

Phase 1 - Identification & Alignment

Questions		Rarely / Never	Not Consistently	Most of the Time	Always	Remarks
Communication Map	1. Were the annual sales goals and objectives for the year shared prior or at the start of the year?					
	2. Were the right communication needs identified? (content, timing, length, geography)					
	3. Was the communication timing requirements (e.g. when the data has to be available to other partners)) been clearly communicated?					
	4. Were the appropriate data providers, receivers, and users identified?					
Data Standards	5. Were the key data characteristics (type, items, length, timing, geography) clearly defined?					
	6. Was the key data defined and organized in a way that makes it easy for your organization to utilize?					
Collaboration Process	7. Is there a formal joint business planning process in place?					
	8. Were overall business strategies and capabilities discussed?					
	9. Was a defined approach / process for forecasting established?					

Phase 2 - Planning

Questions		Rarely / Never	Not Consistently	Most of the Time	Always	Remarks
Communication Map	10. Was the initial and ongoing item forecasts shared on the expected timeline?					
	11. Were the manufacturer and distributor requirements (e.g. lead time, capacity, item commitments, ingredient constraints) shared on the expected timelines?					
Data Standards	12. Did the format of the forecast data enable easy use by your organization?					
	13. Did the format of the supplier and distributor requirement data enable easy use by your organization?					
Collaboration Process	14. Were the production, distribution and inventory plans shared with all partners and discussed as needed?					
	15. Was the impact of non-recurring occurrences (e.g. LTOs/promotions, timing of holidays) discussed?					

Phase 3 - Execution

Questions		Rarely / Never	Not Consistently	Most of the Time	Always	Remarks
Communication Map	16. Are item re-forecasts shared on the expected timeline?					
	17. Is there ongoing visibility and tracking against manufacturer and distributor requirements (e.g. lead time, capacity, item commitments, ingredient constraints)?					
	18. Is current sales POS, inventory balances/locations, and item movement opportunities/costs shared on the expected timelines?					
Data Standards	19. Is their consistency in the the application of the data standards throughout the fiscal year?					
Collaboration Process	20. Are updates to the production, distribution and inventory plans shared on the expected timelines?					



Phase 4 - Analysis & Optimization

Questions		Rarely / Never	Not Consistently	Most of the Time	Always	Remarks
Communication Map	21. Are overall results of the fiscal year vs. goals / objectives shared?					
	22. Is performance (actual vs. projected) shared for production, inventories, orders, and delivers?					
Data Standards	23. Are any changes / updates to the data standards implemented based on insights from the fiscal year?					
Collaboration Process	24. Are lessons learned and opportunities for improvement shared and discussed by all partners?					
	25. Is specific feedback provided to partners?					