

Unlocking Efficiencies with NetSuite ERP Demand Planning

Strategies for Customer-Centric Success



AGENDA

Introductions

What is Demand Planning and Best Practices

Demand Planning and MRP for Your Business

Demand Planning Strategies

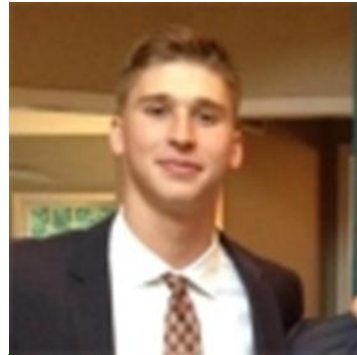
Q&A



Today's Speakers



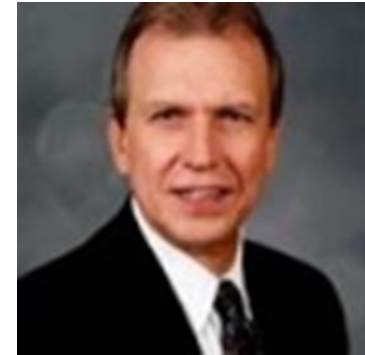
Marcus Colosimo
Director, NetSuite Specialist
- Fairport, NY



Rob Fredericks
Manager, Management
Consulting
- San Diego, CA



Madeline Hurt
Supervisor, NetSuite
Consulting
- Atlanta, GA



Les Jankiewicz
Senior Director,
NetSuite SCM Consulting
- Schaumburg, IL



NetSuite Demand Planning

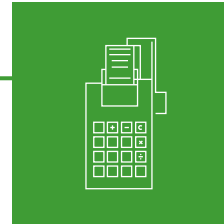
Best Practices

Demand Planning

A SCM process that forecasts demand using various methods and optimizes inventory, costs, and customer satisfaction



Demand planning is a multi-step operational supply chain management (SCM) process used to create reliable forecasts.



Effective demand planning can guide users to improve the accuracy of revenue forecasts, align inventory levels with peaks and valleys in demand, and enhance profitability for a given channel or product.



NetSuite Demand Planning forecasting projection methods:

- Moving Average
- Linear Regression
- Seasonal Average
- Actual Sales

Master Data Management

Accurate and timely data on inventory, orders, lead times, and production is essential for effective ATP, Demand Planning, and MRP Supply Planning

01

On Hand Inventory accuracy (+95%)

