

Defining Demand Management

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Abstract

Design/methodology/approach: Uses the systematic literature review divided into three stages: planning the review, conducting the review, and reporting the review. Findings: This study clarifies the concept of demand management as the creation of synergies between operations and marketing aiming at understanding the market and developing actions synchronized with the company strategy, production capacity and final customer needs. Thus, in order to implement demand management process, it is necessary to understand the market through the capability analysis, constraints, and opportunities of external and internal environments to the organization. Such knowledge, together with the guidelines and strategic and operational practices of the company, focus on designing an efficient operational system to synchronize supply and demand through sales forecasting. In order to do so, the company needs a collaborative supply chain that consist of establishing corporative efforts between internal functions and external agents to the company aiming at meeting the final customers' needs and obtaining competitive advantage.

Index terms— Demand Management, Supply Chain Management.

1 Introduction

Demand management is an emerging topic in supply chain management. It is focused on a fast and adequate integration of supplier needs in order to balance and strategically align demand with operational capability in the supply chain. Lack of accurate information is among some of the progressive demand alignment problems in a supply chain, which leads to inefficient customer service, poor stock rotation, and high obsolescence rate aggravated by the wide diversity of products. Taylor, 2006; Taylor and Fearné, 2006) after finding, through empiric research, that the lack of alignment between supply and demand was indeed a major and expensive problem in a number of supply chains that suffered losses due to waste, lack or surplus of inventory, and low profitability.

There is little information available on demand management (Adebanjo, 2009; Taylor, 2006; Taylor and Fearné, 2006). According to Hilletoft et al. (2009), demand management is a way for organizations to obtain substantial benefits focusing on customers, besides emphasizing the need of collaboration between marketing and supply chain management in order to generate value. Nevertheless, these authors point out that the application of demand management concepts is still fairly recent, and therefore it needs further investigation.

According to Mentzer and Moon (2005) demand management, as well as the concept of demand per se, have not been well understood by supply chain agents. Many companies have failed to realize that achieving chain coordination is not possible without an adequate understanding of demand. Practitioners and academics have used terms like Demand Management, Demand Planning, Demand Forecasting, Sales and Operations Planning (S&OP), Collaborative Planning, Forecasting and Replenishment (CPFR), Integrated Business Planning (IBP), Vendor Managed Inventory (VMI) to designate similar but distinct activities and processes. Therefore, there is a confusion behind the term 'Demand Management'. Some authors discuss the need for demand management in the supply chain and the interactions that involve such process (Esper et al., 2010; Hilletoft et al., 2009; Juttner et al., 2007; Mentzer and Moon, 2005; VICS, 2010), but they do not provide a guidance for its implementation. Croxton et al. (2008) propose a demand management framework whose structure allows the understanding

45 of demand management from all its interfaces providing an integrated view of its relationship with other seven
46 supply chain processes proposed by the Global Supply Chain Forum (Croxtton et al., 2008; Lambert, 2004; Lambert
47 and Cooper, 2000; Thus, the objective of this study is to define demand management in supply chain in order
48 to clarify this concept. In addition, this article aims to provide a guidance for the preconditions that need to be
49 in place in order for a company to implement demand management with its suppliers and customers. In order
50 to develop this research, a systematic literature review (Tranfield et al., 2003; Tranfield et al., 2004) on demand
51 management was conducted.

52 Therefore, the importance and contribution of this study are justified by the fact that supply chain management
53 is considered a new, not yet consolidated concept which requires further and deeper investigation and definitions.
54 Hence, the aim of this study is to contribute for a better understanding and wider approach to demand
55 management, which can lead organizations to implement it in order to overcome the challenges of combining
56 customer needs and supply chain capabilities.

57 This study was structured into three sections. Initially, the research methodology is discussed including the
58 three phases of the systematic literature review. Next, the literature review results are reported describing the
59 demand management definitions and requirements. The last section presents the conclusions.

60 2 II.

