



BECKWAY
Operating Company for Private Equity

**Realizing Strategic Objectives Through IBP
Visibility & Execution**

ASCM Greater North Jersey Chapter

Steven Hainey, CPSM, CPIM, CPF, MCIPS, C.P.M.

February 13th, 2024: 12 – 1 PM ET
Virtual Meeting

Purposeful. Practical. Principled.

Intro: Integrated Business Visibility (IBV) & Execution (IBE)

- **2023 Year of Global Challenges – Organizations Struggle in Achieving Objectives**
 - **Global Disruptions:** Grappling with global disruptions like pandemics, natural disasters, trade disputes, wars and geopolitical tensions
 - **Cost Pressures:** Inflationary pressures on raw materials, labor, and transportation costs can significantly impact supply chain budgets
 - **Demand Volatility:** Fluctuating consumer demand patterns make demand forecasting and inventory management more challenging
- **Need for Enhanced IBV & IBE**
 - **IBV Digital Transformation:** Enhance data usage to innovate faster, improve customer experiences & progress financials to outperform competitors
 - **IBV Operational Costs:** Deeper insights into performance KPIs & data, identify inefficiencies, and streamline operations to drive cost reduction opportunities
 - **IBE Enhanced Decision Making:** With accurate & real-time **IBV**, corporations can make well-informed decisions, anticipate market changes, and adjust strategies swiftly to changing scenarios

Don't worry about acronyms and do focus on the business processes!!!

2023 Headwinds Highlights Industries' "Planning Gaps"
Requiring Immediate "In-flight Repairs" !!!



In a 1935 publicity stunt, Fred Key checks the oil in flight. (NASM (SI 76-17446))

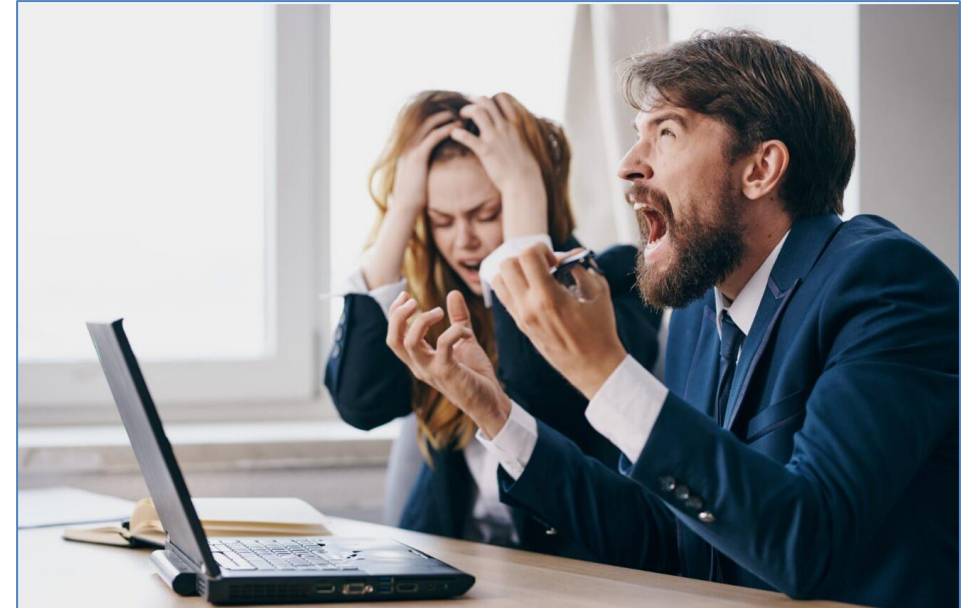


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Image Source: <https://www.airspacemag.com/history-of-flight/the-pressures-on-120938334/>