02

Accurate Purchase Order, Work Order and Transfer Order Lead Times

03

Line item Expected Ship Date on Sales Orders and Transfer Orders

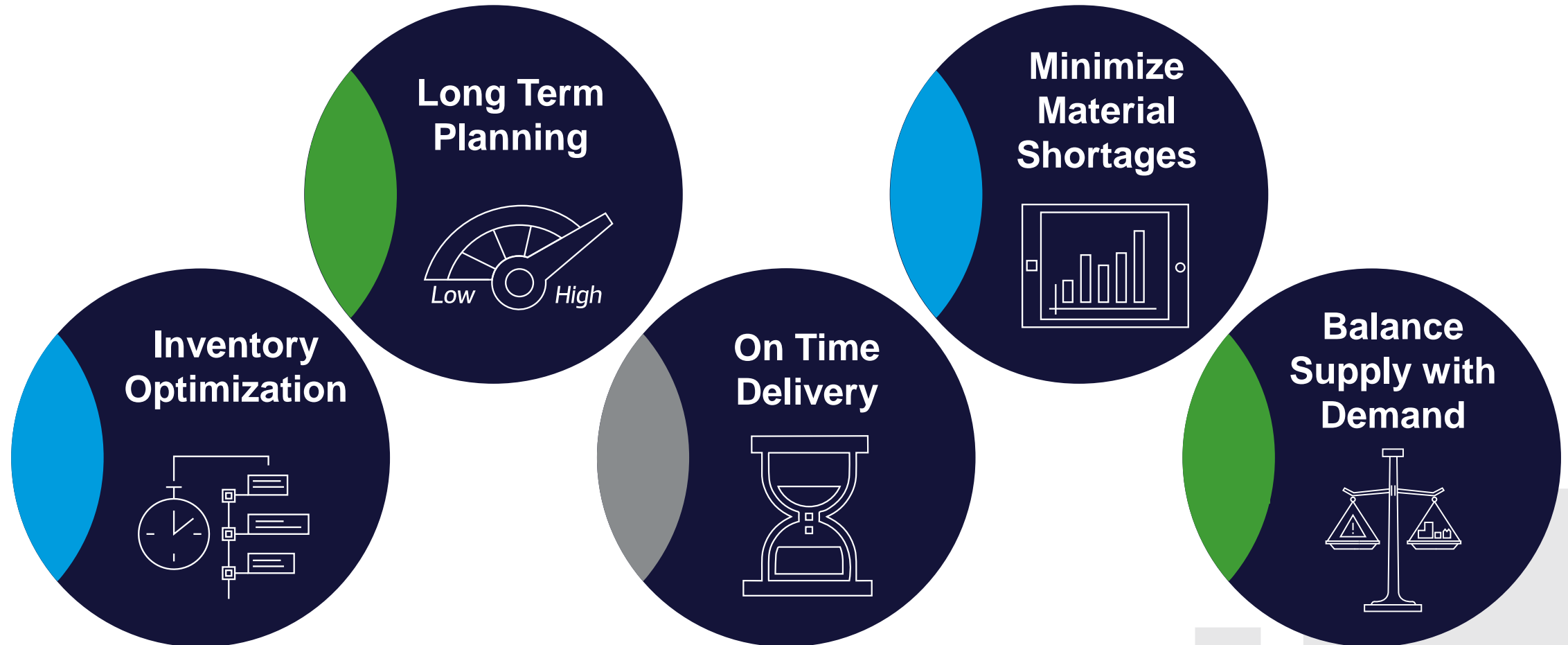
04

Line item Expected Receipt Date on Purchase Orders

05

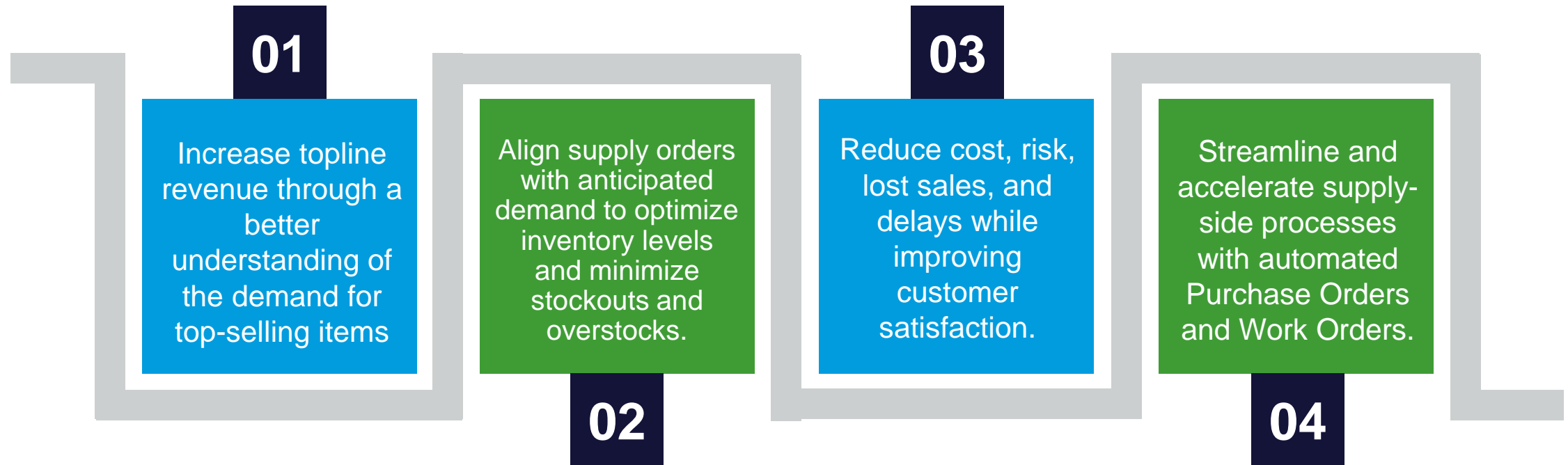
Production Start and End Date on Work Orders

Key Problems Demand Planning Solves



Key Benefits of Demand Planning

Help businesses **increase revenue, reduce costs, improve customer satisfaction** and **automate processes** by **analyzing demand, optimizing inventory** and **facilitating orders**.





Demand Planning and MRP for Your Business

How RSM and NetSuite Can Help

The newly re-designed NetSuite demand planning-MRP interface and workbench has led to a 3-fold increase in NetSuite user adoption

NetSuite Demand Planning Overview



Planning Workbench

Plan List Event Log

SUPPLY PLAN DEFINITION RSM SUPPLY PLAN F+S

REPOSITORY REFRESHED 2/29/2024 1:55 pm

DATE RANGE

PLANNING HORIZON 2/29/2024 - 2/28/2025

RESULTS GENERATED 2/29/2024 1:55 pm

2/29/2024 To 2/28/2025

ITEM FILTERS

PLANNING WORKBENCH VIEW

REPLENISHMENT METHOD

PLANNING ITEM CATEGORY

ITEM

All Locations

Huffman Mfg.

MESSAGE / ORDER FILTERS

ACTION TYPE: EXCEPTION TYPE: SUPPLY TYPE: DEMAND TYPE:

[Return to Summary](#) Viewing Results for AAA-M FG ASSEMBLY

| Action | Exception | Supply | Demand | | |
|---------------------------------|-----------|-----------------------------------|-------------------|----------|-------|
| DEMAND | DUE DATE | ITEM | LOCATION | QUANTITY | UNITS |
| Sales Order #SLS00001091 | 3/4/2024 | AAA-M FG ASSEMBLY : AAA-M FG ASSY | 01: San Francisco | 200 | Ea |
| Sales Order #SLS00001090 | 3/20/2024 | AAA-M FG ASSEMBLY : AAA-M FG ASSY | 01: San Francisco | 450 | Ea |
| Item Demand Plan #2757 | 4/1/2024 | AAA-M FG ASSEMBLY : AAA-M FG ASSY | 01: San Francisco | 130 | Ea |
| Item Demand Plan #2757 | 5/1/2024 | AAA-M FG ASSEMBLY : AAA-M FG ASSY | 01: San Francisco | 200 | Ea |
| Item Demand Plan #2757 | 6/1/2024 | AAA-M FG ASSEMBLY : AAA-M FG ASSY | 01: San Francisco | 185 | Ea |
| Item Demand Plan #2757 | 7/1/2024 | AAA-M FG ASSEMBLY : AAA-M FG ASSY | 01: San Francisco | 390 | Ea |
| Item Demand Plan #2757 | 8/1/2024 | AAA-M FG ASSEMBLY : AAA-M FG ASSY | 01: San Francisco | 410 | Ea |
| Item Demand Plan #2757 | 9/1/2024 | AAA-M FG ASSEMBLY : AAA-M FG ASSY | 01: San Francisco | 300 | Ea |
| Item Demand Plan #2757 | 10/1/2024 | AAA-M FG ASSEMBLY : AAA-M FG ASSY | 01: San Francisco | 500 | Ea |

Show: 200 of 1 Total: 9

Planning Workbench

[Plan List](#) [Event Log](#)

SUPPLY PLAN DEFINITION [RSM SUPPLY PLAN F+S](#)

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PLANNING ITEM CATEGORY

ITEM

All Locations

 > Huffman Mfg.