61 3 Research Methodology

62 The purpose of a literature review is to enable researchers to map and analyze the significant literature published
63 on a topic and to establish a particular issue for its deep investigation. An alternative to literature review is its
64 systematic review (Tranfield et al., 2003).

65 The systematic literature review is a methodology that uses relevant literature to a particular issue as data
66 source providing a selection, critical contribution evaluation, analysis, and summary of each work. It describes
67 the evidences leading to reasonable conclusions about what is known and not known about the topic (Denyer
68 and Tranfield, 2009).

69 Hence, this research is divided into three stages: planning the review, conducting the review, and reporting
70 the review (Table 1). The purpose of this review is to identify the concepts of demand management from a
71 perspective of the supply chain management and its frameworks. Therefore, a research protocol was prepared
72 including information on how the studies would be found and selected from the literature and the criteria for
73 including those studies (Table 2). 3-Access to the following databases: Science Direct, Emerald, and Wiley-
74 Blackwell. Advanced search using the terms: 'demand management', 'demand supply chain', 'demand chain',
75 'demand chain management' as title keywords or as text keywords. 4-Access to the Brazilian Digital Library of
76 Electronic Theses and Dissertations. Advanced search using the terms: 'demand management', as title keywords
77 or as text keywords.

78 5-Access to the major Brazilian scientific journals covering subjects such as Production Engineering and
79 Management. Advanced search using the terms: 'demand management', 6-Access to proceedings of major
80 Brazilian scientific events on Production Engineering and Management. Advanced search using the terms:
81 'demand management', as title keywords or as text keywords.

82 4 b) Stage II: Conducting a review

83 The literature review began by surveying the topic "Supply Chain Management" on international and national
84 books and classic international journals on this topic.

85 During the selection of articles, the titles and abstracts that included demand management in supply chains
86 were evaluated. Book chapters, articles, theses, or dissertations that covered demand forecasting only were
87 excluded. Among the international and national books on supply chain management, the chapters on demand
88 management were selected.

89 Information from the following databases Science Direct, Emerald, and Wiley-Blackwell, available on Capes'
90 Journal Citation Reports Portal, were analyzed retrospectively up to 2011. An advanced search was conducted
91 using the terms: 'demand management', 'demand supply chain', 'demand chain' 'demand chain management' as
92 title keywords or as text keywords considering "every year" (available in the database up to 2011) and 'journals
93 only' as filters. Table 3 shows the total number of articles that resulted from the literature review per database
94 and terms searched. Hence, around 200 articles were analyzed, from which 47 were selected. Those included
95 the concept and/or frameworks and/or challenges of demand management from a supply chain management
96 perspective. The databases and respective journals from which the articles were selected are shown in Table 4.
97 The analysis of the selected articles shown in Table 4 indicated the need of further search in different databases.
98 Therefore, 18 other articles were selected and analyzed (Table 5).

99 5 Global Journal of Management and Business Research

100 Volume XIV Issue V Version I Year () The search of national (Brazil) scientific publications included the digital
101 library of electronic theses and dissertations, articles published in journals, and scientific events' proceedings on
102 Production Engineering and Management.

103 The digital libraries accessed were: Digital Library of Electronic Theses and Dissertations (CAPES), Digital
104 Library of Electronic Theses and Dissertations (USP), and the library of the Federal University of São Carlos
105 (UFSCar). An advanced search was conducted using the terms 'demand management' as title keywords or as
106 text keywords resulting in 4 publications. Among them, only one thesis and one dissertation were selected.
107 In addition, following fellow researchers' suggestions, two other dissertations held by the library of Methodist
108 University of Piracicaba (UNIMEP) that addressed demand management were also analyzed.

109 The Scientific Electronic Library Online (SciELO) was accessed in the search for articles in the following
110 journals: *Produção* (Production) and *Gestão & Produção* (Production and Production & Management).

111 No publications resulted from the search using the terms 'demand management' as title keywords or as text
112 keywords in the RAUSP -*Revista de Administração da Universidade de São Paulo* (journal of management of the
113 University of São Paulo) and using 'demand management' as keywords (search restricted to author and keywords)
114 in the RAE -*Revista de Administração de Empresas* (journal of business administration).

