



Canadian
Supply Chain
Sector Council

Conseil canadien
sectoriel de la chaîne
d'approvisionnement

OCCUPATIONAL STANDARD

(For use in the development of supply chain related job descriptions, performance evaluations, career development plans, etc.)

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| Position: | FORECASTING AND DEMAND MANAGEMENT SPECIALIST |
| Description of Position (As defined by the CSCSC Stakeholder Community) | <i>Forecasting and Demand Management Specialists analyze the drivers of demand in order to generate a forecast for a particular product or service. Forecasting and Demand Management Specialists are employed by a wide range of establishments throughout the private and public sector such as manufacturing firms, utility companies, and the service sector.</i> |
| Position Development | Advancement to more senior management positions is possible through progressively responsible positions and management experience. |
| Required Qualifications: | (Education, Training, Related Work Experience) |
| Education | Post-secondary education is preferred (e.g., a bachelor's degree or college diploma in a business field such as economics, logistics, supply chain management, operations management, finance or engineering, mathematics, or statistical analysis). A professional designation related to supply chain is considered an asset. |
| Training | Individuals generally need some on-the-job training, but typically organizations require that the individual will already have the required skills, knowledge, and work-related experience. |
| Related Work Experience | Progressive experience in one or more of the following fields: forecasting, inventory planning, statistics, business intelligence, and/or operations management. Familiarity with operating supply chain systems. |
| Tasks: | |
| Forecasting and Demand Management Specialists perform some or all of the following tasks | <ul style="list-style-type: none"> Forecast the demand for particular products and/or services in terms of dollars and product mix to drive supply chain activities for a particular future period of time Timely communicate information to all stakeholders using the appropriate communication method Consult with functional teams such as supply planners, sales, |

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| | <p>marketing, operations, finance, and product development to obtain relevant data and insights on demand</p> <ul style="list-style-type: none"> • Drive cross-functional collaboration to influence the demand on the supply chain and prioritize demand for order fulfillment based on business objectives and customer segmentation • Participate as the demand owner/representative in an organization’s sales and operations planning process, to enable demand-supply balancing analysis • Confer with management on demand planning and forecasting assumptions, analysis, and decisions • Prepare reports and statistics related to the demand planning and forecasting function • Manage forecast models, analyze trends, manage forecast tools, and maintain accurate data • Develop and measure key performance indicators to track and evaluate forecasts made, to assist in assessing the effectiveness of the demand planning & forecasting function, and to work towards continuous improvement • Support business, marketing, inventory or production strategies, and organizational / supply chain improvement opportunities to meet market needs • Review and assess risk to supply and demand variability and identify opportunities to manage and mitigate risk • Develop, implement and use tools and technology for managing and analyzing the supplier portfolio • Develop and maintain constructive and cooperative working relationships with all stakeholders • Coach and mentor staff as required • Perform and/or direct day to day administrative tasks. |
| Tools and Technology: | |
| | <ul style="list-style-type: none"> • Computer Hardware and Associated Software and Systems (i.e. analytical or scientific, customer relationship management, enterprise resource planning, accounting software, inventory management, materials requirements planning logistics and supply chain, database user interface and query, information retrieval or search software, project management, forecasting, time accounting, electronic mail, word processing, spreadsheet) • Communication Devices |
| Required Competencies: | (Knowledge, Skills, Personal Attributes) |

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| Knowledge | Forecasting and Demand Management Specialists should have knowledge of supply chain, applicable laws and regulations, the English language, and other languages as required, administration and management, production and processing, mathematics (e.g., analytical and statistical methods), personnel and human resources, economics and accounting, relevant tools and technology, customer and personal service, and education and training. |
| Skills | Forecasting and Demand Management Specialists should have the following skill sets: persuasion, supervisory, active listening and learning, communication, critical thinking, analytical thinking, judgment and decision making, reading comprehension, project management, mathematics, time management, presentation, and operations analysis. |
| Personal Attributes | (Abilities, Work Values, Work Styles) |
| Abilities | The following abilities are important to the role of a Forecasting and Demand Management Specialist: oral expression and comprehension, speech clarity and recognition, written expression and comprehension, inductive and deductive reasoning, and problem sensitivity. |
| Work Values | Individuals who will succeed in this position: <ul style="list-style-type: none"> • empower employees to work collaboratively, but also independently with the ability to make decisions; • embrace progressive opportunities and good working conditions that are health and safety conscious; • adhere to a strict code of ethical conduct; and • offer supportive management. |
| Work Styles | The following work styles are attributable to a Forecasting and Demand Management Specialist: integrity, dependable, stress tolerant, detail oriented, persistent, initiative, leadership, adaptable/flexible, multi-tasking, and cooperative. |
| Essential Skills Profile: | Essential Skills are the skills needed for work, learning and life. They provide the foundation for learning all other skills and enable people to evolve with their jobs and adapt to workplace change. For more detailed essential skills profiles please refer to the HRSDC website: http://www.hrsdc.gc.ca/eng/workplaceskills/LES/index.shtml The Human Resources and Skills Development Canada (HRSDC) Essential Skills Research Project focused on occupations requiring a secondary school diploma or less and on-the-job training. As such a formal Essential Skills Profile for the occupation of Forecasting and Demand Management Specialist has not yet been created by HRSDC. The following section contains essential skills information identified in |

