cycle

NK DEM S&OP Plan - Constrained Social Page Layout DEM Resource Review Summary

Resource Requirement planning | Resource Plan for Linked Resources | Aggregate Build Plan | **Resource Plan by Month**

Actions View

Filters

	February 2019	March 2019	April 2019	May 2019	June 2019	July 2019	August 2019	September 2019	October 2019	November 2019	December 2019	January 2020	February 2020
DEM/DEM_NL_PL	100	100	100	100	100	100	100	100	100	100	100	100	92,308
CASTING	400	528	528	504	528	552	594	528	528	594	552	504	465,231
CASTING	400	528	528	504	528	552	594	528	528	594	552	504	504
DEM CASTER -TYPE A	0	0	0	0	0	0	0	0	0	0	0	0	39
TINTING	0.902	1.456	0	3.593	0	3.583	1.078	4.804	4.788	0	2.14	0	10,634
TINTING													
DEM TINTING > 5 MM													

**Edit Task**

Activity Title: Resolve exceptions or bottlenecks, make recomm

\* Title: Review and adjust resource capacity constraints

\* Owner: Rod.Smith

\* Assignee: Rod.Smith

Due Date:  Offset days from cycle start  Fixed 8 m/d/yy

Type: General

Status: **Completed**

Link: DEM Resource Review Summary

# SUPPLY REVIEW – CONSTRAINED VS CONSENSUS FORECAST

Calendar provides stages and due dates/statuses of activities in the cycle

# SUPPLY REVIEW

Compare operating plan with financial forecast for different periods & product categories

Plan: Demo S&OP Plan | Manage Plans | Plan: NK DEM S&OP - Category Based | Plan: NK DEM S&OP - Constrained BU | Plan: NK DEM S&OP Plan - Constrained | **Planning Cycle: DEM Demo S&OP Planning Cycle** | Plan: NK DEM S&OP Plan

Edit Planning Cycle: DEM Demo S&OP Planning Cycle Done

Overview (38%) | Product Review (100%) | Demand Review (100%) | **Supply Review (0%)** | Financial Review (3%) | Executive Review (0%) | Notes

**Planning Activities**

Title	Due Date	Assignee	Link	Status
1 Generate baseline supply plan	2/6/19		Go	
Run baseline supply plan	2/6/19	Rod Smith	Go	Completed
2 Resolve exceptions or adjustments, make recommendations, and propose alternatives	2/7/19	Rod Smith	Go	Assigned
Review and adjust resource capacity constraints	2/7/19	Rod Smith	Go	
Review and adjust sourcing allocations	2/7/19	Rod Smith	Go	
Review supply exceptions	2/7/19	Rod Smith	Go	
3 Update supply plan	2/8/19		Exceptions   NK DEM S&OP Plan - Constrained	

**Participants**

- Ethan Moore
- Rod Smith

**Action Items**

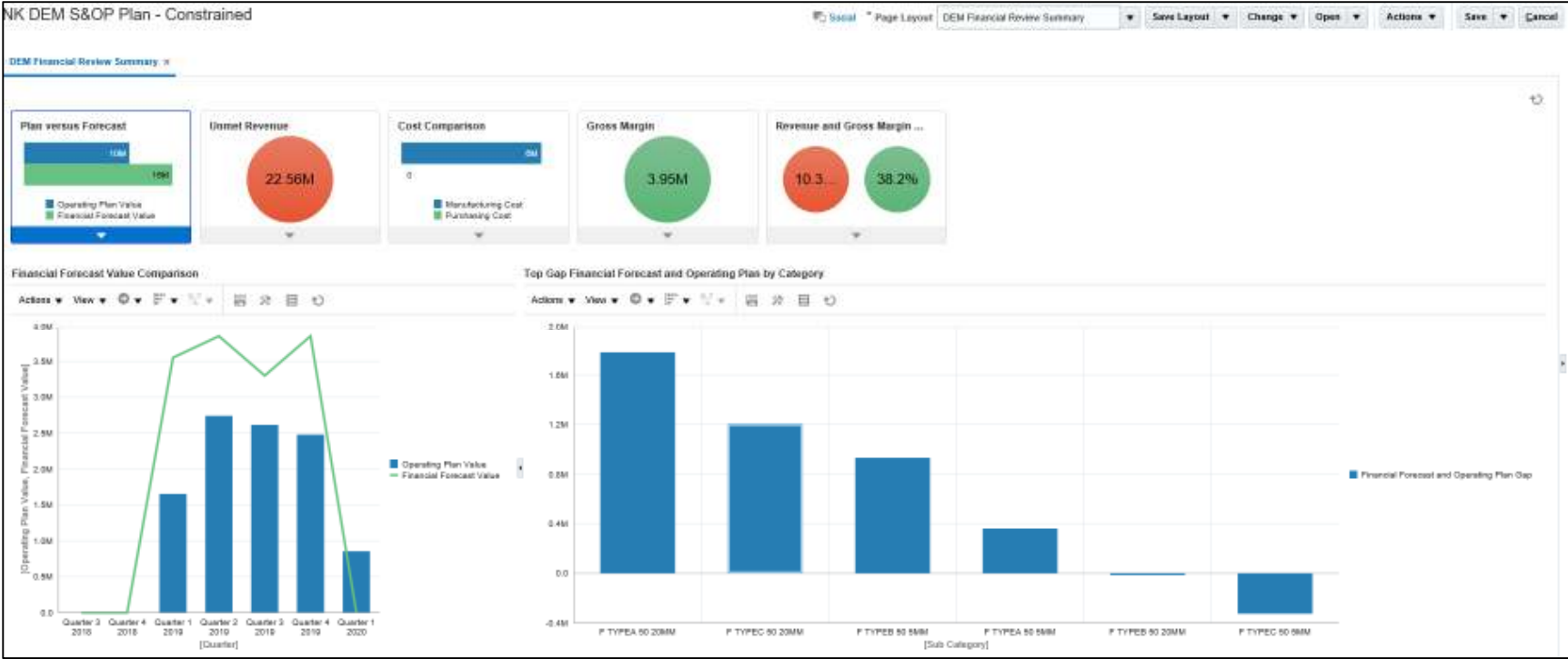
Title	Assignee	Due Date	Status	Link
No data to display.				