Struggles with Integrated Business Visibility & Execution

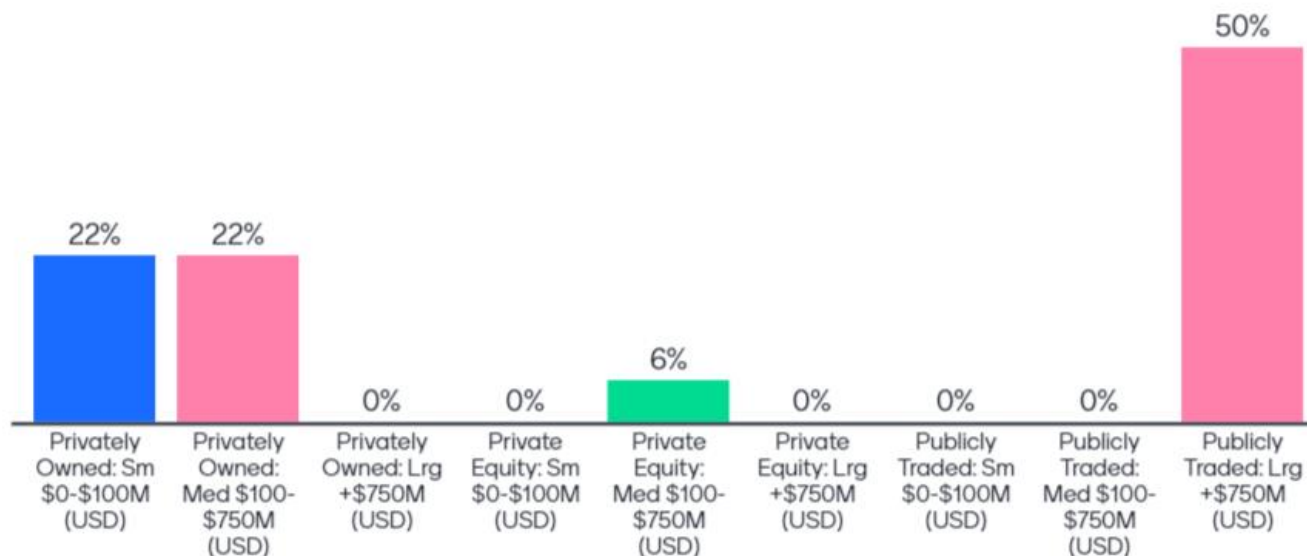
- **Data Overload:** As data grows, non-scalable tools can become slow or crash, affecting business processes and decision-making.
- **Knowledge & Data Vulnerability:** Relying on limited individuals with large offline Excel spreadsheets risks data loss, inconsistencies from human error, and hinders real-time collaboration, and putting critical business processes in jeopardy when they're unavailable or resign.
- **Single Source of Truth:** It's essential to have a Single Source of Truth across functional/regional with inter-locking performance KPIs
- **Data Source Complexity:** Companies' difficulty in merging internal and external intelligence



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Org Type & Rev Size For Your Answers (USD)?

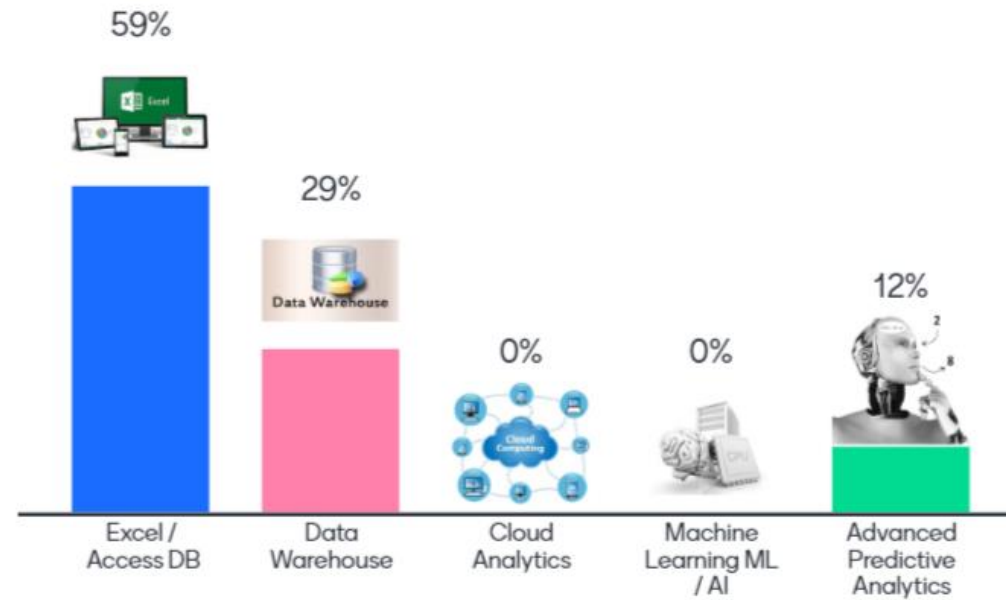


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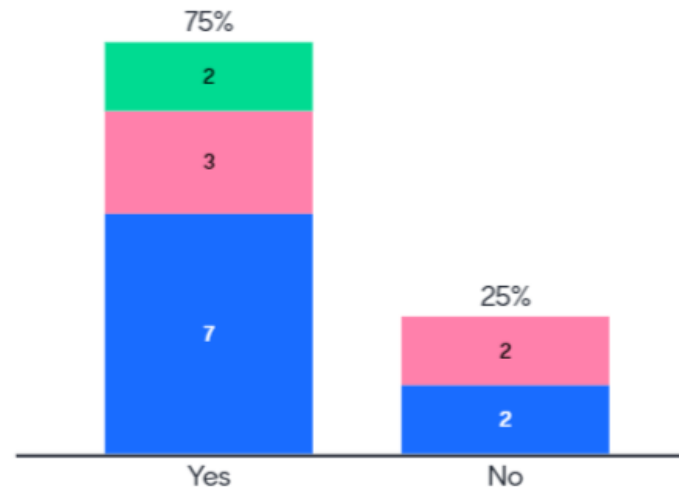
Mentimeter

Your S&OP/IBP Primary Data Analytics Tool Today



Mentimeter

Preparing To Invest In New Planning Technology Within The Next Two Years?



