



# **Certified in Logistics, Transportation and Distribution**

**Sales and Operations  
Planning**





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# **Sales and Operations Planning**

## **1. Purpose and Objectives of S&OP**

S&OP is a cross-functional planning process that aligns sales, marketing, operations, finance, and supply chain activities to create a unified business plan. Its core objectives include balancing supply and demand, improving communication, reducing uncertainty, and increasing organizational responsiveness. S&OP helps companies optimize inventory, enhance customer service, and improve financial predictability. Understanding its purpose ensures professionals recognize S&OP as a strategic tool rather than just a planning exercise. It builds alignment across departments and supports long-term business goals.

## **2. S&OP Process Overview**

The S&OP process typically includes five recurring steps: data gathering, demand review, supply review, pre-S&OP meeting, and executive S&OP meeting. Each step focuses on aligning key planning functions with organizational goals. The process is cyclical, standardized, and performed monthly. Understanding this structured workflow is essential for maintaining discipline, ensuring stakeholder engagement, and producing actionable plans. Mastery of the process enables organizations to proactively manage imbalances between supply and demand.

## **3. Cross-Functional Collaboration**

Effective S&OP depends on active collaboration among sales, marketing, operations, finance, and supply chain teams. Each function provides essential data, insights, and constraints that influence the final plan. Collaboration

prevents silo-based decisions, ensures shared accountability, and enhances decision quality.

Understanding cross-functional roles clarifies how diverse teams contribute to forecasting, capacity planning, budget alignment, and risk mitigation. This concept emphasizes communication and partnership as key drivers of S&OP success.

#### **4. Role of Leadership in S&OP**

Executive leadership sets priorities, approves the final S&OP plan, resolves conflicts, and ensures alignment with strategic goals. Without leadership commitment, S&OP becomes an administrative process rather than a decision-making platform. Leaders must reinforce governance, ensure participation, and support data-driven decisions. Understanding leadership's role helps professionals appreciate the importance of executive buy-in and ensures recommendations align with business objectives.

#### **5. Demand Planning and Demand Review**

The demand review focuses on evaluating and validating forecasted demand. It incorporates statistical forecasts, customer insights, sales intelligence, and market trends. The goal is to create a reliable demand plan that reflects expected orders, promotions, and product lifecycle factors. Understanding demand planning principles—forecast accuracy, bias reduction, and collaborative forecasting—is crucial for building a strong foundation for S&OP. This concept helps balance expectations with realistic demand signals.

## **6. Supply Planning and Supply Review**

The supply review evaluates whether operations can support the approved demand plan. It considers production capacity, workforce constraints, supplier capabilities, transportation availability, and inventory levels. Supply planners identify bottlenecks, assess feasibility, and propose alternative scenarios such as overtime, subcontracting, or inventory repositioning. Understanding supply planning ensures that the final S&OP plan is achievable and balanced across all functions.

## **7. Balancing Supply and Demand**

A key goal of S&OP is to balance demand with available supply while meeting service, cost, and financial targets. Techniques include demand shaping, capacity adjustments, inventory movements, product prioritization, and scenario-based decision-making. Planners must understand how to evaluate imbalances and apply appropriate solutions. Balancing supply and demand reduces volatility, minimizes stockouts, prevents excess inventory, and optimizes operational efficiency.

## **8. Scenario Planning and “What-If” Analysis**

Scenario planning evaluates different outcomes based on changes in demand, supply, cost, or capacity. “What-if” analysis helps organizations assess the risks and benefits of various decisions—such as launching promotions, adding shifts, or increasing inventory. Understanding this concept supports proactive planning and improved decision-making under uncertainty. Scenario modeling strengthens agility and prepares organizations for disruptions or shifts in market conditions.

## **9. Financial Integration and Profitability Alignment**

S&OP integrates financial objectives with operational plans. Finance teams validate revenue projections, cost assumptions, and budget alignment. A financially integrated S&OP process ensures decisions support profitability goals and long-term business health. Understanding cost structures, margin impacts, and revenue strategies helps logistics professionals communicate the financial implications of supply chain decisions. This concept strengthens collaboration between operations and finance.