**Decision Items**

Title	Owner	Creation Date	Status	Link
No data to display.				

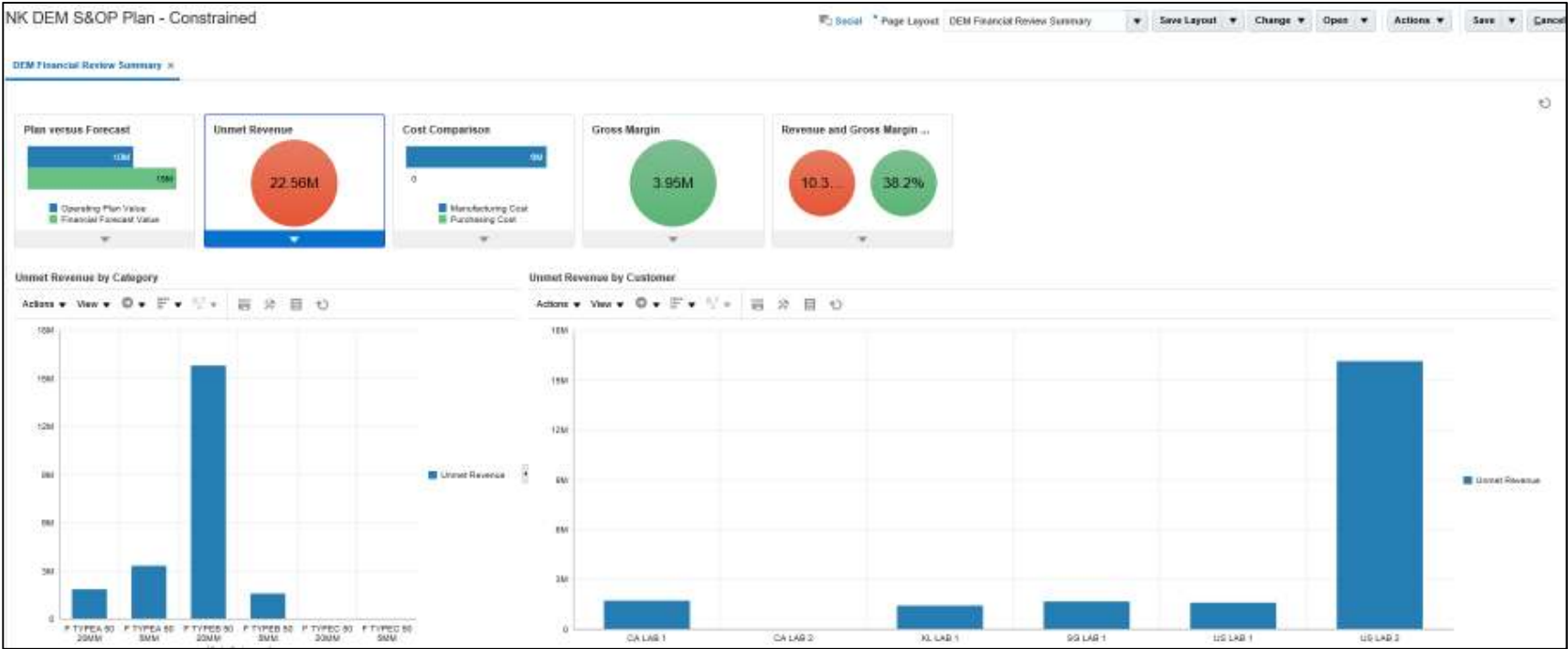
# FINANCIAL REVIEW – FORECAST TARGETS

Compare operating plan with financial forecast for different periods & product categories