115 Fifteen articles that included the terms 'demand management' in the title were found in the proceedings
116 of scientific events. Among them, 4 were selected for analysis (Table 6). The book chapters, articles, theses,
117 and dissertations included in the systematic review were summarized highlighting their major points. The next
118 section presents the findings of the systematic literature review according to stage III: Reporting the review.

119 6 III.

120 7 Results

121 The concepts and objectives of demand management discussed by several authors on Table 7 indicate that
122 demand management cannot be considered an isolated process or an activity restricted to sales forecasting.
123 Those authors offer a more comprehensive concept that involves the creation of synergies between operations
124 and marketing aiming at (2008) Supply chain process composed of operational and strategic subprocesses that
125 focus on determining sales forecasting, synchronize it with the production capacity of the company and the
126 chain, incorporate the company strategy, and map customer needs. Alignment of demand creation and demand
127 fulfillment processes within the internal functions of a particular company and across companies within the chain
128 thus exploring the synergies between market and SCM aiming at obtaining competitive advantages.

129 Mentzer et al. (2007) Mentzer and Moon (2005) An element of the supply chain management. Creation of a
130 coordinated demand flow between the members of the supply chain network and their markets.

131 Vollmann et al. (2004) Key interface between the production activities of a company, and planning and market
132 control systems. It encompasses several activities including forecasting, processing customer orders establishing
133 delivery dates, and balancing demand and supply. Rainbird (2004) Understanding of the current and future
134 customer expectations, market characteristics, and available alternative responses that result from operational
135 processes.

136 The literature review allowed the identification of two demand management frameworks that are summarized
137 in Table 8. Among them, some marketing researchers defend the need for integration between marketing and
138 supply chain management ??Esper et Suggest that the success of the supply chain in creating customer value
139 requires an extensive integration between the processes focused on demand and those focused on supply.

140 8 Juttner et al. (2007);

141 Hilletofth et al. (2009) Demand management is composed of the processes of demand creation and demand
142 fulfillment, and the coordination of these processes through the collaboration of the two areas is necessary.

143 9 VICS (2010)

144 Demand management as the integration of Sales and Operations Planning (S&OP) and Collaborative Planning,
145 Forecasting and Replenishment (CPFR). Demand management as a process or an element of supply chain
146 management Croxton et al. (2008) Demand management as a process of supply chain management emphasizing
147 the need to implement operational and strategic sub-processes focusing on understanding, influencing, and
148 managing customers' demand achieving a fast response throughout the supply chain. Mentzer and Moon (2005)
149 Demand management is the creation of a coordinated demand flow between the members of the supply chain and
150 their markets. They consider demand management as an element of supply chain management encompassing
151 marketing and its coordination between the agents in the supply chain (internal and external) and demand
152 planning.

153 Among the authors mentioned in Table 8, only Croxton et al. (2008) propose a demand management framework
154 that details the implementation process. Under this perspective, the model divides demand management into
155 two parts: strategic sub-process and operational sub-processes. Figure 1 shows the interfaces between each
156 sub-process with the other seven processes proposed by Global Supply Chain Forum.

157 10 Global Journal of Management and Business Research

158 Volume XIV Issue V Version I Year () The interdependence of the demand management process on the other
159 processes limits the model proposed by the authors since the companies may not have implemented them. Hence,

160 the literature review enabled the identification of the requirements for an effective implementation of demand
161 management in order to eliminate its interdependence on the other supply chain processes. Those requirements
162 are shown in Figure 2, and each one will be discussed next. through the analysis of capabilities, constraints, and
163 opportunities of internal and external environments of an organization. Grasping the organization's internal and
164 external market will establish guidance as well as strategic and operational practices in the organization.

