

**ORIGINATOR'S SECTION:**

1. College:  CHABSS  CoBA  
 CoEHHS  CSM

Desired Term and Year of Implementation (e.g., Fall 2008):  
 Spring 2019

2. Course is to be considered for G.E.? (If yes, also fill out appropriate GE form\*)  Yes  No

3. Course will be a variable-topics (generic) course?  Yes  No  
 ("generic" is a placeholder for topics)

4. Course abbreviation and Number:\* OM 632

5. Title: (Titles using jargon, slang, copyrighted names, trade names, or any non-essential punctuation may not be used.)  
Sales and Operations Planning

6. Abbreviated Title for PeopleSoft:  
 (no more than 25 characters, including spaces)  
 Sales and Operations

7. Number of Units: 2

8. Catalog Description: (Not to exceed 80 words; language should conform to catalog copy. Please consult the catalog for models of style and format; include all necessary information regarding consent for enrollment, pre- and/or corequisites, repeated enrollment, crosslisting, as detailed below. Such information does not count toward the 80-word limit.)

Covers sales and operations planning as vital process in supply chain management. Focuses on three main concepts: demand planning, supply planning, and sales and operations planning. Topics include, Demand Forecasting, Demand Shaping, Capacity Planning, Inventory Management, Material and Production Planning, Outsourcing, Aggregate Production Planning, Supply Chain Integration and Coordination, Conesus Forecast (Tactical S&OP), Collaboration (Sales/Operations/Finance/Business Development), Management review and KPI measurement, and S&OP simulation game.

Course Prerequisites BA 602

9. Why is this course being proposed?

This course fits within the SAMBA Supply Chain Management. Sales and Operations Planning (S&OP) is a senior management decision-making process that ensures that the tactical plans in all business functions are aligned and support the business plan. S&OP is the vital process to balance customer demand with supply capacity. S&OP aims to better match supply and demand by managing supply using capacity, inventory, outsourcing, and backlogs and by managing demand using short-term price discounts and trade promotions. To ensure that students are faced with real life situation, this course utilizes Fresh Connection game, which is widely used by companies and business schools to understand and learn S&OP process.

10. Mode of Instruction\*

For definitions of the Course Classification Numbers:  
[http://www.csusm.edu/academic\\_programs/curriculum/scheduling/catalog/curricula/DOCUMENTS/Curricular\\_Forms\\_Tab/Instructional%20Mode%20Conventions.pdf](http://www.csusm.edu/academic_programs/curriculum/scheduling/catalog/curricula/DOCUMENTS/Curricular_Forms_Tab/Instructional%20Mode%20Conventions.pdf)

Type of Instruction	Number of Credit Units	Instructional Mode (Course Classification Number)
Lecture	2	C2
Activity		
Lab		

11. Grading Method:\*  
 Normal (N) (Allows Letter Grade +/-, and Credit/No Credit)  
 Normal Plus Report-in-Progress (NP) (Allows Letter Grade +/-, Credit/No Credit, and Report-in-Progress)  
 Credit/No Credit Only (C)  
 Credit/No Credit or Report-in-Progress Only (CP)

12. If the (NP) or (CP) grading system was selected, please explain the need for this grade option.

13. Course Requires Consent for Enrollment?  Yes  No

Faculty  Credential Analyst  Dean  Program/Department - Director/Chair

\* If Originator is uncertain of this entry, please consult with Program/Department Director/Chair.

Tracker ✓  
RP →  
PS →



**14. Course Can be Taken for Credit More than Once?**  Yes  No  
 If yes, how many times? (including first offering)

**15. Is Course Crosslisted:**  Yes  No  
 If yes, indicate which course \_\_\_\_\_ and check "yes" in item #22 below.

**16. Prerequisite(s):**  Yes  No BA 602

**17. Corequisite(s):**  Yes  No

**18. Documentation attached:**  
 Syllabus  Detailed Course Outline

**19. If this course has been offered as a topic, please enter topic abbreviation, number, and suffix:\*** OM 632

**20. How often will this course be offered once established?\*** Once a year

**PROGRAM DIRECTOR/CHAIR - COLLEGE CURRICULUM COMMITTEE SECTION:**  
*(Mandatory information – all items in this section must be completed.)*

**21. Does this course fulfill a requirement for any major (i.e., core course or elective for a major, majors in other departments, minors in other departments)?**  Yes  No  
 If yes, please specify:  
 Supply Chain Management Specialization for MBA, Specialized Accelerated option.