Your S&OP/IBP Primary Data Analytics Tool Today

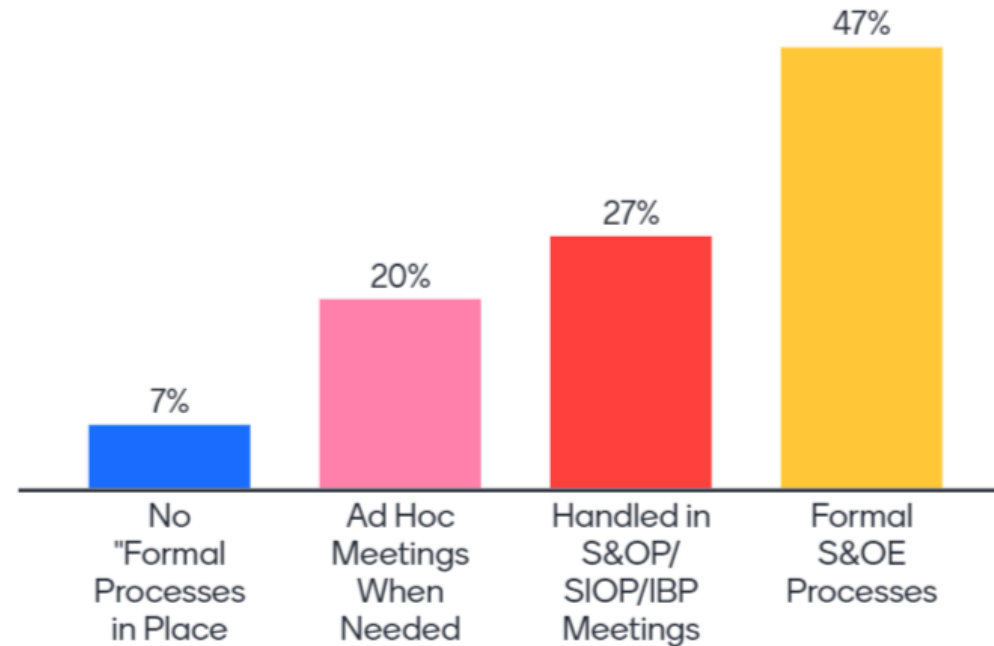
- Excel / Access DB
- Data Warehouse
- Cloud Analytics
- Machine Learning ML / AI
- Advanced Predictive Analytics



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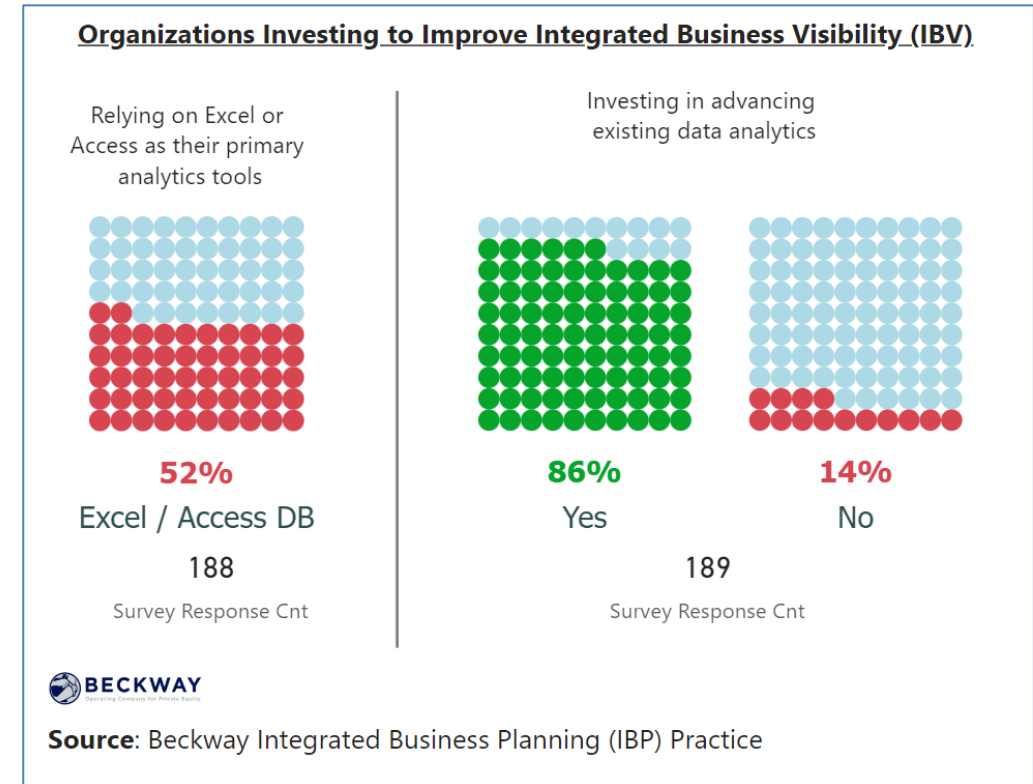
Mentimeter

How Are Your Site Level Tactical Processes Managed?