165 Demand Management

166 11 c) Grasping guidance and strategic/operational practices in 167 organizations

168 It involves sharing strategic operational information between organizations aiming at identifying the difficulties
169 and potentialities of partners (Vieira;Yoshizaki;Ho, 2009) and generating information as well as supply and
170 demand forecasting (information on capabilities, initiatives, suppliers' strategies, technology, tendencies within
171 the sector, stock level, transportation, and storage options) (Esper et al., 2010). In addition, it aims at gauging
172 partner's strategic intent that enables focusing on growing and developing, achieving market share, and improving
173 the services provided ??Min et al., 2005).

174 12 d) Development of cross-functional teams

175 The demand management process involves an cross-functional team composed of members from different
176 organizational levels and sectors and supply chain representatives (suppliers and customers) (Chen, Daugherty
177 and Roath, 2009; Croxton et al., 2008; Hilletoft et al., 2009; Juttner et al., 2007; Mentzer et al., 2007; Vollmann
178 et al., 2004). This cross-functional team should have a complete understanding of the market and the guidance
179 provided, and the strategic and operational practices in the organization (Croxton et al., 2008;Esper et al.,
180 2010;Hilletoft et al., 2009;Mentzer et al., 2007). e) Development of sales forecasting Sales forecasting is a
181 prediction of expected future market demand (Mentzer et al., 2007), and it focuses on accuracy (Aghazadeh,
182 2004;Katz, Pagell and Bloodgood, 2003;Mentzer et al., 2007;Taylor and Fearne, 2006). According to Croxton et
183 al. (2008), in order to develop sales forecasting, it is necessary to determine the levels of detail and the scope of
184 forecasting, to identify the information sources, and to define the forecast method, which could involve internal
185 and external cross-functional teams. The CPFRR is an initiative used by supply chain agents aiming at improving
186 the relationship through the jointed planning and management of the processes and information sharing (Seifert,
187 2003). Therefore, in the CPFRR the supplier is involved in demand planning, but according to VICS (2010), the
188 sales plans, in general, do not include future initiatives such as marketing campaigns, promotions, and product
189 launching. Thus, VICS (2010) proposes a combination of the S&OP and CPFRR models to develop the IBP, in
190 which the S&OP activities (internal alignment, monthly review cycle, scope of planning, involvement of decision
191 makers, and The VMI is the stock management by the supplier since the clients do not control their own inventory,
192 which indicates that this chain tier needs to operate with limited collaboration and reliability (Claassen, Van
193 Weele and Van Raaij, 2008). Therefore, the major difference between VMI and CPFRR is that in the former
194 the supplier is not involved in demand planning, and in the latter the supplier does not control client inventory
195 effectively as to process resupply orders.

196 Therefore, it can be said that the organizations can implement different levels of initiatives of S&OP (Grimson
197 and Pyke, 2007;Lapide, 2005), CPFRR (Danese, 2007;Larsen;Therno;Andresen, 2003;Seifert, 2003), and VMI
198 (Claassen, Van Weele and Van Raaij, 2008; Elvander, Sarpola and Mattsson, 2007) in the demand management
199 process.

200 According to ??in et al. (2005), the development of a joint business plan to be executed by the crossfunctional
201 teams of organizations is one of the consequences of collaboration as the partners' relationship improves. In
202 the context of demand management, Mentzer et al. (2007) define "planning" as a set of specific managerial
203 actions to be taken in order to exceed sales forecast. Based on the economic condition, competitors, Marketing,
204 Sales, Production, and Logistic plans, the expected future market demand is determined. The business plan is
205 therefore developed as an iterative process because if the resulting business plan is not aligned with the needs
206 and the financial objectives of the organization, the demand forecasting should be evaluated again concentrating
207 on determining additional efforts for a successful business plan thus guaranteeing a plan based on the financial
208 and market reality faced by the organization in terms of logistic capabilities, production capabilities, and supply
209 chain (Mentzer et al., 2007).

