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Supply chain management (SCM) professionals work in an inter-organizational, multi-functional world. As supply chain leaders, they need to understand the big picture. They also need the ability to use a variety of tools and techniques to understand and manage the supply chain, as well as general business skills to work with people and move their organizations forward.

Clearly, therefore, successful supply chain management professionals need to have a wide range of knowledge, skills and abilities. These capabilities can be termed “competencies.” Simply stated, competencies answer the question, “What can a supply chain management professional do.”

The answer to this question is of interest to a number of stakeholders, including employers, existing members and prospective members. It is also important to the SCM profession in order that it can continue to evolve the profession such that its members, both prospective and existing, are continually put in an advantageous position to meet the changing needs of employers through the products and services that it provides.

In order to build the competencies required of supply chain management professionals, SCMA has developed a world-class, leading-edge professional designation program called the Supply Chain Management Professional (SCMP) that is unique in its design, structure and content.

**Program Objective**

The holder of the SCMP professional credential will be recognized as the strategic supply chain management professional who provides innovative strategic leadership to enterprises to achieve strategic value-add and sustained economic and social prosperity.

Specifically, SCMPs will demonstrate:

- Knowledge, skills and attributes relevant to the needs and expectations of the marketplace.
- A unique and distinctive competence that differentiates them from others practising in the field of supply chain management.

**The Field of Practice of Supply Chain Management**

SCMA defines supply chain management as: The process of strategically managing flows of goods, services, finance and knowledge, along with relationships within and among organizations, to realize greater economic value through:

- Supporting enterprise strategic objectives.
- Contributing to the achievement of strategic competitiveness of the enterprise.
- Contributing to the enhancement of the competitive advantage of the enterprise.
- Enhancing customer satisfaction.
Dimensions of the Competency Map

In order to facilitate an understanding of the competencies of an SCM professional, they are represented in this document as a “map,” which includes a diagrammatic representation of its various dimensions and characteristics as well as a context for the various competencies.

Knowledge Areas

The field of practice of supply chain management consists of the inter-related core knowledge areas of procurement, operations and logistics and is integrated with the supporting knowledge areas of marketing, finance and accounting, human resources and knowledge management.

The Three “Pillars” of Supply Chain Management

The Competency Map reflects the three “pillars” of supply chain management: management, strategy and professionalism. This construct shows that functional knowledge of supply chain management, together with principles associated with management, strategy and professionalism form the basis for strategic supply chain management. Ultimately, the competencies of SCM professionals can be related back to these three pillars.
Functional and Managerial and Professional Competencies

Consistent with the three pillars and our definition of SCM, the SCM professional must possess both a range of functional competencies as well as general competencies to facilitate effective management and leadership within the context of these functional competencies.

The Competency Map reflects the following functional disciplines:

- Supply chain management (SCM)
- Procurement and supply management
- Logistics and transportation
- Operations and process management
- Knowledge management
- Global sourcing
- Supply chain management for the public sector
- Supply chain management for services, capital goods, and major projects

These functional disciplines form the foundational knowledge set for supply chain management professionals, as well as application areas which reflect the current SCM environment. They serve as the basis for our SCMP modules.

In addition, the Competency Map also reflects the following managerial and professional competencies:

- Leadership and professionalism
- Negotiation skills
- Communication and relational skills
- Competitive bidding and contract management
- Ethical and social responsibility skills
- Risk management skills

These professional competencies focus on general, broad-based skills needed by supply chain professionals in the process of demonstrating the functional knowledge areas above. They serve as the basis for our SCMP interactive workshops.

Career Stages

The Competency Map recognizes that the knowledge, skills and abilities of an SCM professional must advance along with his or her career stage. Thus, the map delineates the various competencies of supply chain management professionals according to three career stages:

- Early career
- Mid-career
- Peak career
The Competency Map reflects the increasing sophistication that would be expected of SCM professionals as they advance in their careers. Indeed, the map identifies three specific roles for SCM professionals with respect to the various competencies reflected in the map, depending on which of these three career stages they are in at any given point in time, namely:

- Provider of business advice and information (Early Career)
- Tactical leader and operational decision maker (Mid Career)
- SCM leader and strategic decision-maker (Peak Career)

The career stages dimension of the Competency Map is depicted diagrammatically as follows:

<table>
<thead>
<tr>
<th>Role of the SCM Professional</th>
<th>Provider of business advice and information</th>
<th>Tactical leader and operational decision-maker</th>
<th>SCM leader and strategic decision-maker</th>
</tr>
</thead>
<tbody>
<tr>
<td>Career Stage</td>
<td>Early Career</td>
<td>Mid-career</td>
<td>Career Peak</td>
</tr>
<tr>
<td>Level of Application</td>
<td>Know</td>
<td>Do</td>
<td>Lead</td>
</tr>
<tr>
<td>Level of Implementation</td>
<td>Research and Evaluate</td>
<td>Select</td>
<td>Oversee Implementation</td>
</tr>
<tr>
<td>Level of Accountability</td>
<td>Explain Phenomena</td>
<td>Manage Tactical Assignments</td>
<td>Lead Strategic Initiatives</td>
</tr>
</tbody>
</table>

Context for the Competencies

Over the years, the standard has been raised in strategic supply chain management. With an increasingly competitive business environment, the supply chain has become more complex and strategic. As a result, the expectations of SCM professionals have been elevated as well, evolving from an operational to a comprehensive strategic role that requires an exceptional standard of leadership in order to add value to organizations. More specifically, the SCM professional is expected to:

- be a **strategic** leader;
- possess an **integrating** perspective;
- possess critical **thinking** skills;
- be a **skilled** decision-maker.

These elevated expectations – which emphasize **adding value** and strategic, integrative **decision-making** – make it necessary to view the functional knowledge and professional competencies listed above within a broader context, which, correspondingly, emphasizes these capabilities as described below.
The Value Chain

Recall that the definition provided earlier of the field of practice of strategic supply chain management emphasizes the realization of greater economic value through the efforts of SCM professionals as reflected in the elevated expectations cited above. In effect, SCM professionals, through the demonstration of their functional knowledge and professional competencies, have the ability to add value throughout the supply chain, which has become synonymous with the concept of a “value chain.”

