MEMORANDUM OF UNDERSTANDING (MU)

PLEASE READ THIS MEMORANDUM OF UNDERSTANDING THOROUGHLY BY AUGUST 19, 2021, AND BE PREPARED TO DISCUSS THE ASSIGNED READING MATERIAL AT THE FIRST SESSION. All times referenced in this MU are in the Eastern Time Zone.

CATALOG DESCRIPTION OF THE COURSE

The course examines the design, operation, and control of organizations to gain and maintain a competitive advantage in the marketplace. Strategic and tactical issues will be integrated with a systems approach.

FACULTY MEMBER

Robert B. Smith        E-Mail: RBSMITH6@UNCG.EDU

Department of Information Systems and Supply Chain Management
Joseph M. Bryan School of Business and Economics
Phone Number:  (334) 202-7795 (Cell)

Robert Smith delivers programs and projects at the enterprise level as a certified PMP leader with Cone Health. He is Board Certified in Healthcare Management by the American College of Healthcare Executives. Robert is also a Certified Management Coach with Coach Academy International. He is the President-Elect of the Ronald McDonald House Charities of the Piedmont Triad. Every summer, he directs the Civil Air Patrol’s National Cadet Officer School at Maxwell Air Force Base in Montgomery, Alabama. Robert has degrees in education, mathematics, and computer science. He often lectures with the MBA program at UNCG. Robert is known as a leader who connects expertise with empathy to deliver outstanding results.

FACULTY OFFICE HOURS

You may drop in virtually via Zoom during office hours, 5:00 p.m. to 6:00 p.m. Eastern on Thursdays, to discuss any problems or suggestions you may have about the course, careers, benefits of advanced courses in operations management, or things in general. If you want to talk to the professor and find the appointment hours inconvenient, feel free to schedule any other online appointment time.

DESCRIPTION OF THE COURSE

The course begins with an introduction to the managerial processes underlying operations in both service-providing and goods-producing organizations. In the initial phase of the course, specific topics to be covered include process design, capacity planning, facilities location and design, application of forecasting in operations, aggregate planning, inventory management, project management, and quality management.

Later, the course will focus on developing and implementing production/operations strategy and
integrating this strategy with other organization functions. Topics in the latter half of the course include alternative production/operations strategies, choice of process, operations strategy selection and implementation, selection and adoption of new technologies (such as enterprise-wide resource planning systems), and the integration of information and quality and productivity into the operations function.

A global theme runs through the entire course. The course is intensive and extensive, integrating strategic and tactical issues with case studies, and an organization-based assignment, and an in-class interactive exam with a guest speaker presentation. To the extent relevant and feasible, the material to be presented will include the ethical issues, the influence of political, social, legal, and regulatory, environmental, and technological issues, and the impact of demographic diversity on the strategic role of operations.

REQUIRED READING AND VIEWING MATERIALS

Students should read and view the required materials before attending each class. Students should have the appropriate reading materials available for each class.

Textbook


Students can purchase the textbook at the UNCG Bookstore (in the Elliott University Center) with one of the following two options:
1) purchase the latest edition of the Operations & Supply Chain Management (loose-leaf version of the textbook) with Connect (ISBN 9781264091676) at $213.35, or
2) purchase the latest edition of Operations & Supply Chain Management (e-book version of the textbook) with Connect (ISBN 9781260706390) at $185.70.

Cases


You can purchase the course pack (containing the two cases) for $8.50 (that is, $4.25 for each case) at https://hbsp.harvard.edu/import/745596.

Videos

We will use various videos throughout the semester listed in the class schedule. There is no need to purchase these videos. You can access the videos in Box.

PREREQUISITE AND CO-REQUISITE COURSES

MBA 701 (Quantitative Analysis for Decision Making) is the prerequisite course. It is not just adequate for a student to do well in the MBA 708 course if the student has taken the MBA 701 course. The student must be thorough with the content (Probability, Normal Distribution, Optimization Techniques, Risk and
Decision Analysis, etc.) and analyze, integrate, synthesize, and communicate well in written and oral form. It is the responsibility of the student to prepare themself adequately in these areas. The concepts and principles covered as part of the MBA 701 course will not be covered in MBA 708 course. There will be quantitative applications (in the form of statistical analysis, optimization techniques, and risk and decision analysis) and qualitative analysis exercises (in the form of written case analysis and in-class discussions) in the MBA 708 course. You will learn new vocabulary related to the operations (and on occasion in the areas of financial and managerial accounting marketing; financial management; technology and innovation; leadership and sustainable business) early in the first nine weeks and then apply the concepts in the latter half of the course.

PLACE

This is an online course. Faculty expectations include regular Canvas access for conceptual materials and timely participation in Canvas discussion threads. While students pursue this course of study asynchronously, your professor relies on your timely input and performance in this course. Your professor highly recommends that you follow the timelines established in this syllabus to stay on track and to better facilitate group interactions.

TIME (Optional)

Your professor encourages you to participate in optional group discussions every Thursday, 7:00 p.m. – 8:00 p.m. Eastern via Zoom. To meet class requirements, you are expected to devote 2.5 hours per week to this class, and the optional group discussions can count towards this requirement.

GROUP DISCUSSION

Courses taught by the case method emphasize inductive learning, with conceptual frameworks and strategic guidelines developed from the analysis of a variety of real-world situations. This approach contrasts sharply with the deductive approach to learning used in lectures, where the concepts are presented first and must then be applied to actual situations.

Role of the Professor

In class, you may find that the role played by a professor using the case method usually differs significantly from that of a lecturer. The professor’s role in case discussions is often like that of a moderator – calling on students, guiding the discussion, asking questions, and periodically synthesizing previous comments. Teaching styles vary, of course, from one case professor to another.

Many professors like to begin the class by asking a student to “layout” the case, which may involve your being asked to identify key problems and opportunities, to present some preliminary data analysis, and perhaps to outline a possible plan of action.

