

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

Instructor information	
Name:	Dr. Nima Zaerpour
Office:	Mark 446
Phone:	760 750-4272
Email:	nzaerpour@csusm.edu
URL:	 www.csusm.edu/coba/about/meet-our-faculty/zaerpour.html LinkedIn: www.linkedin.com/in/nima-zaerpour
Catalog Course Description	<p>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</p> <p><i>Prerequisite: BA 602.</i></p>
Extended Course Description	<p>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. 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&OP), Collaboration (Sales/Operations/Finance/Business Development), Management review and KPI measurement, and S&OP simulation game.</p>
Course Learning Outcomes	<p>Upon completion of this course, students will be able to:</p> <ul style="list-style-type: none"> • Learn better use of information within an organization. • Know how to use demand planning and forecasting to match supply and demand. • Know how to use capacity planning, inventory management, outsourcing to match supply and demand. • Recognize the interface and integration between the financial and operation levels of S&OP. • Experience a complete simulated S&OP process.

	<ul style="list-style-type: none"> Apply S&OP techniques in a simulated environment to coordinate forecast and align decisions.
Course textbook	<p>Compulsory:</p> <ul style="list-style-type: none"> Benton, W.C. (2013) Supply Chain Focused Manufacturing Planning and Control, 1st ed., Cengage Learning. All compulsory and background reading papers, are listed per class session on CC <p>Optional:</p> <ul style="list-style-type: none"> Jacobs, F.R., Berry, W., Vollmann, T., Whybark, D.C. (2010) Manufacturing Planning and Control for Supply Chain Management, 6th ed., McGraw-Hill Higher Education. Chopra, S., Meindl, P. (2015) Supply Chain Management: Strategy, Planning, and Operation, 6th ed., Pearson. <p>Internet links (background materials)</p> <ol style="list-style-type: none"> Sales and Operations Planning resources: http://www.tfwallace.com/ The Fresh Connection: https://www.thefreshconnection.biz/en_us/ Involvation: https://www.involvation.nl/en/
Course Website	Lecture notes, assignments, other reading material and announcements will be on the course website- Cougar Courses.
Introduction to Games	<p>Executive S&OP Role Playing Game (Widget Inc.)</p> <p>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>The Fresh Connection S&OP Simulation Game</p> <p>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 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</p>

	<p>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>Introduction to Cases</p>	<p>Forecasting Case – Leitax 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>Inventory Management Case – O’Neill 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>Aligning Sales, Production and Marketing Case – Grolsch 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>Course Expectations and Preparation</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>

Contacting the Instructor	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 ☺.										
Course Policies	<ul style="list-style-type: none"> • Academic Integrity: 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. • Disability Support Services. Students with disabilities who require academic accommodations must be approved for services by providing appropriate and recent documentation to the Office of Disability Support 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. • University Writing Requirement: CSUSM has established a 1700-word writing requirement for 2-unit courses. To meet this requirement, each student will complete the case studies as well as the report on the executive S&OP game and the fresh connection simulation game. • Confidentiality: 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. • Special Note: Keep your graded work until you receive your final official grade, for there might be recording errors by the instructor. • Attendance: Please make sure to arrive in class on time, participate in assigned activities and stay for the entire class. • Late Submission: Please submit your assignments by the due date. Late submission will jeopardize your grade. 										
Grading Components	<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 70%;">• Attendance and Quizzes</td> <td style="text-align: right;">10 points</td> </tr> <tr> <td>• Assignments and Cases</td> <td style="text-align: right;">40 points</td> </tr> <tr> <td>• Simulation Game</td> <td style="text-align: right;">30 points</td> </tr> <tr> <td>• Final</td> <td style="text-align: right;"><u>20 points</u></td> </tr> <tr> <td></td> <td style="text-align: right;">100 points</td> </tr> </table>	• Attendance and Quizzes	10 points	• Assignments and Cases	40 points	• Simulation Game	30 points	• Final	<u>20 points</u>		100 points
• Attendance and Quizzes	10 points										
• Assignments and Cases	40 points										
• Simulation Game	30 points										
• Final	<u>20 points</u>										
	100 points										
Letter Grades											

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
A	A-	B+	B	B-	C+	C	C-	D	F

Tentative Schedule

Week	General Topic	Topics to be covered
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 Final Exam