MESSAGE / ORDER FILTERS

ACTION TYPE: EXCEPTION TYPE: SUPPLY TYPE: DEMAND TYPE:

RESULTS SUMMARY Show: of 1 ⏪ ⏩ Total: 5

| ITEM DETAILS | | INVENTORY MEASURES | | | | MESSAGE / ORDER COUNTS | | | |
|---|--------------------|--------------------|---------|----------|-------------|------------------------|-----------|--------|--------|
| ITEM | ITEM DESCRIPTION | UNITS | ON-HAND | ON-ORDER | LATE DEMAND | ACTION | EXCEPTION | SUPPLY | DEMAND |
| ALL ITEMS | ALL ITEMS | --- | --- | --- | --- | 6 | 7 | 38 | 37 |
| <input checked="" type="checkbox"/> AAA-M FG ASSEMBLY | AAA-M FG ASSY | Ea | | | 200 | 1 | 1 | 9 | 9 |
| <input type="checkbox"/> BBB-M COMPONENT | BBB-M COMPONENT | Ea | 10 | | 240 | 1 | 2 | 10 | 10 |
| <input type="checkbox"/> DDD-M SUB ASSY | DDD-M SUB ASSEMBLY | Ea | | | 650 | 1 | 2 | 8 | 9 |
| <input type="checkbox"/> BBB-M COMPONENT | BBB-M COMPONENT | Ea | 10 | | 240 | 1 | 2 | 10 | 10 |
| <input checked="" type="checkbox"/> DDD-M SUB ASSY | DDD-M SUB ASSEMBLY | Ea | | | 650 | 1 | 2 | 8 | 9 |
| <input type="checkbox"/> EEE-M COMPONENT | EEE-M COMPONENT | Ea | 5 | 195 | 720 | 3 | 2 | 11 | 9 |
| <input type="checkbox"/> EEE-M COMPONENT | EEE-M COMPONENT | Ea | 5 | 195 | 720 | 3 | 2 | 11 | 9 |

PLANNING PERIOD SIZE

Monthly

[Grid View](#) | [Graph View](#)

| ITEM: EEE-M COMPONENT | PAST DUE | 2/1/2024 | 3/1/2024 | 4/1/2024 | 5/1/2024 | 6/1/2024 | 7/1/2024 | 8/1/2024 | 9/1/2024 | 10/1/2024 | 11/1/2024 |
|-------------------------------------|----------|----------|----------|----------|----------|----------|----------|----------|----------|-----------|-----------|
| Unconsumed Forecast | | | | | | | | | | | |
| <i>Sales Orders</i> | | | | | | | | | | | |
| <i>Planned Transfer Orders</i> | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| <i>Transfer Orders</i> | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Total Demand | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| <i>Parent Planned Work Orders</i> | 0 | 650 | 130 | 200 | 185 | 390 | 410 | 300 | 500 | 0 | 0 |
| <i>Parent Work Orders</i> | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Production Requirements | 0 | 650 | 130 | 200 | 185 | 390 | 410 | 300 | 500 | 0 | 0 |
| Projected Gross Requirements | 0 | 650 | 130 | 200 | 185 | 390 | 410 | 300 | 500 | 0 | 0 |
| <i>Current Item Purchase Orders</i> | 0 | 0 | 195 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| <i>Current Item Work Orders</i> | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| <i>Current Item Transfer Orders</i> | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Scheduled Receipts | 0 | 0 | 195 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Safety Stock | 75 | | | | | | | | | | |
| Projected Available Balance | 5 | -645 | -580 | -780 | -965 | -1,355 | -1,765 | -2,065 | -2,565 | -2,565 | -2,565 |
| Adjusted Available Balance | 5 | -645 | 75 | 75 | 75 | 75 | 75 | 75 | 75 | 75 | 75 |
| <i>Firm Planned Order</i> | | | | | | | | | | | |
| <i>Planned Order</i> | | | 655 | 200 | 185 | 390 | 410 | 300 | 500 | | |
| System Orders | 0 | 0 | 655 | 200 | 185 | 390 | 410 | 300 | 500 | 0 | 0 |

PLANNING PERIOD SIZE

Monthly

[Grid View](#) | [Graph View](#)

| ITEM: EEE-M COMPONENT | PAST DUE | 2/1/2024 | 3/1/2024 | 4/1/2024 | 5/1/2024 | 6/1/2024 | 7/1/2024 | 8/1/2024 | 9/1/2024 | 10/1/2024 | 11/1/2024 |
|-------------------------------------|----------|----------|----------|----------|----------|----------|----------|----------|----------|-----------|-----------|
| <i>Item Forecast</i> | | | | | | | | | | | |
| Unconsumed Forecast | | | | | | | | | | | |
| <i>Sales Orders</i> | | | | | | | | | | | |
| <i>Planned Transfer Orders</i> | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| <i>Transfer Orders</i> | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Total Demand | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| <i>Parent Planned Work Orders</i> | 0 | 650 | 130 | 200 | 185 | 390 | 410 | 300 | 500 | 0 | 0 |
| <i>Parent Work Orders</i> | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Production Requirements | 0 | 650 | 130 | 200 | 185 | 390 | 410 | 300 | 500 | 0 | 0 |
| Projected Gross Requirements | 0 | 650 | 130 | 200 | 185 | 390 | 410 | 300 | 500 | 0 | 0 |
| <i>Current Item Purchase Orders</i> | 0 | 0 | 195 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| <i>Current Item Work Orders</i> | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| <i>Current Item Transfer Orders</i> | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Scheduled Receipts | 0 | 0 | 195 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Safety Stock | 75 | | | | | | | | | | |
| Projected Available Balance | 5 | -645 | -580 | -780 | -965 | -1,355 | -1,765 | -2,065 | -2,565 | -2,565 | -2,565 |
| Adjusted Available Balance | 5 | -645 | 75 | 75 | 75 | 75 | 75 | 75 | 75 | 75 | 75 |
| <i>Firm Planned Order</i> | | | | | | | | | | | |
| <i>Planned Order</i> | | | 655 | 200 | 185 | 390 | 410 | 300 | 500 | | |

Planning Workbench

[Plan List](#) [Event Log](#)

SUPPLY PLAN DEFINITION [RSM SUPPLY PLAN F+S](#)

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PLANNING WORKBENCH VIEW

REPLENISHMENT METHOD

PLANNING ITEM CATEGORY

ITEM

All Locations

 > Huffman Mfg.

