

THE SUPPLY CHAIN PLANNING FIELD GUIDE

Roles, Career Paths & How to Break In

The Next-Gen Planner

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INTRODUCTION

Think about it? Nobody goes to school for supply chain planning. No one comes out of school to become a Supply Chain Planner, they just fall into it eventually. Chances are if you are a new college grad, you don't know much about it.

You might have studied supply chain management, business, operations, or industrial engineering. Maybe you stumbled into planning from a different role entirely. Either way, you probably weren't handed a clear map of what this field looks like, what the different roles actually do, or how to build a career in it.

This guide is that map.

Supply Chain Planning is one of the most in-demand, well-compensated, and genuinely interesting functions in business right now. It sits at the intersection of data, strategy, and execution. It touches every part of the organization, and it's evolving faster than almost any other profession because of AI.

If you're trying to break into the field, understand how it works, or figure out where you fit, this is the place to start.

SECTION 1: WHAT SUPPLY CHAIN PLANNING ACTUALLY IS

Ever get to a shelf at a store and wonder how that product got there? Well, everyone in the Supply Chain Planning organization had a role.

Supply Chain Planning is the function responsible for figuring out what customers are going to want, when they're going to want it, and making sure the business can deliver it profitably.

It sounds simple, but it is not.

At its core, planning sits between two sides of the business that are almost always in tension: demand (what consumers want) and supply (what the business can make or buy). The planner's job is to bridge that gap: forecast demand accurately, ensure supply is aligned, and manage the inevitable gaps when reality doesn't match the plan.

Good planning prevents stockouts that kill service levels and create chargebacks. It prevents excess inventory that ties up cash and eventually gets written off. It helps leadership make better decisions with less uncertainty. In a world where disruptions are more frequent and cycles are compressing, it's more important than ever.

Planning is a communication function. The best planners are the ones who can read data, form a view, and get the rest of the organization to act on it.

SECTION 2: THE PLANNING LANDSCAPE: THE ROLES EXPLAINED

The planning function includes several distinct roles. Many companies use these terms differently, and titles vary by industry and company size. The roles covered here are the five core planning roles you're most likely to encounter.

A note on scope

This guide covers five core planning roles: Demand Planner, Supply Planner, Materials Planner, Production Planner (Scheduler), and S&OE Planner. It is not an exhaustive list. Roles like inventory planner, replenishment analyst, S&OP manager, and network planner are equally valuable paths (titles and roles can vary by company and industry). They just aren't covered here.

DEMAND PLANNER

Demand planning is the starting point of planning. Demand planners are responsible for forecasting how much of each product consumers will buy, by week, by month, by channel, by customer, over a planning horizon that typically stretches 12 to 18 months.

The job is part statistical analysis, part market intelligence, part stakeholder management. A demand planner uses historical sales data, market trends, promotional calendars, new product launches, and input from sales and commercial teams to build a forecast the rest of the supply chain can plan against.

Demand planners own the number. When the forecast is wrong (and it always is to some degree), they explain why, what changed, and what the team should do about it. The best demand planners are curious, organized, and comfortable with ambiguity. They understand that the goal isn't a perfect forecast, rather it's a useful one.

SUPPLY PLANNER

Supply Planners translate the demand forecast into a supply plan. Their job is to figure out how much to make, buy, or move, and when, to meet demand without creating excess inventory or supply risk.

Where demand planners work with uncertainty about the future, supply planners work with the constraints of the present: supplier lead times, production capacity, storage space, transportation availability, and unpredictable events. They're matching a moving target against a set of real-world limitations.

Supply planners spend a lot of time on purchase orders and production orders, managing supplier relationships, expediting when something goes wrong, and building inventory and production strategies that balance service levels against cost.

MATERIALS PLANNER

Materials planners manage the availability of the raw materials, components, and packaging needed to keep production running. They work from the production plan to determine what materials are needed, when, and in what quantity, then manage procurement and inventory of those materials to prevent shortages that stop the line.

Materials planning is closely tied to MRP (Material Requirements Planning), a system-driven process that calculates what to order based on demand, lead times, and current inventory. A materials planner's job is to interpret that output, catch what the system misses, and make judgment calls when things go sideways.

This role is highly cross-functional. Materials planners work constantly with procurement, suppliers, and production schedulers. When a raw material is late or short, it's the materials planner who sounds the alarm, and often the one who figures out how to work around it. Strong attention to detail and a bias for proactive communication are essential.

