

Designing and Implementing a Best-in-Class IBP Process to Drive Cross-Functional Alignment

The client, a rapidly growing nutrition food company, recently underwent a transformative phase following its acquisition by a multinational food company. Prior to the acquisition, the client had a medium-maturity Sales and Operations Planning (S&OP) process to manage their operations. Problem-solving often occurred in siloes, as each function managed its own forecast and set of assumptions. Recognizing the need for a more holistic solution, the client made the strategic decision to shift from S&OP to Integrated Business Planning (IBP) and enlisted the help of Clarkston Consulting.

Clarkston led the client through design and implementation of a leading best-in-class IBP process that fostered alignment across Demand Planning, Supply Planning, Finance, Sales and Marketing, and other functions. This new IBP process allowed the client to align strategic, operational, and financial goals. To ensure the new process would stick, Clarkston developed a robust change management strategy for the adoption of the new IBP process as well as a frictionless transition from the prior S&OP process. Through this effort, Clarkston connected key stakeholders from both the acquired and parent company to ensure metrics were aligned, learnings from the parent company's existing IBP process were adopted, and that the new IBP process was right-sized for where the company was in its integration journey.

Consumer Products Case Study

PROJECT OVERVIEW

INDUSTRY:



Food & Beverage

PRODUCTS AND SERVICES:



Confectionery, Beverage, and
Snack Foods

PRIMARY OBJECTIVES:

- Build an end-state IBP process designed to manage, translate, and align Strategic, Operational, and Financial goals
- Develop an IBP Roadmap that includes tools, processes, roles and responsibilities mapping, activation timeline, execution considerations, and dependencies
- Design and gain alignment with key IBP stakeholders on the responsibilities and process elements of the future-state IBP process
- Develop IBP process maps, RACI (*Responsible, Accountable, Consulted, Informed*) documentation, and SIPOC (*Suppliers, Inputs, Process, Outputs, Customers*) diagrams for each core IBP process, from Demand through Supply Planning and Financial Integrated Reconciliation and into the executive-level Management Business Review
- Assess data availability and system/technology requirements to support the end-state IBP process
- Facilitate change management by developing IBP training materials and post-training job aids, along with a clear and consistent communication plan to keep all stakeholders informed about the IBP launch

RESOLUTION:

- Assessed the client's current S&OP process and parent company's existing IBP process to understand and address immediate pain points and identify quick wins
- In the design of the new IBP process, facilitated blueprinting design workshops across Demand Planning, Supply Planning, Finance, and Marketing, as well as executive leadership teams
- Leveraged insights and industry best practices to develop an end-to-end IBP design, including required inputs and expected outputs for each key process step and the design of streamlined "feeder" or pre-meetings
- Developed and implemented a Training and Communications Plan, including creating training materials, job aids, readiness checklists, communications collateral, and other deliverables impacting 100+ stakeholders
- Executed a continuous improvement approach that included post-meeting debriefs with meeting facilitators and executive leadership as well as surveys to capture participant feedback and suggestions for improvement
- Secured commitment and visible support from top leadership to reinforce the importance of the IBP initiative, empowering process leaders to champion the change

KEY BENEFITS:

- Leading best-in-class IBP process to allow for:
 - Effective business integration and decision-making across time horizons and functional plan alignment with a single operational plan
 - Increased collaboration and ownership across teams, aligned to one set of assumptions, numbers, and forecast
 - Enhanced precision on expected outcomes, such as forecast accuracy and the latest forecast estimate, and increased resiliency to disruptions
- Highly engaged stakeholder group through training and support for IBP team members, including the opportunity to give feedback and ask questions to gain trust as the new process was launched



KPIs

Leveraging supply chain planning expertise and IBP best practices, developed:

- Training content (and support) for over 50+ office hours for impacted IBP stakeholders and functional teams
- 15+ supporting tools and standardized templates to support the IBP process (*Demand Building Blocks templates, data collection files, meeting management templates, etc.*).
- One comprehensive IBP playbook to document the end-to-end IBP process, RACI, and supporting tools & subprocesses

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