The value chain concept categorizes the generic value-adding activities of an organization into a number of specific activities to facilitate the identification of cost and value “drivers” for each activity with a view to maximizing value creation while minimizing costs. Given the close association between the supply chain and the value chain, and the nature of the competencies of SCM professionals which enable them to add value throughout the chain, the Competency Map is structured within the context of the value chain, as represented in SCMA’s Strategic Supply Chain Management Model.

Decision-Making

As mentioned above, the elevated expectations of SCM professionals include the ability to be a strategic, integrative decision-maker. As a result, the Competency Map also views the functional knowledge and professional competencies within a decision-making context.

Decisions must be made and actions must be taken in all organizations. Critical thinking skills are required to ensure the best, most appropriate action follows the decision-making process. While there are many approaches to decision making, the following are typical steps involved in the decision-making process:

1. State the decision to be made.
2. Specify objective(s) and criteria relating to the decision.
3. Identify alternatives that address the objective(s) and criteria.
4. Evaluate the alternatives with respect to how they address the objective(s) and criteria, and consider their direct and indirect implications.
5. Select from among the alternatives identified.
6. Implement the decision made.
Within the context of supply chain management, it should be emphasized that the objective(s) and criteria typically include a consideration of how the alternative selected will add value to the organization. When evaluating alternatives in light of the specified objective(s) and criteria, it is critical to consider both the direct and indirect implications of each alternative; in other words, in order to make optimal decisions, the evaluation of alternatives needs to be undertaken from an integrative perspective.

The Competency Map is designed to ensure that the competencies of an SCM professional reflect decision-making from an integrative perspective. For example, an inbound logistics decision will be considered both from the perspective of issues that affect it directly (strategic, technical, organizational, management, ethical); how it indirectly affects decisions previously made during the procurement stage of the value chain; and the effects of the decision, if any, on subsequent decisions that will need to be made in the operations, outbound logistics, marketing and customer service stages of the value chain.

Supply Chain Management Professional (SCMP) Designation Program

The SCMP designation program has been constructed based on the Competency Map outlined above. Some of the unique features of the program are:

- The SCMP designation program is an executive development program.
- The content of the SCMP designation program is presented with a strategic perspective – always connecting with organizational goals.
- The content of the SCMP designation program demonstrates integration across the core disciplines.
- The content of the SCMP designation program presents management skills with a supply chain perspective.
- The SCMP designation program is designed so that learning can be applied immediately in the workplace.
- The SCMP designation program is a case-based learning program.
- The SCMP designation program promotes networking within a peer group.

Learning Outcomes

SCMA has identified four learning outcomes that are critical for supply chain management professionals. These outcomes are required for effective leadership of supply chain functional and supporting areas. The outcomes are:

- Demonstrated Leadership and Professionalism
- Demonstrated Strategic Thinking and Application
- Improved Communication and Relational Skills
- Enhanced Ethical and Social Responsibility Skills

The Competency Map provides the general framework for the competencies of a supply chain management professional that are developed through the SCMP designation program. This general map is supplemented by a more specific Content Map and Learning Objectives, which follow.
Supply Chain Management

The objective for this module is to gain understanding of the global supply chain management structure and process, and apply analytical models to clarify SCM strategy and link supply chain performance to overall organization performance.

Module Objectives
Upon completion of this module candidates should be able to:
• Implement a SC strategy aligned to the mission vision and values of an organization
• Apply mapping tools to describe and analyze supply chains
• Apply analytical models to clarify SCM strategy and link supply chain Performance to return on assets (ROA) and return on investment (ROI)
• Recognize cycle time reduction (CTR) opportunities
• Make inter-organizational information systems (IOIS) recommendations
• Recognize the importance of, and risks associated with, trust in the supply chain
• Assess supply chain risk
• Audit supply chain in terms of social responsibility

<table>
<thead>
<tr>
<th>Overall Program Learning Outcomes</th>
<th>Related Module Specific Learning Outcomes</th>
</tr>
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<tbody>
<tr>
<td>Demonstrated Leadership and Professionalism</td>
<td>Understand the strategic importance of SCM in the global context. Assess supply chain risk</td>
</tr>
<tr>
<td>Demonstrated Strategic Thinking and Application</td>
<td>Apply analytical models to clarify SCM strategy and link supply chain Performance to return on assets (ROA) and return on investment (ROI).</td>
</tr>
<tr>
<td>Improved Communication and Relational Skills</td>
<td>Discuss the corporate financial contribution of SCM. Make inter-organizational information systems (IOIS) recommendations</td>
</tr>
<tr>
<td>Enhanced Ethical and Social Responsibility Skills</td>
<td>Audit supply chains in terms of social responsibility.</td>
</tr>
</tbody>
</table>
1. Supply Chain Management
   a. What is a Supply Chain?
      * Understand the strategic importance of SCM in the global context.
   b. What is Supply Chain Management?
      * Appreciate the breadth and depth of SCM, in terms of the four perspectives on SCM vis-à-vis purchasing.
      * Describe the supply chain functions and institutions.
      * Identify and critique the candidate’s organization’s perspective on SCM.
   c. The Financial Contributions of SCM
      * Discuss the corporate financial contribution of SCM.
   d. The Strategic Profit Model
      * Link SCM initiatives to the strategic profit model.

2. Supply Chain Strategy
   a. Supply Chain Mapping vs. Process Mapping
      * Compare and contrast supply chain and process mapping.
      * Understand the various purposes of supply chain mapping.
      * Explain using text and diagrams, the characteristics of supply chain maps.
   b. Supply Chain Mapping Example
      * Create a supply chain map for the candidate’s organization.
      * Identify problems or improvement opportunities on a supply chain map.
   c. Strategy alignment and implementation
      * Address an organization’s SCM strategy and its impact on supply chain operations.
      * Examine an organization that has developed the supply chain capabilities to support its overall strategic objectives.
      * Appreciate that supply chain decisions depend on the context, and that there is no "one best way" to develop supply chain capabilities.
      * Address the issue of make-buy decisions, and appreciate that such decisions must consider issues of governance and other strategic concerns.
   d. Core Competencies
   e. Outsourcing / Virtual Integration

3. Performance Metrics that Matter
   a. Metrics that Drive Behaviour
      * Consider issues concerning what behaviours arise when you measure certain metrics.
   b. The Balanced Scorecard
      * Create a supply chain-oriented balanced scorecard for your organization.
c. Cash-to-Cash
   ▪ *Link SCM initiatives to cash-to-cash modeling.

