



# MRP Demand Planning Checklist

## Data Collection & Forecasting

Ensuring accurate historical data is available and appropriate forecasting methods are selected.

### Historical Sales Data Range (Months)

Enter a number...

### Description of Data Sources

Write something...

### Forecasting Method Selection

- ☐ Moving Average
- ☐ Exponential Smoothing
- ☐ Regression Analysis
- ☐ Qualitative Judgment

### Last Data Refresh Date

Enter date...

### Forecast Horizon (Months)

Enter a number...

### Data Quality Assessment Notes

Write something...

## Sales & Operations Planning (S&OP) Alignment

Verifying demand plan aligns with overall sales and operations goals.

### S&OP Objectives Review

Write something...

### Forecast Bias Percentage

Enter a number...

### Key S&OP Risks Identified

- ☐ Supply Chain Disruptions
- ☐ Demand Volatility
- ☐ Capacity Constraints
- ☐ Inventory Imbalances

### Next S&OP Meeting Date

Enter date...

### S&OP Process Owner

### Summary of S&OP Decision Points

Write something...

## Forecast Accuracy Metrics

Establishing and monitoring key performance indicators (KPIs) for forecast accuracy.

### Mean Absolute Deviation (MAD)

Enter a number...

### Mean Squared Error (MSE)

Enter a number...

### Root Mean Squared Error (RMSE)

Enter a number...

### Percentage Bias

Enter a number...

### Forecast Accuracy (%)

Enter a number...

### Tracking Signal

Enter a number...

### Date of Last Metric Calculation

Enter date...

### Notes/Comments on Metric Performance

Write something...

## Demand Signal Identification

Identifying and analyzing key demand signals impacting future requirements.

### Description of Key Economic Indicators Considered

Write something...

### Primary Demand Signal Type

- ☐ Historical Sales Data
- ☐ Market Trends
- ☐ Customer Orders
- ☐ Promotional Activities
- ☐ Competitor Analysis

### Weighting Factor for Customer Orders

Enter a number...

### Specific Customer Segments to Monitor

- ☐ New Customers
- ☐ Existing Customers
- ☐ Key Accounts
- ☐ Online Sales

### Date of Last Market Research Report

Enter date...

## Collaboration & Communication

Confirming clear communication channels and collaborative processes with sales, marketing, and other stakeholders.

### Frequency of Cross-Functional Meetings

Enter a number...

### Communication Channels Used (e.g., Email, Slack, Meetings)

- ☐ Email
- ☐ Slack
- ☐ Scheduled Meetings
- ☐ Other

### Summary of Recent Collaboration Discussions

Write something...

### Date of Last Collaboration Review

Enter date...

### Departments Involved in Demand Planning

- ☐ Sales
- ☐ Marketing
- ☐ Operations
- ☐ Finance
- ☐ Product Management

### Contact Person for Communication Issues

Write something...

## Demand Review Meetings

Scheduling and conducting regular demand review meetings to adjust forecasts.

### Meeting Date

Enter date...

### Meeting Time

### Review Focus (e.g., Promotional, New Product)

- ☐ Promotional Activity
- ☐ New Product Launch
- ☐ Seasonal Trends
- ☐ General Demand Review

### Summary of Key Discussions

Write something...

### Forecast Variance (Actual vs. Projected)

Enter a number...

### Action Required (e.g., Forecast Adjustment, Capacity Planning)

- ☐ Forecast Adjustment
- ☐ Capacity Planning
- ☐ Inventory Review
- ☐ Marketing Collaboration

### Action Items & Responsibilities

Write something...

### Follow-up Date

Enter date...

## Exception Handling

Defining procedures for addressing and resolving forecast exceptions and risks.

### Describe the exception (e.g., unusually high order volume, unexpected market disruption)

Write something...

### Percentage deviation from baseline forecast

Enter a number...

### Exception Category (e.g., Sales, Production, Supply)

- ☐ Sales
- ☐ Production
- ☐ Supply
- ☐ External Factor



### Date of Exception

Enter date...

### Root Cause Analysis - Briefly explain the underlying reason for the exception

Write something...

### Severity Level (e.g., Low, Medium, High)

☐ Low

☐ Medium

☐ High

### Proposed Corrective Actions

Write something...

### Corrective Action Implementation Date

Enter date...

### Authorized Reviewer Signature

## Forecast Consolidation

Ensuring accurate consolidation of individual forecasts into an aggregate demand plan.

### Weighted Average Calculation Factor

Enter a number...

### Consolidation Methodology

- ☐ Simple Average
- ☐ Weighted Average
- ☐ Median

### Total Forecast Volume

Enter a number...

### Consolidation Rationale

Write something...

### Consolidation Date

Enter date...

### Variance from Initial Forecast

Enter a number...

## System Integration

Validating seamless integration between demand planning tools and the MRP system.

### API Response Time (milliseconds)

Enter a number...

### Integration Method

- ☐ Direct API
- ☐ Message Queue
- ☐ File Transfer (SFTP)

### Integration Error Logs (if applicable)

Write something...

### Last Integration Synchronization Date

Enter date...

### Systems Integrated

- ☐ ERP System
- ☐ CRM System
- ☐ WMS System

### Integration User ID

Write something...

## Documentation & Review

Maintaining clear documentation of forecasting processes and regularly reviewing their effectiveness.

**Last Review Date**

Enter date...

**Review Summary & Action Items**

Write something...

**Forecast Accuracy Score (Previous Period)**

Enter a number...

**Review Type (e.g., Monthly, Quarterly)**

- ☐ Monthly
- ☐ Quarterly
- ☐ Annual

**Process Improvement Recommendations**

Write something...

**Supporting Documents (e.g., Forecast reports)**

 Upload File

**Next Review Date**

Enter date...