PRODUCTION PLANNERS (SCHEDULER)

Schedulers sit at the execution end of the supply planning process. Where supply planners determine what to make or buy and when, schedulers translate that plan into a detailed production or fulfillment schedule, sequencing operations, allocating capacity, and managing the day-to-day execution of the plan.

In manufacturing environments, schedulers work closely with plant operations to sequence production runs, minimize changeover time, and respond to real-time disruptions like equipment downtime or raw material delays. In distribution or fulfillment environments, they manage order sequencing and warehouse throughput.

Scheduling requires a high tolerance for change. Plans shift constantly, and schedulers are expected to respond quickly and keep operations moving. It's one of the most hands-on, execution-focused roles in the planning function.

S&OE PLANNER: SALES AND OPERATIONS EXECUTION

S&OE is the short-horizon execution layer of planning, typically covering the next four to eight weeks. Where S&OP operates on a monthly cycle, S&OE operates daily or weekly and focuses on exceptions: what's changed since the last plan, what's at risk right now, and what needs to happen in the next few days to protect service levels.

S&OE is a newer, more formalized concept that many organizations are still building out. It's becoming a formal job title at companies that recognize the execution layer needs its own dedicated attention. S&OE planners triage exceptions, communicate risk quickly, and make fast decisions with incomplete information. If you thrive in fast-moving, problem-solving environments, this is a role worth pursuing.

S&OP VS. IBP: WHAT'S THE DIFFERENCE?

You will hear both terms in planning. They are related but not the same thing, and it's worth understanding the distinction before you walk into your first interview.

S&OP

Sales & Operations Planning

Focuses on balancing demand and supply over a 12-18 month horizon. Monthly cadence. Output is an aligned operating plan.

Participants: demand planning, supply planning, finance, commercial leadership.

Question it answers: Can we meet expected demand, and what do we need to do if we can't?

IBP

Integrated Business Planning

Extends S&OP to include financial planning, portfolio strategy, and long-range business planning. Connects the operating plan directly to the P&L and strategic objectives.

Participants: adds CFO, CEO, and strategic leadership to the S&OP participants. Level of leadership varies by company.

Question it answers: Is our operating plan aligned with where the business is going financially and strategically?

The simplest way to think about it: S&OP aligns operations. IBP connects operations to strategy and finance. Most companies run some version of S&OP. Fewer have matured into true IBP. If a company tells you they run IBP, they're usually signaling that planning has a seat at the strategic table, which is a good sign.

HOW AN S&OP PROCESS ACTUALLY WORKS

The most widely adopted S&OP framework is the Oliver Wight model, developed by Oliver Wight International and used as the Class A standard for planning excellence across industries. It's not the only way to run S&OP, but it's the most rigorous and the most commonly referenced in professional planning circles. Understanding it gives you a significant advantage in interviews and in practice.

The Oliver Wight process runs on a monthly cadence and consists of five sequential reviews. Each one feeds into the next. By the time leadership gets to the final meeting, the plan has already been stress-tested at every level.

STEP 1: PRODUCT MANAGEMENT REVIEW

Who is involved: Product management, R&D, marketing, demand planning, commercial leadership.

The process starts with the product portfolio, not the forecast. The product review examines what's coming into the portfolio (new launches, line extensions, innovation pipeline) and what's going out (discontinuations, phase-outs, end-of-life items). This matters because new product introductions and discontinuations have an outsized impact on demand and supply, and they need to be reflected in the plan before forecasting begins.

This step is often underinvested in organizations that are newer to S&OP. Companies that run it well treat it as a strategic gate: it's where the business decides what it's actually going to sell over the next 24 months.

Desired outcome: An updated product portfolio plan with New Product Introduction (NPI) timelines, launch volumes, and phase-out schedules confirmed and handed off to the demand review.

STEP 2: DEMAND REVIEW

Who is involved: Demand planners, sales, commercial/marketing, key account managers, sometimes finance.

The demand review is where the statistical baseline gets tested against commercial reality. The demand planning team brings a system-generated statistical forecast as the starting point. Sales and marketing then overlay what they know: upcoming promotions, customer conversations, market shifts, changes in account activity. The demand planner's job is to facilitate that conversation, document the assumptions behind every adjustment, and land on a single consensus forecast the business is prepared to stand behind.