Some professors, as in the current course, assign study questions in advance to help students with their case preparation; but others feel it is more realistic (albeit more demanding) to let students define for themselves how they should approach each new case.

Responsibilities of Participants

Instead of being a passive note-taker, as in lecture classes, you will be expected to become an active
participant in class discussions. Indeed, it’s essential that you participate, for if nobody participates, there can be no discussion! If you never join in the debate, you’ll be denying other participants the insights that you may have to offer. Moreover, there’s significant learning involved in presenting your own analysis and recommendations and debating them with your classmates—who may hold differing views or else seek to build on your presentation. But don’t be so eager to participate that you ignore what others have to say. Learning to be a good listener is also an important element in developing managerial skills.

Occasionally, it may happen that you are personally familiar with the organization depicted in a case. Perhaps you are privy to additional information not contained in the case, or perhaps you know what has happened since the time of the case decision point. If so, keep this information to yourself unless and until the professor requests it. (This advice also holds true for written reports and case exams.) There is no extra credit for 20/20 hindsight; injecting extra information that nobody else has is more likely to spoil a class discussion than to enhance it.

Learning comes through discussion and controversy. In the case method of instruction, participants must assume responsibility not only for their own learning but also for that of others in the class. Thus, it’s important for students to be well prepared, willing to commit themselves to a well-reasoned set of analyses and recommendations, and receptive to constructive criticism. Students unwilling to accept this challenge are likely to find the case method aimless and confusing. On the other hand, if you do accept it, you’ll experience in the classroom that sense of excitement, challenge, and even exasperation that comes with being a manager in a real-world situation.

WITHDRAWAL DATE

The last date to drop the course without receiving an academic penalty is October 8, 2021 (Friday).

FACULTY-STUDENT GUIDELINES

The faculty and students in the course will adhere to the faculty-student guidelines stated on the following web page:

GRADING

The course grade is based on a mini-case analysis, written exams, an in-depth case analysis, a topic paper, an ACID Test (written exam), and class contribution. Grades are based on the following “absolute” scale (i.e., there will not be any “curving”).

<table>
<thead>
<tr>
<th>Points</th>
<th>Date</th>
</tr>
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<tbody>
<tr>
<td>First Written Exam</td>
<td>50  September 16, 2021</td>
</tr>
<tr>
<td>Mini-Case Analysis</td>
<td>50  September 30, 2021 (Due 7:00 p.m.)</td>
</tr>
<tr>
<td>Second Written Exam</td>
<td>50  October 21, 2021</td>
</tr>
<tr>
<td>Operations Analysis (Topic Paper)</td>
<td>100  October 28, 2021 (Due 7:00 p.m.)</td>
</tr>
<tr>
<td>In-depth Case Analysis</td>
<td>100  November 11, 2021 (Due 7:00 p.m.)</td>
</tr>
<tr>
<td>ACID Test (Written Case Exam)</td>
<td>100  December 9, 2021</td>
</tr>
<tr>
<td>Class Contribution</td>
<td>50  -----</td>
</tr>
<tr>
<td>TOTAL</td>
<td>500</td>
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</tbody>
</table>

 But ≥ 450; A- ≥ 433; B+ ≥ 416; B ≥ 400; B- ≥ 383; C+ ≥ 366; C ≥ 350; and F < 350.
WRITTEN EXAMS

Each written exam will include five short answer questions (i.e., multiple-choice, true/false, and brief discussion questions) and two problems (which will involve computations). The exam content is drawn from the textbook, vignettes, videos, and class discussions using the objectives listed in the schedule of sessions as a general guideline. The exams are closed-textbook and closed-notes. You will have 75 minutes to complete each exam.

REEXAMINATION POLICY

As a rule, reexaminations are not held. Absence from the written examinations due to illness, summons to jury duty, or any other compelling reason should be backed by the appropriate documents (e.g., medical certificate, etc.) to qualify for a reexamination. If possible, meet/talk with the professor before missing the examination to discuss the circumstances.

HONOR POLICY

Students will comply with the UNCG Honor Policy described on the following web page:
http://academicintegrity.uncg.edu/complete/

MINI-CASE ANALYSIS

At 7:00 p.m. on September 16, 2021, a guest speaker (Chuck Kraft, CEO of the Ronald McDonald House Charities of the Piedmont Triad) will present via Zoom for about thirty (30) minutes. Mr. Kraft will present his concerns about sustainability. The next thirty (30) minutes will be devoted to a question/answer session. Students should refrain from asking any questions while Mr. Kraft is making his formal presentation.

Each student is to submit a written analysis of potential sustainability remedies of the Ronald McDonald House Charities of the Piedmont Triad. This analysis is due by 7:00 p.m. on September 30, 2021. Late submissions will not be accepted. The mini-case analysis is “open book and open notes.” The weblink to the Ronald McDonald House Charities of the Piedmont Triad is https://rmhcpt.org/. Unless otherwise instructed, the individual should take on the role of a manager assigned to review the issue(s) of concern or interest to the firm presented within the case. The written analysis is their report and recommendations on that/those issue(s). Three (3) articles related to sustainability are provided in the readings for sessions 2 and 6 on Canvas. These articles must be referenced in developing the analysis. Other articles could also be found on Google Scholar (at www.scholar.google.com). If you need to make assumptions to accomplish this, feel free to do so and appropriately incorporate them in your written analysis. Discuss the issues in detail.