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| | existing occupational standards and classified using the nine Essential Skills categories. Note that the content is not associated with HRSDC and the Essential Skills Research Project. |
| Reading Text | <ul style="list-style-type: none"> • Frequently read text in both print and non-print media <ul style="list-style-type: none"> ✓ trend, economic, and statistical information ✓ trade magazines ✓ newsletters ✓ purchasing and inventory documentation ✓ agreements and contracts ✓ performance reports ✓ consumer reports • Read and interpret dense and complex texts, and have ability to make high-level inferences using specialized knowledge <ul style="list-style-type: none"> ✓ forecasts ✓ financial statements and reports ✓ policies and procedures ✓ strategies ✓ performance indicators ✓ trade terms ✓ contracts • Frequently read paragraph length text in charts, tables and graphs |
| Document Use | <ul style="list-style-type: none"> • Documents produced and/or used may include price tables, stock lists, data tables, databases, accounting and financial statements, various administrative forms, etcetera, in both print and non-print media • Create forecasts using statistics, graphs and charts depicting demand, consumption, and inventory information on products and services, etcetera • Must be able to read simple to complex documents in which considerable inference may be required • Specialized knowledge of the content of the document may be required; multiple pieces of information from multiple sources are synthesized; the quality of information may be evaluated for accuracy and omissions |
| Writing Skills | <ul style="list-style-type: none"> • Write reports to management regarding forecasting, demand planning, demand management performance, etcetera • Write performance evaluations • Revise writing of others for factual accuracy, grammar, spelling and effectiveness • Write reports to stakeholders – reports may contain, for example, the monthly evaluation or a situation analysis and recommendations |
| Numeracy | <ul style="list-style-type: none"> • Apply data and statistical analysis math |

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| | <ul style="list-style-type: none"> • Apply financial math/money math • Apply scheduling, budgeting and accounting math • Apply measurement and calculation math • Utilize numerical estimation |
| Oral Communication | <ul style="list-style-type: none"> • Provide clear and concise recommendations to upper level management on information regarding future trends and demands • Professional communication and information exchange with customers, staff, and colleagues using a variety of communications devices and media • Conduct meetings and make presentations |
| Thinking Skills | (Problem Solving, Decision Making, Job Task Planning and Organizing, Significant Use of Memory, Finding Information) |
| Problem Solving | <ul style="list-style-type: none"> • Determine and develop appropriate analytical frameworks, approaches, and models • Investigate irregularities and variances between forecasted information and actual information • Address supply and demand related challenges using the appropriate problem-solving and investigation methods • Identify problems with the implementation of procedures, and take the appropriate action to deal with them • Adapt negotiation strategies to cope with new circumstances or issues that arise |
| Decision Making | <ul style="list-style-type: none"> • Decisions are made in line with the strategy of the organization • Participate in strategic decisions • Make decisions with market, economic, social, and political environments taken in to account • Allocate specific work activities to self and others as required |
| Job Task Planning and Organizing | Liaise with staff, other management, suppliers, and customers to manage demand and develop forecasts. |
| Significant Use of Memory | <ul style="list-style-type: none"> • Remember details of various analyses performed • Remember the policies and procedures of the organization |
| Finding Information | <ul style="list-style-type: none"> • Refer to supplier lists to find out what items are available, on sale, discontinued, and temporarily unavailable • Search systems and databases to find quantities in stock, product or service numbers and specifications • Obtain information from teams such as sales, marketing, operations, finance, and research and development to obtain relevant data and information • Obtain information to assist in determining future trends and demand |

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| Working with Others | Forecasting and Demand Management Specialists are generally self-directed and work as part of a broader team. They often will consult with relevant colleagues for their views, concerns and issues related to demand management and forecasting. |
| Continuous Learning | Enhanced learning may be acquired as part of regular work activity, through training offered in-house, through reading or other forms of self-study, or through off-site training. Ongoing learning occurs through participation in professional organizations, seminars, courses, conferences and trade shows. In addition, skills may be upgraded by taking management classes through educational institutions and training providers. |
| Additional Information | (Physical Aspects, Attitudes) |
| Physical Aspects | A Forecasting and Demand Management Specialist works extensively in an office environment however may also be required to partake in outside travel – sitting for long periods of time, with repetitive computer and telephone use. Typically there is no heavy lifting, bending, or stooping required. |
| Attitudes | Attitudes of a Forecasting and Demand Management Specialist include a strong commitment to leadership, management, transparency, and a code of ethical conduct. A Forecasting and Demand Management Specialist should have excellent interpersonal skills and negotiation skills. Furthermore, excellent analytical, planning and organizational abilities are required. Flexibility and an exhibited awareness of, and sensitivity to other cultures are considered important as a Forecasting and Demand Management Specialist may work with diverse groups, individuals and interests. |
| Future Trends Affecting Essential Skills: | Forecasting and Demand Management Specialists will be required to have enhanced computer skills in order to work with more complex computer software. The ability to speak more than one language, and an awareness of and sensitivity to the diversity of international cultures is considered a growing need in the face of increasing globalization. An understanding of the principles of sustainable procurement and supply chain practices as they relate to environmental, social, and corporate governance issues is of increasing importance. |

**Government of Canada
Defined - Related NOC Code &
Description**

A Government of Canada NOC code and description for the position of Forecasting and Demand Management Specialist is not currently available.

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| Document Management: | | | | |
|-----------------------------|-----------------------|-----------------|-------------------------|-------------------------------|
| Activity # | Activity Type* | Replaces | New Version Name | Responsible Individual |
| 1 | Document Created | Not Applicable | May 26, 2010 | M. Cheddi (CSA) |
| 2 | Document Updated | May 26, 2010 | October 4, 2010 | C. Sellar (CSA) |
| 3 | Document Finalized | October 4, 2010 | April 12, 2011 | C. Sellar (CSA) |

***Activity Types:**

- ✓ Document Created
- ✓ Document Modified (Minor Corrections & Editorial Changes)
- ✓ Document Updated (Complete Review)
- ✓ Document Finalized
- ✓ Document Retired

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