## **10. Executive S&OP Meeting and Final Decision-Making**

The executive S&OP meeting is the culmination of the S&OP cycle. Senior leaders review proposed plans, resolve cross-functional conflicts, approve resource allocations, and establish direction for the upcoming period. This meeting aligns operational execution with corporate strategy. Understanding the meeting's purpose, key inputs, and expected outputs ensures effective participation and informed decision-making.

## **11. S&OP Metrics and Performance Measurement**

Metrics provide visibility into S&OP effectiveness. Key KPIs include forecast accuracy, customer service levels, inventory turns, capacity utilization, revenue attainment, and plan adherence. Tracking metrics over time highlights performance gaps and improvement opportunities. Understanding how to apply and analyze KPIs strengthens decision-making and ensures that the S&OP process delivers value.

## **12. Inventory Planning in S&OP**

Inventory plays a central role in balancing supply and demand. In S&OP, planners evaluate safety stock levels, reorder points, replenishment policies, and inventory positioning. Effective inventory planning helps manage demand variability, avoid stockouts, and control holding costs. Understanding how inventory decisions interact with production and transportation constraints is key for building robust S&OP plans.

## **13. Capacity Planning Integration**

Capacity constraints—labor, equipment, warehousing, transportation, and supplier capacity—must be considered in S&OP. Capacity planning determines whether operations can support demand plans and identifies resource gaps. Understanding how to forecast, evaluate, and adjust capacity ensures operational feasibility and avoids overcommitment. Capacity planning also supports long-term investment decisions.

## **14. Demand Shaping and Demand Control**

Demand shaping modifies customer demand patterns through pricing, promotions, lead-time adjustments, and product availability controls. Demand control manages order acceptance during constrained periods. S&OP integrates these strategies to align demand with supply capabilities. Understanding how and when to use demand shaping ensures smoother operations and avoids overload situations.

## **15. Product and Portfolio Management**

S&OP must consider product lifecycles, new product

launches, phase-outs, and portfolio optimization. Product strategies influence demand patterns, inventory requirements, and capacity needs. Understanding product lifecycle management helps organizations plan transitions effectively and support successful introductions. This concept ensures that both new and existing products are aligned with operational capabilities.

## **16. Technology and S&OP Systems**

S&OP relies on digital tools such as advanced planning systems (APS), enterprise resource planning (ERP), data analytics, and collaborative platforms. Technology improves forecast accuracy, scenario modeling, visibility, and workflow standardization. Understanding system capabilities helps professionals automate tasks, reduce errors, and improve decision quality. Mastery of technology is essential for modern S&OP execution.

## **17. Data Management and Forecast Quality**

Data accuracy and consistency are critical to S&OP success. Planners must understand how to cleanse, validate, and integrate data across functional systems. Forecast quality depends on reliable historical data, demand signals, and master data integrity. Understanding data management ensures that decisions in S&OP are fact-based and credible.

## **18. Governance and Process Discipline**

Governance defines roles, responsibilities, timelines, and decision-making authority within S&OP. Discipline ensures the process is followed consistently each month. Without governance, S&OP becomes fragmented or ineffective. Understanding governance structures helps maintain



alignment, improve process maturity, and build organizational accountability.

## **19. Organizational Change Management**

Implementing or enhancing S&OP often requires cultural and behavioral change. Resistance may arise from functional silos, conflicting KPIs, or lack of trust in forecasts. Change management focuses on training, communication, incentives, and leadership sponsorship. Understanding this concept helps ensure successful adoption of S&OP and continuous improvement over time.

## **20. Continuous Improvement and Maturity Models**

S&OP maturity evolves from basic planning to advanced, integrated business planning (IBP). Continuous improvement involves identifying weaknesses, refining metrics, improving forecasting methods, and integrating additional functions such as product development or supply partners. Understanding maturity models helps organizations benchmark performance and build a roadmap toward more strategic and holistic planning.

