

SPECIAL INTEREST GROUP CHARTER

SIG Name: S&OP Special Interest Group

SIG Objectives:

The S&OP Special Interest Group offers a forum for individuals involved in the sales and operations planning process within UWEBC member companies to interact, share opinions and expertise, and leverage each other's experiences. We will address a variety of topics and issues pertinent to the successful deployment S&OP and practices. The objective of the SIG is to serve as an educational and professional resource and support platform and network for members involved in the S&OP process. The SIG will focus on operational paradigms, ideas and best practices from other member companies and UW Madison and adopt them in their own S&OP process.

Benefits:

- Participation in a trusted peer-to-peer network of S&OP leaders and specialists.
- Access to a forum for professional development and learning about S&OP methodology, issues and best practices by a UW-Madison School of Business Professor.
- Identify opportunities to further enhance your current S&OP methods and structures.
- Validation of strategies, methodologies, technologies and best practices through knowledge exchange with other participants and presenters in the S&OP Special Interest Group.

Intended Participants:

- **Companies:** Any member that is looking to implement or improve their S&OP process.
- **Roles:** VP, Directors, Managers and practitioners with direct responsibility within the S&OP process.

Steering Committee:

- Caitlin Acosta, Materials Manager – Kohler Co.
- Barb Bossenbroek, Director - IBP & Analytics Strategy – Mercury Marine
- Tom Moen, Senior Sourcing Manager – J.J. Keller & Associates
- Enno Siemsen, Executive Director of the Erdman Center for Operations & Technology Management – UW-Madison

Facilitators:

- Wayne Thompson, Supply Chain Management Practice Director, UWEBC
- Enno Siemsen, Executive Director of the Erdman Center for Operations & Technology Management – UW-Madison

Number of Meetings, Length, and Frequency:

- TBD

Meeting Location(s)

- Meetings will be at UW-Madison and/or member-company campuses.

Output/Deliverable

- TBD for each meeting.

Meeting Discussion Topics (proposed):

1. Why is it important to differentiate operational S&OP (using mix-forecasts) from executive S&OP (using volume forecasts)?
2. Do the benefits of involving the salesforce in forecasting (i.e. customer specific forecasts) outweigh the costs of doing so?
3. What are the five most important steps to break down siloes between functions in S&OP?
4. What are the five most important steps to better include customers and suppliers in S&OP?
5. How are target service levels developed, and what is a good target service level?
6. How can sales forecasts and sales targets be aligned?
7. How can information technology enable a smoother S&OP process?
8. Which function should own the forecast? Which function should be responsible for S&OP? Who has oversight over the process?
9. Forecast value added – applying lean principles to the forecasting process.
10. Bottom-up, top-down or middle-out? At what level do you forecast, and how do you reconcile forecasts at different levels?

Members planning to Engage in the SIG:

- Ariens Company
- Badger Meter
- Bemis Company
- Briggs & Stratton
- Church Mutual
- Cuna Mutual Insurance
- Curt G. Joa, Inc.
- Demco
- Duluth Trading Company
- Endries International
- Fiskars
- Foot Locker
- Foremost Farms USA
- Harley-Davidson
- Inpro
- J.J. Keller & Associates
- Johnsonville Sausage
- Kohler Co.
- Lakeside Foods
- Lands' End
- Mason Companies
- Menasha Corporation
- Mercury Marine
- Madison Gas and Electric
- Miller Electric Mfg. Co.
- Plexus
- Rockwell Automation
- Sargento Foods
- Schneider
- Schreiber Foods
- Springs Window Fashions
- SSM Health
- Sub-Zero Group, Inc.
- TDS
- Vollrath
- Wm. K. Walther, Inc.
- WEA Trust
- WPS Health Solutions