Students should work on this written analysis individually (and not as a team/group). Individuals should neither seek nor receive help from friends and family in completing this written analysis. The paper should be typed (maximum 12-point size lettering), double-spaced on 8.5” by 11” paper, with 1” margins, and appropriately paginated. No minimum or maximum length is specified, although the written analysis should not typically exceed ten pages (excluding appendices) in length. Individuals are requested to refrain from filling up space by repeating the details provided in the case. That is, individuals are asked to cover the topics thoroughly and efficiently. Do not add verbiage for the sake of length. Feel free to include diagrams or other types of illustrations in your written analysis. Oversized charts or drawings should be folded to fit the rest of the paper. Appendices should be appropriately numbered and referred
to in the write-up. References should be properly cited in the written analysis using the following manual:


In preparing the written analysis, write from an objective view, in the third person. Do not use the words “I,” “We,” or “You.” Use subheadings to correspond with specific issues posed for the mini-case. The written analysis will be graded on organization, thoroughness (depth and breadth of coverage of material), insight of analysis, and written communication skill. The questions that need to be addressed are given at the end of the mini-case. A separate cover page should include the course title, course number (and section number), name of the student, and the title of the assignment. Each student should attest to the statement that “I HAVE ABIDED BY THE ACADEMIC HONOR POLICY ON THIS ASSIGNMENT” on the cover page of the mini-case analysis assignment.

**TOPIC PAPER**

Each student (or a team consisting of two students) is to write a paper relating one aspect of the operations function (such as product and process design, capacity planning, facilities location, facilities layout, and design, forecasting for operations, aggregate planning, inventory management, and quality management, etc.) to an organization (or part of a large one). The organization you choose should preferably be the one where you work. In addition to analyzing the topic as it exists in the organization, the paper should make recommendations for improvement where appropriate. In general, the report should be written from the point of view of an objective researcher, who is writing for an audience, that is familiar with the principles, concepts, decision/problem areas, and techniques of managing operations (at the level of MBA 708) but is not familiar with the specific organization being analyzed. The paper should be built on a good review of the literature on the topic. The paper would entail a good review of the literature (at least 8 to 10 relevant articles and books) on that subject and analyze that aspect as it relates to that organization. The review of the literature could be based on articles published in *Production and Inventory Management Journal*, *Journal of Operations Management*, *International Journal of Operations & Production Management*, *Quality Progress*, *Industrial Management & Data Systems*, *International Journal of Service Industry Management*, *Business Process Management Journal*, and other relevant journals. Articles should be from refereed journals with exact volume and issue number, year of publication, and page numbers provided in the list of references. Information/articles from websites (not connected to refereed journals) should not be used. The refereed articles and books can be searched using www.scholar.google.com. A brief (not more than one page) description of the proposed topic paper (which includes the title of the paper, importance of the specific topic, how the topic relates to an organization chosen, and a shortlist of references) should be submitted to the faculty member by 7:00 p.m. on August 26, 2021. The detailed listing of the references should be as per the following publication:


The topic paper is not the same as writing a case. In general, the paper should be written for an audience (of practitioners and academics) interested in studying more about the topic as it relates to the selected industry (in which the organization operates). Do not assume that the only person reading the paper is the faculty member. Please note that the paper’s focus is not the organization/company but the specific topic. That is, the introduction section should begin with the topic of the paper. The details of the organization should be presented in the research methodology. The following outline should be used for the topic paper: Abstract, Introduction, Review of the Literature (including a summary/framework based on the
review of the literature on how you plan to relate the subject matter to the organization being studied in the fifth section of the paper), Research Methodology (of a case study with a structured interview approach and the details of the organization), Findings (as they relate to the framework presented in the third section of the paper), Conclusions, and References. In addition to analyzing the topic as it exists in the organization, the paper should provide at least two recommendations for the organization in the concluding section. Limitations in the study and suggestions for future research could also be included in the concluding section. A structured interview approach could be adopted to collect the information from the executives in the organization. It would be necessary to develop the list of questions/issues for the structured interview approach after developing the framework at the conclusion of the literature review. It is expected that the entire paper will be written based on data and information obtained from the interview(s) with the managers and secondary sources (such as books, articles, internet websites, annual reports, etc.). You should review the literature and develop the framework on the topic before you interview the concerned manager(s) at the chosen organization. Feel free to seek the advice of the professor on the framework developed as well as the list of questions prior to applying the framework to the organization (as an example of the industry) selected. A few samples of papers have been placed in the “Materials for Topic Paper” section in files on Canvas. That should give the students an idea of how to structure the topic paper. The research method is used in the topic paper is as per the following reference:


Feel free to discuss your topic paper with the faculty member as it is being developed. The paper should be typed (maximum 12-point size lettering), double-spaced on 8.5” by 11” paper, with 1” margins, and appropriately paginated. No minimum or maximum length is specified, although the papers are typically 15 to 25 pages long. Cover the topics thoroughly but efficiently. Do not add verbiage for the sake of length. Include diagrams, photos, sketches, or other types of illustrations that will clarify your presentation. Citations should be appropriately referenced at the end of the paper, and pages, tables, figures should be appropriately numbered.

The topic paper will be graded on organization, thoroughness, insight of analysis/recommendations, and written communication skill. It is highly recommended that a project management approach be taken to ensure the timely completion of the paper. The topic paper (in hard copy form) is to be submitted by 7:00 p.m. on October 28, 2021. Late submissions will not be accepted. Each student/member of the group should attest to the statement that “I/WE HAVE ABIDED BY THE ACADEMIC HONOR POLICY ON THIS ASSIGNMENT” on a separate cover page of the topic project assignment. The cover page should also include the number and title of the course, the title of the paper, and the name(s) of the student(s).

IN-DEPTH CASE ANALYSIS

Each student must carry out an in-depth analysis of the “Boeing 787: Manufacturing a Dream” case. The individual should take on the role of a manager who has been assigned to review the issue(s) of concern or interest to the firm. The written analysis is his/her report and recommendations on that/those issue(s). The three issues/questions have been presented in the 13th session of the “schedule of sessions” section in this memorandum of understanding (MU). Much of the grade beyond a “passing score” depends on the student’s ability to go beyond the “average” solution/answer, integrate the material from the course, and provide innovative perspectives, approaches, or solutions. Feel free to use all the tools and frameworks (including the “Operations for Competitive Advantage” framework) presented in the articles and textbook in this course (and other courses) to substantiate the analysis. If you need to make assumptions to
accomplish this, feel free to do so and appropriately incorporate them in your written analysis. Discuss the issues in detail.

