



Demand Planning and Sales and Operations Planning (S&OP): From Forecast to Consensus Plan

5 – 9 October 2026

London - Central London four-star



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Ref: 1279_7838 **Date:** 5 – 9 October 2026 **Location:** London - Central London four-star **Fees:** 23000 SAR

Technical depth: Practitioner · **Practical mode:** Modelling build

Introduction

When sales, operations and finance each work from their own number, organisations carry excess stock of what does not sell, run short of what does, and make capacity and budget decisions after the market has moved. This Core Concept course equips planners and their managers to build a statistical demand forecast, enrich it with commercial intelligence, measure its accuracy and run the monthly Sales and Operations Planning cycle that turns it into one agreed plan. Participants build a Demand Plan and S&OP Cycle Pack for a product family in their own organisation.

Course Objectives

- Segment a product portfolio with ABC-XYZ analysis and select a suitable forecasting approach for each segment
- Build statistical baseline forecasts using moving averages, exponential smoothing and Holt-Winters seasonal models
- Measure forecast performance with MAPE, weighted MAPE, bias, tracking signal and Forecast Value Added
- Run the five-step monthly S&OP cycle, from data gathering to the executive meeting, with defined inputs, outputs and decision rights
- Balance demand against supply using rough-cut capacity planning and scenario options, and express the result in financial terms
- Produce a Demand Plan and S&OP Cycle Pack ready for the next planning cycle

Target Audience

- Demand planners and forecasting analysts producing the baseline forecast
 - Supply and production planning managers balancing capacity against demand
 - Sales and commercial managers contributing market intelligence and promotion plans
 - Supply chain managers accountable for service levels and inventory
 - Financial planning and analysis managers reconciling volume plans with budgets
 - S&OP process owners and coordinators running the monthly cycle
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Course Outline

Day 1: Demand Planning and S&OP Foundations

- Demand Planning Within the SCOR Plan Process
- Demand Signals: Orders, Shipments, Point-of-Sale and Promotion Data
- Demand History Cleansing: Outliers, Stock-Outs and One-Off Events
- ABC-XYZ Portfolio Segmentation for Forecasting
- S&OP Maturity Self-Assessment Against the Oliver Wight IBP Model

Day 2: Forecasting Methods and Planning Frameworks

- Moving Average and Simple Exponential Smoothing Models
- Holt-Winters Seasonal Forecasting Model
- Forecast Hierarchies and Top-Down and Bottom-Up Reconciliation
- Five-Step S&OP Process and Monthly Calendar
- Integrated Business Planning: Product, Demand, Supply and Financial Reviews

Day 3: Building the Demand Plan and Running the Cycle

- Consensus Demand Review Agenda and Assumptions Log
- Promotion and New Product Forecasting with Analogous Products
- Rough-Cut Capacity Planning and the Supply Review
- Supply-Demand Gap Scenarios and Pre-S&OP Decision Paper
- Financial Reconciliation of Volume Plans to Budget

Day 4: Accuracy, Bias and Process Risk

- Forecast Error Metrics: MAPE, Weighted MAPE and Bias
- Tracking Signal Alerts and Exception Management
- Forecast Value Added Analysis by Process Step
- Collaborative Planning, Forecasting and Replenishment CPFR with Key Customers
- S&OP Governance: RACI, Decision Rights and Escalation Rules

Day 5: Modelling Build and the S&OP Cycle Pack

- Consumer Goods Case: Seasonal Forecast Model Build
 - Pharmaceutical Distribution Case: Supply Constraint and Allocation Decision
 - Forecast Accuracy Dashboard Build for an Own Product Family
 - Demand Plan and S&OP Cycle Pack Assembly
 - Mock Executive S&OP Meeting and Plan Defence
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Skills You Will Gain

- Statistical Forecasting
- Commercial Input Integration
- Forecast Exception Management
- Capacity Planning
- Consensus Building
- Planning Governance
- Volume-to-Value Reconciliation
- Planning Data Management

Why Attend This Course

- Return to work with a Demand Plan and S&OP Cycle Pack built on your own product data and ready for the next monthly cycle
- Show sales, operations and finance where their inputs improve the forecast and where they add bias
- Bring decisions, not only numbers, to the executive S&OP meeting
- Compare planning calendars, tools and maturity levels with planners from other sectors and countries

Conclusion

A forecast is useful only when the whole business acts on the same number. This course moves from demand signals, data cleansing and segmentation, through the principal statistical methods and the S&OP and integrated business planning frameworks, to consensus demand reviews, capacity balancing and financial reconciliation, and then to accuracy, bias and governance. The final day builds a Demand Plan and S&OP Cycle Pack that participants take straight into their next planning cycle.
