



Scoping Questionnaire

S&OP

 anaplan

Process

SCOPING QUESTIONNAIRE

- Who owns the S&OP process and decision-making in your company? Describe the approval process.
- Who participates in the S&OP process? What are their roles and responsibilities?
 - What are their inputs of your S&OP process?
 - What are their outputs of your S&OP process?
 - How often do they participate? (e.g. quarterly, monthly, weekly, etc.)
- What are the dimensions for planning, and how many items are there in each dimension?
 - In addition to SKU and weeks, do they incorporate, GEOs/channels/anything else?
- What are the dimensions for reporting?
 - Do they report on the same dimensions as planning or want to slice and dice with other dimensions?
- Do you what-if scenario planning, and how many variations do you typically create for real-time analysis?
- What level of granularity are the finance and sales plans?
 - How do we marry those to the demand planning bottoms up plan?
- What are the required outputs of S&OP process?
 - What are their frequencies?
 - What are the needed formats?

Data

SCOPING QUESTIONNAIRE

Data – Source

- How many weeks/month of demand, supply and sales forecast data do you need for each S&OP process?
- What is the source system for:
 - Facility capacity data
 - Approved OPEX / CAPEX projects
- 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

- What are the organizations that will receive your S&OP outputs?
- What are the critical reports that will be required?
- What are the systems of record for your CAPEX / OPEX projects?
- What level of granularity is required for your S&OP outputs 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?
- What are the key benchmarks, including but not limited to:
 - Inventory reduction
 - Fulfillment cycle time
 - Supply chain costs
 - Fill rates

Users

SCOPING QUESTIONNAIRE

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Users



- 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

User Interface Design

- 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

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?