Organizations Investing In Integrated Business Visibility (IBV)

- **Why 86% is investing into IBV**
 - Digital transformation: CEOs' and CIOs' new focus
 - Gartner's insights: Emphasis on business intelligence/data analytics and cloud platforms
- **How IBV is a catalyst to achieve strategic objectives**
 - Improve execution performance visibility
 - Address business plan deviations faster
 - Increase organizational resiliency and employee efficiency
- **First Steps to Implement IBV**
 - Clearly define and communicate goals
 - Define existing gaps and resources to implement
 - Assign ownership and monitor progress



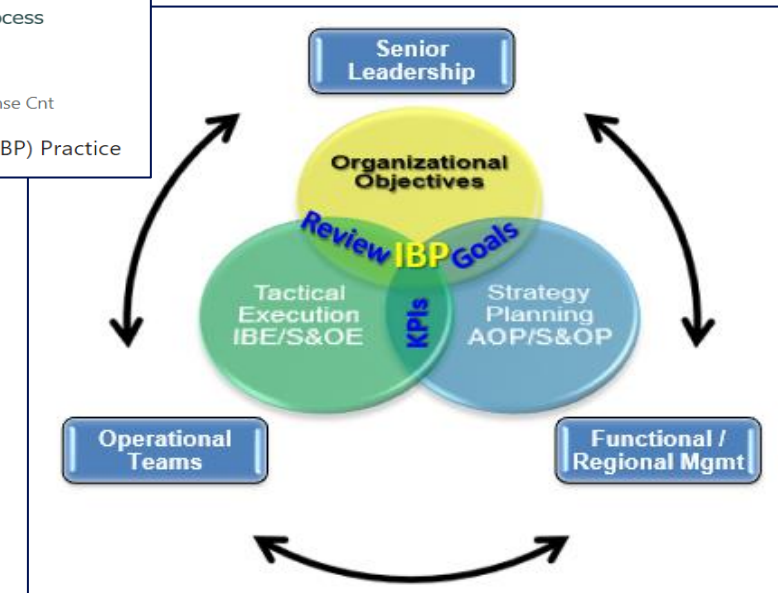
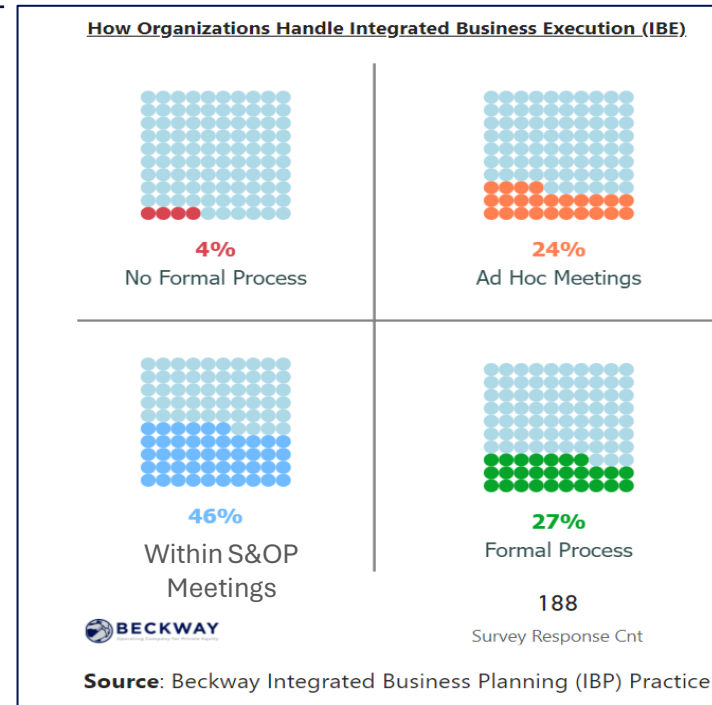
Integrated Business Execution (IBE) Best Practices

Difficulties of IBE Process within IBP/S&OP/Ad Hoc Meetings:

- Good planning but no or poor execution
- Old culture
- Conflicting, redundant, and confusing KPI's

Implementing IBE/S&OE to Achieve Strategic Objectives

- Utilization of a **X-Matrix** to align organizational, cross-functional and individuals' objectives, priorities and responsibilities
- Interlocked/Closed Loop planning and tactical business process with cross-functional performance metrics from the system of truth
- Automated repetitive tasks for enhance responsiveness & efficiencies to be more productive on value-add activities



How IBV and IBE Are Driving Cross-Functional Alignment

Enhanced IBV & IBE enhance cross-functional alignment through the following elements:

- **Increased Confidence In Analytics:** Having a single source of truth enables trust in the figures, improved efficiency by removing duplicate report generation & debate
- **Improved Decision Making & Responsiveness:** Advance IBV allows teams to make decisions with almost real-time insights rather than assumptions, reducing misalignments from individuals making uninformed choices
- **Interlocked Performance IBE KPIs:** Clearly defined performance measurements and roles & responsibilities drive transparency, trust and accountability between teams

