



Planning for Planning – A Planners Perspective

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Following on from the previous report [Planning for Planning – Success in S&OP](#) Jigsaw has now developed a report focused on Planners; the people on the ground, facing the raw data and dealing directly with market forces, on a daily basis. This report has also been developed from an industry wide survey, with live data and insights into Planning departments across Australia.

Some key components of a successful S&OP and Planning function includes low staff turnover, talented and engaged employees, collaboration with key stakeholders and accurate data/information flow to concentrate your business decisions around. Engagement is key to a successful Planning function, but unfortunately only 38% of Planners felt their S&OP or IBP process was effective, with an outstanding 48% saying the Sales department is their main challenge (followed respectively by Marketing, Finance and Operations). Could this be a wake-up call to all Sales Managers? Sales need to be accountable for influencing, at times very poor decisions which are usually driven by their emotion or ego. They need to understand the costs of manufacturing, warehousing, logistics etc. Commercial leaders need to regularly audit which accounts are most lucrative for their business, which SKU's give the best return and the true cost to serve. This will help form business strategies that Sales and Supply Chain can work towards such as inventory levels, stock allocation, forecasting, supplier management, managing obsoletes, NPD, to name a few.

Too often, new leadership will try and implement a new system whether it's an ERP, MRP or forecasting tool before they have acknowledged current processes and procedures. It can be good to act fast, but often acting too soon could see the business at the same point in only a few years. When asked whether People or Systems inhibits Planners most in their role, 45% of Planners stated People, 29% nominated Systems and the remainder suggested Other. Unless businesses have the latest and greatest systems, staff will always complain about system capability. However, it seems stakeholder engagement and clear job descriptions are more important to their roles, compared to a typically overpriced, poorly scoped system.

Staff engagement comes in many forms, but training is a key element. With many Australian companies under financial pressure, they feel their focus could be better spent elsewhere with training given little importance. This was supported by the responses we received, with 59% of Planners claiming they haven't received adequate training. With almost 60% of planners desiring more training, it leaves the door open for top performers to eventually seek out and join organisations that will invest in their staff. Training for Planners could be either technical or behavioural; Excel training, systems training, product knowledge or APICS CPIM to leadership, influencing or negotiation courses.

Finally, what do Planners really want? What improvements would most benefit them? The top 5 requests were S&OP improvements and greater buy-in, ERP upgrade/training, more advanced reporting tools, less Excel (advanced forecasting tools) and for KPI's to be better aligned to business objectives.



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