The demand review is often the most politically charged step in the cycle. Sales tends to be optimistic and Finance tends to want a conservative number. The demand planner is not a referee. They're accountable for the accuracy of the number that comes out the other side, which means they need to push back on bias, regardless of where it comes from.

Desired outcome: One agreed-upon unconstrained demand plan with documented assumptions, representing the business's best view of what customers will buy, before supply constraints are applied.

STEP 3: SUPPLY REVIEW

Who is involved: Supply planners, procurement, operations, manufacturing, logistics.

Supply Planning takes the consensus demand forecast from the demand review and runs it against what's actually possible. Can the supply network handle this volume? Are there capacity constraints at the plant, with key suppliers, or in transportation? What are the lead time implications over the next 12 to 18 months?

The output of the supply review is a constrained supply plan, meaning a plan that reflects what the business can realistically deliver, not just what demand is calling for. Where demand exceeds supply capability, those gaps get quantified and options for closing them get built out: expedite, build ahead, qualify an alternate source, accept the service risk.

Desired outcome: A constrained supply plan with gaps, risks, and mitigation options clearly identified, forming the factual basis for the financial and executive conversations that follow.

STEP 4: INTEGRATED RECONCILIATION/FINANCIAL REVIEW

Who is involved: Planning leads across demand, supply, and finance. Sometimes senior commercial leadership.

Integrated reconciliation is where all the plans come together and get pressure-tested as a whole. The demand plan, the supply plan, and the financial plan are laid side by side. Finance checks whether the volume plan will deliver the revenue and margin the business needs. Where it doesn't, the gap gets sized and the options for closing it get evaluated.

This step is also where the executive agenda gets built. Not every gap or risk needs to go to leadership. Many can be resolved at this level. Integrated reconciliation filters the noise and identifies the two or three decisions that genuinely require executive authority to resolve. Those become the agenda for the Management Business Review.

Done well, this step makes the executive meeting shorter, sharper, and more productive. Done poorly, or skipped entirely, the executive meeting becomes a data dump where nothing gets decided.

Desired outcome: A reconciled, financially validated plan with a crisp executive package: here is the plan, here are the gaps, here are the options, here is what we need you to decide.

STEP 5: MANAGEMENT BUSINESS REVIEW

Who is involved: VP or Director of Supply Chain, CFO, Chief Commercial Officer, COO, and often the CEO or General Manager.

The Management Business Review (sometimes called the Executive S&OP) is where decisions get made. Leadership reviews the reconciled plan, hears the trade-offs, and makes calls on the items that couldn't be resolved at the working level. Do we build inventory ahead of a capacity constraint? Do we accept the service risk and protect the cash? Do we cut a promotion because supply can't support the volume?

In the Oliver Wight model, the MBR is not a status update and it is not a presentation. It is a decision-making forum. Pre-read materials go out in advance. The agenda is built around decisions, not updates and participants come prepared. The meeting ends with documented decisions and assigned owners.

Organizations that run S&OP well protect this meeting aggressively. When the MBR becomes a passive review, the rest of the process degrades. If leadership isn't actually using the plan to make decisions, no one will invest in making the plan better.

Desired outcome: One agreed-upon operating plan the entire business is accountable to, with decisions documented, owners assigned, and action items tracked to closure.

WHAT'S NEXT IN PLANNING

The S&OP process described above has been the standard for decades. It works. But the profession is evolving fast, driven by better data, faster systems, and the rapid advancement of AI. Here are the trends that are reshaping how planning gets done.

Continuous Planning: Traditional S&OP runs on a monthly cycle. The plan gets updated once a month, and everyone operates against it until the next cycle. Continuous planning replaces that fixed cadence with an always-on process: the plan updates as new information arrives, not on a calendar schedule. The goal is a plan that's never stale. This requires better technology and a different operating model, and many organizations are still working toward it. If you are interested in learning more check out my five article series on continuous planning at my newsletter [here](#).

Scenario-Based Planning: Instead of building one 'best guess' forecast, scenario-based planning maintains multiple versions of the future simultaneously: an optimistic case, a base case, and a downside case, and pre-builds the supply and financial responses to each. When reality starts to look more like one scenario than another, the business can respond quickly because the plan already exists. This is especially valuable in volatile markets where the single-number forecast breaks down. This is sometimes also referred to as "range based planning."

Decision-Centric Planning. Traditional S&OP is organized around meetings and reviews. Decision-centric planning reorganizes the process around the decisions that actually need to be made. Instead of asking 'did we run the demand review?' it asks 'what decisions does the business need to make this week, and what information is required to make them?' It's a subtle but significant shift in how planning value gets measured: less about process compliance, more about decision quality.

