

# THE TRAINING SESSIONS



## **INTEGRATED BUSINESS PLANNING AND ANALYTICS**

Using a Balanced Scorecard Approach

A 3-Day Intensive Training Program

# INTEGRATED BUSINESS PLANNING & ANALYTICS

Using a Balanced Scorecard Approach

## COURSE OUTLINE

Effective planning is key to success in today's highly complex and uncertain world. Enterprises, irrespective of their size and industry need to plan their activities across Sales, Marketing, Finance, Manufacturing and Supply Chain. They also need to plan across multiple time horizons; strategic plans for the long term, and tactical and operational plans for the medium and short term. Global leaders such as, Apple, Walmart, P&G, and Toyota understand this, and are able to bring their entire organizations into an integrated planning and execution mode. Integrated Business Planning (IBP) is an approach for establishing such an integrated framework and has emerged as an essential top management tool. Successful adoption of an IBP approach results in effective communication and managing of relationships across marketing, sales, finance, manufacturing and supply chain functions. Successful IBP adopters have witnessed unprecedented levels of improvements in forecasting accuracy, customer service levels, inventory reduction and overall operational efficiency.

A key element in developing a robust IBP is to have a consistent set of measures across business functions that tie an organization's strategic goal to its operational plans and activities. The Balanced Scorecard (BSC) approach has emerged as 'the' framework for achieving the same.

This 3-day training program provides an overview of the different components of IBP and how it fits into a business. It also provides a step by step guide to developing and executing an IBP plan, including how to develop IBP measures using a Balanced Scorecard approach. Another key highlight of the program is to provide insights into the key challenges in executing an IBP plan and provide guidance and skills in securing commitment to the IBP process from senior management.

This program integrates concepts in strategic planning, financial planning, demand and supply planning, IT and change management. A wide array of business cases, real life examples and role play-based learning will be used to cover the state-of-the-art practices in IBP.

## WHO SHOULD ATTEND

Sales Executives, Sales Managers and Sales Operations stakeholders who need an understanding of how sales processes link with the operational and financial side of the business

Manufacturing, Procurement and Supply Chain Executives and Managers who need an understanding of how supply processes impact sales

Demand planners who perform the task of estimating demand

Supply planners who perform supply to demand matching and allocation

Finance executives who are involved in annual budgeting, forecasting and monitoring processes

Corporate planners who perform strategic planning and annual business planning



## KEY TOPICS AND SESSION PLAN

### DAY 1:

#### Morning

##### 1. **Planning Process Overview:**

- Planning in context of today's complex value chains
- Hierarchical nature of Planning – Challenges of linking Strategic, Tactical and Operational Planning
- Overview of Planning Components and their linkages - Strategic Planning, Annual Business Planning / Budgeting, Demand Planning, and Supply Planning
- Need for consistent and integrated cross-functional measures. The Balanced Scorecard approach
- Group Case based activity

#### Afternoon

##### 2. **The Balanced Scorecard Framework:**

- Balanced Scorecard - Basic concepts.
- How Balance Scorecard approach helps improve organizational performance
- Developing meaningful and consistent set of measures and targets
- Group Case based activity

### DAY 2:

#### Morning

##### 3. **Linking Strategic Planning with Annual Business Planning / Financial Budgeting:**

- Strategic Planning Process
- Strategic Planning input to Annual Business Planning
- Annual Business Planning / Budgeting
- Group Case based activity

##### 4. **Linking Annual Business Planning with Operational Level Planning**

- Financial Budget and Forecast monitoring
- Disconnects with Operational Planning
- How Integrated Business Planning approach helps integrate Annual Business Plans with Operations Plans
- Group Case based activity

#### Afternoon

##### 5. **Linking the Supply and Demand Components of Operational Planning**

- Linking Supply with Demand – Key issues and Challenges
- Demand side Planning Concepts
- Demand Planning Components - overview and how they link together
- Existing Products
- New Products
- Promotions

- Inventory (Safety Stock)
- Group Case based activity
- Supply Planning Concepts
- Supply Planning Components - overview and how they link together
- Aggregate Supply Planning (MPS)
- Capacity and Inventory Planning
- Materials Requirement Planning
- Distribution Requirements Planning
- Group Case based activity

### DAY 3:

#### Morning

##### 6. **Integrated Business Planning**

IBP Process Steps – Guide to developing a monthly IBP process

- Structure and Logic of IBP process
- Inputs to IBP – Financial, Demand and Supply Plans
- IBP Outputs – Key decisions taken
- How IBP helps in steering an organization on its course
- Balanced Scorecard based measures for a successful IBP approach
- IBP Process Challenges

- Need for Managing Change. How to successfully help the organization transition into an IBP mindset
- Case studies of IBP Benefits

#### Afternoon

##### 7. **Case Study Presentations**

- Group presentation of a comprehensive IBP Plan based on the case study

##### 8. **Session Wrap-up and Close**





## **CREATIVE BRAINSTORM THE TRAINING SESSIONS**

“Management is, above all, a practice where art, science, and craft meet”  
**Henry Mintzberg**

1TEAM's Training Programs combine theory and practice in the context of the customer's environment to ensure impact and retention of learning. These sessions are high energy, interactive and workshop oriented to ensure maximum participation and knowledge acquisition for today's adult learners. In line with our core belief - 'Knowledge Transforms' - we help participants understand how the session concepts can be innovatively applied in their own business context and achieve business transformations.



Based in Singapore, the hub of the South Asia region, One Team Consulting aims to help Corporates build their competitive edge to face the ever changing business environment.

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