4. Supply Chain Performance Measurement
   a. The SCOR Model
      ▪ *Explain how the SCOR model for supply chain mapping is used by an organization.
   b. Benchmarking
      ▪ *Identify an opportunity to use benchmarking at an organization.
   c. LEAN distribution
   d. Inventory Management

5. Demand Management
   a. Levels of Demand planning
   b. Forecasting
   c. CPFR
      *Address issues of sourcing overseas, such as forecasting, risk, culture, long manufacturing cycle times, and sourcing inputs.
   d. Matching supply and demand – S&OP
      ▪ *Understand the unique aspects of production planning for short life-cycle products with highly variable demand.
      ▪ *Address ways of matching supply and demand in uncertain environments

6. Inventory Strategies & Cycle Time Reduction
   a. Supply Chain Inventory Management
      ▪ *Consider the bullwhip effect, its sources and possible ways to reduce it.
      ▪ *Discuss system implementation issues in the context of inventory management. In particular, discuss potential conflicts between logistics-related considerations of efficiency and effectiveness, and other internal and external concerns of power, decision making authority, culture, and incentives.
      ▪ *Promote a complete channel perspective, i.e. a strategic SCM perspective, when implementing changes to a supply chain situation.
      ▪ *Understand the notion of vendor-managed inventory for improving supply chain effectiveness.
b. Cycle Time Reduction
   - *Recommend possible cycle time improvements in supply chain operations.
   - *Consider the capabilities required to succeed in such an environment from the points of view of the retailer and the offshore supplier.
   - *Identify and understand the causes of excessive cycle times.
   - *Estimate the impact of cycle time on pipeline stock and safety stock.
   - *Recommend strategies for cycle time reduction at your organization.
   - *Address ways of matching supply and demand in uncertain environments.
   - *Consider the idea of minimizing risk via the use of risk-based production sequencing.

7. Flexibility and Resiliency
   a. Supply Chain Strategies – Debriefing the Supply Chain Game
      - *Address the relationships between various supply chain considerations, including forecasting, aggregate planning, inventory control, and supply chain design.
      - *Experience the ongoing tension between various supply chain decisions (e.g., adding factory capacity, adding warehouse capacity, setting order quantities, setting reorder points, transportation methods, etc.).
      - *Appreciate the balance between solid quantitative analysis and the ongoing intuitive monitoring of a supply chain situation.
      - *Compete for the best final cash position by drawing upon available team resources such as supply chain knowledge, personal experience, analytical and monitoring ability, organizing skills, and intuition.

8. Relationship Management
   a. Methods for Conducting Business
      - *Recognize partnership facilitators in your own organization.
   b. The Transactional, Relational, and Portal Approaches
      - *Understand the differences between the transactional, relational and portal approaches to conducting business.
   c. Power and Dependence
      - *Apply portfolio methods such as Kraljic’s purchasing portfolio and Cox’s power matrix to your own organization.
      - *Discuss behavioral dimensions (e.g. power and conflict) in supply chains.
      - *Develop a step-by-step approach for creating supply chain partnerships.
   d. Vertical Integration and Outsourcing
      - *Address an organization’s SCM strategy and its impact on supply chain operations.
      - *Appreciate that supply chain decisions depend on the context, and that there is no “one best way” to develop supply chain capabilities.
      - *Address the issue of make-buy decisions, and appreciate that such decisions must consider issues of governance and other strategic concerns.
9. Information Sharing Systems

a. Inter-organizational Information Systems (IOIS)
   - *Consider the application of information technology in a difficult and unconventional supply chain situation.
   - *Understand the principles that can enhance the implementation process and reduce the risk of failure in similar settings.
   - *Consider how to leverage newly developed supply chain capabilities.

b. Inter-organizational Information Systems, and RFID and Wal-Mart
   - *Determine supply chain information requirements by using structured interview techniques.
   - *Evaluate the suitability of enterprise resource planning (ERP) systems vs. Best-in-Breed for your organization.
   - *Evaluate the costs and benefits of radio frequency identification (RFID).

10. Design for Supply

a. Design for Supply – Hewlett-Packard Company Case and Exercise
   - *Consider the potential of product design as part of a postponement strategy.
   - *Address issues of risk pooling in reducing the costs from variability and uncertainty.
   - *Consider the value of postponement over different stages of the product life cycle.

11. Supply Chain Risk Management

a. Risk Efficiency and Flexibility
   - *Describe the differences between increasing velocity, pooling risk, and postponing differentiation.
   - *Identify drivers of risk in your supply chain.

b. Risk Mitigation and Strategies
   - *Recommend supply chain risk mitigation strategies for your organization.
   - *Perform a supply chain risk assessment for your organization.
   - *Conduct a supply chain security audit at your organization.

12. Social Responsibility in Supply Chain Management

a. Principles of Social Responsibility
   - *Specify some of the aspects of social responsibility in supply chain management.
   - *Identify supply chain stakeholders.

b. Supply Management Audit for Social Responsibility
   - *Conduct a social responsibility audit at your own organization.
Leadership and Professionalism

The goal of this workshop is to develop the abilities of participants to become supply chain leaders and supply chain management professionals, i.e. to lead groups of people and to manage change.

Workshop Objectives

Upon completion of this workshop you should be able to:

- Understand and apply the five best practices of leadership.
- Identify ways to adapt your behaviour to individuals to build effective relationships.
- Critique your organization’s vision and mission statement.
- Evaluate your leadership abilities and apply best practices.
- Describe unique aspects of leading teams.
- Understand critical steps and roles in the change management process.
- Create and present a leader profile.
- Select appropriate applications for each of the four leadership styles.
- Differentiate between the continuity and discontinuity perspectives.
- Develop ways to build a cohesive team.
- Determine the appropriate approach to handling conflict.

