Sales and Operations Planning Training Course: Demand, Capacity, Inventory and Service Trade-offs

15 – 19 February 2027
New York

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Programme Summary

Sales and operations planning, covering demand, capacity, inventory and service trade-offs, is the subject of this one-week training course for supply chain, sales, operations and finance leaders at managerial level, ending in an executive planning pack for one product family. Plans often disagree because each function works from its own numbers, and the gap appears as shortages, excess stock or missed service. The programme moves from the monthly planning cycle to demand and supply reviews, trade-off decisions and executive governance, using prepared planning data. Mars Training Centre UK delivers this programme on sales and operations planning to mixed-organisation cohorts.

The Business Case

Manufacturers, distributors, retailers and healthcare supply units all balance what customers want against what capacity and stock can deliver. Leaders who run one agreed monthly cycle can see problems earlier, decide trade-offs openly and hold each function to a single plan. Without it, decisions are made late and corrected at high cost.

- Service Level: Improves when demand shifts are seen early enough for supply to respond.
- Inventory Cost: Falls when stock targets follow demand variability and supply lead times rather than habit.
- Plan Stability: Rises when changes are agreed at the executive review and recorded.

Principles and Evidence Base

- Monthly S&OP Cycle: The sequence of data gathering, demand review, supply review, pre-meeting and executive meeting, applied in Sessions 1 and 5 to structure the planning pack.
- Forecast Accuracy and Bias Measurement: Error and bias metrics tracked by product family, applied in Session 2 to judge the demand plan.
- Service Level and Safety Stock Logic: The link between demand variability, lead time and stock, applied in Sessions 3 and 4 to set inventory targets.

Intended Participants

- Supply chain and planning leaders who own the supply plan and report on service and stock.
- Sales and commercial managers who submit the demand view and explain its changes.
- Operations and production managers who confirm capacity and constraints.
- Finance partners who reconcile the volume plan with the budget.

Typical settings include manufacturing, distribution, retail, food and healthcare supply.

Learning Outcomes

1. Participants will be able to evaluate a demand plan by forecast error, bias and assumptions.
2. Participants will be able to construct a supply plan that tests capacity against demand scenarios.
3. Participants will be able to compare inventory targets by service level and carrying cost.
4. Participants will be able to prioritise trade-offs between service, stock and capacity by value and risk.
5. Participants will be able to diagnose causes of plan gaps between sales, operations and finance.
6. Participants will be able to justify an executive planning pack and its decisions to a senior committee.

Programme Structure

Day 1: Sales and Operations Planning Foundations

How does a monthly cycle bring one plan out of several?

- Monthly Cycle Calendar
- Planning Role Responsibility Chart
- Product Family Grouping
- Planning Horizon Setting
- Plan Gap Baseline

Day 2: Demand Review and Forecast Evidence

How reliable is the demand plan, and where does it lean?

- Forecast Error and Bias Table
- Baseline and Override Comparison
- Demand Assumption Log
- Promotion and New Product Adjustments
- Demand Scenario Range

Day 3: Supply Review, Capacity and Constraints

Can supply meet the demand range, and where does it break?

- Capacity Load Profile
- Constraint Identification Sheet
- Supplier Lead Time Review
- Rough-Cut Capacity Check
- Supply Option Ladder

Day 4: Inventory, Service and Trade-off Decisions

What mix of stock, capacity and service is worth paying for?

- Service Level and Stock Curve
- Safety Stock Target Setting
- Carrying Cost Comparison
- Trade-off Decision Matrix
- Financial Reconciliation Sheet

Day 5: Executive Planning Pack for One Product Family

Do the findings join into a pack an executive meeting can decide on?

- Applying the Session 2 Error and Bias Table
- Testing the Session 3 Constraint Sheet
- Checking the Session 4 Decision Matrix
- Preparing the Executive Meeting Agenda
- Completing the Executive Planning Pack

Methodology

The programme is a structured exercise built on prepared planning data for a manufacturer and a distributor. Participants run a compressed monthly cycle, reading forecasts, loading capacity, setting stock targets and arguing trade-offs in functional roles, then present the pack to peers acting as the executive team.

- Suggested activity: Reviewing a forecast history and agreeing which overrides to accept.
- Suggested activity: Loading a capacity profile against two demand scenarios.
- Suggested activity: Choosing between extra stock and extra shifts for a service gap.

Capstone Output

Each participant completes an executive planning pack for one product family. It holds a demand review with error and bias, a supply and capacity view, inventory targets, a trade-off decision record and a meeting agenda. At work it is presented to the executive meeting and becomes the template for each later monthly cycle.

Frequently Asked Questions

Is sales and operations planning training suitable for leaders who are not planners?

Yes. Sales and operations planning is taught through prepared data and templates. You need a role in sales, operations, supply chain or finance that contributes to the plan, but no specialist planning or software background.

Which models does sales and operations planning rest on in this training?

Sales and operations planning here rests on the monthly S&OP cycle, forecast accuracy and bias measurement, and service level and safety stock logic, each applied to a review, target or trade-off decision.

How is the planning pack from sales and operations planning training used at work?

You take the executive planning pack to your executive meeting, use its decision record to agree trade-offs, and keep its agenda and tables as the template for each later monthly cycle.

How does sales and operations planning differ from a programme on demand forecasting?

Sales and operations planning concentrates on agreeing one plan across demand, supply, stock and finance, while a programme on demand forecasting concentrates on building and measuring statistical forecasts.