Leadership in a Supply Chain Excellent Organization – Your Company Masterclass
Program Charter

Executive Sponsor:

Business Sponsor:

Department:

Program Leader:

Start Date:

Approval Date:

Revision Date:

I. Introduction

Purpose of the Charter

The project charter is created during the initiation phase of a project to ensure that a complete understanding of the project scope and objectives is established. The document allows confirmation of assumptions and expectations with the executive team, project sponsors, stakeholders, project managers, program manager project, validation and resource team members. During the course of the project, change requests may be generated and approved which vary the scope, schedule, or cost of the project. These changes should be documented through the change management process and updates reflected through revisions of the project charter.

Charter Contents

The project charter documents the background and business need for the project as well as expectations for the project moving forward. The project overview provides the project scope, business and project objectives and any assumptions. The project approach outlines the methodology to be used in completing the project along with the schedule, milestones, deliverables and any project dependencies. A budget for the project is presented and the organization of the project team is discussed. Project expectations will be discussed and how project success will be measured. A plan for communication on the project will also be presented.

Maintenance of the Charter

After the initial approval by project sponsor, the project charter will be updated with approved change requests and noted with a revision date on the cover page.

Program Approach

SCOR (Supply Chain Operations Reference) model Version DS will be the basis for this project. The major work tasks will be organized using the discipline highlighted in the Supply Chain Excellence book and is summarized by the activities in Phase 0 – Build Organizational Support; Phase 1 – Define Project; Phase 2 – Analyze Performance; Phase 3 – Develop Project Portfolio; and Phase 4 – Implement Plan. Supply Chain Excellence uniquely combines the concepts Business Process Engineering - Management, Project Management and SCOR DS.

II. Program Overview

Scope

Your Company Global Supply Chain Definition		Markets			
		Z	Y	X	W
Product Families	A	X	X	X	X
	B	X	X	X	X
	C	X	X	X	X
	D	X	X	X	X

- All major Your Company Global markets
- All major product families
- All SCOR DS processes: Orchestrate, Plan, Source, Transform (Make), Order, Fulfill and Return
- Supply chain leaders (CSCO direct reports plus their direct reports) that are responsible for demand (forecasting) and supply planning, purchasing (sourcing), manufacturing, logistics, customer service, financial control
- Related corporate functions including IT, sales, marketing, and finance.
- 4 targeted shareholder metrics: operating margin, inventory turns, return on invested capital, and revenue growth
- Related level 1 SCOR metrics for Reliability, Responsiveness, Agility, Cost, Assets, Environmental, and Social.
- Related system components of ERP, planning, and advanced analytics (including AI)
- Strategic portfolio driving 2027 to 2029 initiatives

Business Objective

Develop the next generation of Your Company supply chain leaders through a **learn-by-doing** masterclass structured as a team oriented, hands-on program. This immersive experience leverages **SCOR DS process engineering** of the end-to-end supply chain to drive real-world improvements in supply chain performance and optimize system utilization. The team will work together on a **practical, impact-driven initiative**, applying strategic insights, AI-enabled analytics, and best practices to solve business challenges. Through guided mentorship and iterative problem-solving, they will develop critical leadership skills while delivering measurable results tied to **operating margin, inventory turns, return on invested capital (ROIC), and revenue growth**. By integrating structured learning with hands-on execution, this masterclass ensures that Your Company's supply chain talent is not only equipped with knowledge but also empowered to **implement solutions that drive shareholder value and long-term business success**.

Program Outcomes

- Your Company benchmark of supply chain resilience
- Updated global scorecard with supporting advanced analytics and targets
- Updated process blueprint featuring SCOR DS
- Supply chain practice maturity assessment leveraging SCOR DS
- Talent development plan
- Project portfolio to drive 2027 to 2029 supply chain strategy
- 2026 quick hits
- AI governance template

III. Program Organization

Proposed Schedule for Leadership in a Supply Chain Excellent Organization – An Your Company Masterclass

Phase	Session Theme and/or Agenda	Classroom Style, Dates
Phases 0 and 1 Build Organizational Support and Define Project Scope	May, 2025	
	Session 1: Masterclass strategic alignment workshop with CSCO direct reports – 2 days	**F2F preferred, May TBD**
	Masterclass orientation with steering and program teams – .5 days	Virtual, May TBD
	Supply Chains to Admire Benchmark, Business Context Summary, Supply Chain Definition Matrix, and updated Charter working session with selected program team members – .5 days	Virtual, May TBD
	Complete SCOR DS Self Study Online – steering and program teams	Due by Kickoff
	Weekly Progress Reviews – .5 days per month	Virtual, May TBD
Phase 2 Analyze Performance: Metrics, Process and Data, Practices and People	June, July and August, 2025	
	Session 2: Kickoff and Metrics – 3 days	**Hybrid, June TBD**
	• Review Supply Chains to Admire Benchmark, Business Context Summary, Supply Chain Definition Matrix (with data), and updated Charter	Agenda Item
	• SCOR DS Metric Orientation, Definitions and Data Collection Plan	Agenda Item
	• Advanced analytics, Defect Analysis and Data Collection Plan	Agenda Item
	• Competitive Requirements	Agenda Item
	• Other Benchmark Sources	Agenda Item
	• Preliminary Scorecard	Agenda Item
	Weekly Progress Reviews – .5 days per month	Virtual, June TBD
	Session 3: Process and Data – 3 days	**Hybrid, July TBD**
	• Review Session 2 Homework	Agenda Item
	• Staple Yourself to an Order Process Analysis	Agenda Item
	• Constructing a SCOR Level 3 Blueprint	Agenda Item
	• Constructing a SCOR Level 4 Blueprint	Agenda Item
	• Estimating System Utilization, Data Integrity and Failure Modes	Agenda Item
	Weekly Progress Reviews – .5 days per month	Virtual, July TBD
	Session 4: Practices and People – 3 days	**Hybrid, August TBD**
	• Review Session 3 Homework	Agenda Item
	• SCOR DS Process Blueprint Alignment	Agenda Item
	• Practice Maturity Assessment	Agenda Item