The professor will facilitate the discussion of the case. There will not be any formal presentations of the case. Students should work on this written analysis on an individual basis (not in groups). Individuals should neither seek nor receive help from friends and family in completing this written analysis. The written analysis should be typed and double-spaced on 8.5” by 11” paper and appropriately paginated. No minimum or maximum length is specified, although the written analysis (not counting the appendices) should not typically exceed 15 pages in length. Individuals are requested to refrain from repeating the details provided in the case (just to fill up space) in their written analysis. That is, individuals are requested to cover the topics thoroughly but efficiently. Do not add verbiage for the sake of length. Feel free to include diagrams or other types of illustrations in your written analysis. Oversized charts or drawings should be folded to the 8.5” by 11” format. In preparing the written analysis, write from an objective view, in the third person. Do not use the words “I,” “We,” or “You.” Use subheadings to correspond with specific issues posed for the individual case. Appropriate credit will be given to those individuals who are able to integrate their analysis with readings presented outside the case.

The written analysis will be graded on organization, thoroughness, insight of analysis, and written communication skill. While working on the numerical analysis, students must ensure the following, as needed: (1) identify all the uncertain aspects of the decision environment; (2) define decision alternatives and output measures; (3) calculate possible outcomes of all decisions; (4) calculate statistical estimates (if applicable) of output measures of interest; (5) assess the statistical precision of all output measures (if applicable); and (6) incorporate risk into the decision-making process. In writing the report, students must ensure the following: (1) communicate the conclusion clearly; (2) explain the logic behind the analysis and conclusion; (3) demonstrate effective organization; (4) employ proper spelling, punctuation, and grammar; (5) include an appropriate amount of information and discussion; and (6) support analysis with clearly identified tables and/or figures.

The individual written analysis (in hard copy form) is to be submitted by 7:00 p.m. on November 11, 2021. Late submissions will not be accepted. Each student should attest (with a signature) that “I HAVE ABIDED BY THE ACADEMIC HONOR POLICY ON THIS ASSIGNMENT” on the cover page of the in-depth case analysis. The cover page should also include the name of the student, the title of the assignment, and course name and number.

ACID TEST (IN-CLASS INTERACTIVE WRITTEN CASE EXAM)

The final written exam will be held on December 9, 2021. This exam, popularly called the ACID Test (ACID is an acronym for Analysis and Application, Content and Conceptualization, Integration and Implementation, and Decision making and Discrimination), will be a “live” with a guest speaker presentation on the operations for competitive advantage at Cone Health.

A note on the “live” case (viz., Cone Health Ambulatory Services) will be given to the students on November 18, 2021. A comprehensive (essay) question (or a set of questions) on that case will be given to the students on December 9, 2021. At 7:00 p.m. on December 9, 2021, the guest speaker (Mr. Deno Adkins, Vice President Ambulatory Services, Cone Health) will present via Zoom for thirty (30) minutes. The next thirty (30) minutes will be devoted to a question/answer session. Students should refrain from asking any questions while Mr. Adkins is making his formal presentation. After the Q&A with the presenter, students can begin writing the answer(s) to the final exam question(s). The written exam is “closed book and closed notes.” The only items to be brought to the final exam are the case on Cone
Health (with any comments that the students might have noted while reading the case or from the company website), blank sheets of paper for writing the answer(s), and a calculator. Students may choose to type the answers on a laptop computer or using one of the computers (if the labs are open at that time) in the Bryan School of Business and Economics.

PEDAGOGIC APPROACH

Lectures, cases, videos, and situation vignettes will be used. For any “lecture” portions, your professor will rely on the “Socratic” method to the extent possible. The schedule in this MU contains a listing of topics and assignments to be covered in the respective sessions. For a better understanding of the course content, each student should prepare for the topics and assignments (listed in the MU) prior to the appropriate discussion session. The Discussion Questions (from the specific chapters in the textbook) and the questions/issues identified as WBS in the respective session should be Worked Before the Session. The information needed to answer the Discussion Questions and the questions/issues identified as WBS is directly available in the appropriate chapter/supplement in the textbook or the assigned video. On an individual basis, each student may wish to work on the problems and questions and turn them in for checking by the professor. Each student should be prepared to discuss the assigned readings for each class session. On an individual basis, each student must work on the problems and questions. That would improve the effectiveness and efficiency of your learning process over the entire semester. Please feel free to use all the materials available on Connect. The assigned questions given in the MU are the only representative of the content that can be expected on the exams. The list of questions is not an exhaustive one. The MU is a general plan for the course; deviations may be necessary.

COGNITIVE COURSE OBJECTIVES

Upon completing the course, the student should be able to:

1) Elaborate on various operations strategies for service/manufacturing firms and discuss various Key Performance Indicators (KPIs), also called performance measures for those organizational strategies.
2) Use project management techniques to plan and execute a project.
3) Explain the role played by total quality management (TQM) in enhancing the performance in organizations and utilize various process control charts.
4) Explain the factors that influence the location, layout, and capacity planning of service and manufacturing facilities.
5) Select appropriate production/operations systems for different types of product mixes (i.e., high volume standardized products vs. low volume specialty products) for different markets.
6) Critique the role of forecasting in the operations of an organization.
7) Describe the typical objectives and constraints in medium range (aggregate) planning related to both manufacturing and service organizations.
8) Differentiate the inventory management concerns between dependent demand items and independent demand items in manufacturing and service organizations and define the impact of JIT/TQC (Just-in-Time (JIT)/Total Quality Control) philosophies.
9) Differentiate between alternate methods of securing a competitive advantage with the operations function focusing on the appropriate order winner(s) and qualifiers required for various operations strategies.
10) Elaborate on and develop opportunities for sustainable operations in both services (logistics, banking, warehousing, transportation, retail, etc.) and manufacturing environments.
11) Demonstrate a thorough understanding of the tactical and strategic role of the operations function and its inter-relationship with other functional areas (such as marketing, finance, etc.) to effectively lead
a multi-functional task force in building a global organization.