**22. Does this course impact other discipline(s)? (If there is any uncertainty as to whether a particular discipline is affected, check "yes" and obtain signature.)**  Yes  No  
 If yes, obtain signature(s). Any objections should be stated in writing and attached to this form.

Discipline _____	Signature _____	Date _____	Support _____	Oppose _____
Discipline _____	Signature _____	Date _____	Support _____	Oppose _____

**SIGNATURES : (COLLEGE LEVEL) :**

**(UNIVERSITY LEVEL)**

1. Nima Zaerpour 04/17/2017  
 1. Originator (please print or type name) Date

2. [Signature] 5/11/17  
 2. Program Director/Chair Date

3. [Signature] 8/27/17  
 3. College Curriculum Committee Date

4. [Signature] 8/31/17  
 4. College Dean (or Designee) Date


5. \_\_\_\_\_ Date  
 5. UCC Committee Chair

6. \_\_\_\_\_ Date  
 6. Vice President for Academic Affairs (or Designee)

7. \_\_\_\_\_ Date  
 7. President (or Designee)

\* If Originator is uncertain of this entry, please consult with Program/Department Director/Chair.

College of Business Administration  
California State University San Marcos  
**Sales and Operations Planning**

<b>Instructor information</b>	
Name:	Dr. Nima Zaerpour
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<b>Catalog Course Description</b>	<p>Covers sales and operations planning as vital processes in supply chain management. Focuses on three main concepts: demand planning, supply planning, and sales and operations planning. Topics include, Demand Forecasting, Demand Shaping, Capacity Planning, Inventory Management, Material and Production Planning, Outsourcing, Aggregate Production Planning, Supply Chain Integration and Coordination, Conesus Forecast (Tactical S&amp;OP), Collaboration (Sales/Operations/Finance/Business Development), Management review and KPI measurement, and S&amp;OP simulation game</p> <p><i>Prerequisite: TBD.</i></p>
<b>Extended Course Description</b>	<p>Sales and Operations Planning (S&amp;OP) is a senior management decision-making process that ensures that the tactical plans in all business functions are aligned and support the business plan. S&amp;OP is the vital process to balance customer demand with supply capacity. S&amp;OP aims to better match supply and demand by managing supply using capacity, inventory, outsourcing, and backlogs and by managing demand using short-term price discounts and trade promotions. This course particularly focuses on three main concepts: demand planning, supply planning, and sales and operations planning. Topics include, but are not limited to, Demand Forecasting, Demand Shaping, Capacity Planning, Inventory Management, Material and Production Planning, Outsourcing, Aggregate Production Planning, Supply Chain Integration and Coordination, Conesus Forecast (Tactical S&amp;OP), Collaboration (Sales/Operations/Finance/Business Development), Management review and KPI measurement, and S&amp;OP simulation game.</p>
<b>Course Learning Outcomes</b>	<p>Upon completion of this course, students will be able to:</p> <ul style="list-style-type: none"> <li>• Develop tactical plans within an organization.</li> <li>• Apply demand planning and forecasting knowledge to match supply and demand.</li> <li>• Recognize and apply methods of capacity planning, inventory management, and outsourcing to match supply and demand.</li> </ul>

