



## Sales & Operations Planning (S&OP) Special Interest Group Charter

### Intended Participants

**Companies:** UWEBC member companies with sales & operations planning processes at various levels of maturity.

**Roles:** Directors, managers, and/or senior planners with responsibility to influence existing S&OP processes and/or technology for their company.

### Goals

1. To learn and share ideas and best practices on Sales & Operations Planning between member companies and industry partners.
2. To create an educational and professional support community for the successful implementation and evolution of Sales & Operations Planning.
3. To foster deeper collaboration across an organization's ecosystem.

### Example Topics for Practice-Sharing Discussion (actual list of topics to be determined by participants in the group)

- Demand planning: how to anticipate changing customer demand
- Supply planning: inventory strategies in a flexible environment
- Planning Under Uncertainty
- Concurrent Planning: Annual Operating Plan, Integrated Business Planning
- Tools & Technology
- Collaborating across teams; ownership and influence
- S&OP (Planning) vs S&OE (Execution)

### Meeting Frequency, Length and Location

- Meetings will be scheduled approximately every 3 months
- The total number of meetings will be determined based on the number of topics participants choose to discuss
- Meetings will be two hours in length
- Meetings will take place virtually or hybrid, based on preference of participants)

## Participant Expectations

- All session participants and registrants will be invited to future sessions and should make a reasonable effort to attend as many of the meetings as possible.
- New participants will need to request invitations to the Special Interest Group via the Supply Chain Practice Director.

## Steering Committee

- **John Cavey**, Director of Global Sales, Inventory & Ops Planning – Brunswick Corporation
- **Leah Westpfahl**, Director, Global Supply Chain - The Master Lock Company
- **Sarah Rothmeier**, Senior Manager, e2e Supply Chain - Amcor Flexibles North America
- **Stu Heil**, Systems Manager, Sourcing - Greenheck
- Additional Steering Committee Members may be added

## Facilitator

- **Jenny Patzlaff**, Supply Chain Practice Director, UWEBC
  - *For questions, email [jenny.patzlaff@uwebc.wisc.edu](mailto:jenny.patzlaff@uwebc.wisc.edu)*