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<tr>
<td>Demonstrated Leadership and Professionalism</td>
<td>Evaluate your leadership abilities and apply best practices.</td>
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<tr>
<td>Demonstrated Strategic Thinking and Application</td>
<td>Critique your organization’s vision and mission statement.</td>
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<tr>
<td>Improved Communication and Relational Skills</td>
<td>Select appropriate applications for each of the four leadership styles.</td>
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<tr>
<td>Enhanced Ethical and Social Responsibility Skills</td>
<td>Understand critical steps and roles in the change management process.</td>
</tr>
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</table>
Leadership and Professionalism (continued)

1. Introduction to Leadership and Professionalism
   a. What is Leadership?
      *Understand the characteristics of leadership.
   b. Employee engagement
   c. The Leadership Challenge
   d. The Diamond Model
      *Describe the four elements of the diamond model of leadership.
      *Apply the diamond model to a leadership situation at your organization.
   e. The Four Categories of Intelligence
      Differentiate between intellectual, emotional, social and change intelligence
   f. Sources of Power
      *Describe the five sources of power, and then link them to the three levels of leadership.

2. Self Awareness
   a. The DISC model
      *Determine your own managerial style using DISC or other psychometric tools
      *Identify ways to improve your leadership (vision, commitment and management) skills, and create a plan for improvement.
   b. Meyers-Briggs Type Indicator
   c. The Language of Leadership
      *Practice the language of leadership.

3. Leadership Styles
   a. Styles of Leadership
   b. Situational Leadership
   c. The Hersey-Blanchard Model

4. Leadership Levels
   *Assess your ability in effective leadership.
   *Discuss the differences between the continuity and discontinuity perspectives.
Leadership and Professionalism (continued)

5. Vision and Mission

- *Compare and contrast a vision and mission statement

6. Leading Teams

a. Tuckman's Model.
   - *Explain the team life cycle (TLC) concept.

b. Team Roles
   - *recognize how people take on different team roles while working on a small group” The five dysfunctions of a team

c. The 5 dysfunctions of a team
   - *identify the potential dysfunctional behaviours exhibited by teams”

7. Conflict Resolution

a. Describe conflict

b. Styles of conflict resolution
   - *recognize how people deal with conflict; and how to bring about healthy resolution”

c. The five dysfunctions of a team

8. Leading Change

a. What is Change?
   - *Understand when and how to initiate change.

b. The Change Management Process
   - *Understand the critical steps in the change management process.
   - *Describe various important roles in the change management process.

c. Common Reactions to Change
   - *Discuss the various reactions to change in a work setting.
   - *Make use of change preparation tools.

d. Resilience to Change
   - *Explain how to maintain the change process to create ongoing improvement
Procurement and Supply Chain Management

The goal of this module is to better understand the strategic role of procurement, as well as tactical approaches that support strategy.

Module Objectives:

- Understand the elements of procurement strategy.
- Develop procurement strategy.
- Develop and apply tactics that support procurement strategy including those related to processes, organization, supplier selection and relationships, decision making and technology.
- Develop a supplier optimization plan
- Implement a supplier certification project and a supplier development plan
- Analyze, or direct others in the analysis of make or buy decisions, price, cost, quality, inventory and total cost of ownership.

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<td>Implement a supplier certification project and a supplier development plan</td>
</tr>
</tbody>
</table>
Procurement and Supply Chain Management (continued)

1. Procurement Processes
   a. *Describe the steps in the procurement process.
   b. Specifications and Standardization
      ▪ *Understand the critical importance of needs description (specifications).
      ▪ *Display knowledge of the types of specifications.
   c. Specification Development and Problems
      ▪ *Describe the broad considerations to specification development.
      ▪ *Understand potential problem areas.
      ▪ d. Financial leverage
      ▪ Understand the impact of procurement on corporate finances

2. Tactical and Strategic Procurement
   a. Procurement and Supply Management
      ▪ *Describe the relationship between tactical and strategic procurement.
   b. Strategic Stages of Purchasing
      ▪ *Describe and differentiate the five stages of strategic procurement management.
   c. Spend Analysis
      ▪ *Define spend analysis including direct and indirect spend.
      ▪ *Understand why spend analysis is an important strategic purchasing function.
      ▪ *Recognize the opportunities from and barriers to spend analysis.
   d. Procurement Risk
      ▪ *Identify types of supply risk.
   e. Make of Buy Decisions
      ▪ *Discern between insourcing and outsourcing for given situations.
      ▪ *Describe the factors (quantitative and qualitative) that enter into the make or buy decision.
      ▪ *Explain the concept of core competency.
      ▪ *Describe the role of core competencies in creating competitive advantage.

3. Procurement and Supply Management Organization
   a. Procurement Internal Relationships
      ▪ *Identify the relationships between procurement and other functional areas of an organization.
   b. The Leverage Effect of Improved Procurement on Financial Results
   c. Cross-Functional Teams
      ▪ *Describe the reasons for/benefits of using of cross functional purchasing teams.
      ▪ *Discuss the problems in using cross functional teams.
Procurement and Supply Chain Management (continued)

- *Understand the critical success factors for cross functional teams.

  d. Ways of Organizing Procurement
  - *Describe range of options for organizing procurement.
  - *Assess the options for the organization of procurement in an organization.

  e. Centralization vs. Decentralization

4. Competitive Bidding, Negotiation and Total Cost of Ownership

  a. Competitive Bidding
     - *Understand the factors that suggest bidding is more appropriate than negotiation and vice versa.

  b. Types of Competitive Bids
     - *Describe types of bids.

  c. Negotiation
     - *State the objectives of a negotiation.

  d. The Negotiation Plan
     - *Prepare a negotiating plan.

  e. Elements and Benefits
     - *Describe the benefits of the total cost of ownership approach.

  f. Total Cost of Ownership: Implementation
     - *Conduct a total cost of ownership analysis for a product or service used in an organization.