MESSAGE / ORDER FILTERS

ACTION TYPE: EXCEPTION TYPE: SUPPLY TYPE: DEMAND TYPE:

RESULTS SUMMARY Show: of 1 ◀ ▶ Total: 5

| ITEM DETAILS | | INVENTORY MEASURES | | | | MESSAGE / ORDER COUNTS | | | |
|---|--------------------|--------------------|---------|----------|-------------|------------------------|-----------|--------|--------|
| ITEM | ITEM DESCRIPTION | UNITS | ON-HAND | ON-ORDER | LATE DEMAND | ACTION | EXCEPTION | SUPPLY | DEMAND |
| ALL ITEMS | ALL ITEMS | --- | --- | --- | --- | 6 | 7 | 38 | 37 |
| <input checked="" type="checkbox"/> AAA-M FG ASSEMBLY | AAA-M FG ASSY | Ea | | | 200 | 1 | 1 | 9 | 9 |
| <input type="checkbox"/> BBB-M COMPONENT | BBB-M COMPONENT | Ea | 10 | | 240 | 1 | 2 | 10 | 10 |
| <input type="checkbox"/> DDD-M SUB ASSY | DDD-M SUB ASSEMBLY | Ea | | | 650 | 1 | 2 | 8 | 9 |
| <input type="checkbox"/> BBB-M COMPONENT | BBB-M COMPONENT | Ea | 10 | | 240 | 1 | 2 | 10 | 10 |
| <input checked="" type="checkbox"/> DDD-M SUB ASSY | DDD-M SUB ASSEMBLY | Ea | | | 650 | 1 | 2 | 8 | 9 |
| <input type="checkbox"/> EEE-M COMPONENT | EEE-M COMPONENT | Ea | 5 | 195 | 720 | 3 | 2 | 11 | 9 |
| <input type="checkbox"/> EEE-M COMPONENT | EEE-M COMPONENT | Ea | 5 | 195 | 720 | 3 | 2 | 11 | 9 |

Planning Workbench

Plan List Event Log

SUPPLY PLAN DEFINITION [RSM SUPPLY PLAN F+S](#)

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ITEM FILTERS

PLANNING WORKBENCH VIEW

REPLENISHMENT METHOD

PLANNING ITEM CATEGORY

ITEM

All Locations
 Huffman Mfg.

MESSAGE / ORDER FILTERS

ACTION TYPE: EXCEPTION TYPE: SUPPLY TYPE: DEMAND TYPE:

[Return to Summary](#) **Viewing Results for EEE-M COMPONENT**

| | Action | Exception | Supply | Demand | | | |
|--|--|--------------|-----------|-----------------------------------|-------------------|----------|-------|
| <input type="button" value="Perform Selected Actions"/> Show: <input type="text" value="200"/> <input type="text" value="1"/> of 1 < > Total: 3 | | | | | | | |
| <input type="checkbox"/> | ACTION | CHANGE ORDER | DATE | ITEM | LOCATION | QUANTITY | UNITS |
| <input type="checkbox"/> | Consider Releasing proposed Planned Purchase Order #12210 as it is nearing its lead-time threshold | | 2/29/2024 | EEE-M COMPONENT : EEE-M COMPONENT | 01: San Francisco | 525 | Ea |
| <input type="checkbox"/> | Reschedule in unfirm Purchase Order #PUR00001766 from 5/18/2024 to 3/10/2024 | | 5/18/2024 | EEE-M COMPONENT : EEE-M COMPONENT | 01: San Francisco | 95 | Ea |
| <input type="checkbox"/> | Reschedule in unfirm Purchase Order #PUR00001766 from 5/18/2024 to 3/10/2024 | | 5/18/2024 | EEE-M COMPONENT : EEE-M COMPONENT | 01: San Francisco | 100 | Ea |

Planning Workbench

Plan List Event Log

SUPPLY PLAN DEFINITION RSM SUPPLY PLAN F+S

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2/29/2024 To 2/28/2025

ITEM FILTERS

PLANNING WORKBENCH VIEW
 Select View

REPLENISHMENT METHOD
 All Methods

PLANNING ITEM CATEGORY
 RSM PLN ITEM CATEGORY

ITEM
 EEE-M COMPONENT

All Locations

Huffman Mfg.

MESSAGE / ORDER FILTERS

ACTION TYPE: All Actions

EXCEPTION TYPE: All Exceptions

SUPPLY TYPE: All Supply

DEMAND TYPE: All Demand

[Return to Summary](#) **Viewing Results for EEE-M COMPONENT**

| Action | Exception | Supply | Demand |
|--------|-----------|--------|--------|
| | Exception | | |

Show: 200 of 1 Total: 2

| EXCEPTION | DATE | ITEM | LOCATION | QUANTITY | UNITS |
|--|-----------|-----------------------------------|-------------------|----------|-------|
| Insufficient lead time for proposed Planned Purchase Order #12210 by 11 day(s) | 2/18/2024 | EEE-M COMPONENT : EEE-M COMPONENT | 01: San Francisco | 70 | Ea |
| Insufficient lead time for proposed Planned Purchase Order by 10 day(s) | 2/19/2024 | EEE-M COMPONENT : EEE-M COMPONENT | 01: San Francisco | 650 | Ea |

Planned Purchase Order #12210 Pegging

View Independent Demand

| ORDER | ITEM | LOCATION | START DATE | END DATE | PEGGED | TOTAL | ALLOCATED |
|-------------------------------|-------------------|-------------------|------------|-----------|--------|-------|-----------|
| Planned Purchase Order #12210 | EEE-M COMPONENT | 01: San Francisco | 2/29/2024 | 3/10/2024 | | 525 | |
| Planned Work Order #12227 | DDD-M SUB ASSY | 01: San Francisco | 2/29/2024 | 3/7/2024 | 525 | 650 | |
| Planned Work Order #12218 | AAA-M FG ASSEMBLY | 01: San Francisco | 2/29/2024 | 3/14/2024 | 200 | 200 | |
| Sales Order #SLS00001091 | AAA-M FG ASSEMBLY | 01: San Francisco | 3/4/2024 | 3/4/2024 | 200 | 200 | |
| Planned Work Order #12219 | AAA-M FG ASSEMBLY | 01: San Francisco | 3/6/2024 | 3/20/2024 | 450 | 450 | |

Planning Workbench

Plan List [Event Log](#)

SUPPLY PLAN DEFINITION [RSM SUPPLY PLAN F+S](#)

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ITEM FILTERS

PLANNING WORKBENCH VIEW

REPLENISHMENT METHOD

PLANNING ITEM CATEGORY

ITEM

All Locations
 Huffman Mfg.