	• Orchestration Capability Analysis	Agenda Item
	• People's Knowledge, Skills, and Experience Assessment	Agenda Item
	• AI Governance	Agenda Item
	• Plan and organize brainstorm event	Agenda Item
	Weekly progress reviews – .5 days per month	Virtual, August TBD
Phase 3 Developing the Project Portfolio	September, October, 2025	
	Session 5: Brainstorm Event – 3 days	**Hybrid, September TBD**
	• Review Session 4 Homework	Agenda Item
	• Final preparations for brainstorming event	Agenda Item
	• Conduct and document brainstorm	Agenda Item
	• Align brainstorm with defect analysis	Agenda Item
	• Develop preliminary project portfolio	Agenda Item
	Weekly progress reviews – .5 days per month	Virtual, September TBD
	Session 6: Opportunity Analysis – 3 days	**Hybrid, October TBD**
	• Review Session 5 Homework	Agenda Item
	• Refine and Prioritize Project Portfolio	Agenda Item
	• Identify quick-hit candidates	Agenda Item
	• Develop Opportunity Worksheets	Agenda Item
	• Assemble opportunity validation plan	Agenda Item
	Weekly progress reviews – .5 days per month	Agenda Item
Phase 4 Implementation Plan	November, 2025	
	Session 7: Implementation Plans – 3 days	**Hybrid, November TBD**
	• Review Session 6 Homework	Agenda Item
	• Develop preliminary program scope and sequence	Agenda Item
	• Develop due diligence plan to align overall project portfolio with 2026 to 2029 budget cycle and expected ROIC	Agenda Item
	• Develop "Strategy in Action" support level to guide program management, quick hit implementation, and continued mentorship	Agenda Item
	• Develop implementation charters for quick hit candidates	Agenda Item
	Weekly progress reviews – .5 days per month	Virtual, November TBD

Steering Team Meetings

May TBD	Session 1: Masterclass strategic alignment
June TBD	Session 2: Preliminary Scorecard
July TBD	Session 3: Process and Data
August TBD	Session 4: Practices and People
September TBD	Session 5: Preliminary Portfolio
October TBD	Session 6: Opportunity Analysis
November TBD	Session 7: Implementation Plan

Program Roles

Executive Sponsor
TBD

Steering Team (Executive Sponsor's Direct Reports Plus Needed Peers)
TBD

Program Leader
TBD

Program Team (Direct Reports to Steering Team)
TBD

Extended Team
Identified by Program Team

Responsibilities

Project Sponsor
- Set strategic mission, vision, and direction as context for the project
- Review team progress against deliverables
- Provide resource support to Program Leader and Team
- Resolve escalated issues
- Approve budget and schedule
- Provide final approval for all changes within defined scope
- Attend Steering Team Meetings

Steering Team
- Identify program team members
- Review and approve Program Team recommended changes
- Ensure organizational and functional commitment
- Resolve cross-functional issues
- Provide resources to project team as needed
- Lead change management cross-functionally
- Initiate and champion projects
- Attend Steering Reviews

Program Leader
- Serve as liaison between project team and sponsors
- Measure team progress against deliverables
- Manage all external resources assigned to the project to contractual commitment
- Manage all aspects of the project in a manner consistent with company business requirements, policies, project management methodology, and budget procedures
- Define and plan the program. Responsible for establishing quality standards and acceptance criteria in the statement of work
- Escalate the resolution of critical issues
- Obtain necessary approvals

Program Team
- Commit to class sessions and other blocks of time as required.
- Complete any assigned work (project deliverables) on time
- Provide subject matter expertise as needed
- Develop and validate deliverables as needed
- Define, communicate, and facilitate necessary changes to policies and standards
- Present results to the Steering Team
- Identify Extended Team members.

Extended Team
- Expected to be available by appointment with advance notice
- Participate in team meetings, as specified
- Contribute to all activities of the design team as requested

Coach
- Provide formal knowledge transfer to the project team RE Supply Chain Excellence, SCOR, etc.
- Provide formal and informal direct knowledge transfer to Project Leader of all aspects of Supply Chain Excellence, Project Leadership, Tools and Techniques, and Change Management
- Facilitate face-to-face, virtual, and hybrid classroom sessions
- Provide input and guidance to team members as they develop deliverables
- Modify instructional method as necessary
- Ensure curriculum integrity

IV. Program Measures of Success

Stakeholder Expectations – List to be developed during the strategic alignment workshop
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Benchmark Sources
- Supply Chains to Admire
- Warehouse Education Research Center
- SCORmark Lite with PwC, potential for additional costs
- Manufacturing Performance Institute, potential for additional costs
- Gartner, if your organization is a member

Risks & Dependencies
- Active sponsorship
- Availability of resources
- High priority
- Willingness to see things from a different perspective

Benefit Summary

TBD by November Steering 2025 Steering Review. In general, the average Supply Chain Excellence portfolio achieves from a 1.5% to 4.5% operating income improvement with benefits falling into 4 areas: revenue growth, improved cash-to-cash, cost reduction, and productivity improvement.

Project Communication

A formal communication plan will be established for each group of stakeholders in this project including the steering team, project manager, design team, extended team and Your Company at large.