5. Price and Cost Analysis

  a. Price Assessment
     - *Conduct a price assessment.
     - *Understand that lowest price is not necessarily the best option.
     - *Describe different types of discounts.

  b. Market Conditions and Price Negotiation Strength (Procurement Leverage)

  c. Cost Analysis
     - *Describe types of cost analyses.

  d. Types of Costs: Direct Costs and Indirect Costs
     - *Distinguish the components of direct and indirect costs.
     - *Conduct a cost analysis.
Procurement and Supply Chain Management (continued)

e.  Profit
   • *Describe considerations with respect to supplier profit.

f.  Learning Curves
   • *Understand, at a general level, the importance of learning curves in cost analysis.

6.  Quality and Inventory

a.  Factors That Affect Long Run Quality
   • *Understand factors that affect quality.

b.  Total Quality Management
   • *Identify the difference between error detection and error prevention.
   • *Describe some common total quality management systems.
   • *Weigh the pros and cons of implementing ISO 9001: standards in your organization.

c.  Quality Training for Procurement Staff
   • *Outline the benefits of a strategic purchasing organization having quality management training.

d.  Purposes of Inventory
   • *Describe the purposes of inventory.

e.  Forecasting Demand
   • *Understand the uses and drawbacks of basic forecasting models.

f.  Inventory Models
   • *Use basic inventory models.

g.  Inventory Relationships
   • *Outline the relationship between delivery issues and inventory.
   • *Discuss the trade-off between inventory and customer service.
Procurement and Supply Chain Management (continued)

7. Supplier Selection

a. Supplier Selection: Weighted Evaluation Systems
   - Identify potential supply sources.
   - Produce an evaluation matrix for supplier selection.

b. Supplier Selection: Product Attribute Considerations
   - Describe different types of products (routine order, procedural, performance and political) as they effect supplier selection.
   - Connect the product type with supplier selection criteria.

c. Supplier Selection: Total Cost Approach
   - Understand the elements of the total cost approach of selecting suppliers: risk factors, business desirable factors, and measurable cost factors.

d. Single versus Multiple Sourcing
   - Describe factors that suggest an organization should use a single source or multiple sources for a good or service.
   - Understand the difficulties in negotiating in a sole source situation.

e. Rationalization and Optimization
   - Understand how to determine the right number of suppliers for a given situation.

8. Supplier Certification

a. Procurement Performance Monitoring: Eight Best Practices
   - Describe the best practices in procurement performance measurement.

b. Procurement Performance Monitoring: Measures
   - Specify procurement performance measures for an organization.

c. Objectives of Supplier Certification Programs
   - Describe the objectives of supplier certification.

d. Benefits of Supplier Certification
   - Discuss the benefits of supplier certification.

e. Supplier Certification: Steps
   - Apply the general steps in the supplier certification process.

9. Supplier Development

a. Approaches to Supplier Development
   - Identify the many types of supplier development approaches.

b. Product Development Cycle Times and Supplier Performance Measurement
   - Describe the use of product cycle times in supplier performance management.
Procurement and Supply Chain Management (continued)

c. Category Management
d. Procurement Performance Monitoring

10. Services Procurement

a. Services are Different
   - *Describe the unique aspects of services procurement.
   - *Describe the tactical and strategic considerations related to services procurement.

b. Services are the Same: Procurement Involvement
   - *Assess the need for procurement’s involvement in services buying.

c. Specification: Statements of Work
   - *Outline the elements of a statement of work.
   - *Prepare a statement of work

d. Specification: Service Level Agreements
   - *Outline the elements of a service level agreement.
   - *Prepare a service level agreement.

11. e-Procurement

a. Forms of e-Procurement

b. Pros and Cons of e-Procurement
   - *Discuss the advantages and disadvantages of e-procurement.

c. Implementing e-Procurement
   - *Lead a discussion on the many aspects of and potential of e-procurement for your organization.

d. Reverse Auctions: Steps
   - *Apply the steps in reverse auctions.
   - *Assess the impact of reverse auctions on total costs and supplier relations.

12. Involving Users and Suppliers

a. P-Cards: Benefits
   - *Describe the benefits available through effective use of p-cards.

b. P-Cards: Considerations in Implementation
   - *Understand the challenges related to implementing a p-card program.

c. Vendor (Supplier) Managed Inventory: Benefits
   - *Describe the benefits of a vendor managed inventory approach.
d. Implementing Vendor or Supplier Managed Inventory
   • *Develop a VMI / SMI implementation plan.

e. Just In Time and Just In Time II
   • *Describe how JIT II works along with its benefits.
Negotiation Skills

The goal of this workshop is to develop the ability to prepare, execute and analyze negotiations, to become a more effective negotiator.

Workshop Objectives

- Understand and develop the primary negotiation skills.
- Develop your BATNA, and estimate your reservation point in preparation for negotiation.
- Apply tools for negotiation preparation—including self-assessment and assessment of the other party.
- Identify obstacles to integrative negotiation in the buyer-supplier (supply chain) context.
- Explain the complexity of multiparty negotiations, and apply strategies for effective negotiation in the multi-party context.
- Describe challenges and strategies for dealing with coalitions, agents, constituents and teams in negotiation.
- Understand the importance of trust and relationships in negotiation.
- Recognize and apply sources of power in negotiation.
- Practice ethical negotiation practices—and recognize unethical practices.