210 With regard to the CPFRR, the partner organizations will develop a joint business plan to identify the significant
211 factors that affect demand and supply establishing sales forecasting and resupplying ??VICS, 2004). S&OP
212 involves an integration of customer focused marketing plans with the management of the supply chain in order to
213 support the annual business planning ??APICS, 2009). S&OP links the company's strategic plans and business
214 plan to its detailed processes, this process requires a synchronized demand, supplies, and finance plan for a period
215 between 18 and 24 months identifying the risks, opportunities, and action plans to solve problems (Wallace, 2004).
216 VICS (2010) proposes the development of an integrated business plan, in which the S&OP activities, such as
217 internal alignment, monthly review cycle, scope of planning, involvement of decision makers, detailing of sales
218 and marketing plan are incorporated into the CPFRR.

219 According to Esper et al. (2010), applying the knowledge about internal and external environments and
220 demand forecasting is made possible through the demand plans (4Ps of marketing: price; place, promotion and
221 product). Therefore, in the demand management, the marketing and supply management work together in order
222 to develop adequate relationships for different customers, customer priority strategies, and accurate information
223 process to customers. They also focus on developing combined actions to conciliate value requirements and
224 operational capabilities.

225 According to Croxton et al. (2008), the objective of executing a single plan is to balance Manufacturing
226 needs and costs, Logistics, Sales and suppliers to meet an anticipated demand. Therefore, the terms "joint
227 business plan" (Barratt and Oliveira, 2001; Yin et al., 2005; ICS, 2004), "integrated business plan" (VICS,
228 2010), "business plan" (Mentzer et al., 2007; APICS, 2009; Wallace, 2004), "demand and supply management
229 plans" (Esper et al., 2010), and "single execution plan" (Croxton et al., 2008) are used to designate the set of
230 actions developed by partners in the supply chain management. Those actions include synchronizing marketing
231 and operational management to better understand demands, and should be aligned with the strategic plans of
232 organizations.

233 The process of collaboration should be formalized detailing the key performance indicators Min et al.,
234 2005) that involve specific focus on costs, productivity, goals, and gains. In the demand management process,
235 the cross-functional teams define the indicators to measure and monitor the process and establish performance
236 improvement goals (Croxton et al., 2008).

237 The aim to implement demand management is to create synergies between operational and marketing
238 management in order to understand the market and develop actions aligned with organizational strategy,
239 productive capability, and meeting final customer needs (Croxton et Yin et al. (2005), the internal alignment
240 involves determining organization internal actions and the role of external partners. In order to guarantee this
241 alignment, the top management group involvement is essential. The support of senior decision makers is important
242 for both financial and non-financial investments. Furthermore, the interaction between top management groups
243 aiming at identifying opportunities and improvement areas is crucial to create an information sharing and
244 communication environment among the supply chain agents (Min et al., 2005).

245 The executive S&OP meeting requires the participation of top management group representatives to make
246 decisions regarding the recommendations discussed in previous sections and to solve conflicts (Wallace, 2004).
247 apide (2004) reinforces the need for senior decision makers' participation in the S&OP.

248 Hence, demand management should balance the customer needs and the company capabilities reducing
249 uncertainties and providing efficient flow in the supply chain. Therefore, demand management is essential for the
250 success of supply chain management. According to Croxton et al. (2008) proper implementation of the process
251 can improve the level of services delivered to the customer and can derive substantial financial benefits such as
252 inventory reduction, better use of assets, and product availability improvement.

253 IV.

254 13 Conclusions

255 This study contribute to a better understanding and a broader view of demand management as an integrated
256 process that guides the actions of organizations to overcome the challenges of combining customer needs and
257 supply chain capabilities. It clarifies the concept of demand management as the creation of synergies between
258 operations and marketing aiming at understanding the market and developing actions synchronized with the
259 company strategy, production capacity and final customer needs. This paper identifies two frameworks for
260 demand management: integration between marketing and supply chain management and as a process or an
261 element of supply chain management. As such, it should help practitioners as well as researchers understand
262 demand management.