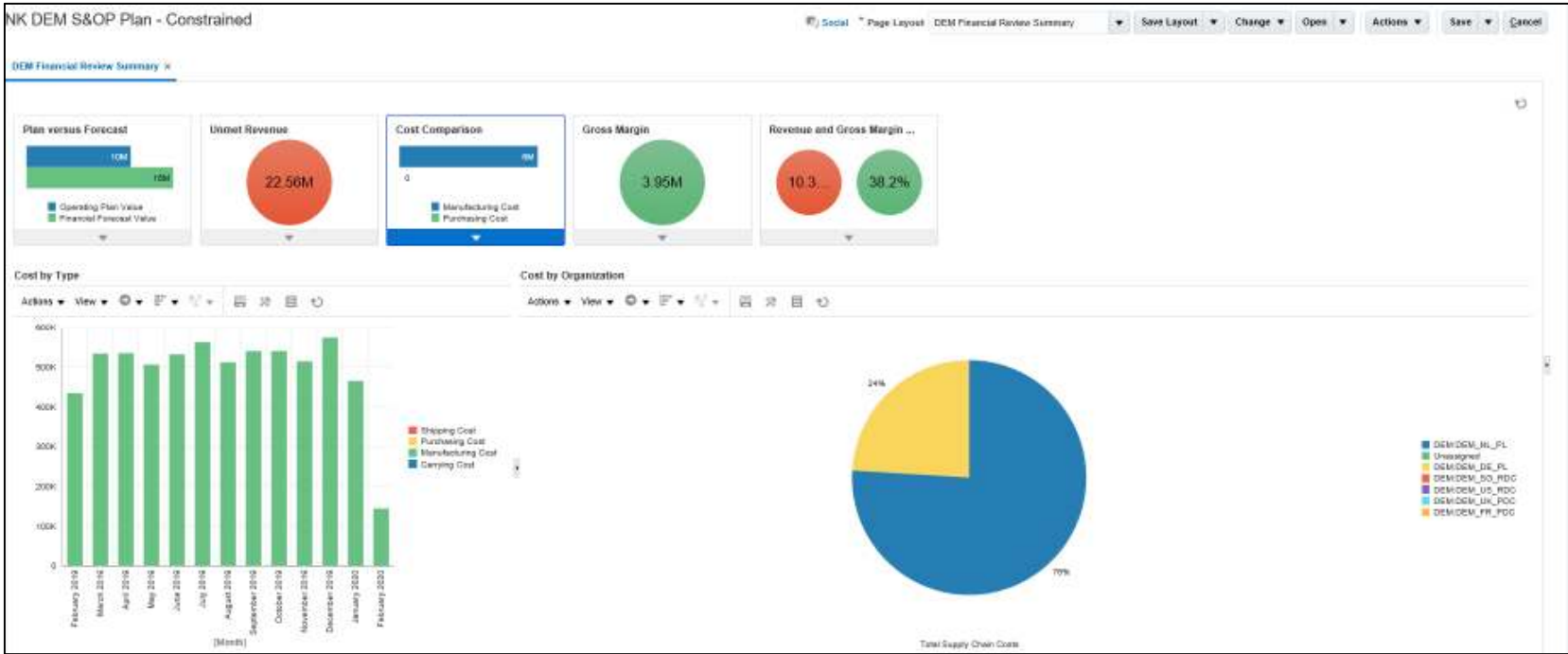
# FINANCE REVIEW - UNMET REVENUE

Review lost revenue due to operational constraints by period and product categories



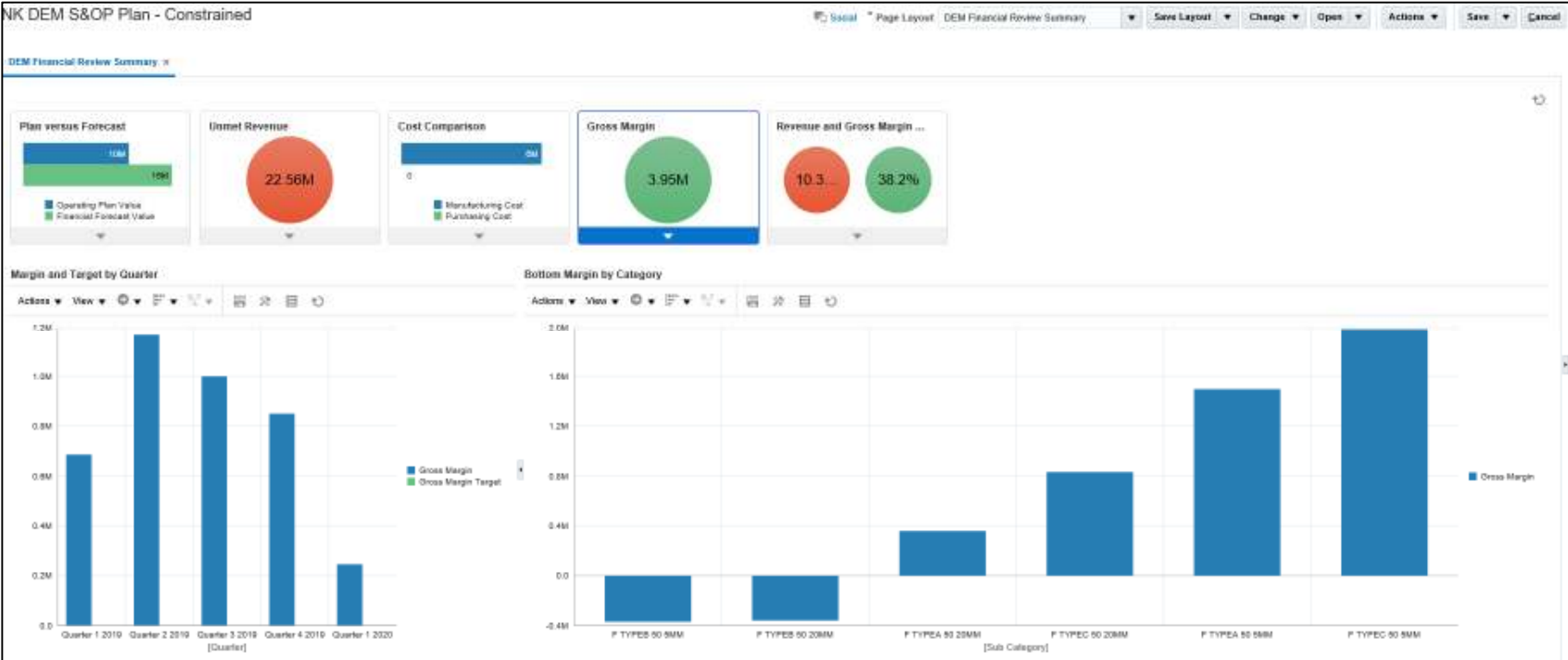
# FINANCE REVIEW - OPERATING COSTS

Review operational budgets and projected cash outflow for different periods and product categories by reviewing costs