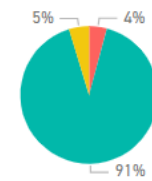


Live Power BI Slide – Interactive Discussions

Days: 90 PBI App Type: Online LastRefresh: 2/13/24 10:11 AM

Date_Adj: Last 1 Weeks 2/7/2024 - 2/13/2024

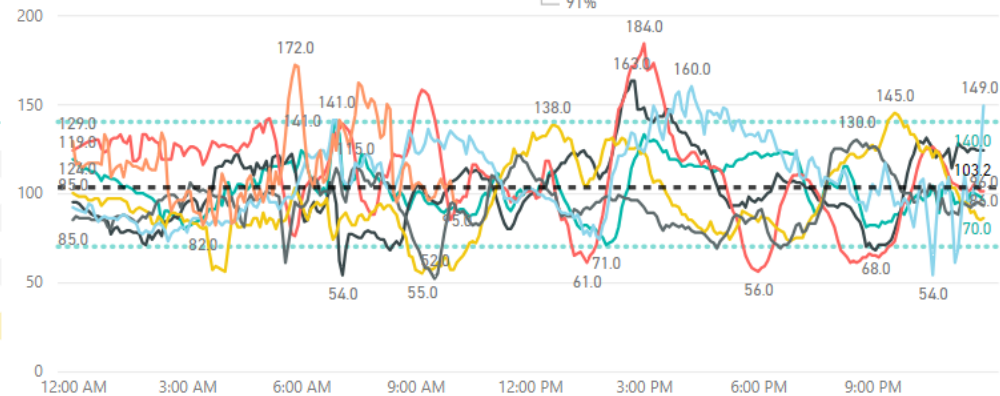
● Low Cnt ● In Range Cnt ● High Cnt



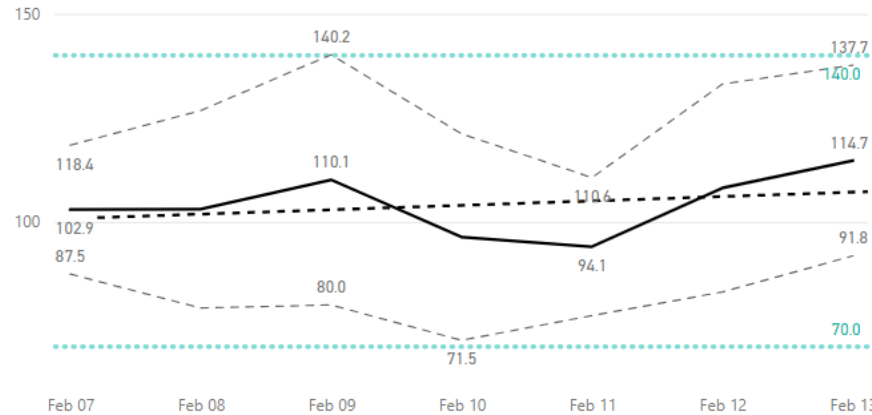
Tgt Range
70 - 140

Performance Measures KPIs by Date

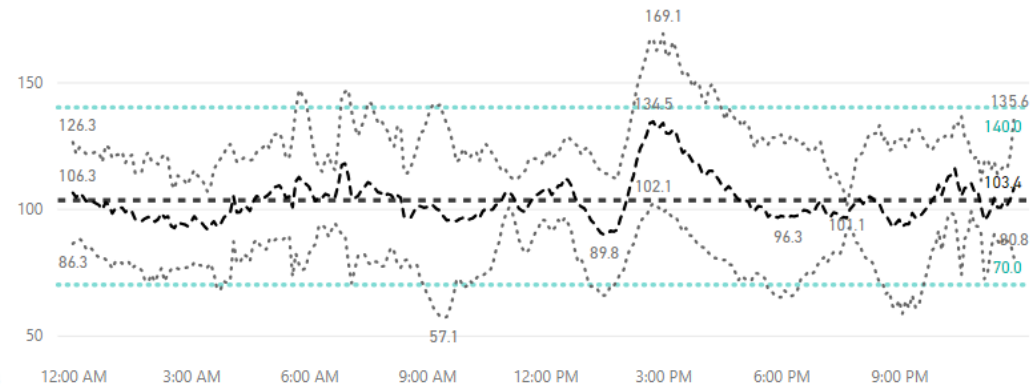
Date_Adj	Cnt	SGV Avg	In Range %	Low %	High %	SGV Std Dev	Demand	Supply Bolus	Supply Base Line	Supply Total	Demand /Supply Ratio
Tue, Feb 13	122	114.7	87%	0%	13%	19.9	48	14.6	30.0	38.5	1.25
Mon, Feb 12	274	108.1	90%	1%	9%	21.7	91	20.9	31.1	42.5	2.14
Sun, Feb 11	285	94.1	96%	4%	0%	14.4	92	21.4	30.5	40.7	2.26
Sat, Feb 10	287	96.4	90%	9%	2%	21.5	71	18.1	30.9	38.1	1.87
Fri, Feb 9	288	110.1	81%	11%	9%	26.1	111	28.7	31.4	45.8	2.42
Thu, Feb 8	288	103.0	93%	2%	5%	20.6	111	25.6	31.5	46.8	2.37
Wed, Feb 7	288	102.9	100%	0%	0%	13.4	106	22.5	30.9	42.6	2.49
Total	1832	103.2	91%	4%	5%	21.1	630	151.6	216.3	295.0	2.14



● Avg ● SGV 75% Conf High ● SGV 75% Conf Low



● SGV Avg ● SGV 75% Conf ● SGV 75% Conf



Confidence That Improved Visibility Will Drive Improvements

Automated Emails & Live Interactive PP Slide:

