

Name \_\_\_\_\_  
Email \_\_\_\_\_

Date \_\_\_\_\_  
Company \_\_\_\_\_

This assessment identifies where your organization is strong and where integration gaps may be limiting results. Rate each area from 1 (No Process) to 5 (Process with Measurable Results). Return to [discovery@mryangroup.com](mailto:discovery@mryangroup.com), and we'll schedule a call to discuss your highest-leverage opportunities.

## Scoring

- 1- No Process:** No defined structure or ownership; decisions are reactive and inconsistent.
- 2- Ad Hoc Process:** Some effort or awareness exists, but execution depends on individuals, not systems.
- 3- Defined Process:** The process is documented and followed, but it is not yet fully cross-functional or disciplined.
- 4- Process, Limited Results:** Process is active and consistent, but outcomes are inconsistent.
- 5- Process, Measurable Results:** Process consistently delivering financial and operational results.

## LEADERSHIP & ALIGNMENT

Score

<b>Executive Ownership</b>	Do senior leaders actively drive and support the planning process?	
<b>One-Number Culture</b>	Do Sales, Operations, and Finance operate from one shared forecast?	
<b>Accountability for Metrics</b>	Are owners clearly assigned and accountable for closing performance gaps?	
<b>Communication Clarity</b>	Are updates and decisions communicated clearly across functions?	
<b>Cross-Functional Decisions</b>	Are tough decisions and trade-offs made during the planning meetings?	
<b>Leadership &amp; Alignment Score</b>		

## PROCESS DISCIPLINE & CADENCE

Score

<b>Process Discipline</b>	Are supply, demand, and financial risks identified and mitigated in planning?	
<b>Cadence Discipline</b>	Are planning meetings held consistently on a regular basis, or only as needed?	
<b>Forecast Credibility</b>	Are major demand changes vetted before being added to the plan?	
<b>Constrained Planning</b>	Do planning decisions reflect labor, capacity, and supplier limits?	
<b>Process Governance</b>	Is planning executed with the same rigor and priority as financial reviews?	
<b>Process Discipline &amp; Cadence Score</b>		

## INSIGHT & INTEGRATION

Score

<b>Scenario Agility</b>	Can the team model 'what-if' scenarios quickly to test outcomes?	
<b>External Signals</b>	Does planning incorporate real customer or market data into the demand plan?	
<b>Performance Metrics</b>	Are metrics defined, clear, and consistent in measuring planning success?	
<b>Financial Integration</b>	Does the demand plan align with the annual budget?	
<b>Executive Dashboards</b>	Are dashboards current and easy to access for reviewing planning results?	
<b>Insight &amp; Integration Score</b>		

## CONTINUOUS IMPROVEMENT & VALUE CREATION

Score

<b>Strategy Alignment</b>	Does planning turn strategy and financial goals into executable plans?	
<b>Lifecycle Management</b>	Are obsolete or slow-moving SKUs reviewed and addressed regularly?	
<b>Continuous Improvement</b>	How often are planning processes and tools reviewed and improved?	
<b>ROI &amp; Impact</b>	Can the business clearly show financial results driven by planning?	
<b>Capability &amp; Scalability</b>	Does the team have the skills, tools, and capacity to sustain improvement?	
<b>Continuous Improvement &amp; Value Creation Score</b>		

Grand Total