BEM VINDOS, BEM VINDAS!









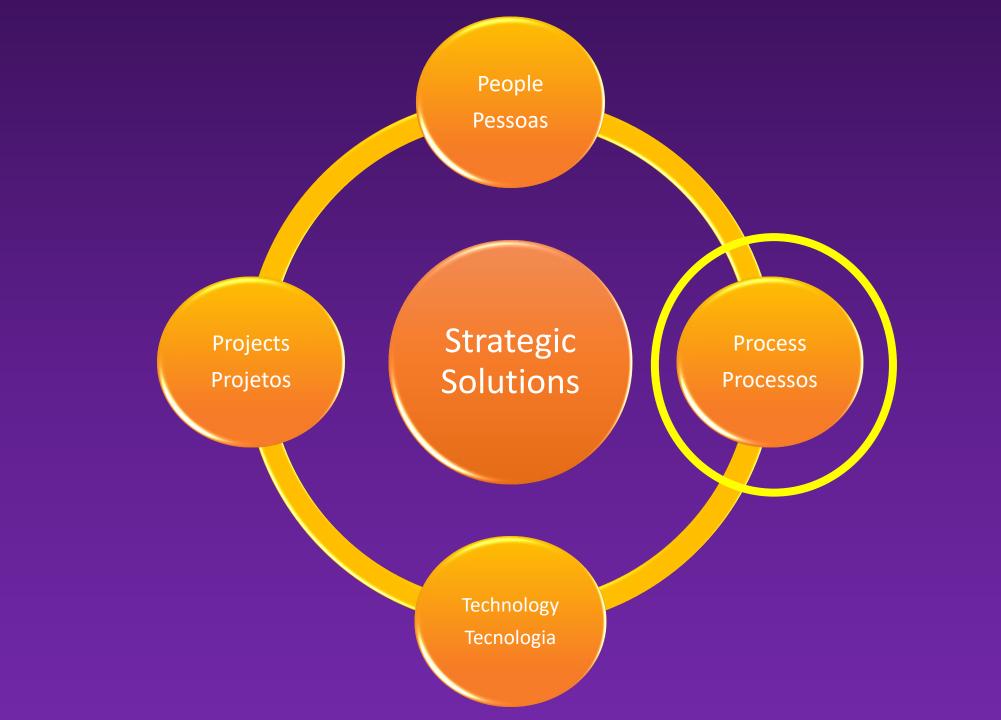
IBP - Integrated Business Planning – Planejamento Integrado de Negócios

✓ Como a empresa pode atingir a maturidade do processo

✓ Desafios

✓ Beneficios







EVOLUÇÃO DO IBP (S&OP > IBP ≠ S&OE)

70s

início 80s

meados 80s

final 80s

final 90s início 2000s

meados 2000s

início **2020s**

Planejamento de produção

Planejamento de vendas e operações Balanceamento de oferta e demanda e controle de estoque

Integração Financeira Integração de gerenciamento de produtos e portfólio Planejamento de Cenário e Implantação Estratégica

Colaboração Supply Chain Integrated Business Planning/ Gestão da estratégia



Sales and Operations Planning - Planejamento de Vendas e Operações Integrated Business Planning - Planejamento Integrado de Negócios

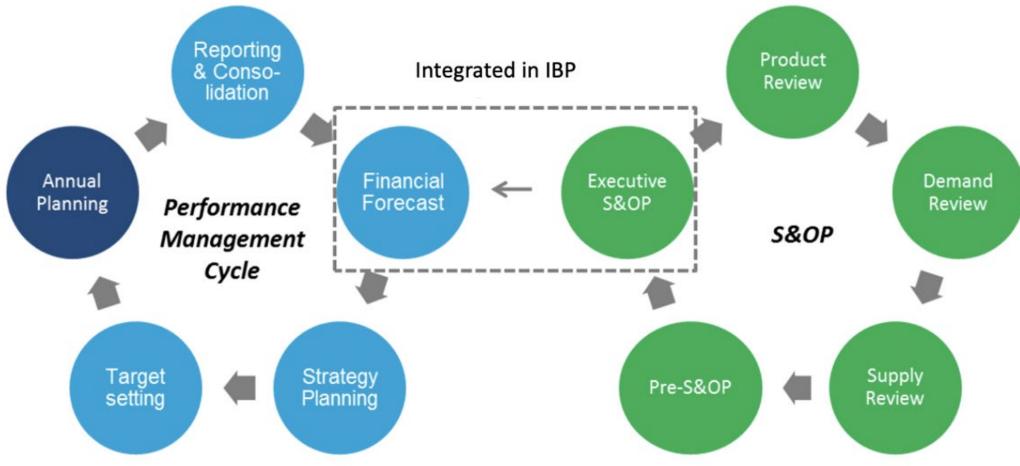
Sales and Operations Execution - Execução de Vendas e Operações



