



Business Process Evaluation Questions

Global S&OP “Class A” Assessment Checklist

The global “Class A” Checklist incorporate multiple questions. The answer to each question is a rating number from 1 (strongly disagree) to 5 (strongly agree) where current performance is:

- 1 – not doing it at all
- 2 – poor
- 3 – fair
- 4 – good
- 5 – very good / excellent

Study the questions carefully. Some may not be applicable in certain companies. A qualified consultant can tailor the checklist to your specific business situation while retaining the integrity of the “Class A” Assessment.

For S&OP “Class A” Certification, the standards must be achieved and maintained for a minimum of one calendar or financial quarter.

S&OP “Class A”: DETERMINING CLASS STATUS.

The global and site checklist ratings are both calculated using the same methodology with one exception.

For a business to be considered as a Global S&OP “Class A” business, each of the sites must be performing at an S&OP “Class A” level based on the Site S&OP “Class A” Checklist. This is question number 31 on the Global S&OP checklist. For “Class A”, no individual question can be rated below 2.0.

The ratings of all questions in the checklist are totaled then divided by the number of questions to determine the overall average. Scoring is as follows...

- 4.5 or higher = Class A**
- 3.5 to 4.49 = Class B**
- 2.5 to 3.49 = Class C**
- Below 2.49 = Class D**

Source: Jack Gips Inc., Robert L. Jones Inc., Partners for Excellence, Gray Research



Business Process Evaluation Questions

actions taken where required. Where appropriate, demand chain partners (dealers, distributors, wholesalers, etc.) are included as participants in the process with clearly defined responsibilities and roles.

0 1 2 3 4 5
strongly disagree strongly agree

GP4. The Supply Plan highlights recent past performance, capability and flexibility, and alternative supply scenarios. Commitment is made to an achievable supply plan in response to demand and product management requirements while managing resources and costs. Comparison of actual to planned performance is made, deviations explained, and corrective actions taken where required.

0 1 2 3 4 5
strongly disagree strongly agree

GP5. A rough cut capacity planning process is used to evaluate, both locally and globally, the impact of supply and demand strategies and shifts.

0 1 2 3 4 5
strongly disagree strongly agree

GP6. The S&OP process extends into the future at least as long as the longest Site S&OP horizon. An analysis of the corporate issues, global bottlenecks, and response times has been performed and the S&OP horizon has been extended, if necessary, to facilitate S&OP planning across a longer global horizon.

0 1 2 3 4 5
strongly disagree strongly agree

GP7. Changes to plans are managed based on published guidelines which reflect critical lead times and time frames ("time fences"), based on both local and global considerations. These guidelines also specify the level of detailed analysis and required organizational approvals for each type of change across the time horizon.

0 1 2 3 4 5
strongly disagree strongly agree

GP8. Planning is based upon considering both the unconstrained and constrained demand, if necessary. The unconstrained Demand Plan is used to determine upside potential and resources required. A consensus constrained rolling forecast plan and related supply and inventory plans are among the key outputs of the S&OP process for a company operating under capacity constraints. They are based upon the current and actual constraints and agreed upon achievable action plans.

0 1 2 3 4 5
strongly disagree strongly agree

GP9. A written Global Sales & Operations Planning policy defines the global product families and the participants, responsibilities, timing, and objectives of each step in the process. It also defines how the various site S&OP issues of global focus are aggregated, discussed, and elevated to the Global S&OP level. In addition, it needs to include an emergency clause stating how to handle situations that cannot wait until the next S&OP cycle. Published policies and procedures specify required participants or meeting attendees for each step of the process. They also document specific responsibilities for each activity, sub-process, data element and performance measurement in the process. Included should be criteria for the frequency and timeliness of update of critical data elements such as local forecasts, production plans, inventories, etc.

0 1 2 3 4 5
strongly disagree strongly agree

Source: Jack Gips Inc., Robert L. Jones Inc., Partners for Excellence, Gray Research