# FINANCE REVIEW - GROSS MARGIN

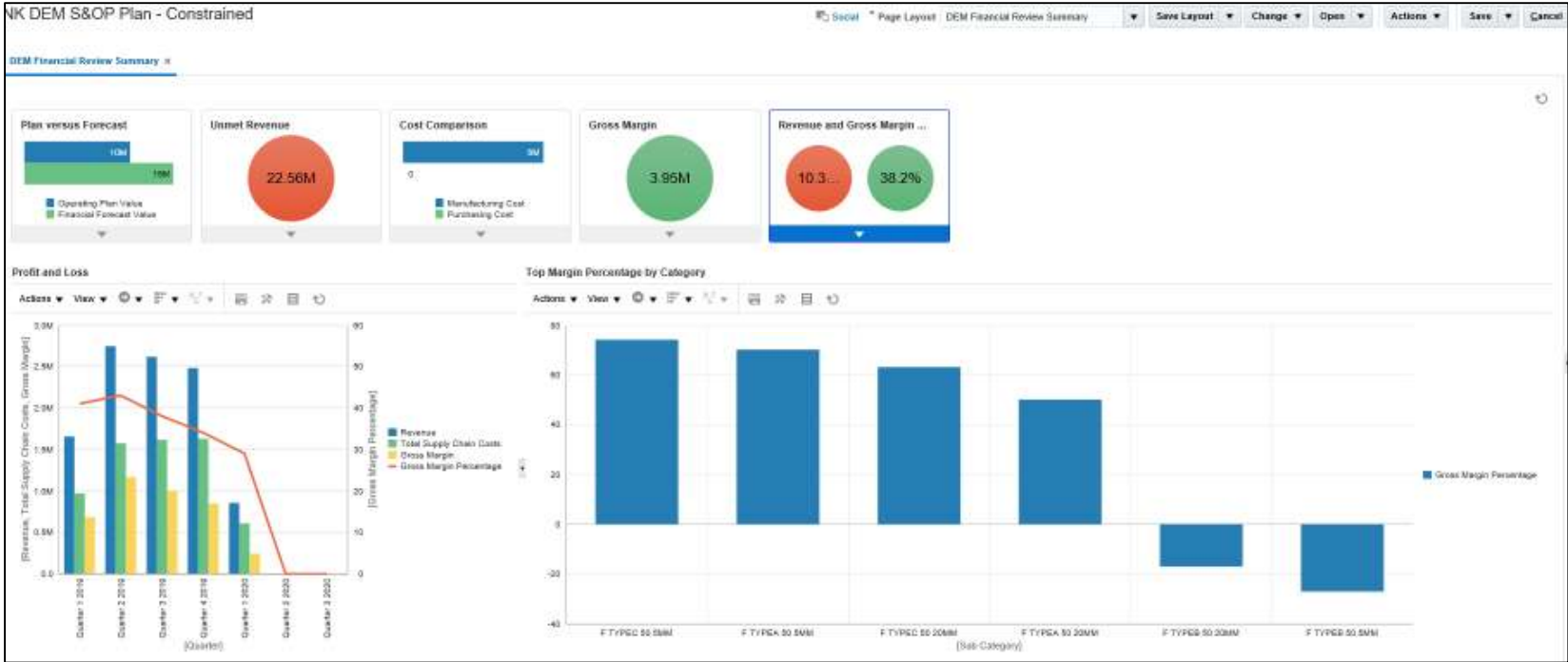
Review operational profits by reviewing gross margins for different periods and product categories





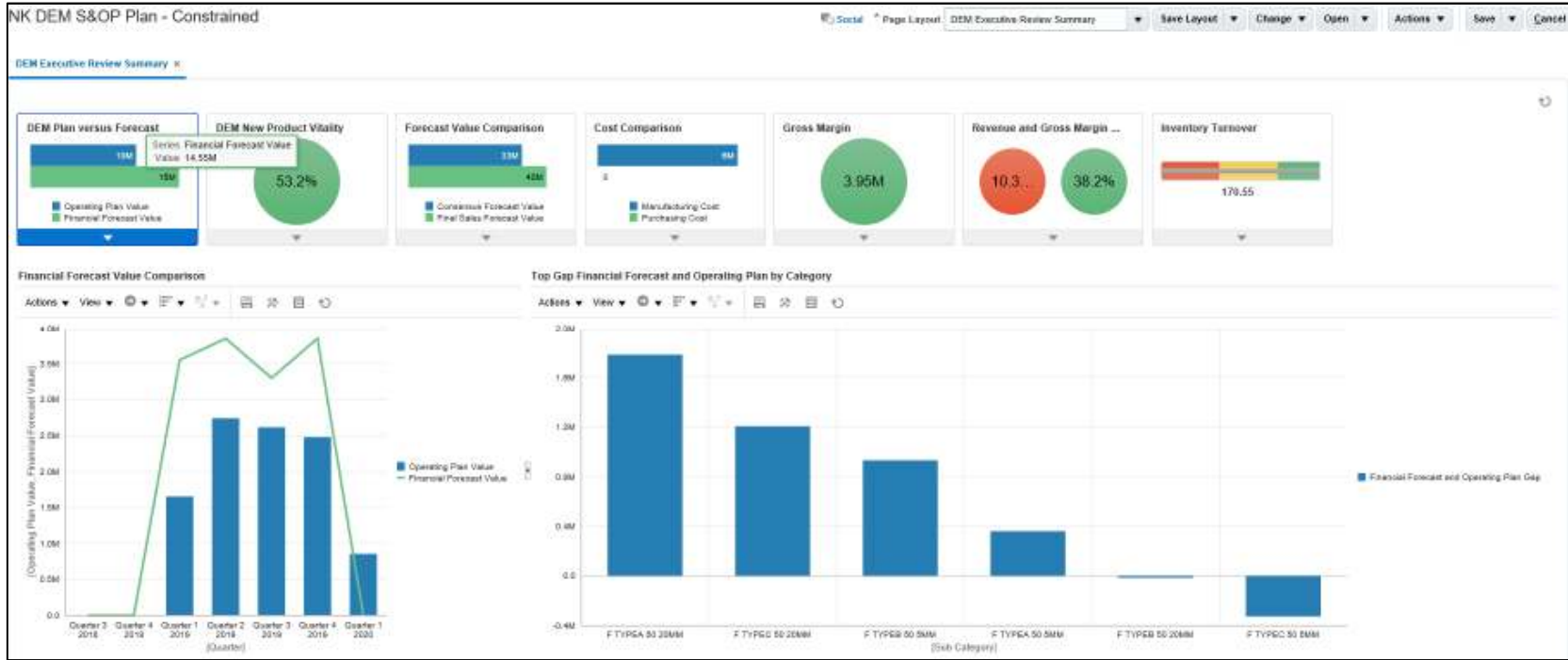
# FINANCE REVIEW - REVENUE & MARGINS

Review operational revenue & margins for different periods and product categories



