Scoping Questionnaire

SUPPLY PLANNING

Anaplan

Supply Planning Org

SCOPING QUESTIONNAIRE

Anaplan

Supply Planning Organization

- ☐ Do all the regions of your organization plan the same way? If different, how?

- ☐ What granularity of the product are you planning? (e.g. SKU, product, family, demand forecast units, etc.)

- ☐ What is the time period of your supply plan, production plan, and master production schedule if applicable? (e.g. weekly, monthly, quarterly, etc.)

- ☐ How many time periods in the future do you set your supply plan (e.g. 12 months)?

- ☐ How frequently do you update your plans?

- ☐ Does the planning process vary by product type or product family, manufacturing facility or source? If so, how?

- ☐ How do you incorporate inventory requirements into your supply plan? Do you incorporate your supply plan back into your inventory optimization plan?

- ☐ Do your planning processes differ by product group?

- ☐ Do you sell products in bundles? How do you plan for that?

Process

SCOPING QUESTIONNAIRE

Anaplan

Process

☐ What is the life of your supply planner? (e.g. on a weekly, monthly and quarterly basis)

☐ How often do you run MRP? How often do you execute your MRP?

☐ What is your planned order release window? How often do you release purchase orders?

☐ Do you have a manual approval process for placing purchase orders that were not created through the MRP process?

☐ How do you do your variance analysis?

☐ What does your typical cadence look like?

☐ Do you have a manual review process that you follow to confirm validity of purchase recommendations and exception messages generated through the MRP process?

☐ Do you have any special processes in place for requesting material at the end of financial periods (i.e. month end, quarter end, etc.)?

☐ Are orders created in your ERP system?

☐ Do you transmit forecast to your suppliers? How? (email, edi, fax) How often? Do you transmit net or gross demand?

☐ Do you have a process for order confirmation from your suppliers?

☐ Do you have a system to review coverage/shortage reports?

☐ Is your shortage management process based on a manufacturing / build plan?

☐ What horizon does these reports cover (i.e. week, month, quarter)?

☐ How often are these reports distributed to the procurement team?

☐ Do you have ROP, safety stock or safety lead times set up in your ERP system?

☐ Do you have MOQ's, rounding profiles, planning time fences that are critical for your planning process?

☐ Do you have any special processes in place based on ABC classification that are controlled within or outside of the ERP system (i.e. quarterly ordering policy for low dollar parts, auto PO, 2 bin systems, consumables, etc.)

Production Planning

SCOPING QUESTIONNAIRE

Anaplan

Production Planning

Anaplan

- ☐ How do you plan your manufacturing schedule? (e.g. weekly, biweekly, etc.)
  - ☐ Do you do a clear to build assessment using ERP or another tool?
- ☐ Do you build to forecast or orders or both?
- ☐ Do you have contractual requirements for building a FG buffer or safety stock? (might be CM only)
- ☐ Do you consider factory capacity or other resource capacity before you schedule builds? If so, at what level (i.e. rough cut factory capacity, critical resource centers)?
- ☐ Do you review material availability prior to order release?
- ☐ Do you only release orders that have material available? Or do you release orders based on the MRP recommended due date?
- ☐ What is your output to your DRP system?
- ☐ What are the inputs that guide your production schedule?

Data

SCOPING QUESTIONNAIRE

Anaplan

Data – Source

Anaplan

- ☐ How many weeks/month of demand are you planning for?
- ☐ Do you utilize multi-level Bill of Materials? And if so, how many levels?
- ☐ What is the frequency, size and source for the following?
  - ☐ Inventories
  - ☐ Inbound shipments
  - ☐ Inter-warehouse movements
  - ☐ Sales orders
  - ☐ Production / WIP
- ☐ For each of the following category hierarchies:
  - ☐ Products
  - ☐ Organization
  - ☐ Customer
  - ☐ Distribution centers
  - ☐ Distributors
  - ☐ Point of sales

- ☐ Suppliers
- ☐ Geographies / regions
- ☐ Manufacturing facilities
- ☐ What are your source systems?
- ☐ What is your current frequency of updates?
- ☐ How many items are in each hierarchy?
- ☐ How many levels are in each hierarchy?

Data – Output

Anaplan

- [ ] What are the organizations that will receive your purchasing plan, production plan, and/or MPS?
- [ ] What are the critical reports that will be required?
- [ ] What are the systems of record for your supply plan?
- [ ] What level of granularity is required for your supply plan in regards to the following categories:
    - [ ] Products
    - [ ] Organization
    - [ ] Customer
    - [ ] Distribution centers
    - [ ] Distributors
    - [ ] Point of sales
    - [ ] Suppliers
    - [ ] Geographies / regions
    - [ ] Manufacturing facilities
- [ ] What is your current frequency of updates?

Users

SCOPING QUESTIONNAIRE

Anaplan

Users

Ʌnaplan

- ☐ What are the types of roles of the anticipated users of Anaplan?
    - ☐ How many users do you anticipate for each type of role?
- ☐ How will each role interact with the model?
    - ☐ Are there individuals who fit into more than one role?
- ☐ How are the users accessing the platform? Via SSO? Or else?
- ☐ What level(s) of hierarchies should the permission be granted?

User Interface

SCOPING QUESTIONNAIRE

Anaplan

User Interface Design

Anaplan

- ☐ Who are the end users?

- ☐ What is their technical aptitude?

- ☐ What are some examples of current user interfaces?

- ☐ Do the users use PC, Mac, or both?

  - ☐ What is the typical resolution of the users' computer screen?

  - ☐ What browser(s) are used?

- ☐ Are other devices used? If so, what (e.g., mobile, tablet, TV screen, double screen, etc.)?

Other Considerations

SCOPING QUESTIONNAIRE

Anaplan

Other Considerations

- ☐ How would you measure success of your project? Which metrics do you need to achieve?
- ☐ How are the decisions made in your organization?
  - ☐ What are the technical criteria to make a decision?
- ☐ Who will sign off on moving forward at each stage?
- ☐ Who is in the power base?
- ☐ What is the consequence of doing nothing?
- ☐ Who is willing to carry the Anaplan flag internally?
- ☐ Who is your executive sponsor?
- ☐ Who is your project sponsor / business owner?
- ☐ Who are the model owner(s)? Model builder(s)?
- ☐ Who will attend Anaplan training? How many people?
- ☐ Do you have change management resources who will help with training?
- ☐ How do you plan to train your end users?
- ☐ Users will need to have suitable access to modules, lists, versions and actions. Who will provision users?
- ☐ What is your desired go-live timing?