263 The framework in Figures 2 has considerable applicability for practitioners providing guidance as to the
264 preconditions that need to be in place in order for a company to implement demand management with its
265 suppliers and customers. Thus, in order to implement demand management process, it is necessary to understand
266 the market through the capability analysis, constraints, and opportunities of external and internal environments
267 to the organization. Such knowledge, together with the guidelines and strategic and operational practices of
268 the company, focus on designing an efficient operational system to synchronize supply and demand through
269 sales forecasting. In order to do so, the company needs a collaborative supply chain that consist of establishing
270 corporative efforts between internal functions and external agents to the company aiming at meeting the final
271 customers' needs and obtaining competitive advantage.

272 Demand management can incorporate different initiatives such as CPFR, S&OP, VMI, and IBP. The business
273 plans are developed based on sales forecasting done by the cross-functional teams of the organizations in the
274 supply chain. Those teams have also the responsibility to execute and monitor the business plan in order to
275 find combined alternatives to better serve the clients and redirect actions in difficult situations. The whole
276 demand management process should be supported by the organization top management group to guarantee a
277 successful implementation of the process. Therefore, it can be said that demand management process involves
278 a crossfunctional team composed of different level and sector members of an organization and some strategic
279 supply chain representatives (suppliers and customers). This team will be responsible for the joint development

280 of sales forecasting and for formulating, execution, and monitoring a business plan. Therefore, the external and
281 internal agents in the chain should have supply chain orientation.

282 The business plans to be reached should be based on sales forecasting through the joint efforts of the supply
283 chain agents. Besides the responsibility for the joint development of sales forecasting, the crossfunctional teams
284 of the focal company and its suppliers are responsible for executing and monitoring the business plan searching
285 for joint alternatives to provide customers with better services and redirect actions in situations that diverge from
286 expected. All demand management process should be supported by the company top management to guarantee
287 a successful implementation of the process.

288 For researchers, Figure 2 provides a wealth of research questions to investigate: How demand management
289 can be effectively coordinated within a company and across supply chain? What are the challenges for demand
290 management? What are the key performance indicators for demand management? The results are based on a
291 thorough review of the literature, thus this paper highlights the need for developing an empirical framework of
292 demand management and the constructs and relationships proposed in Figure 2 is intended to guide this research.

14 Global Journal of Management and Business Research

Volume XIV Issue V Version I Year () ¹



Figure 1:

1

Figure 2: Table 1 :

2

Figure 3: Table 2 :

294

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3

database and terms used in the search

Advanced search: terms used as title keywords or as text keywords ('every year' and 'journals only')	Number of articles per database		
	Science Direct	Emerald	Wiley-Blackwell
Demand management	100	47	37
Demand supply chain	100	14	5
Demand chain	100	11	6
Demand chain management	48	6	1

Figure 4: Table 3 :

4

Database of	Number of Journals	Articles
Emerald (34 articles)	1	European Business Review
	2	Industrial Management and Data Systems
	1	Integrated Manufacturing Systems
	1	Journal of Business and Industrial Marketing
	1	Journal of Consumer Marketing
	1	Journal of Contemporary Hospitality Management
	1	Journal of Enterprise Information Management
	8	Journal of Logistics Management
	1	Journal of Operations and Production Management
	6	Journal of Physical Distribution and Logistics Management
Science Direct (12 articles)	1	Journal of Retail and Distribution Management
	10	Supply Chain Management
	2	European Journal of Purchasing & Supply Management
	2	European Management Journal
	4	Industrial Marketing Management
Wiley-Blackwell	1	International Food and Agribusiness Management
	1	Journal of Operations Management
	2	Journal of Production Economics
	1	British Journal of Marketing

Figure 5: Table 4 :

5

Database	Number	Journals of Arti- cles
Academy of Marketing Science	3	Journal of the Academy of Marketing Science
Gale	3	Harvard Business Review
Informs	1	Management Science
Wilson	3	Journal of Marketing
	1	Conradi Research Review
Other databases accessed through Michigan State University or School of Management at Cranfield University (8 articles)	3	1 Food Logistics Journal of Business Logistics
	1	Journal of Logistics Research and Applications
		Journal on Chain and Network Science
	1	Production Engineer

Figure 6: Table 5 :

6

Scientific events

Figure 7: Table 6 :

7

Authors
Croxtton et al.