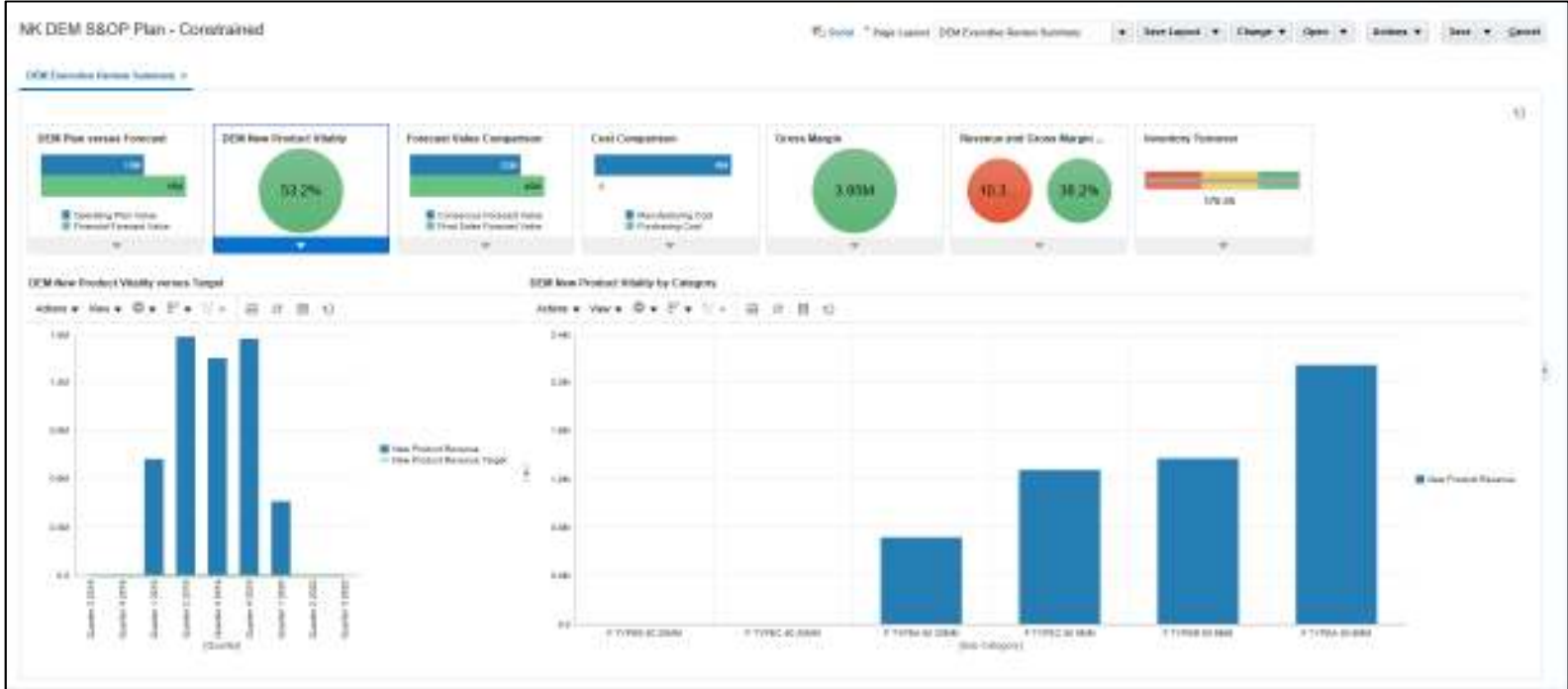
# EXECUTIVE REVIEW – OPERATING PLAN

Compare operating plan with financial forecast for different periods and product categories



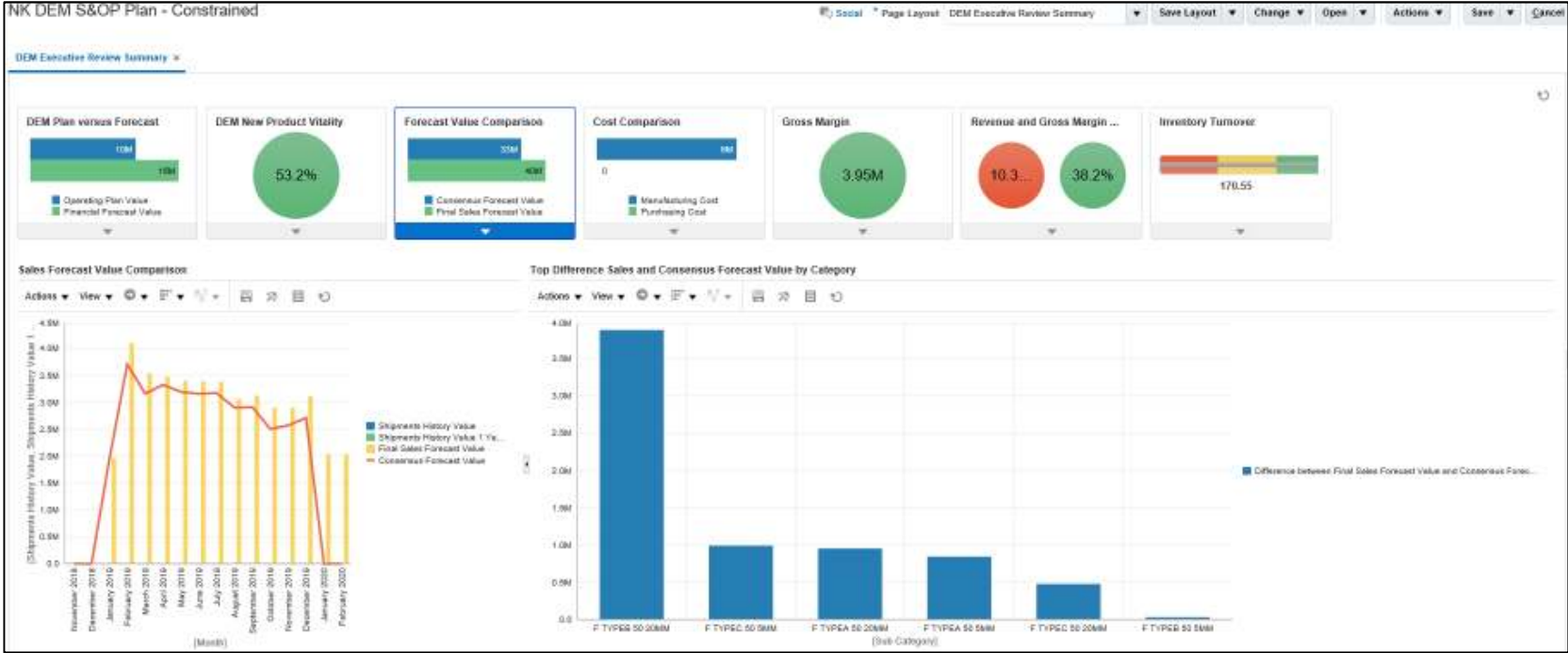
# EXECUTIVE REVIEW - NEW PRODUCT REVENUE