MBA COURSE OBJECTIVES

Upon completing the course, the student should be able to:

<table>
<thead>
<tr>
<th>Learning Goal</th>
<th>Learning Objectives</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Global Issues</td>
<td>1.a Demonstrates an understanding of the effects of economic, political, and</td>
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<td>cultural factors on business practices</td>
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<td></td>
<td>1.b Adjusts a business model in a global environment based on economic,</td>
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<td>political, and cultural factors</td>
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</table>

| 2. Organizational Sustainability | 2.a Demonstrates an understanding of sustainable business factors                      |
|                                | 2.b Evaluates sustainable business practices                                         |

| 3. Ethical Leadership and Ethical Behavior | 3.a Demonstrates an understanding of ethical business principles and practices        |
|                                          | 3.b Examines the ethical leadership and ethical behavior in an organization          |

| 4. Organizational Innovation       | 4.a Demonstrates an understanding of the fundamentals of innovation in relation to   |
|                                | products, services, and strategies                                                  |
|                                | 4.b Recommends strategies to manage innovation to enhance the performance             |

| 5. Knowledge Integration          | 5.a Utilizes concepts, frameworks, and/or analytical tools from multiple business     |
|                                | disciplines                                                                       |
|                                | 5.b Identifies possible strategic solutions and recommends a strategy that integrates |
|                                | concepts from multiple business disciplines                                         |

SCHEDULE OF SESSIONS

<table>
<thead>
<tr>
<th>SESSION #</th>
<th>DATE</th>
<th>TOPICS AND ASSIGNMENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>8/19</td>
<td>DISCUSSION OF THE MEMORANDUM OF UNDERSTANDING</td>
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INTRODUCTION TO OPERATIONS FOR COMPETITIVE ADVANTAGE


WBS! Chapter 7 (Manufacturing Processes): Discussion Questions 1 and 4. Objective Questions 8-10.

WBS! Video: Product-Process Matrix (Video Number 12 in Box)

WBS! Video: Louisville Slugger Aluminum Bat Plant Tour (Video Number 14 in Box)

1) Describe the main elements of an “Operations Systems” model.
2) What are the primary differences between manufacturing and service operations?


4) Compare and contrast the different conversion processes (i.e., project, job shop, mass production/assembly line, and continuous process).

5) Be prepared to calculate the break-even volume for a process.

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<tr>
<th>SESSION #</th>
<th>DATE</th>
<th>TOPICS AND ASSIGNMENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>8/26</td>
<td>Due: BRIEF (ONE-PAGE) DESCRIPTION OF ORGANIZATION FOR THE TOPIC PAPER ASSIGNMENT</td>
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**OPERATIONS FOR COMPETITIVE ADVANTAGE, SUSTAINABILITY, AND THE JOURNEY TO EXCELLENCE**


1) Identify the key elements (including order winners and qualifiers) in the operations for competitive advantage framework for understanding how operations play a role in gaining a competitive advantage.

2) What is the most simple and general form of the “productivity” formula?

3) Differentiate between a partial measure of productivity and total factor productivity.

4) Explain the difference between productivity, effectiveness, and efficiency.

5) Briefly describe the “Journey to Excellence” Model. Does it relate to the “Triple Bottom Line”? If so, how so? If not, why not?

6) How might one construct a productivity index for the Joseph M. Bryan School of Business and Economics?

**PROJECT MANAGEMENT**


Video: Project Management at Six Flags, New Jersey (Video Number 1 in Box)

1) Identify the three fundamental objectives in managing projects.

2) Differentiate between Gantt charts and networks.

3) What is the difference between Activity-On-Node and Activity-On-Arrow networks.
4) Given the requisite information, be prepared to develop an Activity on Node or Activity on Arrow network, identify the critical path(s) for a project, and discuss mechanisms for “crashing” a project.

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<tr>
<th>SESSION #</th>
<th>DATE</th>
<th>TOPICS AND ASSIGNMENTS</th>
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<tbody>
<tr>
<td>3</td>
<td>9/2</td>
<td><strong>QUALITY MANAGEMENT</strong></td>
</tr>
<tr>
<td>WBS!</td>
<td></td>
<td>Chapter 12 (Six Sigma Quality): Discussion Questions 3, 6, and 9. Objective Questions 1, 2, and 4.</td>
</tr>
<tr>
<td>WBS!</td>
<td></td>
<td>Video: Six Sigma at Caterpillar (Video Number 3 in Box)</td>
</tr>
<tr>
<td>WBS!</td>
<td></td>
<td>1) How would you define the quality of a product and/or service?</td>
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<tr>
<td>WBS!</td>
<td></td>
<td>2) Describe the tenets/facets of Total Quality Management.</td>
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<td>WBS!</td>
<td></td>
<td>3) Discuss the elements of Cost of Quality (COQ).</td>
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<td>WBS!</td>
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<td>4) Distinguish between the ISO 9000 certification process and the Malcolm Baldrige National Quality Award.</td>
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<td>5) Discuss the roles of cause/effect diagrams, Pareto Charts, Process Flowcharts, and other tools for continuous improvement.</td>
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<td><strong>CONTINUOUS IMPROVEMENT</strong></td>
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<td>WBS!</td>
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<td>Chapter 13 (Statistical Quality Control): Discussion Questions 4 and 6. Objective Questions 7, 10, and 11.</td>
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<td>WBS!</td>
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<td>1) Describe acceptance sampling. Why is it used? Could it be used in services?</td>
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<tr>
<td>WBS!</td>
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<td>2) Describe Statistical Process Control. Why is it used? How can it be used in services?</td>
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<td>WBS!</td>
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<td>3) Be prepared to develop process control charts for attributes and variable measurements and understand the situations under which further investigation is required.</td>
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<td>9/9</td>
<td><strong>PRODUCT, SERVICE, AND PROCESS DESIGN</strong></td>
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<td>WBS!</td>
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<td>Chapter 9 (Service Processes): Discussion Questions 5 and 6.</td>
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<tr>
<td>WBS!</td>
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<td>Video: Manufacturing Design at Burton Snowboards (Video Number 5 in Box)</td>
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Video: Green Product Design and PHILL at Honda (Video Number 6 in Box)

1) Discuss the role of value analysis/value engineering.
2) Describe Design for Manufacturing and Assembly (DFMA) Work. Is this applicable to service organizations? If not, why not? If so, why so?
3) Based on the video titled “Green Product Design and PHILL at Honda,” discuss the sustainability efforts of Honda.
4) Discuss the Service-System Design Matrix.
5) Draw the process flowchart for the advising/registration process for completing the MBA degree in the Bryan School.

