



Certified in Planning and Inventory Management

S&OP Roles and Process



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S&OP Roles and Process

1. Purpose of the S&OP Process

The S&OP process provides a structured, monthly cadence for aligning demand, supply, and financial plans across the organization. Its purpose is to create a single, agreed-upon operating plan that balances customer service, cost, and resource utilization. Understanding this foundation helps you appreciate why S&OP is both a planning and decision-making mechanism. It connects senior leadership with operational teams, ensuring assumptions are transparent, risks are evaluated, and corrective actions are agreed upon. The exam expects clarity on why S&OP is essential for cross-functional alignment.

2. S&OP Process Governance

Governance defines who owns each step of S&OP, what decisions are required, and how conflicts are escalated. Good governance avoids ambiguity, increases accountability, and ensures meetings focus on decisions rather than data debates. Governance frameworks include roles, responsibilities, meeting structures, decision authorities, and adherence rules. CPIM emphasizes understanding how governance strengthens process discipline and repeatability. This is crucial when identifying root causes for failures in collaboration or plan adherence.

3. Sales Team Role in S&OP

The sales team provides real-world market insights, customer intelligence, account priority information, and feedback on pricing or promotions. Their role is to contribute to the demand plan without excessive optimism

or bias. They help transform customer-facing information into actionable forecasts and support consensus building. In the exam, remember that sales does not own the forecast alone but collaborates with demand planning. Their involvement increases forecast reliability and ensures operational plans reflect true market conditions.

4. Marketing Role in S&OP

Marketing contributes strategic and tactical insights related to campaigns, product launches, channel priorities, and competitive positioning. They provide demand-shaping inputs that may alter volume or mix, influencing planning assumptions. Their work with sales helps align commercial strategies with available supply capabilities. CPIM expects you to know how marketing impacts the demand plan, especially through promotions or price changes, and how these require cross-functional alignment within the S&OP cycle.

5. Demand Planner Role

Demand planners synthesize statistical forecasts, market insights, historical trends, and business intelligence into a consensus forecast. They evaluate forecast accuracy, identify sources of bias, segment demand data, and communicate uncertainty to supply teams. Their analytical skills support scenario development and sensitivity analysis. In S&OP, they facilitate the demand review meeting and ensure demand assumptions are transparent and logical. Understanding this role is essential for CPIM, as demand plans are the starting point for all downstream planning.

6. Supply Planner Role

Supply planners evaluate whether the organization can fulfill the consensus demand plan. They review capacity, constraints, suppliers, inventory positions, and lead times. Their job is to translate demand into feasible supply plans that balance cost, service, and resource use. They also prepare supply scenarios for the pre-S&OP review, highlighting potential bottlenecks and trade-offs. CPIM stresses understanding supply planning tools like RCCP, rough scheduling, and constraint management as part of this role.

7. Operations Role

Operations teams provide visibility into manufacturing constraints, labor availability, equipment uptime, and schedule flexibility. They represent the feasibility and realism side of S&OP. Their participation ensures that plans are not based on hypothetical capabilities. They help quantify risks, evaluate alternative production strategies, and participate in scenario planning. CPIM often tests how operations input validates or corrects supply assumptions in the S&OP cycle.

8. Finance Role in S&OP

Finance integrates financial projections with volume-based S&OP plans. They reconcile revenue, cost, and margin implications of demand and supply scenarios. Finance ensures the S&OP plan aligns with annual budgets, strategic plans, and performance expectations. They support decision-making by translating operational scenarios into financial terms, helping executives select the most viable path. CPIM focuses heavily on this linkage because S&OP

must produce both an operational and financial plan.

9. Product Management Role

Product managers bring portfolio insights, product life-cycle data, launch timelines, phase-outs, and mix changes into the S&OP process. They help ensure the plan reflects realistic product availability and aligns with market strategies. Their role is key in managing new product introductions, obsolescence, and product transitions. CPIM examines how planning must incorporate these life-cycle changes to avoid stockouts, excess inventory, and poor financial outcomes.

