



Demand Planning Accuracy Checklist

Data Source Validation

Verify the accuracy and reliability of data inputs used for demand planning.

Data Source 1: Sales System

- ☐ Connected & Accurate
- ☐ Connected, Requires Verification
- ☐ Disconnected/Unavailable

Data Source 2: Market Research Data

- ☐ Connected & Accurate
- ☐ Connected, Requires Verification
- ☐ Disconnected/Unavailable

Last Data Refresh Timestamp (Epoch)

Next Scheduled Data Refresh Date

Data Integrity Notes

Write something...

Data Security Protocol

- ☐ SSL/TLS Enabled
- ☐ Firewall Protected
- ☐ Other (Specify)

Historical Data Review

Assess the quality and relevance of historical sales data.

Number of Years of Data Reviewed

Enter a number...

Description of Data Cleansing Steps Performed

Write something...

Data Source Verification Status

- ☐ Verified
- ☐ Needs Verification
- ☐ Not Applicable

Last Data Audit Date

Enter date...

Data Anomalies Identified?

- ☐ Significant Outliers
- ☐ Seasonality Variations
- ☐ Trend Changes
- ☐ No Anomalies Found

Notes on Data Quality Issues & Resolutions

Write something...

Forecast Method Selection

Evaluate the appropriateness of the forecasting method used (e.g., statistical, qualitative).

Primary Forecasting Method

- ☐ Statistical
- ☐ Qualitative
- ☐ Hybrid (Statistical & Qualitative)

Statistical Method Used (if applicable)

- ☐ Moving Average
- ☐ Exponential Smoothing
- ☐ Regression Analysis
- ☐ ARIMA
- ☐ Other

Justification for Method Selection

Write something...

Forecast Horizon (in weeks/months)

Enter a number...

Software Used for Forecasting

- ☐ Dedicated Forecasting Software
- ☐ Spreadsheet (e.g., Excel)
- ☐ ERP System
- ☐ Other

Factors Considered in Method Choice

- ☐ Data Availability
- ☐ Forecast Accuracy Requirements
- ☐ Complexity
- ☐ Resources Available

Key Assumption Validation

Review and validate key assumptions influencing demand forecasts (e.g., promotions, market trends).

Describe Promotional Activities Planned

Write something...

Estimated Impact of Promotional Activities (Units)

Enter a number...

Market Trend Influencing Demand

- ☐ Increasing
- ☐ Decreasing
- ☐ Stable
- ☐ Uncertain

Estimated Impact of Market Trend (Percentage)

Enter a number...

Date of Key Market Event

Enter date...

Describe any external factors impacting demand

Write something...

Competitor Actions Considered

- ☐ New Product Launch
- ☐ Price Reduction
- ☐ Marketing Campaign
- ☐ No Significant Action

Collaboration and Communication

Ensure effective communication and collaboration with sales, marketing, and other relevant stakeholders.

Summary of Sales & Marketing Input

Write something...

Communication Method Used (e.g., Meeting, Email, Shared Document)

- ☐ Meeting
- ☐ Email
- ☐ Shared Document
- ☐ Other

Date of Last Collaboration Meeting

Enter date...

Stakeholders Involved in Collaboration

- ☐ Sales
- ☐ Marketing
- ☐ Finance
- ☐ Supply Planning
- ☐ Product Management

Key Decisions Made During Collaboration

Write something...

Forecast Error Metrics

Monitor and analyze forecast error metrics (e.g., MAPE, MAD, RMSE) to identify areas for improvement.

MAPE (Mean Absolute Percentage Error)

Enter a number...

MAD (Mean Absolute Deviation)

Enter a number...

RMSE (Root Mean Squared Error)

Enter a number...

Bias (Mean Forecast Error)

Enter a number...

Forecast Error Trend (Overall)

- ☐ Improving
- ☐ Stable
- ☐ Worsening

Forecast Accuracy (%)

Enter a number...

Comments on Error Metrics and Analysis

Write something...

Bias Detection & Correction

Identify and address any consistent bias in the forecasting process (either over or under-forecasting).

Average MAPE over Last Quarter

Enter a number...

Primary Bias Type?

- ☐ Over-Forecasting
- ☐ Under-Forecasting
- ☐ No Obvious Bias

Description of Observed Bias

Write something...

Magnitude of Typical Bias (e.g., % difference)

Enter a number...

Date Bias First Noticed

Enter date...

Potential Root Causes Investigated

Write something...

Corrective Actions Implemented (select all that apply)

- ☐ Data Source Adjustment
- ☐ Model Parameter Tuning
- ☐ Collaboration Improvement
- ☐ External Data Integration

Expected MAPE Reduction (%)

Enter a number...

Process Documentation & Updates

Maintain updated documentation of the demand planning process and ensure it reflects current practices.

Current Demand Planning Process Documentation Summary

Write something...

Last Documentation Review Date

Enter date...

Summary of Changes Made to Process Since Last Review

Write something...

Documentation Version Control Status

- ☐ Draft
- ☐ Approved
- ☐ Obsolete

Attach Updated Process Flow Diagram

 Upload File

Document Version Number

Write something...

Next Scheduled Documentation Review Date

Enter date...

System Configuration

Verify the proper configuration of demand planning software and integrations.

Forecast Horizon (in days)

Enter a number...

Demand Planning Software Version

- ☐ Version 1.0
- ☐ Version 2.0
- ☐ Version 2.1
- ☐ Latest Version

Integrated Systems (Select all that apply)

- ☐ ERP System
- ☐ CRM System
- ☐ WMS System
- ☐ External Data Feeds

Last System Configuration Review Date

Enter date...

Notes on Configuration Changes

Write something...

Exception Management

Review and address exceptions or unexpected variances in demand forecasts.

Describe the Exception

Write something...

Forecasted Demand (Units)

Enter a number...

Actual Demand (Units)

Enter a number...

Reason for Exception (Select Best Fit)

- ☐ Promotional Impact
- ☐ Unexpected Market Shift
- ☐ Supply Chain Disruption
- ☐ Data Error
- ☐ Other

Date of Exception

Enter date...

Corrective Actions Taken

Write something...

Exception Status

- ☐ Open
- ☐ In Progress
- ☐ Resolved
- ☐ Closed

Reviewer Signature