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<td>Demonstrated Strategic Thinking and Application</td>
<td>Describe challenges and strategies for dealing with coalitions, agents, constituents and teams in negotiation.</td>
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<tr>
<td>Improved Communication and Relational Skills</td>
<td>Explain the complexity of multiparty negotiations, and apply strategies for effective negotiation in the multi-party context.</td>
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<tr>
<td>Enhanced Ethical and Social Responsibility Skills</td>
<td>Practice ethical negotiation practices—and recognize unethical practices.</td>
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Negotiation Skills (continued)

1. Introduction to Negotiation
   a. What is Negotiation?
      ▪ Define Negotiation
   b. Strategic Negotiation
      ▪ Discuss the importance of negotiation skills as a core management competency.
   c. The Bargaining Zone
      ▪ Set parameters for determining a successful negotiation.
      ▪ Understand the concepts of bargaining zones, reservations points and target points.
      ▪ Determine the reservation point and target point for negotiation.
   d. Assessing the parties
      • Assessing one’s own needs and wants
      • Assessing the other party’s needs vs. wants
   e. Characteristics of a Good negotiator
      ▪ Formulate a style that invites negotiation
      ▪ Know how to maintain assertiveness without being difficult
      ▪ Building trust
   f. Engage in a simple negotiation simulation - Hubcaps
   g. Negotiations Preparation

2. Persuasion
   a. Target Setting and BATNA
      ▪ Determine the best alternative to a negotiated agreement in a given situation.
      ▪ Determine your reservation point in a given situation.
   b. Persuasion
      ▪ Identify how to move a stalled negotiation forward.
      ▪ Personalize your approach in a negotiation simulation
   c. Visual / Auditory / Kinesthetic communication
      ▪ Apply different communication styles in a simulation
   d. Emotional Styles
      ▪ Understand the benefits and drawbacks of different emotional styles applied to negotiation
      ▪ Employ positive vs. negative language

Bakra Beverage Role Simulation
   a. Preparing for Simulation
Negotiation Skills (continued)

- Prepare for a two party negotiation, i.e. determine your BATNA and reservation point; estimate the other party’s BATNA and reservation point; and consider critical aspects of the situation.
- Assess critical features of the negotiation situation, and use this information during and after the negotiation.

b. Negotiation In Pairs
- Conduct a two-party negotiation keeping in mind the critical information you prepared.
- Use your interest as well as the interest of the other party, to develop multiple issues during the negotiation.

c. Negotiation styles
d. Approaches to negotiation

3. Six Phases of Negotiations

a. Preparation and planning
   - Understand the detailed planning required for successful negotiations.

b. Opening
   - Understand the importance of knowing who the other party is.

c. Testing / Creating Impression
   - Estimate the other party’s reservation point in a given situation.

d. Moving
   - Gain forward momentum in a negotiation

e. Concluding
   - Know how to leave a round of negotiations without creating further issues

f. Reviewing
   - Explain the importance of de-briefing after a round of negotiations

g. Multi-Party Negotiations
   - Explain the complexity of multiparty negotiations; and describe several strategies for effective multiparty negotiations.
   - Understand the challenges and negotiation strategies in situations involving coalitions and agents.
   - Explain challenges and describe strategies for negotiation situations involving constituencies and team negotiations.

Hopkins Hospital Role Simulation

a. Preparing for Simulation
   - Prepare for a three party negotiation, i.e. determine your BATNA and reservation point; estimate the other party’s BATNA and reservation point; and consider critical aspects of the situation.
Negotiation Skills (continued)

b. Multiparty Negotiation
   ▪ *Conduct a three party, multiple issue negotiation.
   ▪ *Understand how perceptions of power and relationships between parties can affect an agreement.

c. Debriefing
   ▪ *Create a matrix of possible deals (parties by issues) to support negotiation.

4. Politics and Ploys

a. Sources of Power
   ▪ *Describe and discuss the components of enlightened power.

b. Team Dynamics

c. Culture and International Negotiations

d. Fairness, Trust and Ethics
   ▪ *Describe and discuss factors that affect trust in buyer-supplier relationships.
   ▪ *Discuss unethical techniques encountered in a negotiation situation.
   ▪ *Describe the tests for ethical behaviour.

Property Developer Simulation

▪ *Apply the negotiation approaches described over the previous sessions of the workshop in a negotiation situation.
Logistics and Transportation

The objective for this module is to develop an understanding of the position and role of logistics in supply chain management, and the need to integrate the logistics functions (primarily customer service, inventory management, transportation and warehousing) as part of the supply chain strategy.

Module Objectives
Upon completion of this module, candidates should be able to:

- Discuss strategic logistics issues across stages of the product life cycle (PLC)
- Define customer service and explain the service/cost trade-off in logistics
- Develop a customer service improvement plan for their organizations
- Apply various ordering strategies, from fixed quantity/fixed cycle to variable quantity/variable cycle.
- Assess the applicability of cross-docking for their organizations.
- Develop a framework for 3PL provider selection for their organizations.
- Make a recommendation regarding transportation, warehousing and 3PL changes at their organizations.
- Create a transportation management system (TMS) RFP for their organizations.

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<td>Improved Communication and Relational Skills</td>
<td>Develop a customer service improvement plan for their organizations.</td>
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<tr>
<td>Enhanced Ethical and Social Responsibility Skills</td>
<td>Define customer service and explain the service/cost trade-offs in logistics.</td>
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Logistics and Transportation (continued)

1. Logistics Strategy
   a. Strategic Logistics
      • *To define logistics in terms of utilities it provides, functions it performs and objectives it pursues.
      • *Identify and describe strategic logistical issues.
   b. Product Life cycle and Logistics
      • *Describe strategic logistics issues across stages of the product life cycle
   c. Logistics Organization
      • *Explain the impact of organizational structure on integrated logistics management.

2. Computer Simulation
   a. Supply chain conceptual model
      • Work on a computer simulation to demonstrate inventory and cost reduction.

3. Location Analysis
   a. Decision Factors
      • *Know the factors used to determine where to set up a logistics hub.
   b. Location Trends
      • *Explain the 5 trends in supply chain real estate planning.
   c. Inland Ports
      • *Determine when to use an inland port
      • Understand the benefits and drawbacks associated with using inland ports.
   d. Push / Pull boundary
      • *Recognize the point at which an inventory strategy might change from supply side to demand side.

4. Customer Service
   a. Total Cost/Service Level Trade-off
      • *To compare logistics alternatives in terms of total cost/service level trade-offs.
   b. The Perfect Order
      • *Identify relevant customer measures service for your organization.
   c. Customer Service Improvement
      • *Develop a customer service improvement plan for your organization.
Logistics and Transportation (continued)

d. CPFR
   ▪ *Understand the nature and importance of order management and demand management.