Review contribution of revenue from new product launches and their demand profiles



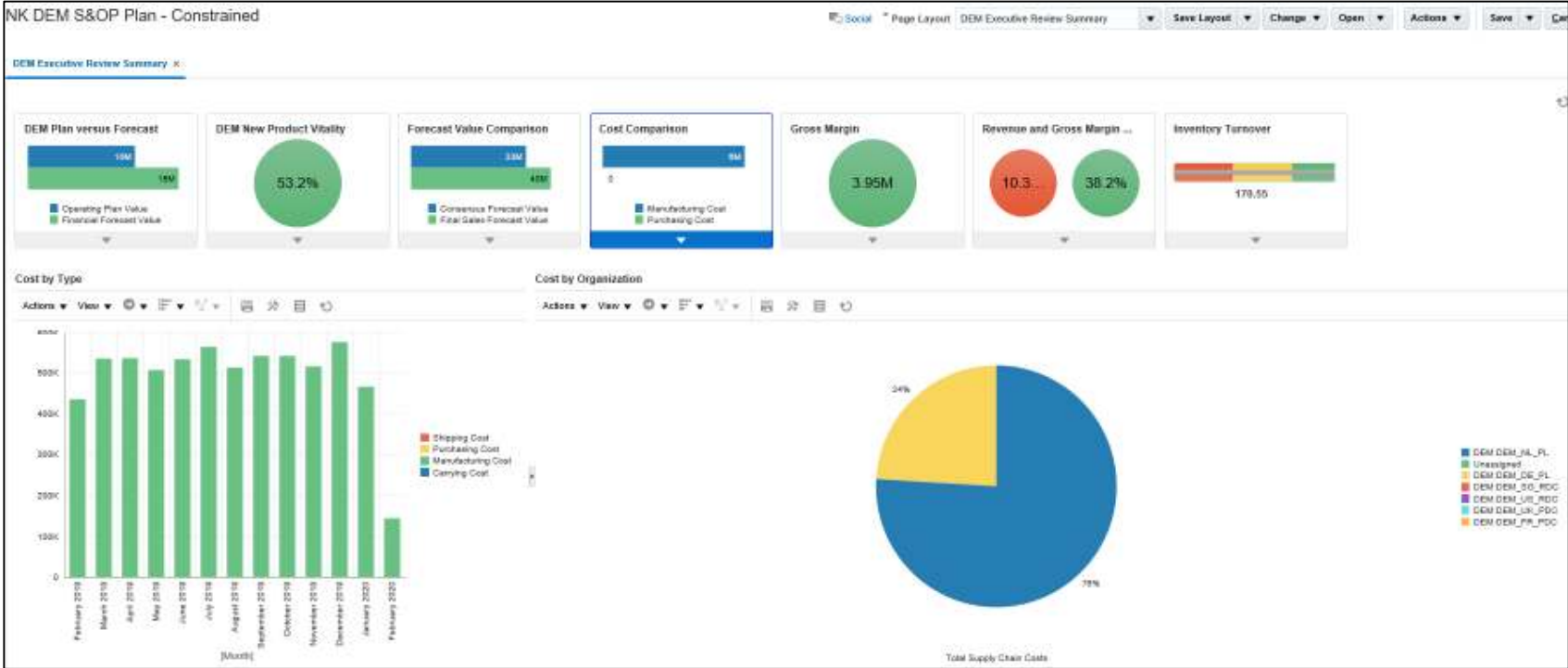
# EXECUTIVE SUMMARY - FORECAST TARGETS

Compares Sales to Consensus Forecast and Historical Shipments



# EXECUTIVE SUMMARY - OPERATING COSTS

Review costs by different cost types and facilities to arrive at operating budget view by facility



