



*Training Course:
Sales and Operations Planning & Integrating the
Business*

*24 - 28 May 2027
Lisbon (Portugal)*

Training Course: Sales and Operations Planning & Integrating the Business

Training Course code: SM1035 From: 24 - 28 May 2027 Venue: Lisbon (Portugal) - Training Course Fees: 6050 € Euro

Introduction

This training program is designed by [Global Horizon Training Center](#) to equip senior professionals with the knowledge and practical tools required to successfully implement and manage an effective [Sales & Operations Planning S&OP](#) process.

S&OP is also referred to as Integrated Business Management IBM or Sales, Operations & Financial Planning SOFP. It is a cross-functional process that aligns all major business functions including sales, marketing, operations, finance, HR, and supply chain. The objective is to ensure that all plans are synchronized and balanced to achieve the organization's medium- to long-term strategic goals.

The program focuses on enabling organizations to become ["one-number companies"](#), where all departments operate based on a unified and consistent plan, leading to improved coordination, decision-making, and business performance.

Course Objectives

By the end of this program, participants will be able to:

- Understand the concept and importance of S&OP
- Identify the objectives and benefits of the S&OP process
- Describe the five phases of the S&OP cycle
- Recognize roles and responsibilities across different functions
- Align demand, supply, and financial plans effectively
- Prepare for successful implementation of S&OP within their organizations
- Contribute to improved planning accuracy and business performance

Target Audience

- Senior Management and Business Unit Leaders
- Department Heads Sales, Marketing, Operations, Finance, HR, IT
- Supply Chain and Planning Professionals
- Anyone involved in forecasting, planning, and resource allocation

Training Outline

Day 1: Introduction to S&OP & Portfolio Management

- Overview and definition of S&OP
- Importance and business value of S&OP
- Position within ERP and supply chain systems
- Roles and responsibilities across functions
- Introduction to the 5-step S&OP process
- Managing product/service portfolios
- New product introduction and product phase-out

Day 2: Demand Planning Phase

- Objectives of demand planning
- Forecasting vs. demand planning
- Inputs and data requirements
- Demand planning methodologies and logic
- Outputs and communication of demand data
- Demand planning exercises
- Demand planning meetings and governance

Day 3: Supply & Resource Planning Phase

- Objectives of supply and resource planning
- Inputs and data requirements
- Supply planning logic and methodologies
- Resource planning and capacity considerations
- Outputs and integration with demand plans
- Practical exercises in supply and resource planning
- Supply and resource planning meetings

Day 4: Integration & Reconciliation Phase

- Aligning demand, supply, and financial plans
- Identifying gaps between plans and budgets
- Cross-functional collaboration and alignment
- Pre-S&OP meeting structure and agenda
- Financial integration and performance alignment
- Preparing executive-level reports

Day 5: Executive S&OP & Continuous Improvement

- Structure and governance of executive S&OP meetings
- Reviewing demand-supply balance
- Financial performance review
- Decision-making and documentation
- Continuous improvement of the S&OP cycle
- Extending S&OP beyond operational levels
- Technology and systems supporting S&OP

Registration form on the Training Course: Sales and Operations Planning & Integrating the Business

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Complete & Mail or fax to Global Horizon Training Center (GHTC) at the address given below

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Payment Method

- ☐ Please find enclosed a cheque made payable to Global Horizon
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