Demand Management Definition

Figure 8: Table 7 :

8

Demand	Authors	Demand management framework description
management framework		
Demand management as	Esper et al. (2010)	
integration of marketing and supply management	an	chain

Figure 9: Table 8 :

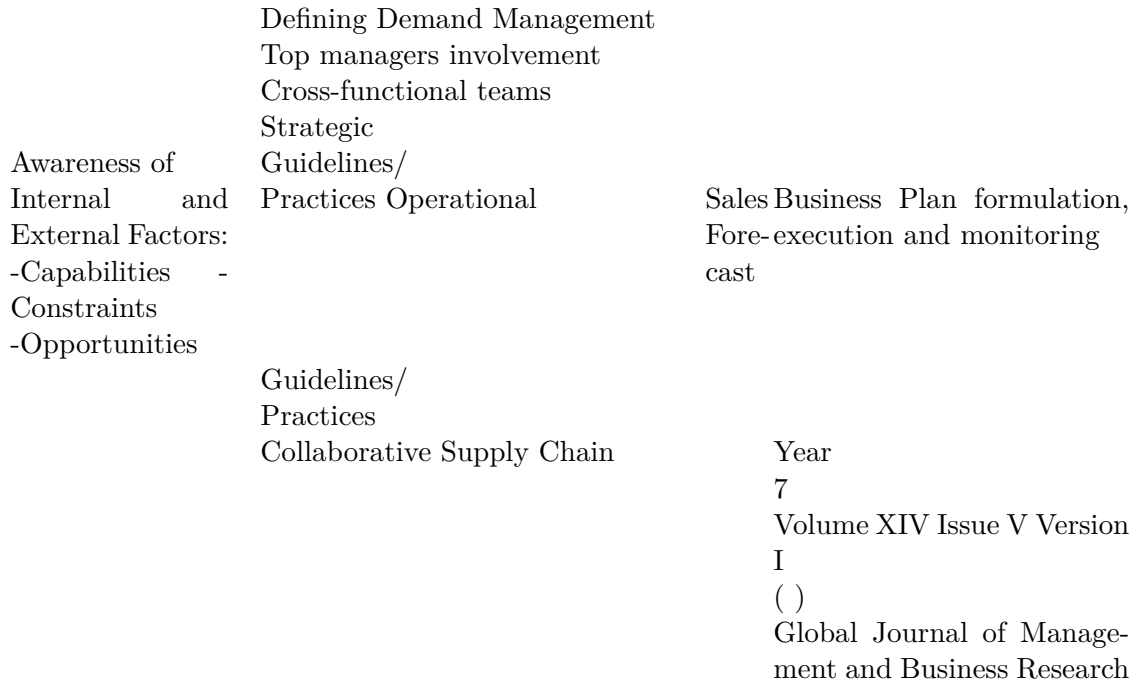


Figure 10:

2007; Mentzer and Moon, 2005; Rainbird, 2004; Vollmann et al., 2004; Walters, 2006; Walters; Rainbird, 2004).

g) Top management involvement

According to

Figure 11:

295 Author ??: Universidade Federal do Triângulo Mineiro. Some authors highlighted the need of further research
296 on demand management (Adebanjo, 2009; Kaipia et al., 2006; Simatupang and Sridharan, 2002;
297 [Sage and Oaks] , Thousand Sage , Oaks .
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299 www.supply-chain.org/cs/root/scor_tools_resources/scor_model/scor_model April 2009.
300 [Fawcett et al. ()] ‘A three-stage implementation model for supply chain collaboration’. S E Fawcett , G M
301 Magnostan , M W Mccarter . *Journal of Business Logistics* 2008. 29 (1) p. .
302 [Simatupang and Sridharan ()] ‘Benchmarking supply chain collaboration: an empirical study’. T M Simatupang
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