5. Inventory Strategies

a. Inventory Strategies
   ▪ *Explain three strategic inventory strategies and their application to different business scenarios.

b. Inventory Costs
   ▪ *Identify and calculate inventory cost elements and trade-offs between inventory costs (e.g. carrying vs. order costs; carrying vs. stock-out costs).

c. EOQ, ETQ and Safety Stocks
   ▪ *Describe the economic order quantity (EOQ) concept.
   ▪ *Explain variable demand and safety stock.

d. Inventory Categories and Cycle time reduction
   ▪ Explain how to minimize safety stock and pipeline stock

6. Inventory and Variability

a. Reorder Point
   ▪ *Use different approaches to trigger reorder signals.

b. Square root rule
   ▪ *Understand the concept of joint probability, or simultaneous variation.
   ▪ *Apply the square root rule.

c. Variation in Demand and Lead time

d. Simultaneous Variation
   ▪ *Establish appropriate safety stock levels when demand and lead time vary simultaneously.

7. Logistics Presentations

8. Transportation

a. Fundamentals Of Transportation
   ▪ *Explain the role of transportation in logistics and SCM.

b. Carrier Reduction
   ▪ *Make a recommendation regarding carrier reduction at your organization.

c. Transportation Management Systems
Logistics and Transportation (continued)
  - *Create a transportation management system (TMS) for your organization.

d. Cabotage

e. Transportation Management Systems
  - *Identify what your organization can do to move toward sustainable transportation.

9. Warehousing

a. Fundamentals of Warehousing
  - *Explain the role of warehousing in logistics and SCM.

b. Cross Docking
  - *Assess the applicability of cross-docking for an organization.

c. Warehouse Management Systems

d. Process Management Tools
  - *Discuss the role of ISO 9000 in warehousing and the complementary nature of process management tools.

10. Third-party Logistics (3PL)

a. Canadian Logistics Industry
  - *Explain the types of 3PL providers that operate in Canada.
  - *Assess the applicability of 3PL for your organizations.

b. Outsourcing

c. 3PL Provider Selection Methodology
  - *Develop a framework for 3PL provider selection for your organizations.

11. Reverse Logistics

a. The Magnitude of Reverse Logistics
  - *Explain the critical differences between forward and reverse logistics.
  - *Describe the current state of reverse logistics at your organization, and make recommendations for improvement.

b. Returns Management
  - *Understand sources of returns and reasons for returns.

c. Best Practices

12. Logistics Presentations
The primary goal of this workshop is to develop supply chain relationship building skills and advance overall oral and written communications skills through readings, discussions, exercises and presentations.

**Workshop Objectives**

- Understand the importance of effective communication as a supply chain manager.
- Assess the strengths and weaknesses of communication in your current environment.
- Understand the strengths and weaknesses of different media of communication both written (e.g., e-mail) and verbal (including formal presentations, meetings, one-on-ones, etc.).
- Develop skills to effectively communicate within and outside the organization.
- Receive and process constructive feedback on current communication skills and provide such feedback to others.
- Develop supply chain relationship building skills.
- Understand the difference between strategic and tactical information sharing.
- Explain the strategic role of information sharing in managing supply chains.
- Understand the causes and symptoms of information overload, and develop strategies for coping with information overload.
- Deliver a business proposal presentation before a professional audience.

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Communication and Relational Skills (continued)

1. Your Role in Communications
   a. What is communication?
      * Understand the Transmission model of communication.
   b. Communication behaviour and styles
   c. The impact of culture on communications.

2. Situational Context and Relationships
   a. Noise.
   b. Building trust.
   c. Communication options
   d. Active and passive communication

3. Structure and Support
   a. Basic structures for communication.
   b. Principles of Persuasion
   c. Report Writing
      * Understand the importance of writing skills in technical communication.
      * Understand the steps in writing a report or proposal.

4. Using Visuals
   a. Alternatives to PowerPoint
   b. Using Tables and Graphs

5. Skills for Presentations
   a. Effective Presentations
      * Prepare effective oral presentations.
   b. Using Eye Contact, Voice, movement and gestures
Communication and Relational Skills (continued)

6. Giving Feedback
   a. The role of feedback
   b. Structure for feedback.

7. Self Management
   a. Effective meetings
   b. What does the data tell you?
   c. Best practices for managing emails and meetings
       *Understand the limitations of email as a communication tool.

8. Getting Audience Attention
   a. The opposer group
       *Explain the relationship between communication and various levels of partnerships.
   b. The AIDA structure
   c. Listening

9. Oral Presentations and Critiques
   a. Deliver an oral business proposal presentation to a group of decision makers
       *Develop an effective oral presentation.
   b. Critique and oral presentation delivered by someone else.
       *Critique an oral presentation.
Communication and Relational Skills (continued)

Operations and Process Management

The objective for this module is to introduce the fundamental concepts of operations management from a general management perspective and to understand the scope and complexity of problems faced by operations managers, like the integrative nature of any given operation.

Module Objectives
Upon completion of this module, candidates should be able to:
- Understand the nature of operations management in making tactical and strategic decisions for the organization.
- Identify and discuss operations transformation processes and relate them to operational conditions such as stage in the product life cycle.
- Apply appropriate tools to solve product and service quality problems, and process improvement problems.
- Explain the basic elements of a lean production system (e.g., the Toyota Production System), and value-added activity, and elimination of waste in the system.
- Explain the project planning process, develop the work breakdown structure and network (and associated critical path) for a project, and use this to solve project related problems.
- Discuss issues concerning the process of new product development, including the management of the prototyping and innovation process.
- Apply operations strategy, in the context of operational capabilities, philosophies of operations, performance frontiers, competitive position, capacity strategies, and operations improvement strategies.

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<td>Improved Communication and Relational Skills</td>
<td>Present arguments for and against ways of expanding capacity given certain contexts such as labour rates and availability, competitor characteristics, economic situation and existing facilities.</td>
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<td>Enhanced Ethical and Social Responsibility Skills</td>
<td>Explain the importance of considering the sources of cost differences when benchmarking a competitor’s product.</td>
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Communication and Relational Skills (continued)

1. Introduction to Operations and Transformation Systems
   a. Operations Strategy Overview
   b. Operational Processes
      • “Describe the major activities of operations management, and operations as a transformation process/system.
      • “Explain the concept "product-process matrix”
   c. Service Characteristics
      • “Explain the concept "service-system design matrix."
   d. Transformation Systems
      • “Identify elements of transformation processes in your organization.