MESSAGE / ORDER FILTERS

ACTION TYPE: EXCEPTION TYPE: SUPPLY TYPE: DEMAND TYPE:

[Return to Summary](#)
Viewing Results for EEE-M COMPONENT

Action
Exception
Supply
Demand

Show: of 1 [<](#) [>](#) Total: 11

| <input type="checkbox"/> | SUPPLY | START DATE | END DATE | FIRM | ITEM | LOCATION | SOURCE | QUANTITY | UNITS |
|--------------------------|---|------------|-----------|--------------------------|-----------------------------------|-------------------|-------------------|----------|-------|
| | On-Hand Quantity | 2/28/2024 | 2/28/2024 | | EEE-M COMPONENT : EEE-M COMPONENT | 01: San Francisco | | 5 | Ea |
| <input type="checkbox"/> | Planned Purchase Order #12210 | 2/29/2024 | 3/10/2024 | <input type="checkbox"/> | EEE-M COMPONENT : EEE-M COMPONENT | 01: San Francisco | Computers Extreme | 525 | Ea |
| | Purchase Order #PUR00001766 | 2/29/2024 | 3/10/2024 | | EEE-M COMPONENT : EEE-M COMPONENT | 01: San Francisco | Computers Extreme | 100 | Ea |
| | Purchase Order #PUR00001766 | 2/29/2024 | 3/10/2024 | | EEE-M COMPONENT : EEE-M COMPONENT | 01: San Francisco | Computers Extreme | 95 | Ea |
| <input type="checkbox"/> | Planned Purchase Order #12211 | 3/1/2024 | 3/11/2024 | <input type="checkbox"/> | EEE-M COMPONENT : EEE-M COMPONENT | 01: San Francisco | Computers Extreme | 130 | Ea |
| <input type="checkbox"/> | Planned Purchase Order #12212 | 3/31/2024 | 4/10/2024 | <input type="checkbox"/> | EEE-M COMPONENT : EEE-M COMPONENT | 01: San Francisco | Computers Extreme | 200 | Ea |
| <input type="checkbox"/> | Planned Purchase Order #12213 | 4/30/2024 | 5/10/2024 | <input type="checkbox"/> | EEE-M COMPONENT : EEE-M COMPONENT | 01: San Francisco | Computers Extreme | 185 | Ea |
| <input type="checkbox"/> | Planned Purchase Order #12214 | 5/31/2024 | 6/10/2024 | <input type="checkbox"/> | EEE-M COMPONENT : EEE-M COMPONENT | 01: San Francisco | Computers Extreme | 390 | Ea |
| <input type="checkbox"/> | Planned Purchase Order | 7/1/2024 | 7/11/2024 | <input type="checkbox"/> | EEE-M COMPONENT : EEE-M COMPONENT | 01: San Francisco | Computers Extreme | 410 | Ea |



Planning Workbench

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ITEM FILTERS

PLANNING WORKBENCH VIEW

Select View

REPLENISHMENT METHOD

All Methods

PLANNING ITEM CATEGORY

RSM PLN ITEM CATEGORY

ITEM

EEE-M COMPONENT

All Locations

Huffman Mfg.

MESSAGE / ORDER FILTERS

ACTION TYPE

All Actions

EXCEPTION TYPE

All Exceptions

SUPPLY TYPE

All Supply

DEMAND TYPE

All Demand

[Return to Summary](#) Viewing Results for EEE-M COMPONENT

Action

Exception

Supply

Demand

Show: 200 of 1 of 1 Total: 9

| DEMAND | DUE DATE | ITEM | LOCATION | QUANTITY | UNITS |
|---|-----------|-----------------------------------|-------------------|----------|-------|
| Safety Stock | 2/28/2024 | EEE-M COMPONENT : EEE-M COMPONENT | 01: San Francisco | 75 | Ea |
| Planned Work Order #12227 | 2/29/2024 | EEE-M COMPONENT : EEE-M COMPONENT | 01: San Francisco | 650 | Ea |
| Planned Work Order #12228 | 3/11/2024 | EEE-M COMPONENT : EEE-M COMPONENT | 01: San Francisco | 130 | Ea |
| Planned Work Order #12229 | 4/10/2024 | EEE-M COMPONENT : EEE-M COMPONENT | 01: San Francisco | 200 | Ea |
| Planned Work Order #12230 | 5/10/2024 | EEE-M COMPONENT : EEE-M COMPONENT | 01: San Francisco | 185 | Ea |
| Planned Work Order #12231 | 6/10/2024 | EEE-M COMPONENT : EEE-M COMPONENT | 01: San Francisco | 390 | Ea |
| Planned Work Order #12232 | 7/11/2024 | EEE-M COMPONENT : EEE-M COMPONENT | 01: San Francisco | 410 | Ea |
| Planned Work Order #12233 | 8/9/2024 | EEE-M COMPONENT : EEE-M COMPONENT | 01: San Francisco | 300 | Ea |
| Planned Work Order #12234 | 9/10/2024 | EEE-M COMPONENT : EEE-M COMPONENT | 01: San Francisco | 500 | Ea |

Planning Workbench

[Plan List](#) [Event Log](#)

SUPPLY PLAN DEFINITION [RSM SUPPLY PLAN F+S](#)

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REPLENISHMENT METHOD

PLANNING ITEM CATEGORY

ITEM

All Locations
 > Huffman Mfg.

