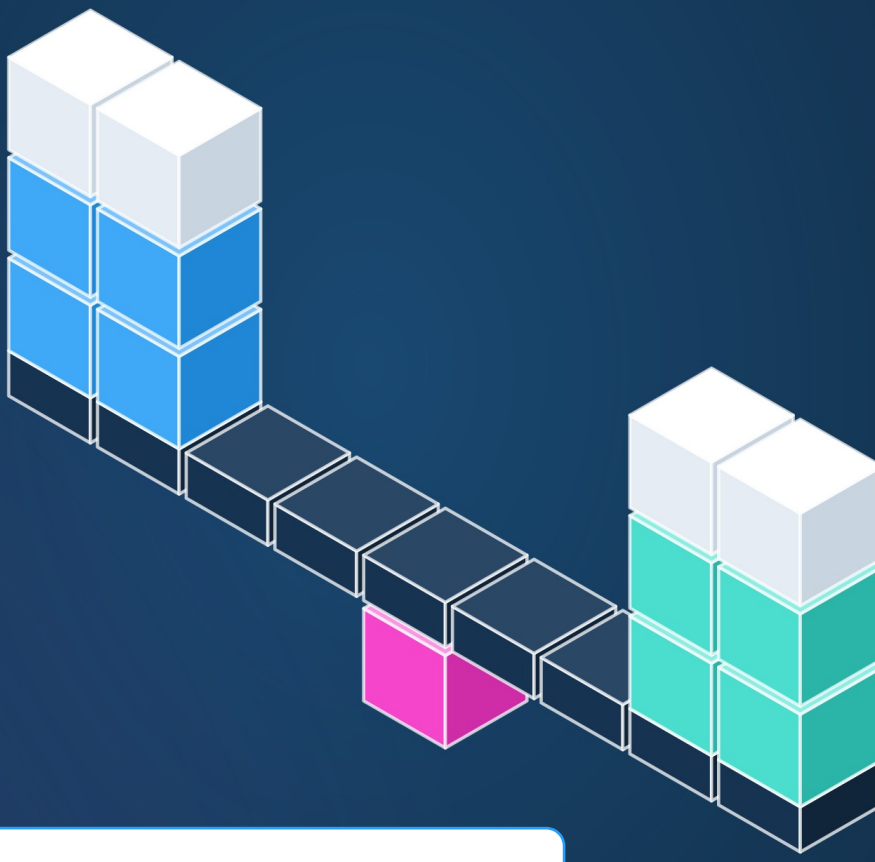
OPERATIONS INSIDER

LEAN · OPERATIONS · LEADERSHIP

THE MANAGER'S S&OP QUICK START CHECKLIST

Score one business unit in twenty minutes, with evidence you can point at.



ONE PLAN. ONCE A MONTH. DECIDED EARLY.

START HERE

How to Use This Check

One business unit, one hour with the planning team, twenty-five statements, one number.

01 LOOK	02 SCORE	03 ACT
Sit with planning, sales and operations and open the real material: last demand plan, capacity check, inventory report, meeting minutes. Do not score from memory.	Score each statement from 0 to 4. Without a document, a report or a calendar entry you can point at, the score is 2 or lower.	Pick the weakest block and agree one action with an owner and a date before you leave.

The Scoring Scale

POINTS	MEANING
0	Not in place.
1	Happens occasionally, depends on individuals.
2	Partly in place, not consistent across families or months.
3	Mostly in place and visible in the cycle.
4	Consistently in place, visible, reviewed and improved.

> **WHY ONE BUSINESS UNIT**
>
> **Sales and operations planning balances one market with one supply base. Score a business unit or a plant with its own customers and its own capacity, then repeat the check after three monthly cycles.**

Before You Start

- **Scope:** a business unit or plant with a sales team, a production area and a monthly planning meeting of some kind.
- **Evidence:** the last three demand plans, a capacity overview, the inventory and delivery reports, and the minutes of the last planning meetings.
- **Tone:** you check the process between departments, not the people in them. Ask how a number was made and who decided, not who got it wrong.