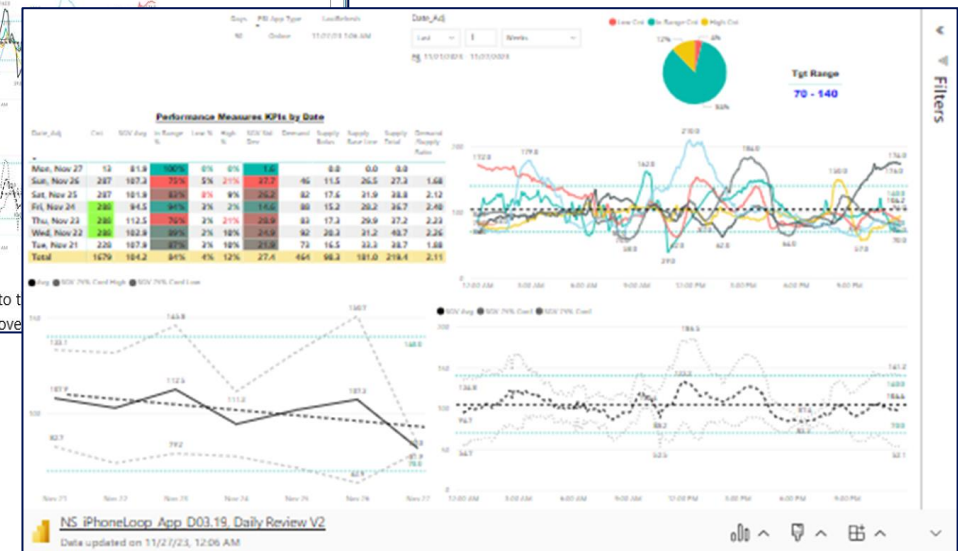
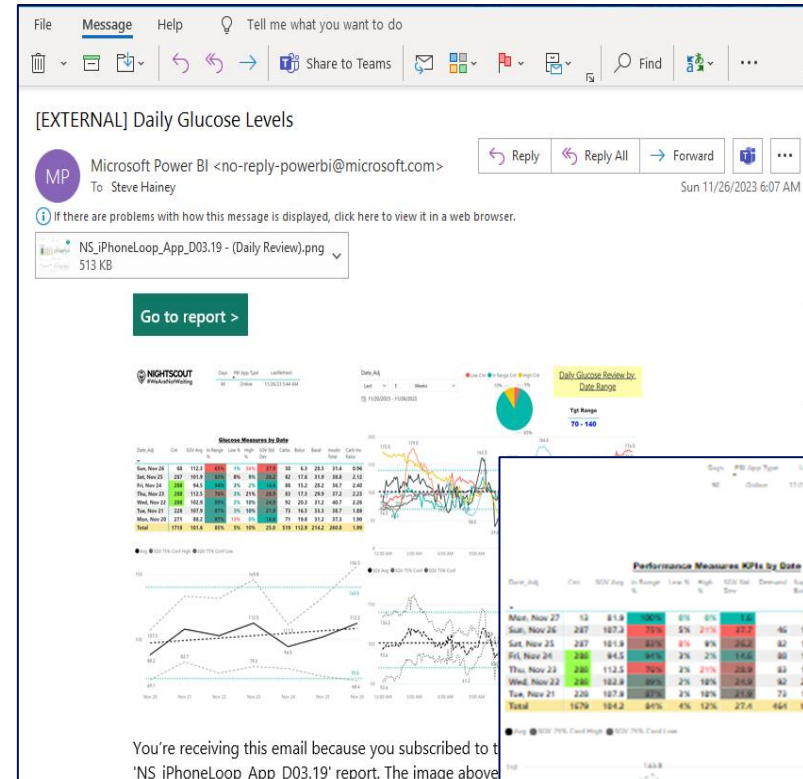
- Automated Performance KPI email distribution updates
- Automatic refresh with the most current data & direct linkage to minimize discrepancies and errors
- Dive deeper with on-the-spot data exploration within the slides
- Eliminate repetitive exporting and updating of static charts

IBV/IBE Case Study Results

- Global manufacturing of electronic equipment
- Customers' order past due was reduced by \$7.5M or 35%
- Forecast accuracy increased from 0% in to 52% in 5 months

Personal Case Study Results

- DIY Artificial Pancreas
- Close loop analytics refreshing every 5 minutes with PBI Dashboard & emails
- Done with a cost of <\$1K and limit tech experiences
- **A1C of 5.2% or Absence of Diabetes**



I will bet my life on it!!!

Closing Conversations/Questions

1. Relevance to your current practices?
 2. What opportunities and barriers are you facing?
 3. What digital transformation questions do you have?
 4. Thoughts on separating the execution from the planning process?
 5. Difficulties with cross-functional collaboration?
-



Integrated Business Visibility (IBV) & Execution (IBE)

Reference Material

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Realizing Strategic Objectives Through IBV & IBE Article

LinkedIn Article by Steve Hainey:

[Realizing Strategic Objectives Through IBP Visibility & Execution](#)

CEOs and CIOs are prioritizing digital transformation with a significant shift towards business intelligence and cloud platforms, according to Gartner's 2023 report.