IBP

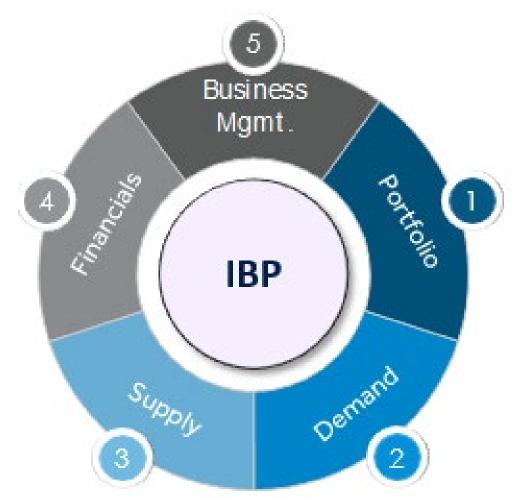












IBP – MATURITY (ADVANCED S&OP) – CAPABLE MILESTONE

Knowledge-based Integrated Business Planning

- Structural modelling; Some knowledge-based automation
- Customers Strategic alliances for long term horizon; shared gain
- Exploiting strategic opportunities through organization agility
- Process operates at all levels of the corporate structure

Advanced Integrated Business Planning

- Customer Experience Value Chain focus
- Optimization scenario planning & modeling
- Strategically driven
- Reshapes to meet changing organization
- Shaped to operate at all levels of the corporate structure;
- Supply chain with established collaboration
- Continuous Integrated Reconciliation
- Risks modelled, mitigated and managed through the process

Capable Integrated Business Planning

- Integrated Business plans with scenario planning
- Process used to create Annual Business Plan
- Business decisions not functional; Team working
- Formal way to run the business; this is the decision making process
- Risk assessed
- This process helps to shape optimal organizational structure
- Bottom up challenges the Top Down (Strategy, Business Plan and directives)

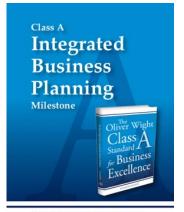
Foundation Process

- All elements defined with correct accountability, KPI's and structure
- Focus is demand /supply tactical balancing
- Initiate integrated supply chain KPI's
 Challenging behaviors but not yet team working

Disconnected Management Processes

- Traditional management meeting focused on the past
- Annual budgeting process with poor basis for forward projections
- Functional/silo management few/unaligned objectives & measures
- Defensive functional behaviors





OLIVER WIGHT WORKBOOK

Adv S&OP (IBP)

Capable Milestone

IBP - INTEGRATED BUSINESS PLANNING PROCESS

Characteristic	Typical Good						Typical Poor					
	10	9	8	7	6	5	4	3	2	1	О	
Behavior	Committed, Realistic, Integrated, Teamwork						Compliant, skeptical, assign blame, passive					
Frequency	Monthly						Weekly/Quarterly					
Horizon	24+ month rolling						Historical bias; 3 to 12 month or shrinking					
Language	Segments, Brands, Products					SK	SKU & detail					
Decisions	Tactical and Strategic					No	No decisions, Information sharing					
Business Focus	Exception-based routine re-planning, company perspective					Sh	Short-term Functional planning					
Involvement	Executive Led with Middle Management						Middle Management					
Outcome	Gap-Closing Plans linked to execution						Production output					
Process	Strategy Deployment Driven; Integrated with Financial Planning						Meeting to review volume numbers					
Performance	Review performance to date and projected performance						Historical, no causal analysis or corrective action					
Optimization	Scenario Modeling, Risk Mgmt						A plan					

IBP MATURITY ASSESSMENT

OVERVIEW

WHAT

- A tool built upon industry best practices identified by Gartner
- Used to measure progress across 6 key elements (outcome, process, organization, metrics, time horizon, technology)

WHY

- Measure progress & ensure we achieve desired outcomes
- Identify gaps and develop course correction

WHO

- Facilitated by IBP leads
- Participants: key contributors from Sales, Marketing, Finance, Supply Chain, Regulatory

WHEN

- Baseline was September/October FY23
- Repeat at the end of Q4 FY23
- After that once a year at the end of Q4

MATURITY JOURNEY





- BU-specific metrics
- Revenue focus; firefighting
- No centralized analysis

2 ANTICIPATE

- Function-specific metrics that often conflict
- Siloed solutions

FY23 GOAL INTEGRATE (Defined as IBP)

- OU ownership
- IBP Integrated Strategic Planning/AOP/S&OE
- Integrated decision-making
- Balanced metrics



COLLABORATE (Requires APS)

- Executive level ownership
- High automation reporting and analysis
- Internal and external metrics



ORCHESTRATE

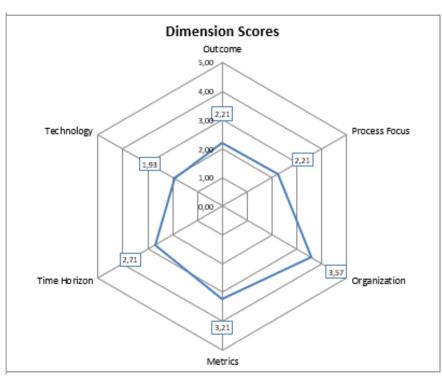
 Network-centric decisions; translating innovation into execution

