

SCM 7385 Supply Chain Corporate Projects

Section 16425 Spring 2023

Professor: Gordon D. Smith, Ph.D.

Class Schedule: 6:00 to 9:00 PM Wednesday

Class Room: Zoom

Student Hours: Wednesday Zoom or by appointment

Office Phone: 1.713.743.0402 **Mobile:** 1.832.477.4393

Email: GDSmith@CougarNet.UH.edu

I. Course Description

The Supply Chain Corporate Projects is a capstone practicum course. The course is designed to meet the needs of the majority of students who work in existing organizations, where issues such as changes in strategy, changes in organization, process improvement, feasibility studies, quality certification, and many other kinds of challenges routinely arise and may require internal project/consulting skills. The course is also appropriate for new venture development and entrepreneurial projects.

What to Expect

You are enrolled in a course that is probably unlike any you have experienced. Your responsibility for the semester will be to satisfy the business needs of a client. After our initial class session your work will be mostly with the client and driven by the client's project schedule and needs. You will be working 'for them', often at their location, on a problem/problems that are very real to them and for which they seek a real and useful solution. You are expected to actually solve their problem, not tell the client or your professor about a possible solution. Students take the lead in these projects - faculty (myself and/or subject matter mentors) are responsible for providing tools for the course and organizing the teams and clients; after that, I as the faculty supervisor have minimal interaction with clients, until the team progress presentations and final project presentation. I, as the supervising faculty, will attend all initial introduction meetings, appropriate interim progress meetings and all final team presentations.

Do not be misled by the lack of formal classroom structure. Even though there are only a few formal class sessions, expect to put in many hours of effort. There may well be times when you will wish for a more traditional lecture-type course that has more structure—there are no regular exams; clients may cancel or change meetings with your team and disrupt your schedule; client needs may not be well defined, especially at the beginning of the project; and more. Your clients will contribute significantly to the evaluation of the project for your grade; and, unlike many professors, they feel no obligation to be nice or to reward you for the "old college try." They are expected by their senior management team to deliver results, and they will expect no less from you.

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II. Course Reference Textbooks and Other Details

Recommended: *The Basic Principles of Effective Consulting*. Linda K. Stroh and Homer H. Johnson. Mahwah, NJ: Lawrence Erlbaum Associates, 2006. ISBN 0-8058-5420-7. (pdf version posted in **OneDrive**) (In this syllabus I use the reference S&J and specific Chapter numbers.)

And

Recommended: *Project Management, Achieving Competitive Advantage, 5th ed.* Jeffrey K. Pinto 2019. ISBN 978-0-13-473071-4

Or

Project Management in Practice, 4th ed. Jack R. Meredith, Samuel R. Mantel, Jr., Scott M. Shafer, and Margaret M. Sutton. Wiley, 2010. (pdf version posted in **OneDrive**).

Readings: See OneDrive

Class and Online Meetings

Regular Zoom class meetings will be the exception rather than the rule. There are currently only three **required** Wednesday Zoom classes. Week 1, Week 7 and Week 14. Required that all teams and team members be present. The other Zoom updates can be scheduled with flexibility.

Client Meetings

Most if not all meetings with clients will be held at the client site as well as virtual. Project and client dependent.

Team Formation

Teams will be announced at the first-class meeting. The chosen technology for meeting with the Professor on a weekly or as needed basis is ZOOM.

Course Grading

Your grade is primarily dependent on your project work (90+ percent), and your project work will be evaluated on the basis of three important criteria:

1. “Technical merit.” Your work is evaluated on how well you achieve the deliverables required in this course. Key to this is to develop the solution(s) and the quality of the solution(s). As relevant to each client problem or need, the correct and appropriate application of business metrics, process/workflow mapping, project management, and other tools made available through the texts, any readings, and from prior course work or experience will be evaluated as part of the technical merit of the final product. Quality of writing and clarity of the final report is a significant part of technical merit. Client evaluations of the project final deliverables is also a significant component of this criterion.
2. “Implementation success probability.” This is based on an assessment or best

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estimate of the real impact your effort will have on the client's operations and success. The best assessments are possible with the best quality of analysis, development of solution and final management report.

3. "Professionalism." This takes into consideration how well you deal with your client, your teammates, and your faculty mentor(s). Submission of deliverables during the semester to the faculty mentor will be a significant factor in evaluation of this criterion, as will client evaluation of each student and the teams work.

Student/Team Deliverables

During the semester your progress will be monitored through the following required reporting mechanisms; these are to be uploaded to OneDrive. Due dates for these are shown in the course schedule:

- The team project proposal (detailed below), which describes very precisely the consulting project that you plan to do and serves as the basis of the written contract between you and your client, and an accompanying project plan. *Due:* after meetings with client and definition of project scope.
- A contract (if required) and a non-disclosure agreement (if required) with the client (detailed below). *Due:* after approval of the project proposal.
- Regular progress reports throughout the semester to update team activities and progress. These are flexible in structure but must include: (1) a brief verbal update of project progress via Zoom video session (when scheduled), (2) short Progress report (submitted to course OneDrive) and (3) updated Project Tracking Chart (submitted to course OneDrive).

Since these are our primary means of staying in touch, it is very important that these be done regularly and as required in the course schedule.

- A final report and presentation to the client for the project that details the project statement/problem, solution that you have developed for the client and provides complete documentation for the implementation of the project solution (as appropriate). *Due:* end of semester on date to be scheduled with client.
- At the end of the project, clients will provide an evaluation of the project to the faculty mentor(s). Evidence of either superior performance or problems in performing the project will influence the ratings teams receive on these factors. *Due:* end of semester on date to be scheduled with client.
- In addition, students are required to provide an evaluation of their teammates; these evaluations also influence the final determination of individual grades. *Due:* end of semester.

