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COURSE BROCHURE

Integrated Business Planning and S&OP Decisions Training Course

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Registered in the United Kingdom and Saudi Arabia

Integrated Business Planning and S&OP Decisions Training Course

Integrated Business Planning and S&OP Decisions is a 1-week training course for demand, supply and operations planners who prepare the monthly executive decision meeting, and each participant builds an executive S&OP decision pack. Boards now expect volume plans, revenue forecasts and inventory budgets to tell one story, and planners who reconcile them early earn a voice in portfolio and capital choices. Jupiter Prime Training runs this course on integrated business planning.

Why Integrated Business Planning Matters Now

Three pressures shape integrated business planning today: finance leaders who want rolling forecasts tied to physical volumes, commercial teams launching more product variants, and executives who must trade service against working capital within weeks rather than quarters. When volume, revenue and margin views stay apart, leaders debate whose number is right instead of choosing between scenarios. The course rests on Sales and Operations Planning S&OP and its executive extension, Integrated Business Planning IBP, together with the planning and inventory body of knowledge behind the Certified in Planning and Inventory Management CPIM credential.

Who Gains Most from Integrated Business Planning

- Demand planners who turn commercial assumptions into consensus volume and revenue forecasts
- Supply planners who test rough-cut capacity and material constraints against the demand signal
- Financial planning analysts who convert volume plans into margin, inventory and cash projections
- Product portfolio coordinators who bring launches, phase-outs and promotions into the monthly cycle
- Planning process owners who prepare the agenda and minutes of the executive meeting

A cross-functional planning cell from one business unit gains most when demand, supply and finance members attend together and rehearse their hand-offs.

Integrated Business Planning Capabilities

Participants leave able to move a monthly plan from raw volume figures to a priced executive choice.

- Reconcile unit volume plans with revenue, margin and inventory budgets — finance director sign-off
- Frame two or three costed scenarios with stated assumptions — executive trade-off decisions
- Calculate the working-capital effect of service level and stock policy changes — treasury and inventory targets
- Design an escalation path for gaps the pre-meeting cannot close — executive agenda setting
- Specify a small set of cycle health indicators — process owner improvement priorities
- Communicate a decision pack in under twenty slides — general manager approval

Key Integrated Business Planning Terms

- Integrated Business Planning IBP — an executive monthly process aligning product, demand, supply and financial plans with strategy over a rolling horizon.
- Pre-S&OP meeting — a working session where planners settle cross-functional gaps and prepare scenarios before executives meet.
- Financial reconciliation — translating agreed volume plans into revenue, cost, margin and inventory values and comparing them with the budget.
- Gap-to-plan — the difference between the latest projection and the annual business plan, expressed in volume and value.
- Planning time fence — a point in the horizon inside which changes need higher approval because commitments are already fixed.
- Decision log — a record of each executive choice, its owner, assumptions and the date it will be revisited.

Integrated Business Planning Day by Day

Day 1: Executive Planning Context

- IBP Maturity Model — Where The Current Cycle Stands
- Monthly Cycle Calendar — Sequencing Reviews Ahead Of Month-End Close
- Rolling Horizon And Time Fences — Which Changes Need Executive Approval
- Annual Business Plan Linkage — Measuring Gap-To-Plan Each Month
- Roles And RACI For Planning Forums — Who Owns Each Number

Day 2: Demand and Portfolio Inputs

- Consensus Forecast Assembly — Merging Statistical And Commercial Views
- Forecast Value Added Tracking — Which Overrides Earn Their Place
- Portfolio Review Of Launches And Phase-Outs — Volume Transition Choices
- Promotion And Pricing Assumptions — Revenue Risk In The Plan
- Demand Plan Sign-Off Template — Accountable Commercial Commitment

Day 3: Supply Balancing and Financial Reconciliation

- Rough-Cut Capacity Check — Overtime, Outsourcing Or Demand Shaping
- Inventory Projection By Family — Service Versus Working Capital
- Volume-To-Value Conversion — Revenue, Margin And Cost Of Goods
- Budget Variance Bridge — Explaining Movement Since Last Cycle
- Cash And Capital Expenditure Signals — Investment Timing Decisions

Day 4: Scenarios and the Executive Meeting

- Scenario Costing Grid — Comparing Options On Service, Margin And Cash
- Pre-Meeting Gap Resolution — Issues Escalated To Executives
- Executive Agenda Design — Decisions First, Information Second
- Decision Log And Follow-Up — Accountability Between Cycles
- Cycle Health Indicators — Attendance, Plan Stability And Bias

Day 5: Practising the Executive S&OP Decision Pack

- Applying Gap-To-Plan Measures — Building The Opening Summary
- Applying Consensus Demand And Capacity Checks — Case Data From Two Sectors
- Applying Volume-To-Value Conversion — Reconciled Financial Page
- Mock Executive Meeting Role-Play — Defending A Recommended Scenario
- Executive S&OP Decision Pack — Final Pack For Sponsor Review

Applying Integrated Business Planning After the Course

- Run a volume-to-value reconciliation on the next monthly plan and present the budget variance bridge to the finance lead.
- Redesign the next executive agenda so that two costed scenarios and a decision log replace status updates.

Integrated Business Planning Questions FAQ

What is integrated business planning and why does it matter now?

Integrated business planning is the executive monthly process that links volume plans to financial outcomes. It matters now because leaders must trade service against cash quickly, and only a reconciled plan lets them do that with one set of numbers.

Which roles gain most from integrated business planning and S&OP decisions?

Demand, supply and financial planners gain most, along with the process owner who prepares the executive meeting. Each role learns how its numbers feed a priced scenario that executives can approve.

How does integrated business planning differ from a supply chain planning techniques course?

Integrated business planning focuses on the executive decision and the financial view rather than forecasting algorithms or scheduling methods. A techniques course builds the plan; this one reconciles it with the budget and turns it into choices.

What do you bring back from integrated business planning and S&OP decisions training?

You bring back a decision pack drafted on case data, with a reconciled financial page, costed scenarios and a decision log format ready for your own monthly cycle.

Integrated Business Planning: The Way Forward

The executive S&OP decision pack first informs which scenario the leadership team funds for the coming quarter. General managers, finance directors and planning heads use it to approve volume, inventory and capacity moves together. After its first use, revisit the time fences and the cycle health indicators, since they show whether decisions are sticking or being reopened each month.