DEMAND MANAGEMENT AND FORECASTING

Chapter 18 (Forecasting): Discussion Questions 1 and 3. Objective Questions 8, 12, and 15.

Video: Service Processing at Buycostumes.com (Video Number 2 in Box)

1) Discuss the role of marketing and the sales function in developing a forecast.
2) Distinguish between short term, medium term, and long-term forecasting.
3) Describe simple moving average, weighted moving average, simple exponential smoothing, and regression analysis methods of forecasting.
4) Be prepared to use simple moving average, weighted moving average, simple exponential smoothing, and regression analysis methods of forecasting, and assess the effectiveness of each technique.

SESSION # DATE TOPICS AND ASSIGNMENTS

5  9/16 FIRST WRITTEN EXAM

LONG-RANGE CAPACITY PLANNING

Chapter 5 (Strategic Capacity Management): Discussion Questions 2, 4, and 5. Objective Question 8.

1) Define capacity and differentiate between output and capacity.
2) Distinguish between short-, medium-, and long-range capacity planning.
3) Describe the concepts of a focused factory and a Plant within a Plant.
4) Be prepared to solve a long-range capacity planning problem using the decision tree model.

SESSION # DATE TOPICS AND ASSIGNMENTS

6  9/23 SUSTAINABILITY


Case Materials on the Ronald McDonald House Charities of the Piedmont-Triad (available on Canvas).

Guest Speaker: Mr. Chuck Kraft, CEO, Ronald McDonald House Charities of the Piedmont-Triad

### FACILITY LOCATION

Chapter 15 (Logistics, Distribution, and Transportation): Discussion Questions 1, 2, 5, and 6. Objective Questions 9 and 10.

1) What are factors that would influence the facility location (macro-level factors) and site selection (micro-level factors) of a bank and a paper mill?

2) Be prepared to solve facility location problems using the Transportation Method of Linear Programming. This method has been covered in the “Quantitative Analysis for Decision Making” (MBA 701) course.

3) Be prepared to solve facility location problems using the Centroid Method.

### FACILITY LAYOUT

Chapter 8 (Facility Layout): Discussion Questions 1, 2, 3, 5, and 8. Objective Questions 5-7, 9, and 10.

1) Differentiate between product (flow shop) and process (functional) layout.

2) What are the primary advantages and disadvantages of a cellular layout?

3) What is the cycle time? What is its role in designing an assembly line?

4) Understand the relationship between the production rate and cycle time.

4) Be prepared to balance a line and compute its efficiency.

### AGGREGATE PLANNING


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<td>7</td>
<td>9/30</td>
<td>Due: MINI-CASE ANALYSIS</td>
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1) Differentiate between product (flow shop) and process (functional) layout.

2) What are the primary advantages and disadvantages of a cellular layout?

3) What is the cycle time? What is its role in designing an assembly line?

4) Understand the relationship between the production rate and cycle time.

4) Be prepared to balance a line and compute its efficiency.
1) How are forecasting, aggregate planning, master scheduling, materials requirements planning, and operations control tied together?

2) What is the objective function in the aggregate planning problem? Why does the problem exist? What are the typical planning period and planning horizons used in the aggregate planning problem?

3) Is the aggregate planning problem long-range, medium-range, or short-range in nature? Please explain your conclusion.

4) What are the three typical strategies available for a manager in developing an aggregate production plan, i.e., what are the controllable variables?

5) What are the typical costs affected by the aggregate production plan?

6) What are the specific characteristics of industries where the three extreme strategies could be applied?

7) Be prepared to develop an aggregate plan. Also, be prepared to compute the total cost using the three strategies for a given aggregate planning problem.

SESSION # DATE TOPICS AND ASSIGNMENTS

8  10/7  INVENTORY MANAGEMENT SYSTEMS FOR INDEPENDENT DEMAND

Chapter 20 (Inventory Management): Discussion Questions 1, 4, 5, 6, 9, and 10. Objective Questions 12 and 24.

1) What are the two fundamental questions in developing an inventory policy?

2) What are safety stock and service levels? How are they related?

3) What are cycle counting and physical inventory? What purpose do they serve?

4) Given the required data, be prepared to compute the Economic Order Quantity, the Reorder Point, and Total Cost in a perpetual ordering system.

5) Given the required data, be prepared to compute the Economic Order Interval (i.e., the time between orders) and the quantity to be ordered at a given point in time in a periodic ordering system.

6) Under what assumptions would a fixed order quantity system be chosen over a fixed order interval system, i.e., what practical considerations would encourage the use of a fixed order quantity system over the use of a fixed order interval system?

SESSION # DATE TOPICS AND ASSIGNMENTS

9  10/14  INVENTORY MANAGEMENT SYSTEMS FOR DEPENDENT DEMAND (MATERIAL REQUIREMENTS PLANNING - MRP)

1) Differentiate between independent and dependent demand inventory.
2) What is a Material Requirements Planning (MRP) system?
3) What are the primary inputs and outputs in an MRP analysis? What are the objectives of an MRP system?
4) Discuss the role of Master Production Scheduling in developing the MRP.
5) What is the significance of low-level coding in developing the MRP?
6) Be prepared to develop a Material Requirements Plan.

SCHEDULING

Chapter 22 (Workcenter Scheduling): Discussion Questions 1 and 3. Objective Questions 8 and 9.

