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Sales and Operations Planning (S&OP) Sample Agenda and Roles and Responsibilities



Introduction

In today's fast-paced and unpredictable market, businesses can no longer afford to operate in silos when balancing demand, supply, and financial goals. Sales and Operations Planning (S&OP) provides a structured, cross-functional framework that unites executive leadership, operations, sales, marketing, finance, and supply chain teams to make data-driven decisions that improve forecast accuracy, optimize inventory, reduce costs, and drive profitability.

This whitepaper outlines the essential roles and responsibilities within the S&OP process, along with a step-by-step agenda to guide productive planning meetings—ensuring that organizations can align strategy with execution, enhance operational efficiency, and achieve sustainable growth.



S&OP roles and responsibilities

S&OP – especially supply chain planning – starts with data. That means it starts with the people who can get you that data. Below is a guide to S&OP roles and responsibilities.

- **Executive management**

At the top, there's executive management, which includes the CEO or organizational leader. This person serves as the chair of the executive S&OP meeting. They're the top authority when it comes to making sales and operations decisions.

- **Demand planner**

The demand planner has the important job of sharing the demand plan with the group. They'll likely work with the sales team to get the data for their demand plan (opportunity commits + run-rate history). They'll then present a realistic look at your near-future demand (depending on lead times of the various product lines). This can shape how you plan your supply.

Key metrics: historical run-rate demand, opportunity funnel w/ commits

- **Operations leader**

You have to figure out the demand for your offerings before you can determine the supply. That's where the operations leader comes in – this person uses the demand plan to create a supply plan. They also run your supply meetings and move the supply planning team in the right direction.

Key metrics/factors: engineering BOM and/or routing changes, capacity improvements on the shop floor that positively or negatively affect capacity constraints, operational efficiency (over/under absorption of payroll costs by shop floor).

S&OP roles and responsibilities cont'd

- **Supply planning and master scheduling**

Following closely behind the operations leader is the supply planning and master scheduling team. This role also looks at lead times, the number of goods produced in a timeframe, and seller performance.

Key metrics include: inventory turns, schedule attainment, vendor performance, on-time delivery, and fill rates.

- **Sales and marketing leader**

They look at your sales numbers and set the record straight for peak forecast accuracy.

Key metrics: forecast accuracy

- **Sales team**

The sales team plays a big part in updating the monthly sales forecast and explaining how it affects demand during S&OP meetings.

Key metrics: opportunity funnel, commit vs closed sales, close (win/loss) ratio by salesperson, adherence to standard lead times.



Steps of the S&OP process

To prepare for S&OP meetings, you'll need to move your team through the S&OP process. Here's what that looks like.

- Product/Previous Period Performance review
- Demand review
- Supply review
- Finance review
- Pre-S&OP
- Executive S&OP

1. Product/Previous Period Performance review

This first step is looking at the product itself: How is it doing in its market, what substantial changes were made to components in the previous period that engineering should know about, what quality issues came up in the previous period that we should address as part of continuous improvement? The demand planner, along with operations can provide the data you need here. This phase might involve meetings about when to roll out a new product and what that could mean for your other products. It could also involve engineering.

Also, review the list of continuous improvement initiatives from the previous meeting and follow up with those accountable to ensure that they are being actioned.

Be sure to review what was agreed to in the previous period and corporate performance vs that plan. What can we improve upon? What went well? What didn't? What additional actions do we need to focus on during the next period?

Review key metrics from above list for previous period and compare to corporate targets! (use of a balanced scorecard is HIGHLY recommended here)

Steps of the S&OP process cont'd

2. Demand review

Since demand comes before supply, it's only natural that the product review leads to a demand review. This is a series of discussions on anticipated demand to help avoid wasting money on too much supply. Create the demand plan from the data on past performance and sales and marketing predictions (marketing campaigns, spiffs, seasonality, etc).

3. Supply review

Bring manufacturing and logistics/procurement teams in to make sure the inventory expectations are realistic.

This is a great example of why cross-functional collaboration is so important during S&OP planning processes. It's all well and good to come up with ideal numbers, but you have to make sure your plans are realistic too. Working together with the teams that know best can yield those results. Take into account material constraints, poor performing suppliers and capacity constraints.

4. Finance review

It's best practice to look at your finances at every step of the way. This way, you can come up with accurate, effective demand and supply plans. Ensure that the demand and supply plan support the "bigger picture" for Finance, include cash flow requirements to support the labor and material requirements.

Steps of the S&OP processes cont'd

5. Pre-S&OP

Pre-S&OP is kind of like the dress rehearsal before the big show (the executive S&OP meeting). Ideally, all the different departments involved in all the steps before this one meet to ensure they are on the same page. This part requires a leader to ensure the meeting stays on track and everyone is on the same page prior to final review by the executive.

6. Executive S&OP

This is the meeting to present the well-thought-out plan with everyone on the same page. Review the previous period data and action items, demand plan, supply plan, and finance review. This gives executive leadership everything they need to know so they can make the right decisions with the right information.



KPI Summary

Sales and Financial Budgets

- Financial Budget (by GL/Period)
 - Comes from Finance Budget Module
- Sales Budget (Customer/Item/Location/Period)
 - Comes from Sales Budget Module
 - Sales budget tied to Revenue
 - Mapping by Item General Business Posting Group and Customer General Product Posting Group -> Sales GL Account
- Sales Budget (forecast) vs Financial Budget Report (w/ variances)
- Sales Actual revenue by Item/period/location vs Sales Budget by period/Item/Location (forecast accuracy)

Supply Chain Metrics

- Inventory Turns
- Vendor performance reporting (on time delivery)
- Schedule Attainment
 - Production Order plan (Released production order schedule) vs actual production order completion by qty/date/item
- Sales Order/Shipment on time delivery
- Fill Rate (% of completely fulfilled sales order/shipments on time)

Conclusion

By clearly defining roles, following a structured agenda, and tracking meaningful KPIs, organizations can turn S&OP into a powerful driver of collaboration and accountability. When executed effectively, S&OP not only aligns operations with strategy but also equips businesses to respond with agility and confidence in an ever-changing market. To take the next step, download our **[Sales and Operations Planning app through Microsoft AppSource](#)** and **[contact WebSan](#)** for more information on how we can support your journey.