Despite this shift, many organizations, even those with substantial revenues, continue to rely on outdated tools like Excel for analytics, leading to scalability and efficiency challenges.

There's a pressing need for Integrated Business Visibility (IBV) and Execution (IBE) processes, with many companies recognizing the importance of moving from siloed operations to collaborative, data-driven strategies.

LinkedIn

Articles People Learn



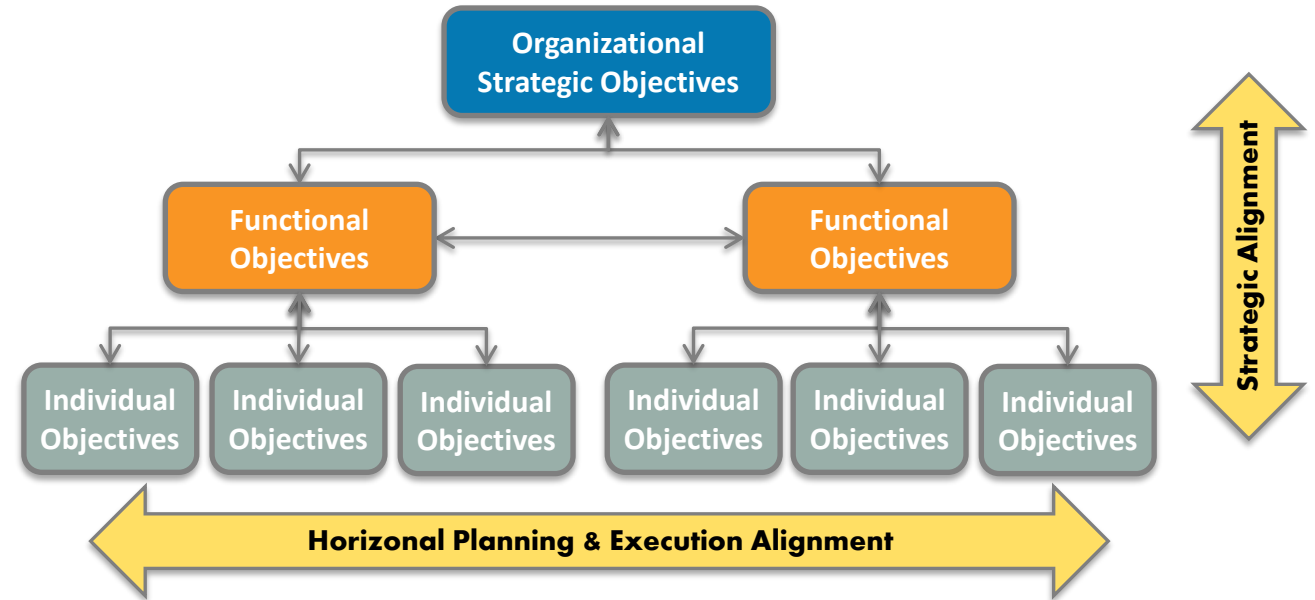
Realizing Strategic Objectives Through IBP Visibility & Execution



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Senior Operating Director - IBP Practice at Beckway
Published May 12, 2023

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IBP/IBE Alignment Through the Hoshin Kanri X-Matrix



Integrated objectives, collaboration, decision making and inter-locked performance measurements throughout the company allows senior & functional leadership down to the tactical execution teams understand how their decisions & activities impact those across the company to progress or hinder the Organizational Strategic Objectives

Sources:

- [Hoshin Kanri – Part 4: The X-Matrix?](#)
- [The Ultimate Guide to Strategy Deployment using Hoshin Kanri \(X-Matrix\)](#)

IBV and S&OE Integration within the Overall IBP Process

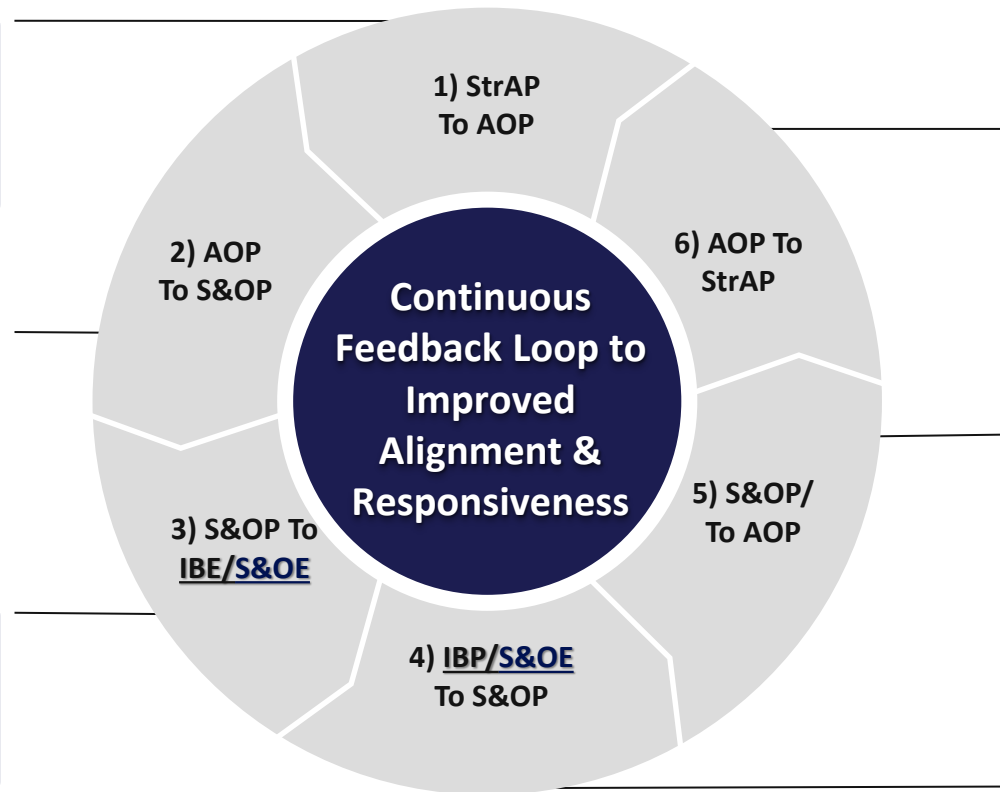
IBV Platform and Data Data-driven Decisions Over the Entire IBP Process