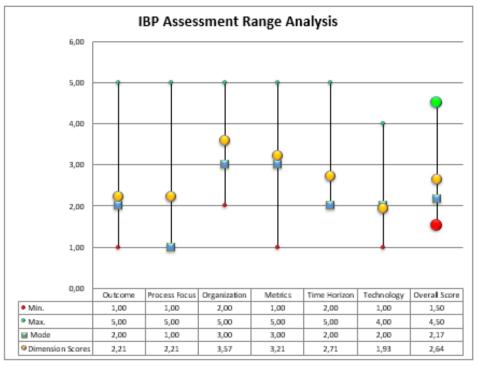
Further Defined: End of FY22 - All OUs at Stage 2 at minimum; End of FY23 - Org average maturity Stage 3





IBP MATURITY ASSESSMENT



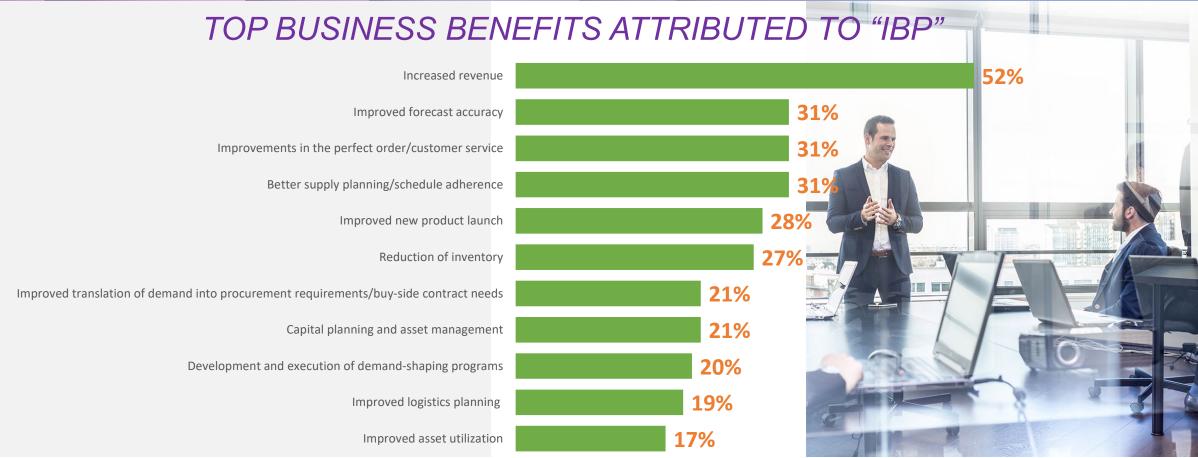


Dados fictícios



WHAT AN EFFECTIVE IBP PROCESS LOOKS LIKE

- ✓ The company's functional plans are aligned. These plans include sales, marketing, supply chain, operations, product and portfolio, and the resulting financial plans.
- ✓ Bias has been eliminated from product, demand and supply plans.
- ✓ The planning horizon is at least 24 months rolling to ensure that capabilities required to support the execution of the plans are available, developed, or acquired.
- ✓ Projected gaps in achieving the business plan (annual plan) and in deploying strategies are identified with sufficient time to act to close the gaps.
- ✓ A balanced and integrated set of KPIs measure business performance to determine how well the company executes its plans and achieves its goals and to take actions to sustainably improve execution.
- ✓ The company operates to one set of integrated numbers used by all functions in the business.
- ✓ The company Leadership Team owns and is actively engaged in the process.
- ✓ IBP helps to create empowerment that enables decisions to be made at the right time by the right people.
- ✓ The benefits of integrating the company's core processes monthly ensure that top-down decisions and commitments are routinely aligned with bottom-up plans, information and decisions.



^{*} Bechmark OW Class A Companies

Sources: AMR, Aberdeen, Ventana Fonte: https://oliverwight-eame.com/resource/books





Dúvidas?







Fontes e reconhecimentos

Fontes para base teórica







Fontes para base prática



Medtronic

Engineering the extraordinary





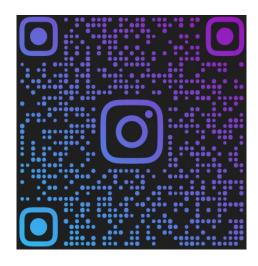


WhatsApp contact



Wiviane Marshal

(11) 9 7298 7000 wivianemarshal@gmail.com wiviane_marshal_strategic https://www.linkedin.com/in/wiviane-marshal/ Instagram contact



Gestão Estratégica Empresarial | Strategic Pricing, FP&A
Process & Operational Excellence (IBP Integrated Business Planning, S&OP, S&OE)
Tratadora Treinadora Líder de Equinos
Bombeira Civil Industrial e Guarda Vidas – Internacional

Consultorias – Palestras – Treinamentos