THE CHECK

01 Process and Rhythm

NO.	CHECK	SCORE 0 TO 4
01	A monthly S&OP cycle runs on fixed dates: portfolio, demand review, supply review, pre-S&OP and executive review, and the dates are in all calendars for the year.	
02	Planning happens in product families of five to fifteen groups with similar demand and similar resources, not in thousands of item numbers.	
03	The plan covers at least 18 months, with written time fences for the frozen, the firm and the open zone.	
04	Every review has a standard agenda, a fixed set of inputs and a recorded result, prepared before the meeting and not in it.	
05	The executive review is chaired by the general manager and takes decisions, not just notes.	

02 Demand Planning

NO.	CHECK	SCORE 0 TO 4
06	Sales and marketing own one demand plan in units per family and month, with the assumptions behind it written down.	
07	The statistical forecast and the sales input are compared, and every larger override is explained.	
08	Forecast accuracy and bias are measured every month per family at a fixed lag, and the results are discussed in the demand review.	
09	New products, phase outs, promotions and large customer projects are reviewed in a portfolio step before the demand review.	
10	The demand plan is one number for the whole company: sales, operations, purchasing and finance plan with the same figures.	

THE CHECK

03 Supply and Capacity

NO.	CHECK	SCORE 0 TO 4
11	A rough cut capacity check compares required hours with available hours per critical resource and month for the full horizon.	
12	Overloads and underloads are visible at least three months ahead, with options and their cost, before they reach the shop floor.	
13	Critical materials and suppliers with long lead times are part of the supply review, with confirmed capacity.	
14	The supply plan states the production volume per family and month, and the master schedule follows it within agreed limits.	
15	Make to stock, assemble to order and engineer to order families are planned with the right strategy for each.	

04 Inventory, Service and Finance

NO.	CHECK	SCORE 0 TO 4
16	Inventory targets per family are calculated from demand, variability, lead time and service target, not set by gut feeling.	
17	Delivery performance on time and in full is measured against the customer request date and reviewed monthly per family.	
18	Days of supply per family are tracked, and excess or obsolete stock has an owner and a plan.	
19	The volume plan is translated into revenue, cost and inventory value and compared with the budget every month.	
20	Gaps to the budget are closed with decisions in the plan, not with a separate finance forecast.	

THE CHECK

05 Decisions and Integration

NO.	CHECK	SCORE 0 TO 4
21	Scenarios with options, cost and risk are prepared for every major gap, and the executive review chooses one.	
22	Decisions, owners and dates are recorded in one decision log and followed up in the next cycle.	
23	The agreed plan is the input for the master schedule, leveling, Kanban sizing and purchasing.	
24	Roles are clear: a process owner runs the cycle, each review has a chair, and every number has an owner.	
25	The process is reviewed twice a year, and lessons change the calendar, the families or the rules.	

Your Result

BLOCK	POINTS	OUT OF
01 Process and Rhythm		20
02 Demand Planning		20
03 Supply and Capacity		20
04 Inventory, Service and Finance		20
05 Decisions and Integration		20
TOTAL		100

YOUR RESULT

Read the Number

The total tells you how much the company plans together. The weakest block tells you where to start.

TOTAL	WHAT IT MEANS	WHAT TO DO FIRST
0 to 39	Silos. Sales, operations and finance each work with their own numbers. Expediting is the plan.	Define product families and run one demand review with sales and operations.
40 to 59	Meetings, not decisions. A monthly meeting exists, but it reports the past.	Add a rough cut capacity check and a decision log. Measure forecast accuracy.
60 to 79	Balanced. Demand and supply meet every month, the plan holds most of the time.	Add inventory targets, financial reconciliation and scenarios.
80 to 100	Integrated. One plan steers the company, gaps are closed with decisions.	Hold the level. Extend the horizon and move toward integrated business planning.

Your Three Priorities

NO.	WHAT TO IMPROVE	FIRST ACTION	OWNER	DUE

THE RULE FOR EVERY ACTION

Owner and date, or it did not happen. Repeat the check after three cycles and compare the blocks, not the feeling.

What to Do Next

NEXT STEP	WHAT YOU GET
S&OP STARTER KIT	The guide for the first three monthly cycles, plus the planning workbook with demand plan, forecast accuracy, rough cut capacity, inventory targets and a dashboard.
S&OP EXCELLENCE BUNDLE	The full playbook, the two-day workshop pack, eight templates, the Excel system with scenarios and financial reconciliation, and a ready-to-use workshop deck.