AI-Augmented Planning. AI is already changing the day-to-day work of planners. Systems are getting better at identifying exceptions, generating forecast adjustments, and surfacing risks before they become problems. The near-term impact is a reduction in the manual, repetitive work that has always consumed planning bandwidth: running reports, chasing numbers, formatting slide decks. The longer-term impact is AI moving into the decision layer itself: recommending actions, simulating trade-offs, and flagging when the plan is no longer credible. Planners who understand how to work alongside these systems, and how to apply judgment where AI falls short, will be the most valuable ones in the room.

S&OE as Standard Practice. Short-horizon execution planning has existed informally for years. What's new is the formalization of S&OE as its own dedicated function. More organizations are recognizing that the monthly S&OP cycle can't respond fast enough to the disruptions that happen every week, and that someone needs to own the execution layer explicitly. As a career path, S&OE is one of the fastest-growing in planning. If you're comfortable in fast-moving environments and want to be at the center of the action, it's worth pursuing.

SECTION 3: WHAT PLANNERS ACTUALLY DO

Here is what a week looks like in practice for each role.

A demand planner's week

- Reviewing the statistical forecast output from the planning system
- Adjusting forecasts for upcoming promotional events or new item launches
- Joining a weekly commercial alignment call with the sales team
- Preparing materials for the monthly S&OP reviews
- Documenting assumptions in case someone asks 'why did you forecast that?' three months from now

A supply planner's week

- Reviewing open purchase orders and flagging any at risk of being late
- Running a capacity check for the next 12 weeks
- Working with a supplier to expedite a shipment on a fast-moving item
- Updating the production plan based on a revised demand forecast
- Attending the weekly S&OE exception review

A materials planner's week

- Reviewing MRP output and validating system-generated purchase order recommendations
- Following up with suppliers on open orders and flagging any at risk of being late
- Monitoring raw material and component inventory levels against production needs
- Communicating material shortages or risks to scheduling and supply planning teams
- Updating lead times, safety stock parameters, and supplier data in the ERP system

A production planner's (scheduler's) week

- Sequencing production or fulfillment orders for the day or week
- Adjusting the schedule when equipment goes down or materials are delayed
- Coordinating with plant operations or warehouse teams on capacity and throughput
- Communicating schedule changes to supply planners and S&OE teams
- Tracking actual vs. planned production and flagging variances

An S&OE planner's week

- Reviewing daily exception reports
- Communicating supply risks to commercial and logistics teams
- Making real-time decisions about priorities when supply is short
- Escalating issues that can't be resolved at the planning level

SECTION 4: THE CAREER LADDER

Planning careers typically follow this progression, though titles and levels vary by company size and industry.

Planning Analyst / Junior Planner

Entry-level. Focused on data management, reporting, and supporting senior planners. You learn the tools, processes, and vocabulary. Expect a lot of Excel and a lot of questions. This is the foundation.

Demand Planner / Supply Planner

The core practitioner role. You own a category, region, or set of SKUs. Accountable for forecast accuracy, inventory performance, or service levels. Where most planners spend the bulk of their early career.

Senior Planner

More complex portfolio, more cross-functional responsibility, more leadership in S&OP. Expected to own your space without close supervision and drive continuous improvement, not just execute.

Planning Manager

You're now responsible for a team. The job shifts from doing the planning to building the capability of the people doing it. A significant transition that many planners find harder than expected.

Director / VP of Supply Chain

Strategic leadership. Accountable for planning performance across the enterprise. Building organizational capability, driving technology strategy, and representing planning in the C-suite. At this level, business acumen and executive presence matter most.

SECTION 5: THE TOOLS YOU'LL ENCOUNTER

You do not need to know all of these before you start. But you will encounter them, and it helps to know what they are.

Microsoft Excel

Still the backbone of planning in most organizations. Pivot tables, VLOOKUP/XLOOKUP, basic modeling. This is not optional.

SAP / Oracle

Enterprise Resource Planning (ERP) systems for managing supply chain data: purchase orders, inventory levels, production orders. SAP is most common. You'll learn it on the job.

Blue Yonder / o9 / Kinaxis / SAP IBP

Specialized planning tools that handle statistical forecasting, scenario planning, and S&OP processes. Different companies use different tools. Understanding the planning process matters more than tool knowledge. There are A LOT of new software coming out.