All Builds Upon a Good Long Game

1) **Strategic Action Plan (StrAP):** Strategic long-term **multiyear** plan for how to get the organization where it wants to be within the next 1 to 5 years

2) **Annual Operating Plan (AOP):** Comprehensive **yearly** plan for goals, financial budget figures & performance KPIs to achieve its annual commitments **to Achieve the StrAP**

3) **S&OP Planning:** Cross-functional **monthly** process to get alignment on who needs to do what by when to **exceed the organization's AOP Objectives**



6) **AOP Feedback to StrAP:** The AOP **quarterly** review with its **supporting intelligence**.

5) **S&OP Feedback to AOP:** Establishes latest **monthly** plan **with supporting IBE/S&OE tactical data** for Gap analysis/bridge .

4) **IBE/S&OE:** Structured practice to monitor, trend, prioritize and resolve **weekly** demand, supply, process & system disruptions to **realize monthly S&OP Plans**

The momentum of the “**Integrated Business Planning Flywheel**” requires consistent communications, sponsorship & aligned “**Data-driven Decisions**” across the organization.

INTERIM DIRECTOR OF GLOBAL SIOP

\$600M Manufacturing Company

BACKGROUND

- Global leader in the manufacturing of commercial and home electronic equipment with distribution through original equipment manufacturer (OEM) and wholesale channels
- Operates ten manufacturing facilities in North America, Brazil, Europe, and India
- More than 1,700 customers around the world

KEY ISSUES

- **Need for enhanced Integrated Business Visibility (IBV) & Execution (IBE)**
- Due to changes in their manufacturing locations and variations in the customer demand patterns, the North American customer order past due figures continued to grow
- Struggle to supply their customers with valid order shipment available-to-promise (ATP) dates due to multiple planning systems and their processes were not integrated

BECKWAY CONTRIBUTIONS

- **Led IBP best practices training and rolled out cross-functional and intercompany performance measurements to improve IBV and IBE**
- Completed multiple system training and mass updates of the supply chain planning parameters to improve the systems' data integrity, alignment of their configurations, and utilization of them
- Implemented Power BI Dashboards for enhanced IBV analysis & weekly automated refreshes
- Completed formal global IBP, IBV, and IBE training with supporting documentation and videos for the new planning processes and tools

RESULTS

- During the engagement, the customers' order past due versus the original promise dates (ATP) was reduced by \$7.5M or 35%
- The alignment of the customers' original promise dates (ATP) across their independent planning systems progressed from 17% to 90%, enhancing the customer service levels
- Forecast site/item absolute mix accuracy increased from 0% to 52% within 5 months
- Rolled out 7 weekly action-based global IBV supply chain automated Pareto analysis tools & KPIs
- Completed 33 formal training sessions across the global organization for a total of 171 hours of guidance

CEO Post-engagement Comments: *"It was a pleasure working with you over the last 5 months! You have given the team some great tools to help fix and then sustain our supply chains, so thank you for all your efforts!"*



Digital Diabetes Article PBI Data-driven Decision:

[Microsoft Power BI. Analyze your glucose data and make data-driven decisions](#)

The article delves into the role of technology, specifically Nightscout, in storing and managing glucose data for diabetic individuals.

The author highlights the transformative impact of Microsoft Power BI (PBI) - discovered through the Nightscout Power BI Reporting Facebook group - in visualizing and interpreting this data for informed decision-making.

Key contributors, including Steve Hainey, Jonathan Chan, Emmanuel Sánchez Tovar, and Mateusz Wachowiec, are recognized for their roles in developing the Nightscout PBI Reports, offering invaluable insights to improve diabetes management based on real-world data.



Español

English

History ∨ Freestyle ∨ Nightscout ∨ Apps ∨ Gadgets ∨

Blog for parents of kids with diabetes who fancy tinkering with Technology

Microsoft Power BI. Analyze your glucose data and make data-driven decisions

Microsoft Power BI. Analyze your glucose data and make data-driven decisions



Comentarios Seguir ...