	<ul style="list-style-type: none"> <li>Recognize the interface and integration between the financial and operation levels of S&amp;OP.</li> <li>Apply S&amp;OP techniques in a simulated environment to coordinate forecast and align decisions.</li> </ul>
<p><b>Course textbook</b></p>	<p><b>Compulsory:</b></p> <ul style="list-style-type: none"> <li>Benton, W.C. (2013) Supply Chain Focused Manufacturing Planning and Control, 1<sup>st</sup> ed., Cengage Learning.</li> <li>All compulsory and background reading papers, are listed per class session on CC</li> </ul> <p><b>Optional:</b></p> <ul style="list-style-type: none"> <li>Jacobs, F.R., Berry, W., Vollmann, T., Whybark, D.C. (2010) Manufacturing Planning and Control for Supply Chain Management, 6<sup>th</sup> ed., McGraw-Hill Higher Education.</li> <li>Chopra, S., Meindl, P. (2015) Supply Chain Management: Strategy, Planning, and Operation, 6<sup>th</sup> ed., Pearson.</li> </ul> <p><b>Internet links (background materials)</b></p> <ol style="list-style-type: none"> <li>Sales and Operations Planning resources: <a href="http://www.tfwallace.com/">http://www.tfwallace.com/</a></li> <li>The Fresh Connection: <a href="https://www.thefreshconnection.biz/en_us/">https://www.thefreshconnection.biz/en_us/</a></li> <li>Involvation: <a href="https://www.involvation.nl/en/">https://www.involvation.nl/en/</a></li> </ol>
<p><b>Course Website</b></p>	<p>Lecture notes, assignments, other reading material and announcements will be on the course website- Cougar Courses.</p>
<p><b>Introduction to Games</b></p>	<p><b>Executive S&amp;OP Role Playing Game (Widget Inc.)</b> The company has been in business for a while, selling widgets. The company is approaching the last quarter of the year (Oct-Dec), and the management team needs to coordinate activities for these three months. Each team consists of CEO, VP of Operations, VP of Marketing, VP of Business Development, VP of Finance, and Director of Demand Planning The objective is to make as much profit as possible within these last three months of the year – the teams in the classroom will be ranked according to their profits. The team with the highest profit will be the winner of this competition. However, each player also has to maximize his/her personal <i>political capital</i>. Should your team is the winner, the player with the highest amount of political capital will be the Ultimate winner of this game. Each player starts the game with a certain amount of political capital. Each player can gain more (and loose some) by achieving certain objectives that are detailed in the description of their position.</p> <p><b>The Fresh Connection S&amp;OP Simulation Game</b> The Fresh Connection (TFC) is a web based learning environment built around a cross-functional business simulation with the aim of providing a holistic experiential learning of supply chain management aspects. Each team will be in</p>

	<p>charge of the fruit juice producer The Fresh Connection. Each team will make strategic and tactic decisions related to strategic supply chain issues.</p> <p>The central entity in the simulation is The Fresh Connection, a loss making virtual producer of fruit juices serving retail and out of home channels. In teams of four to five participants, players assume the role in the new management team of TFC in the functions of VP Purchasing, VP Sales, VP Operations, and VP Supply Chain and potentially the role of CEO, responsible for the coordination between the functions. The focus of the game will be very much on strategic and tactical management decisions.</p>
<p><b>Introduction to Cases</b></p>	<p><b>Forecasting Case – Leitax</b></p> <p>Leitax is the seventh largest digital camera manufacturer in the US. Recently spunoff from an electronics company, Leitax has grown quickly to having strong sales to retailers in the US and around the world. During 2002, the company suffered poor product launches and poor planning and inventory to meet demand. Originally there was little coordination between the sales, finance and operations group for inventory planning. The process changes initiated by the senior director of Planning and Fulfillment to improve planning (Redesign Project) have at its heart a process where all parties affected by the forecasts came to consensus surrounding these forecasts. The case describes the entire process used for planning at Leitax, and reports a couple of missteps in forecasting and planning that represent challenges still existing for the planning process.</p> <p><b>Inventory Management Case – O’Neill</b></p> <p>The case describes the case of O’Neill, a high-end fashion surfwear design and merchandising company headquartered in Santa Cruz, California, that sells its products globally through licensed re-sellers. The company procures most of its critical surfwear products through Chinese manufacturers, which drives down costs but increases the need for better planning and risk management. This case provides an in-depth description of the planning and production processes O’Neill and its supply channel partners undergo each year to develop and deliver the company product line, with a particular emphasis on the nature of the information that flows among the members of the supply chain and the timing of key decision and events.</p> <p><b>Aligning Sales, Production and Marketing Case – Grolsch</b></p> <p>Aligning Marketing and Production Strategies. We build on the analyses performed and insights obtained thus far to deepen our understanding of the role manufacturing plays in various supply chain management issues and challenges, specifically related to managing product variety. The Grolsch case serves as the metaphor to discuss the relevant issues. Grolsch, the second largest brewery in the Netherlands, sees its operational performance degrading as a result of the shift from market push to market pull. It responds to the required shorter and shorter lead-times by the customers, particularly the supermarket chains, the shorter product life cycles and the increase in product variety by stocking more and more, in order to be able to deliver in time. Yet, its delivery performance is declining, its responsiveness is faltering, and the inventories go literally through to the roof. Should Grolsch build or hire extra warehouse capacity, or are there other ways to respond to these supply chain management challenges?</p>

