

ALLEN K. PRATT

Sales, Marketing & Business Development for
Start-Up, Turnaround & High Growth Environments

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Sales & Operations Planning Process Improves Financial Services Firms

Business Challenge:

- Business strategy and cost saving efforts drove the effort to enhance robust Sales & Operations Planning (S&OP) process for greater visibility
- Operational data was scattered in different places making a comprehensive view of the business more difficult
- New product introductions may not be coordinated across functions so that customer service is prepared to handle incoming inquiries or complaints.

Consultant Role:

- Develop a higher level of communication and trust between product managers, sales and operations and processing centers.
- Regularly discuss and resolve cross functional issues.
- Create policies that guide day-to-day operations in an objective manner, periodically reviewed and clearly communicated.

Quantifiable Results:

- Set service and supply policies. Get everyone on the same page with frequent, scheduled communication.
- Tighten forecasts. Create the revenue predictions that others can believe in.
- Develop analytical models.. Communicate across functions. Track metrics. Establish the feedback mechanism to bring effective accountability to the organization.



Sales and Operations Planning (S&OP) Process creates collaboration using a single-focus as a key metric. This has a huge impact on effectiveness of the organization.

Effective S&OP can help Financial Services companies handle demand fluctuations more proactively through better collaboration.

High performance companies know how best to balance resources with dynamic demand.

“Allen is a fantastic listener and communicator. He is always very professional in his personal presentation and he's always been there whenever I needed anything. I would highly recommend Allen as a tremendous asset to any company that might have the good fortune of hiring him.”

***Matt Pollock, COO**
Adeniat Corporation*

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