

The S&OP Process Prep Checklist



Sales, Marketing & Analytics

- Have I communicated the details of all new account launches?
- Have I communicated the details of all new promotional activities & marketing events?
- Have I communicated the details of any and all discontinuations?
- Do I have an up to date bottoms up sales growth plan and have I checked the velocity and store assumptions against available data?
- Do I have a quantifiable understanding of my sales pipeline?

Operations & Product Dev

- Have I updated our demand forecast to account for this month's POs?
- Do I have a good understanding of our inventory, both in our warehouses and at our distributors?
- Is our new product development timeline updated?
- Do I have a good understanding of our current production timeline & co-packer requirements, so I can integrate the sales team's data and communicate any challenges?

The S&OP Process Post Meeting Checklist



Operations & Product Dev

- Have I updated my Demand Plan based on my updated Demand forecast and the information I received from Sales & Marketing?
- Have I updated my Production Plan based on the outputs of my Demand Plan?
- Have I updated my Material Requirements Plan based on my new Production Plan?
- Have I communicated my new Production Plan and any procurement adjustments to my finance team?

Finance

- Have I updated our revenue estimates to match the updated Demand Plan?
- Do I have a good understanding of our Production Plan and procurement timeline?
- Did I receive an updated accrual report to plan for trade spend and future deductions?