Progress reports are "graded" as submitted during the semester. Every report (see [Progress Report Guideline](#)) should have information regarding Parts 1 - 3; Parts 4 - 6 may not be relevant to a specific report, and that can be noted. Generally, reports meeting the criteria above will receive "A" grades and contribute as such to the final grade. Missing or poorly done reports may result in a reduction of the final grade. Similarly, contracts, NDAs, and evaluations

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must be submitted for full credit.

The Project Proposal

Think of the proposal as a formal contract you are tendering to the client, but with additional information to show you understand the client's needs and also to persuade the client that you are the source of competence best suited to meet those needs. Depending on the client, most of you will find that the Stroh and Johnson proposal outline and guidance works well.

The specific nature of the proposal will vary depending on the technical requirements, of course, but the majority of proposals are "business proposals," and have some important characteristics. Domain knowledge is an important part of the "situation" of the business, and often the most important part. What are the major variables that define "success" (often discussed as "critical success factors")? What *specific metrics* are used; what is the basis for measuring "success" or performance? Whether getting approval for a project within a company or winning business through competitive bids in a consulting firm, effective business proposals are a key requirement.

For this course, the project plan should be developed and presented using project management software or use Excel (Team choice with Professor agreement). As will be seen, this requires the project team to think the project through in detail, and to schedule tasks in a way that meets both student and client timetables. In addition, it creates an excellent way to portray the project, and to communicate critical parameters about the project to team members, faculty mentors, and client stakeholders.

Client Relationships

All client organizations (as appropriate) sign an agreement to enable students to work with the client and assure mutual protection of client and student interests. All information to and from clients is to be held in confidence—students and faculty mentors (if required) sign a non-disclosure agreement (NDA) with the client for all projects. Students may be required to sign company forms or be required to meet other company related criteria, such as security screening (NASA requirement). Clients have the right to not accept students if employment or other affiliations might create a conflict of interest. I don't expect this to be the case. However, have had a delay regarding security access badge in the past.

The Final Report and Presentation to the Client

The **final report** will be similar in format to the proposal, except you will describe what you actually did rather than what you plan to do. It is important that your final report *sell* the project to the client, as did the proposal. "Selling," of course, means a positive view of the project outcomes, but it also requires honesty and ethical reporting—sometimes what has to be "sold" is information the client would rather not hear. Whatever the situation, you should discuss why the solution/analysis is a good one and how the client will benefit from implementation of the solution. Limitations and shortcomings that may have a significant impact on the client should also be acknowledged.

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The faculty supervisor and/or mentor(s) must approve the final report before it is submitted to the client. The report should have a well-designed cover page; a table of contents; an executive summary; and then the full report. Project scope often changes from that in the original proposal, and this should be reported so that a history of the project is given. Technical appendices may be added if necessary, and the final update of the project management plan should be attached.

It is very important that the final report provide complete documentation of the project so that the client may refer to it later, should the need arise. This means that a comprehensive list of all resources used (publications, interviews, government information, internet sources, etc.) must be provided with full bibliographic information. This may be prepared using any consistent set of guidelines, such as the Turabian (University of Chicago) style manual, American Psychological Association, Modern Language Association, IEEE, etc.

All project reports will be submitted to the client along with a **formal presentation**. In the majority of cases, the final report will be presented to the client on their premises, with the faculty supervisor/mentor(s) in attendance. If necessary, client organizations may come to campus and receive their presentation and report there.

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SEMESTER SCHEDULE (Modified as necessary)

Reference text suggested reading:

Text pdf's: (1) Stroh and Johnson, *The Basic Principles of Effective Consulting*, all chapters. Very good reference for your long-term professional use.

(2) Meredith *et al.*, *Core Concepts of Project Management*, sections Chapter 1; Chapter 2: Roles and Responsibilities; Chapter 3: Project Plan (Charter)(important), Planning Process, Work Breakdown Structure; skim Chapter 4 (Budgeting); Chapter 5 Scheduling; skim Chapter 6 Allocating Resources; Chapter 7 Monitoring and Controlling the Project; skim Chapter 8 Evaluating and Terminating the Project.

Or equivalent chapters in Pinto if you have taken SCM 7A01 Project Management and used the book.

- Week 1 (**Wed**) **Zoom** Introduce students
Course Overview and Syllabus Review
Review and Discuss Critical Success Factors and Business Metrics for Business outcomes and Results
Discussion of each Corporate Project
Review each Team
Discuss Next Steps
- Week 2 Team meet with client for introductions and scope of work discussions
- Week 3 (**Wed**) Project Report #1; **Zoom** meeting to review draft project scope and draft project plan
- Week 4 Project Report #2
- Week 5 (**Wed**) Project Report #3; Brief **Zoom** meeting to review Project Status
- Week 6 Project Reports #4
- Week 7 (**Wed**) Project Report #5; **Zoom** Review draft mid-semester project status presentation; Schedule Client mid-semester project status review for week 8
- Week 8 Client mid-semester project status review; Set tentative Final Presentation date: Project Report #6;
- Week 9 **Spring Break and/or 'Catch-up'**
- Week 10-12 Project Reports #7, #8, and #9
- Week 13 Project Report #10; Post Final Report Outline
- Week 14 (**Wed**) Project Report #11; **Zoom** Review Draft of Final Report; Final Presentation Outline; Confirm Final Presentation Date
- Week 15 Final Report and Final Presentation
- Week of 1 May Final Presentations to Clients; submit peer evaluations; Client completes Project Evaluation
- TBD Final report submitted to client team; Grades submitted; **Celebrate**
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