10. Pre-S&OP Meeting Role and Purpose

The pre-S&OP meeting reconciles demand and supply plans before they are presented to executives. Cross-functional managers review gaps, debate alternatives, finalize assumptions, and prepare recommendations. This step ensures the executive meeting is focused on decisions instead of operational debates. Understanding this calibration meeting is essential for CPIM, as it reflects how organizations build consensus and prepare trade-offs.

11. Executive S&OP Meeting Role

The executive meeting is the final decision point where leadership approves the unified plan. Executives evaluate scenarios, risks, KPIs, and financial implications. They authorize resource decisions such as capacity expansions, hiring, outsourcing, or demand-shaping initiatives. CPIM tests the role of executive sponsorship, decision accountability, and the importance of one set of numbers. This meeting anchors S&OP to corporate strategy.

12. Five-Step S&OP Process

The classic process includes: Data Gathering, Demand Review, Supply Review, Pre-S&OP, and Executive S&OP. Each step has defined inputs, outputs, owners, and objectives. The exam frequently refers to this standardized framework and expects you to match activities to each phase. Mastery involves knowing how the five steps create a closed-loop system that continuously aligns demand, supply, and financial expectations.

13. Data Gathering and Validation

This foundational step consolidates demand history, forecasts, inventory data, capacity metrics, supplier data, and financial numbers. Data must be cleansed, validated, and standardized before use. Poor data leads to unreliable decisions and misaligned plans. CPIM often tests how data issues propagate through S&OP and the importance of master data governance. Understanding inputs and the importance of data quality is essential for accuracy throughout the cycle.

14. Consensus Forecasting

Consensus forecasting merges statistical models with human intelligence from sales, marketing, and operations. The goal is to create a single, agreed-upon demand plan. The process includes identifying bias, reconciling differences, validating assumptions, and documenting uncertainties. CPIM stresses consensus forecasting because it reduces the friction between departments and improves the reliability of the supply chain plan.

15. Supply–Demand Reconciliation

This step evaluates whether the organization can meet demand profitably and reliably. It includes reviewing constraints, adjusting production plans, modifying inventory strategies, and evaluating capacity alternatives.

Understanding reconciliation is crucial because it converts demand projections into a realistic operating plan. CPIM focuses on how trade-offs are addressed and what levers supply planners use to balance demand and supply.

16. Scenario and What-If Analysis

Scenario analysis enables teams to test the impact of unexpected changes such as demand surges, supply delays, capacity loss, or cost fluctuations. These scenarios help leaders pick robust plans and prepare mitigation strategies. In S&OP, scenario planning supports agile decision-making and risk readiness. CPIM expects you to know how scenarios are created, communicated, and used to guide executive choices.

17. KPI Use in S&OP Roles

Key performance indicators measure the effectiveness of S&OP decisions, processes, and individuals. Common KPIs include forecast accuracy, inventory turns, plan adherence, service level, and financial variances. Each role uses KPIs differently: demand planners track forecast error, operations track capacity use, executives track margin impacts. CPIM tests how KPIs connect performance across roles and support continuous improvement.

18. Collaborative Culture Requirements

S&OP thrives on transparency, discipline, trust, and cross-functional accountability. Collaboration ensures data sharing, reduced surprises, and constructive conflict resolution. Understanding cultural enablers and blockers is important for CPIM, as culture often determines whether S&OP succeeds or fails. Collaboration is not optional; it is a structural requirement of the process.

19. Technology Support in S&OP Roles

Technology such as ERP systems, demand planning tools, capacity planning modules, and analytics dashboards supports data accuracy, visualization, and decision-making. Technology enables automation, scenario modeling, and cross-functional visibility. While S&OP is not a software product, tools strengthen role effectiveness and process maturity. CPIM tests the difference between transactional and planning systems and their influence on process quality.

20. Continuous Improvement in S&OP

S&OP is not static. Teams must continually refine their roles, assumptions, data flows, and KPIs. Continuous improvement includes root-cause analysis, maturity assessments, and workflow optimization. This concept reinforces that S&OP must evolve with business conditions, product complexity, and market dynamics. CPIM frequently tests how iterative improvement strengthens the effectiveness and adoption of the S&OP process.

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49. Managing Procurement with Power BI Dashboards
50. Future Skills and Trends in Procurement



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