Video: Queuing at Disney (Video Number 13 in the DVD)

1) Describe any four priority rules that can be used for scheduling jobs at a work center.
2) What would be a good scheduling rule to use for a waiting line for teller services at a bank? Substantiate your response with a detailed explanation.
3) Elaborate on four performance measures that can be used for a work/service center.

SESSION # DATE TOPICS AND ASSIGNMENTS

10 10/21 SECOND WRITTEN EXAM

GLOBAL SOURCING, LEAN SYSTEMS, AND SUPPLY CHAIN MANAGEMENT

Chapter 16 (Global Sourcing and Procurement): Discussion Questions 1 and 4.

Chapter 14 (Lean Supply Chains): Discussion Questions 1, 2, and 16.

Video: Ford Supply Chain Management (Video Number 8 in Box)

Video: Ford Supply Organization (Video Number 9 in Box)

2) Discuss the challenges in managing global supply chains.
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<td>10/28</td>
<td>Due: OPERATIONS ANALYSIS ASSIGNMENT</td>
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**OPERATIONS FOR COMPETITIVE ADVANTAGE** (Continued)


WBS! Parable: A Tale of Two Countries (on page 26 of this MU).

WBS! 1) Identify the two countries described in “A tale of two countries” (see the end of the syllabus).

WBS! 2) Discuss the linkages between operations strategy, marketing strategy, and order winning criteria/qualifiers in meeting corporate objectives.

**ENTERPRISE-WIDE RESOURCE PLANNING SYSTEMS IN GLOBAL OPERATIONS STRATEGY**


WBS! 1) Discuss the salient features of the Enterprise-wide Resource Planning (ERP) systems for global operations at VF Corporation, Inc.

WBS! 2) Discuss the features of Enterprise-wide Resource Planning Systems in global operations. Elaborate on the functionality of vendor information considering order winners and qualifiers.

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<td>12</td>
<td>11/4</td>
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“Mass customization could lead to regression in facilities focus.” Comment on this statement.

2) Discuss product profiling and its strategic implications.

3) Elaborate how product profiling aids in the process of developing operations for competitive advantage.

OPERATIONS FOR COMPETITIVE ADVANTAGE IN SERVICES

WBS!


WBS!

1) Using the “Compass Group: The Ascension Health Decision” case, be prepared to detail the following:
   a) Draw up a timetable of the major events described in the case study.
   b) Analyze the success of the Compass Group. Be as specific as possible.
   c) What should Gary Green do? Substantiate your answer with detailed explanations.

SESSION # DATE TOPICS AND ASSIGNMENTS

| 13 | 11/11 | Due: IN-DEPTH CASE ANALYSIS |

WBS! EVALUATION OF OPERATIONS FOR COMPETITIVE ADVANTAGE


WBS!

1) Based on the “Boeing 787: Manufacturing a Dream” case, be prepared to discuss the following issues:
   a) What went wrong and why? Discuss in as much detail as possible.
   b) Was Boeing’s global-partnership model inherently flawed, as many of its critics and the media argued? Or was the global partnership model a fundamentally sound strategy whose implementation had been mishandled? Substantiate your answers with detailed analyses.
   c) Should Boeing continue to pursue a global partnership model for future airplane programs? And, in light of the 787 programs, should the company reconsider Vision 2016? Substantiate your responses with detailed explanations.
SESSION #     DATE     TOPICS AND ASSIGNMENTS

14         11/18     CONNECTING THE DOTS

1) Discuss the mechanisms by which operations can enhance competitiveness.
2) Based on your readings or experience, discuss a specific organization’s operations that led the way to a competitive advantage.

SESSION #     DATE     TOPICS AND ASSIGNMENTS

15         12/9     ACID TEST (WRITTEN CASE EXAM)

OPERATIONS FOR COMPETITIVE ADVANTAGE AT CONE HEALTH

Guest Speaker: Deno Adkins, Vice President, Ambulatory Services

STUDYING AND LEARNING FROM CASES

The cases featured in this course are representative of real-world problems that managers in different organizations must face and resolve. Although designed principally for use in classroom discussions, many of these cases can offer valuable insights to the individual reader.

The comments that follow are directed primarily at participants in courses and seminars who have been assigned one or more of these cases to prepare for subsequent class discussion. Unlike methods of instruction that use lectures and textbooks, the case method of instruction does not present students with a body of tried-and-true knowledge about how to be a successful manager. Instead, it provides an opportunity for students to learn by doing.

As a student, you may find that dealing with cases is very much like working with the actual problems that people encounter in their jobs as managers. In most instances, you’ll be identifying and clarifying problems facing the management of a company or non-business organization, analyzing qualitative information and quantitative data, evaluating alternative courses of action, and then making decisions about what strategy to pursue for the future. You may enjoy the process more—and will probably learn more—if you accept the role of an involved participant rather than that of a disinterested observer who has no stake, or interest, in resolving the problems in question.
The goal of case analysis is not to develop a set of “correct” facts but to learn to reason well with available data. Cases mirror the uncertainty of the real-world managerial environment in that the information they present is often imprecise and ambiguous. You may perhaps be frustrated that there is no one right answer or correct solution to any given case. Instead, there may be several feasible strategies managers might adopt, each with somewhat different implications for the future of the organization and each involving different trade-offs.

In this course, you’ll be exposed to a wide range of different management situations within a relatively short time. As a result, the cases presented in this course will collectively provide a much broader exposure to issues than most managers experience in many years on the job.

CASES AND THE REAL WORLD

Recognizing that managerial problems are not unique to a particular institution (or even to a specific industry) forms a basis for developing a professional approach to management.

It’s important to recognize that even though case writers try to build realism into their cases, these cases differ from real-world management situations in several important respects. First, the information is prepackaged in written form. By contrast, managers accumulate their information through memoranda, meetings, chance conversations, research studies, observations, news reports, and other externally published materials—and, of course, by rumor.