<p><b>Course Expectations and Preparation</b></p>	<p>The course is a mixture of front class lectures, case discussions, student presentations and games. I encourage you to be an active participant in classroom discussions and visit Cougar Courses frequently. Your questions and participation in class will enhance your learning. Do not hesitate to ask questions during lectures. Important information and additional readings will be posted on Cougar Courses. I may not necessarily cover all of the materials in the chapter, but it is the responsibility of the student to understand the concepts presented in the textbook and lectures.</p>
<p><b>Contacting the Instructor</b></p>	<p>If you require assistance, you are encouraged to speak to me, It is best to email me to make an appointment. However, my door is always open if I am in office 😊.</p>
<p><b>Course Policies</b></p>	<ul style="list-style-type: none"> <li>• <b>Academic Integrity:</b> Students will be expected to adhere to standards of academic honesty and integrity, as outlined in the Student Academic Honesty Policy. All written work and oral presentation assignments must be original work. All ideas/materials that are borrowed from other sources must have appropriate references to the original sources. Any quoted material should give credit to the source and be punctuated with quotation marks. Students are responsible for honest completion of their work including examinations. There will be no tolerance for infractions. If you believe there has been an infraction by someone in the class, please bring it to the instructor’s attention. The instructor reserves the right to discipline any student for academic dishonesty, in accordance with the general rules and regulations of the university. Disciplinary action may include the lowering of grades and/or the assignment or a failing grade for an exam, assignment, or the class as a whole.</li> <li>• <b>Students with Disabilities.</b> Students with disabilities who require academic accommodations must be approved for services by providing appropriate and recent documentation to the Office of Disabled Student Services (DSS). This office is located in Craven Hall 4300, and can be contacted by phone at (760) 750-4905, or TDD (760) 750-4909. Students authorized by DSS to receive accommodations should meet with me during my office hours or in a more private setting in order to ensure your confidentiality.</li> <li>• <b>Confidentiality:</b> In order for us to have a free and open learning environment, each student is expected to respect the confidentiality of any information or material shared in class discussion.</li> <li>• <b>Special Note:</b> Keep your graded work until you receive your final official grade, for there might be recording errors by the instructor.</li> <li>• <b>Attendance:</b> Please make sure to arrive in class on time, participate in assigned activities and stay for the entire class.</li> <li>• <b>Late Submission:</b> Please submit your assignments by the due date. Late submission will jeopardize your grade.</li> </ul>
<p><b>Grading Components</b></p>	<ul style="list-style-type: none"> <li>• Attendance and Quizzes 10 points</li> <li>• Assignments and Cases 40 points</li> <li>• Simulation Game 30 points</li> <li>• Final 20 points</li> </ul>

	100 points								
<b>Letter Grades</b>									
The final grades will then be converted to your final letter grades according to the following table:									
93-100	90 < 93	87 < 90	83 < 87	80 < 83	77 < 80	73 < 77	70 < 73	60 < 70	< 60
<b>A</b>	<b>A-</b>	<b>B+</b>	<b>B</b>	<b>B-</b>	<b>C+</b>	<b>C</b>	<b>C-</b>	<b>D</b>	<b>F</b>

### Tentative Schedule

<b>Week</b>	<b>General Topic</b>	<b>Topics to be covered</b>
1	Demand Planning	Demand Forecasting Demand Shaping
2	Supply Planning	Inventory Management Capacity Planning Material and Production Planning Outsourcing
3	Introduction to S&OP	Aggregate Production Planning Supply Chain Integration and Coordination
4	Executive S&OP (Role Playing Game)	Conesus Forecast (Tactical S&OP) Collaboration (Sales/Operations/Finance/Business Development) Management review and KPI measurement
5	S&OP Simulation	TFC Game Introduction and preparation Team presentations TFC Game debrief