Power BI / Tableau

Data visualization tools used to build planning dashboards and reports. Increasingly important as companies move away from static Excel reports.

AI Tools (Claude, ChatGPT, Gemini)

AI is moving into planning fast. Right now, planners use AI primarily for communication tasks: writing exception summaries, analyzing data, drafting meeting prep. The frontier is AI moving into forecasting and decision-making itself.

SECTION 6: SKILLS THAT ACTUALLY GET YOU HIRED

Hiring managers for entry-level planning roles are not looking for people who already know how to plan. They're looking for people who can learn how to plan.

Analytical ability. You need to be comfortable working with data, not necessarily coding or statistics, but logical thinking, pattern recognition, and the ability to draw a conclusion from a spreadsheet.

Communication skills. This surprises a lot of candidates. Planning is not a back-office role. Planners present to leadership, facilitate cross-functional meetings, and write summaries that drive decisions. If you can write clearly and speak confidently about data, you stand out.

Intellectual curiosity. Good planners ask why. Why is this forecast biased? Why did this product underperform? Why is this supplier consistently late? Hiring managers can spot the candidates who are genuinely curious versus the ones who just execute.

Coachability. Entry-level planning involves a steep learning curve. Hiring managers are investing time in you. They want to see that you'll take feedback, ask questions, and grow quickly.

Basic Excel proficiency. You need this. It does not have to be advanced, but you should be able to work with data in Excel without significant help.

SECTION 7: HOW TO BREAK IN

Build the vocabulary first. Before you apply for planning roles, learn the language. Understand what a forecast is, what S&OP means, what safety stock does, what a service level target represents. You don't need deep expertise, but you need to be able to have a conversation in the interview without looking lost.

Target the right roles. Look for titles like Demand Planning Analyst, Supply Chain Analyst, Planning Coordinator, or S&OP Analyst. These are the entry points. Avoid targeting senior planner or manager roles without the experience: it signals you don't understand the career path.

Use your internship or current role. If you've had any exposure to supply chain, operations, logistics, or finance, find the planning angle in that experience and lead with it. Worked in a warehouse? Talk about how inventory accuracy impacted the forecasting process. Worked in retail? Talk about replenishment and in-stock rates.

Tailor your resume for the function. Most planning resumes are too generic. Use planning vocabulary. Quantify where you can: even rough numbers show analytical instincts. 'Managed inventory for 200 SKUs' is stronger than 'assisted with inventory management.'

Prepare for the interview. Expect questions about how you handle ambiguity, how you work cross-functionally, and how you use data to make decisions. You will almost certainly get a case study or analytical exercise. Practice thinking through problems out loud: show your reasoning, not just your answer.

Network intentionally. LinkedIn is where planning professionals live. Follow planners, engage with content in the space, and don't be afraid to reach out to people in roles you want. Most practitioners are willing to talk to someone who is genuinely curious and comes prepared with specific questions, including myself!

SECTION 8: YOUR FIRST 90 DAYS

Your first 90 days in a planning role are not about being good at planning. They are about learning fast, building relationships, and earning trust.

DAYS

1–
30

Listen and learn.

Your only job is to understand how this company does planning. Every company does it differently. Learn the tools, the process, the vocabulary they use internally, and who the key stakeholders are. Ask questions constantly and take notes. Do not try to fix anything yet.

DAYS

31–
60

Start contributing.

Handle basic planning tasks independently. Show your work. Communicate proactively when something is off. Start building relationships with cross-functional partners: sales, supply, finance. Be reliable on the small things before you take on the bigger ones.

DAYS

61–
90

Add your perspective.

Now you can start bringing ideas. Not major process overhauls, just small observations, questions that lead to improvements, better ways to document something. Show that you're thinking beyond just executing your tasks.

The planners who advance fastest are the ones who communicate well, build trust quickly, and make the people around them more effective.

WHAT'S NEXT

You now have a map of the planning landscape, but what you do with it is up to you.

If you're preparing to break in, start with the vocabulary, sharpen your Excel skills, and get your resume ready to tell a planning story.

If you've just landed your first role, focus on learning fast and building relationships before you try to change anything.

And once you're in the field and ready to grow, that's where **The Next-Gen Planner** comes in.

The Next-Gen Planner

A LinkedIn newsletter for supply chain planners navigating AI and the future of the profession. Published about every two weeks. Written by a practitioner, for practitioners.

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