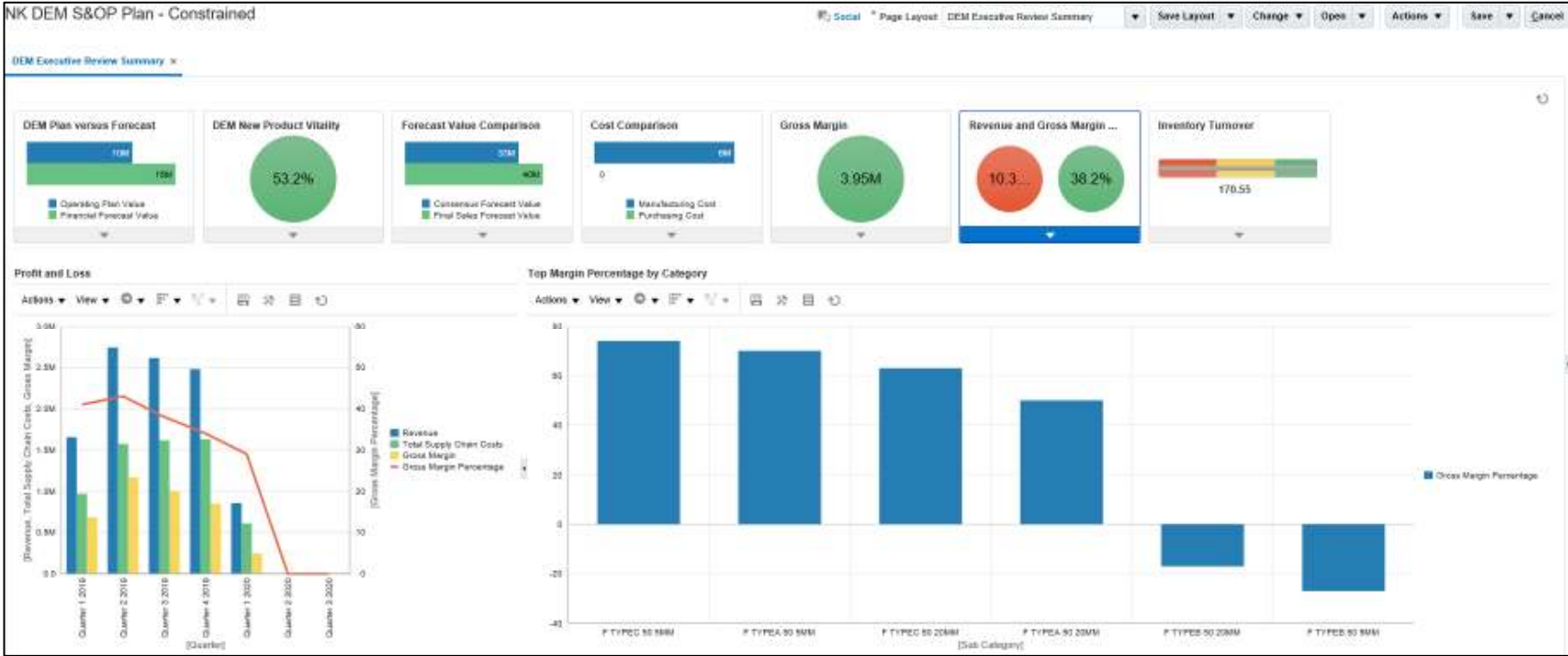
# EXECUTIVE REVIEW - PROFIT MARGINS

Review margins by periods & by category to focus to loss making categories



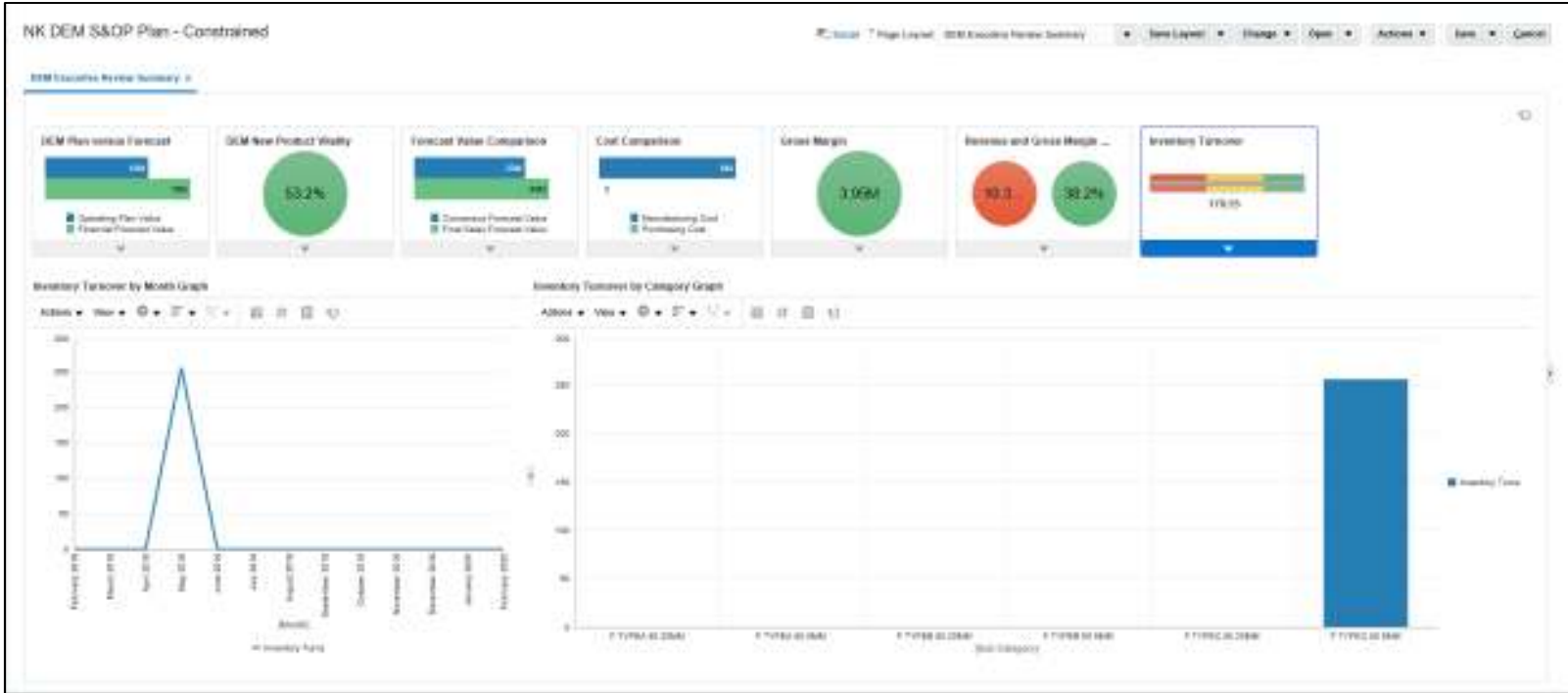
# EXECUTIVE SUMMARY - PROFITABILITY

Review overall and category based profitability based on operating revenue and associated costs