MESSAGE / ORDER FILTERS

ACTION TYPE: EXCEPTION TYPE: SUPPLY TYPE: DEMAND TYPE:

RESULTS SUMMARY Show: of 1 < > Total: 5

| ITEM DETAILS | | INVENTORY MEASURES | | | | MESSAGE / ORDER COUNTS | | | |
|---|--------------------|--------------------|---------|----------|-------------|------------------------|-----------|--------|--------|
| ITEM | ITEM DESCRIPTION | UNITS | ON-HAND | ON-ORDER | LATE DEMAND | ACTION | EXCEPTION | SUPPLY | DEMAND |
| ALL ITEMS | ALL ITEMS | --- | --- | --- | --- | 6 | 7 | 38 | 37 |
| <input checked="" type="checkbox"/> AAA-M FG ASSEMBLY | AAA-M FG ASSY | Ea | | | 200 | 1 | 1 | 9 | 9 |
| <input type="checkbox"/> BBB-M COMPONENT | BBB-M COMPONENT | Ea | 10 | | 240 | 1 | 2 | 10 | 10 |
| <input type="checkbox"/> DDD-M SUB ASSY | DDD-M SUB ASSEMBLY | Ea | | | 650 | 1 | 2 | 8 | 9 |
| <input type="checkbox"/> BBB-M COMPONENT | BBB-M COMPONENT | Ea | 10 | | 240 | 1 | 2 | 10 | 10 |
| <input checked="" type="checkbox"/> DDD-M SUB ASSY | DDD-M SUB ASSEMBLY | Ea | | | 650 | 1 | 2 | 8 | 9 |
| <input type="checkbox"/> EEE-M COMPONENT | EEE-M COMPONENT | Ea | 5 | 195 | 720 | 3 | 2 | 11 | 9 |
| <input type="checkbox"/> EEE-M COMPONENT | EEE-M COMPONENT | Ea | 5 | 195 | 720 | 3 | 2 | 11 | 9 |

NS Demand Planning/MRP Considerations

01

When the Assembly BOMs contain an extreme number of sub-assemblies or components (over 1,000)