Second, cases tend to be selective in their reporting because most of them are designed with specific teaching objectives in mind. Each must fit a relatively short class period and focus attention on a defined category of management problem within a given subject area. To provide such a focus—and to keep the length and complexity of the case within reasonable bounds—the writers may need to omit information on problems, data, or personnel that are peripheral to the central issue in the case.

In the real world, management problems are usually dynamic in nature. They call for some immediate action, with future analysis and major decisions being delayed until some later time. Managers are rarely able to wrap up their problems, put them away, and go on to the next “case.” In contrast, discussing a case in class or writing an analysis of a case is more like examining a snapshot taken at a particular point in time—although sometimes a sequel case provides a sense of continuity and poses the need for future decisions within the same organization.

A third and final contrast between case analyses and real-world management is that participants in case discussions and authors of written case reports are not responsible for implementing their decisions, nor do they have to live with the consequences. However, this doesn’t mean you can be frivolous when making recommendations. Professors and students are likely to be critical of contributions that aren’t based on careful analysis and interpretation of the facts.

PREPARING A CASE

Just as there is no one right solution to a case, there is also no single correct way of preparing a case. However, the broad guidelines outlined in “Preparing a Case” may help familiarize you with the job of case preparation. With practice, you should be able to establish a working style with which you feel comfortable. The guidelines on initial analysis and on developing recommendations should also serve you well for preparing written case reports or case-based exams.
First, it’s important to gain a feel for the overall situation by skimming quickly through the case. Ask yourself:

- What sort of organization does the case concern?
- What problems does management appear to be facing?

Preparing a Case: A Brief Outline

I. Initial fast reading
   No notes
   Get a feel for what’s going on
   Think about major problems and forces present

II. A second, careful reading
   Make notes identifying organizational objectives, nature of the problem(s), key facts, and key decisions
   Identify the problem to be solved, what is the current state, and what is the risk of continuing without intervention

III. Evaluate and analyze the case data
   Develop the Root Cause Analysis of specific issues
   Identify alternative courses of action to meet objectives
   Consider implications of each action
   Provide recommendations that are supported by analysis
   Identify any potential future states beyond the proposed recommendations

An initial fast reading, one without making notes or underlining, should provide a sense of what is going on and what information is being presented for analysis. Then you will be ready to make a very careful second reading of the case. Then, seek to identify key facts so that you can develop a situation analysis and clarify the nature of the problems facing management. As you go along, try to make notes in response to such questions as:

- What decisions need to be made, and who will be responsible for making them?
- What are the objectives of the organization itself and of each of the key players in the case? Are these objectives compatible? If not, can the problem be reconciled, or will it be necessary to redefine the objectives?
- What resources and constraints are present that may help or hinder attempts by the organization to meet its objectives?

You should make a particular effort to establish the significance of any quantitative data presented in the text of the case or, more often, in the exhibits. See if new insights may be gained by combining and manipulating data presented in different parts of the case. But do not accept the data blindly. In the cases, as in real life, not all information is equally reliable or equally relevant. On the other hand, case writers will not deliberately misrepresent data or facts to trick you.

Developing courses of action on specific issues

At this point in the analysis, you should be able to summarize your evaluation of the situation and develop some recommendations for management. First, identify the alternative courses of action that the
organization might have. Next, consider the implications of each alternative, including possible undesirable outcomes, such as provoking responses from stronger competitors. Ask yourself how short-term tactics fit with longer-term strategies. Relate each alternative to the objectives of the organization (as defined or implied in the case or as redefined by you). Then, develop a set of recommendations for future action, making sure that these recommendations are supported by your analysis of the case data. Specific issues to be considered for each case are provided under the appropriate class session in the “schedule of sessions” section in the memorandum of understanding.

Your recommendations include how the proposed strategy could be implemented:

- What resources (human, financial, or other) will be required?
- Who should be responsible for implementation?
- What time frame should be established for the various actions proposed?
- How should subsequent performance be measured?
- What is the proposed benefit or value realization?
A TALE OF TWO COUNTRIES

There once was an economic power that dominated the world’s industrial production. This country was the world’s leading manufacturer and its predominant exporter of goods. Much of its success was based on its basic research, its ability to invent, and its unparalleled technological leadership. A time came, however, when it began to decline relative to its international competitors and was challenged by another country whose ships, filled with new products, arrived with increasing frequency.

Several decades earlier, the two nations had been engaged in a bitter war, but they had become allies. Sometime after the war, the upstart country focused on its manufacturing prowess, eventually gaining renown for its new and unique production processes that turned out goods of high quality.

At first, the dominant country had no fear of its lowly ally, which focused only on low-end products with small profit margins. It was not known for its quality, and all its products were basically limitations; inventiveness or creativity was not its strong suit. But the upstart country kept plugging away, improving its manufacturing processes, quality, exports, and market share in a number of industries.

As the number of industries in which the upstart country challenged the dominant one grew, people began to examine how and why this was happening. Articles were written, reports were commissioned, and books were published to explain the new and powerful manufacturing process of the upstart country and to recommend how it could best be emulated. Many factors were identified to explain its success, including:

- A focused, orderly, and systematic manufacturing process that depended on the combination of highly skilled workers, automated machinery, and a new way for moving materials and goods through the factory.
- Strong and continual gains in productivity and quality, thanks to the involvement of workers in improving the process.
- Highly skilled and well-educated workers who maintained clean work environments and had high marks for attendance.
- Continual, incremental technological innovations.
- A high level of cooperation among national competitors, which helped the rapid diffusion of process innovations.
- A high degree of reliance on subcontractors for innovations and production skills.
- A strong education system.
- A culture that was unique and relatively homogeneous.

Thoughtful individuals in the dominant country warned of dire consequences if the nation as a whole did not change its ways and rise to the challenge. But the nation’s business leaders did not know quite how to respond. As the upstart country continued its march toward a larger and larger market share, fears arose that it would eventually overwhelm its bigger ally and the rest of the world with its exports, putting domestic firms and even entire industries out of business. The dominant country was faced with the prospect of losing the economic superiority it had held for so long. Time appeared to be running out.