# EXECUTIVE REVIEW - INVENTORY TURNS

Review Sales Turnover vis-à-vis ending stock

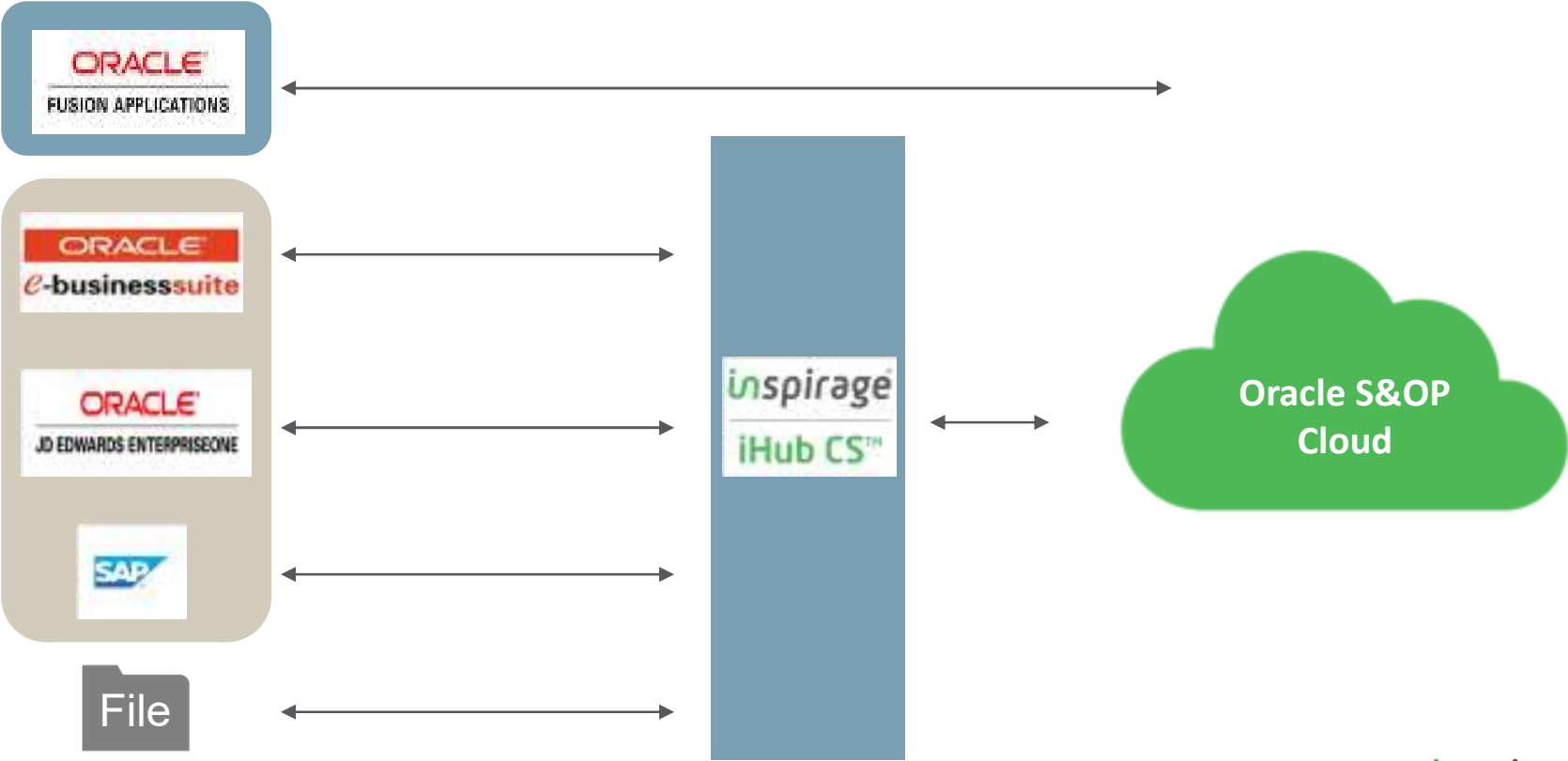




# CHALLENGES ADDRESSED

- ✓ Aggregated supply planning for all nodes in the supply chain
- ✓ Single platform with single source of truth for data
- ✓ Review supply requirements for different distribution centres & plants at one place
- ✓ Budget planning for factories
- ✓ Simulate scenarios for capacity changes

# CO-EXISTENCE & INTEGRATION



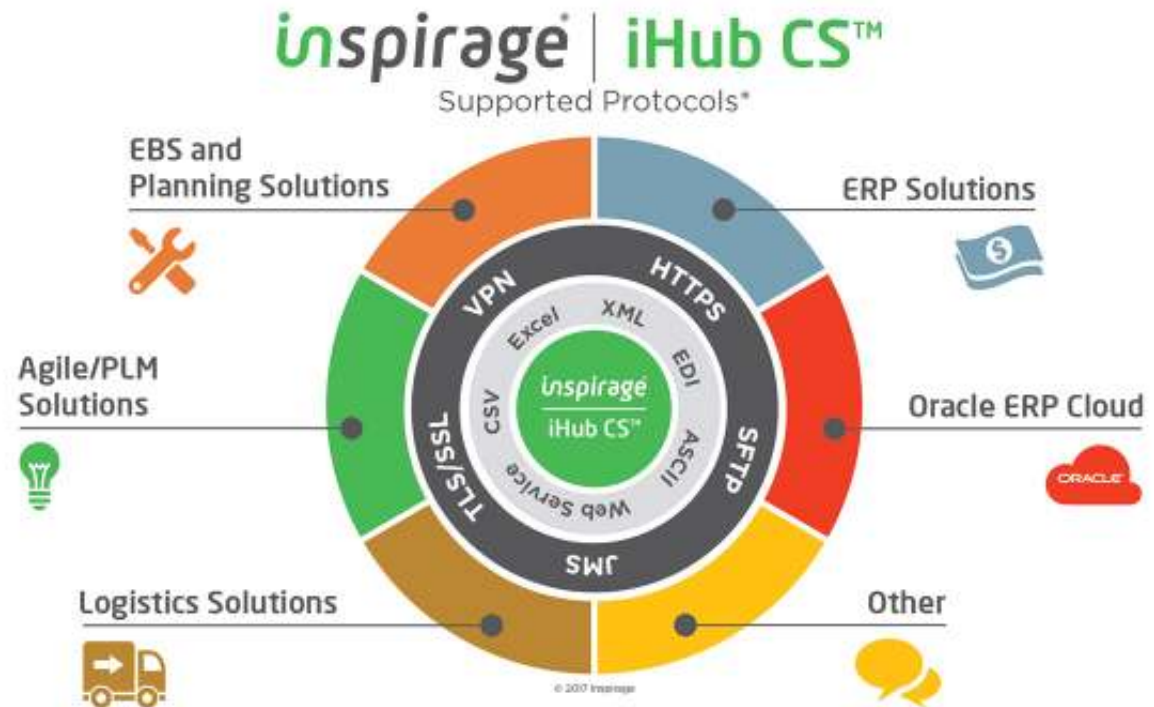
# KEY FEATURES

Intuitive Dashboard

Data Mapping Tool

Pre-integration placeholders

IaaS-level security





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∴ **THANK YOU**