02

what-if scenario planning is required

03

planning by production batch size or by lot is required

04

planning by expiration dates is required

05

planning by supplier's lead time

06

dynamic safety stock is required

07

planning by attribute, potency, quality or volume is required

08

multi-source contract manufacturing is used

NS Demand Planning/MRP Checklist



Familiar with NetSuite Advanced Inventory and demand-based planning



Have historical sales or forecast sales



General usage of NetSuite CRM opportunities and estimates



Long lead times from suppliers



Buying, building and selling from the same location



Multi-level bill of materials



Small number of planning locations



Limited usage of kits
Planning at the kit component level

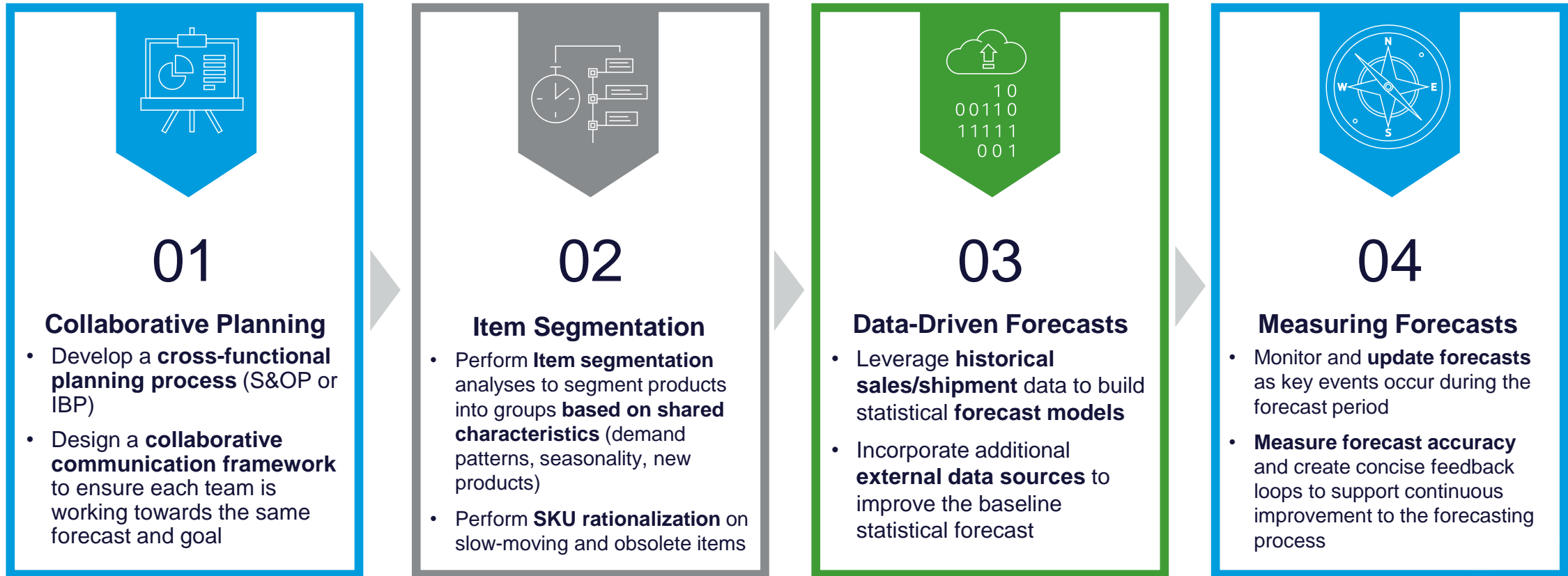


Demand Planning Strategies

Enhancing your business needs

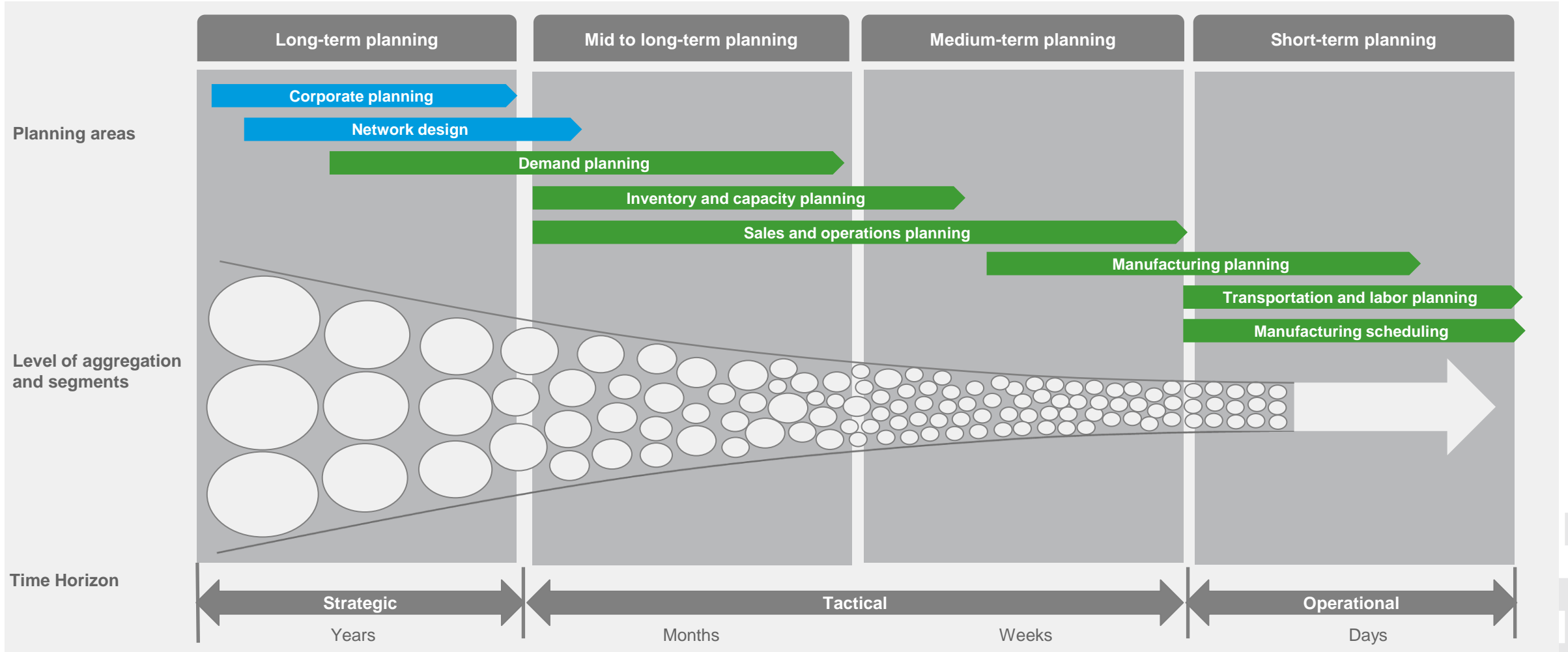
Demand Planning Strategies

Key planning strategies to achieve greater demand forecast accuracy



Business Planning Horizons

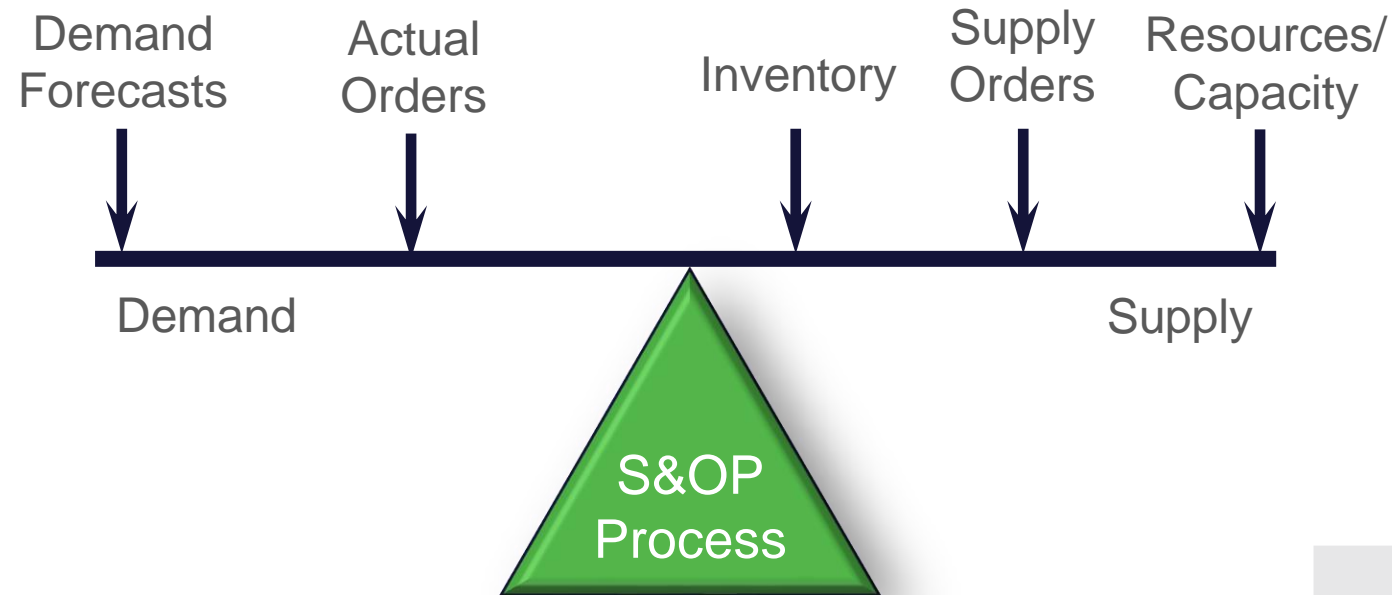
Understanding planning horizons will allow us to better link strategic objectives with tactical execution