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# Micro-Learning Programs in Supply Chain Management



1. Fundamentals of Supply Chain Management
2. Supply Chain Planning and Optimization
3. Demand Forecasting Techniques
4. Inventory Control and Management
5. Distribution and Logistics Strategy
6. Warehouse Layout and Operations Efficiency
7. Supply Chain Risk Management
8. Supply Chain Performance Metrics (KPIs)
9. Lean Supply Chain Practices
10. Agile and Responsive Supply Chains
11. Sales and Operations Planning (S&OP)
12. Supply Chain Network Design
13. Supply Chain Digital Transformation
14. AI and Data Analytics in Supply Chain
15. Supply Chain Sustainability and Green Logistics
16. Reverse Logistics and Returns Management
17. Supply Chain Collaboration and Integration
18. Supplier Relationship Management in SCM
19. Global Supply Chain Strategy
20. Transportation Management Systems (TMS)
21. Inventory Optimization Models
22. Demand-Driven MRP (DDMRP) Concepts
23. Blockchain Applications in Supply Chain
24. Supply Chain Cost Reduction Techniques
25. SCOR Model and Process Improvement

# Micro-Learning Programs in Supply Chain Management ...



26. Capacity Planning and Resource Allocation
27. Managing Supply Chain Disruptions
28. End-to-End Supply Chain Visibility
29. Cold Chain Logistics Management
30. Supply Chain Compliance and Ethics
31. Import–Export Procedures and Documentation
32. Managing Third-Party Logistics (3PL) Providers
33. Supply Chain Collaboration Technologies
34. Production Planning and Scheduling
35. Strategic Supply Chain Design Using Case Studies
36. Circular Economy in Supply Chain
37. Vendor-Managed Inventory (VMI)
38. Transportation Optimization Techniques
39. E-Commerce Supply Chain Models
40. Omni-Channel Fulfillment Strategies
41. Warehouse Automation and Robotics
42. SCOR DS Roadmap for Supply Chain Excellence
43. Customer-Centric Supply Chain Strategies
44. Supply Chain Finance and Working Capital Management
45. Supply Chain Data Visualization Using Power BI
46. Strategic Sourcing in Supply Chain Context
47. Supply Chain Benchmarking and Best Practices
48. Integrated Business Planning (IBP)
49. Supply Chain in Crisis Management and Recovery
50. Future Trends and Technologies in Supply Chain



# Micro-Learning Programs in Procurement



1. Fundamentals of Procurement Management
2. Strategic Sourcing and Category Management
3. Supplier Selection and Evaluation
4. Contract Management Essentials
5. Cost and Price Analysis in Procurement
6. Negotiation Strategies for Procurement Professionals
7. E-Procurement and Digital Tools
8. Procurement Planning and Budgeting
9. Risk Management in Procurement
10. Supplier Relationship and Performance Management
11. Sustainable and Ethical Procurement
12. Total Cost of Ownership (TCO) Analysis
13. Make-or-Buy Decision Frameworks
14. Procurement Policies and Governance
15. Procurement in Public vs. Private Sectors
16. Procurement Audit and Compliance
17. Procurement Data Analytics and Reporting
18. Procurement Scorecards and KPIs
19. Strategic Supplier Partnerships
20. Category Strategy Development
21. Managing Global and Offshore Procurement
22. Negotiation Simulation Workshop
23. Contract Law for Procurement Managers
24. Cost Reduction Strategies in Procurement
25. Supplier Risk Assessment Models

# Micro-Learning Programs in Procurement ...



26. Procurement Process Mapping and Improvement
27. Procurement Automation and AI Applications
28. Managing Procurement Teams Effectively
29. Procurement Ethics and Transparency
30. Procurement in the Digital Supply Chain
31. Vendor Consolidation Strategies
32. Spend Analysis and Optimization
33. Demand Forecasting for Procurement
34. E-Auction and Reverse Bidding Techniques
35. Inventory and Procurement Alignment
36. Procurement in Project-Based Organizations
37. Supplier Onboarding and Development
38. Procurement Market Intelligence
39. Measuring Supplier Innovation
40. Procurement in Times of Supply Disruption
41. Cross-Functional Collaboration in Procurement
42. Writing Effective RFPs, RFQs, and RFIs
43. Contract Negotiation Best Practices
44. Green Procurement and Circular Economy
45. Legal Aspects of Procurement Contracts
46. Performance-Based Contracting
47. Procurement Leadership and Strategic Influence
48. Cost Avoidance and Value Creation in Procurement
49. Managing Procurement with Power BI Dashboards
50. Future Skills and Trends in Procurement



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