Collaborative Planning - The S&OP Process

Sales and Operations Planning (S&OP) is a structured, monthly, business process. The result is a Consensus Plan: agreed-upon actions approved by the executives to best balance Supply and Demand

- Demand Planning – Forecasts future sales volume by product family using inputs such as customer forecasts, historical sales, statistical analysis, pricing and promotion strategy and new product introduction
 - Creates an **unconstrained forecast**
- Supply Planning – Aligns distribution, manufacturing, and procurement to best meet the Demand Plan considering resource and capacity constraints
 - Creates a **constrained forecast**



Forecast Process – Best Practices

Performing the following activities will result in a more streamlined demand forecast process

01

Forecast Pre-requisites

1. Clearly define the delivery model and inventory strategy (MTO/MTS)
2. Measure inventory accuracy and define inventory management processes
3. Create controls around transactional diligence and master data cleanliness (past due dates, open order management, Lead Time accuracy)
4. Determine the purpose of the forecast and set the level of aggregation and planning horizons

02

Forecast Key-Steps

1. Gather and visualize the data (how much data do we have and what is the quality of this data)
2. Clean the data (stock-outs, one-time large orders, duplicate orders, intercompany)
3. Choose the forecasting technique
4. Test the forecast using historical data
5. Forecast demand
6. Achieve consensus on the forecast
7. Continuously improve and measure the forecast



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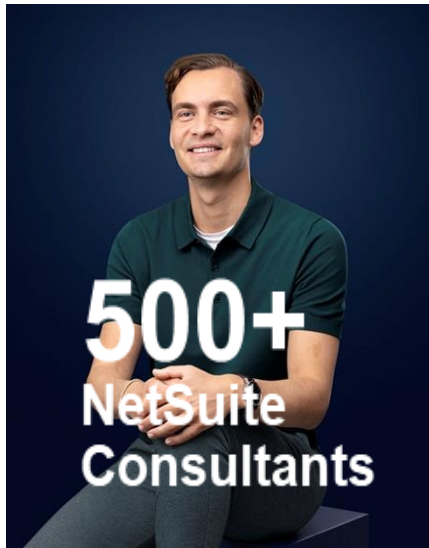
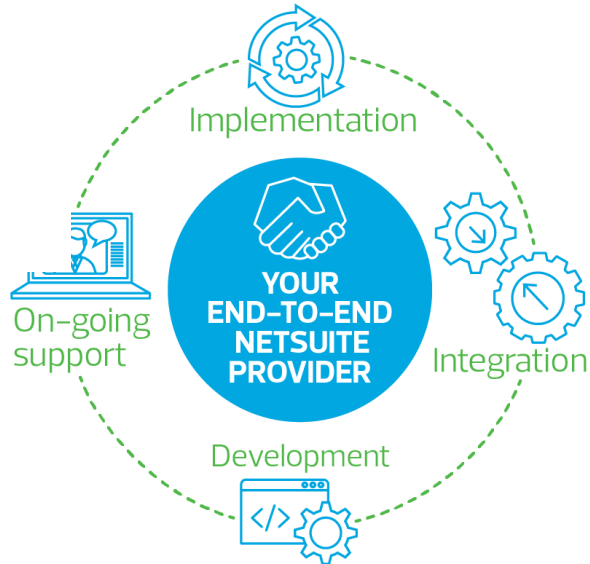


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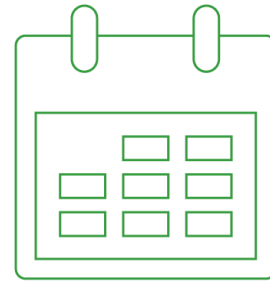


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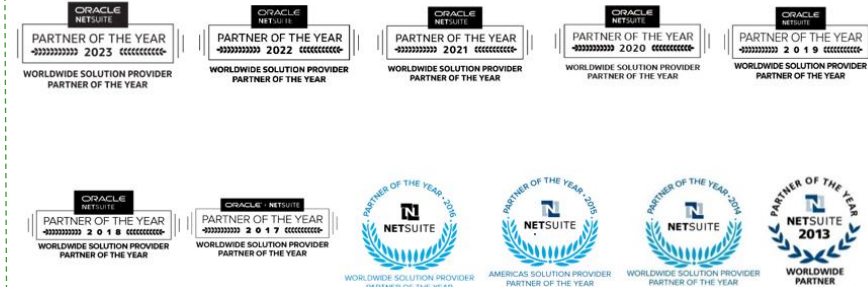


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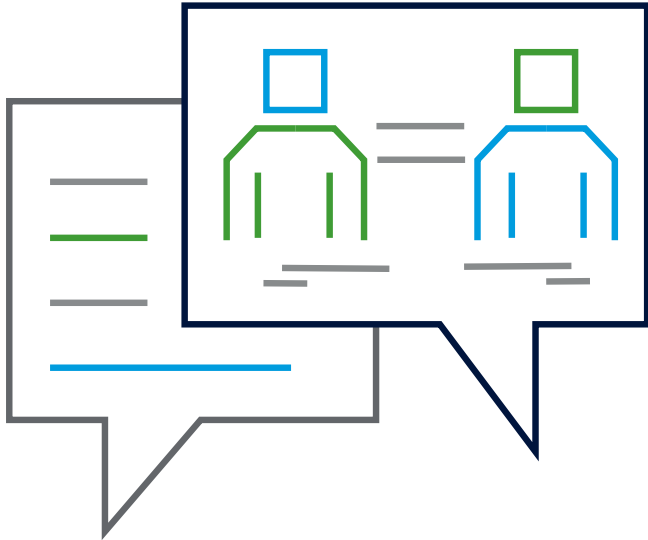
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- Business Intelligence (BI)
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- Software Subscription Management (SaaS)
- State & Local Sales Tax (SALT)
- Supply Chain Management (SCM)
- SuiteApps (SDN)

Questions

Let's Connect!



ADDITIONAL QUESTIONS?

For any questions, please reach out to us
- Contact info will be provided in the chat

WEBSITE

For additional information, please visit our website:

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Appendix

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