2. Capacity, Process Flow and Bottlenecks I
   a. Process Fundamentals
      • “Understand the role of bottlenecks in determining system capacity.
      • “Understand the relationships between capacity, process flow, bottlenecks, and inventory in systems.
      • “Do straightforward calculations concerning capacity, cycle time, throughput time, and inventory levels.
      • “Explain the relationship between throughput time, cycle time, and work-in-process system.
   b. Assembly Line Balancing

3. Capacity, Process Flow and Bottlenecks II
   a. Synchronous Operations
      • “Understand the interaction between capacity, process flow, and bottlenecks – in light of various other considerations such as variability and lead time requirements.
      • “Analyze systems of humans and machines and suggest improvements, using the lessons about bottlenecks as guides.
   b. Drum, Buffer and Rope - Goldratt's rules of production scheduling
      • “Understand the key role of bottlenecks in determining the capacity of a system.
   c. Goldratt's Theory of Constraints
      • “Explain Goldratt’s theory concerning the management of bottlenecks as an effective way to manage the overall system.
Communication and Relational Skills (continued)

4. Quality I

   a. Quality management systems
      - *Describe a number of important considerations concerning the implementation of
        quality systems in existing operations.
      - *Appreciate that improving quality is not simply a quick fix or a one-time program, but
        rather requires ongoing effort by many people in an organization.
      - *Explain the concept of six-sigma quality.

   b. Quality and process control
      - *Explain the underlying concepts behind statistical process control (SPC), including the
        notion of common versus assignable causes and the use of control limits and other
        signals from charting processes.
      - *Discuss the extent to which techniques like SPC are applicable in a services
        environment.
      - *Calculate the midpoint and control limits, given some initial diagnostic data.
      - *Explain the concept of being in statistical control.

   c. Dabbawallahs of Mumbai (A) Case

5. Lean Systems

   a. What is Lean?
      - *Discuss the elements of lean production and explain how it fits into the overall system.
      - *Suggest how lean approaches may or may not apply to your workplace.

   b. Lean transportation

   c. Toyota Production System
      - *Relate the various lean production systems to the increase in value-added activity and
        the elimination of waste in the system.

   d. minimized set-up times

6. Quality Improvement Tools

   a. Tools for generating ideas

   b. Tools for organizing data

   c. Tools for identifying problems
      - *Use raw complaints (or problem) data to determine a reasonable course of action to
        address quality issues via the use of a package of tools (check sheets, Pareto diagrams
        and fishbone diagrams).

   d. Decision making tools
Communication and Relational Skills (continued)

7. Project Management
   a. Project Planning
      * To describe the process of planning a project
      * Develop a useable statement of a project in terms of required activities, estimated times, and precedence relationships – suitable for entering into project management software.

   b. Project Management
      * Explain the managerial importance of the critical path of a project.
      * Explain the differences in desired management approaches to critical vs. non-critical activities.
      * Determine how to "crash" a project in the most cost effective way, given crash costs and time

8. New Product Development
   a. The Product Development Process
      * Explain the innovation process, especially how to manage the balance between innovation and project completion.
      * Explain the testing and prototyping phases of bringing a new product from concept to full-scale operation.
      * Apply the various concepts concerning innovation to your workplace.

   b. The Service Development Process
      * Explain the testing and prototyping phases of bringing a new service from concept to full-scale operation.

   a. Operations Strategy
      * Explain the ways in which operations can be configured to help gain competitive advantage.
      * Outline the differences among three philosophies of operations: mass production, lean production, and contingency theory.
      * List and discuss the "operations strategy decision categories."

   b. Levels of Strategy

   c. Planning horizons
      * Appreciate that many seemingly tactical decisions concerning operations are in fact strategic decisions.

   d. Performance frontiers
      * Explain, with reference to performance frontiers, how to resolve the apparent contradiction between having to make trade-offs at times in operations and being able to improve in multiple directions at other times.
      * Explain how operational capabilities may be used to attack and/or defend competitive positions.
Communication and Relational Skills (continued)

10. Operations Strategy II - Planning and Scheduling
   a. Aggregate Planning
   b. Short-term scheduling

   a. Capacity Strategy
      ▪ *Outline and explain various options for expanding capacity, both in the short term and the long term.
      ▪ *Explain the operational and capacity considerations connected with various positions for various products on the product-process matrix.
      ▪ *Outline the preferred ways to establish and utilize capacity in developing economies vs. developed economies.
      ▪ *Present arguments for and against various ways of expanding capacity given certain contexts such as labour rates and availability, competitor characteristics, economic situation, and existing facilities, to name a few.
   b. Operations improvement

12. Maintenance and Reliability
   a. Failure Modes and Effects Analysis (FMEA).
   b. Implementing preventive maintenance
Knowledge Management (continued)

Knowledge Management

The objective for this module is to understand what knowledge management is, where and how it should be applied, and the challenges that go along with implementing knowledge management systems.

Module Objectives
Upon completion of this module candidates should be able to:

- Apply the basic concepts of knowledge management through a series of group and individual assignments.
- Describe the advantages and disadvantages of knowledge management systems, and the obstacles to implementing knowledge management systems.
- Develop a knowledge management strategy for their organization.
- Identify the importance of strategic alignment and benefits realization for any project.
- Identify their own role and that of other key stakeholders, in the initiation, design, development or sourcing, operation and evolution of information and knowledge management systems.
- Describe key considerations such as security, privacy, audit, project management and organizational change management.

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Knowledge Management (continued)

1. Introduction to Knowledge Management
   a. What is Knowledge Management?
      * Appreciate the breadth and depth of knowledge management, in terms of technologies, social networks, and content management.
      * Describe the knowledge management function.
   b. Drivers of Knowledge Management
   c. Obstacles to Knowledge Management
   d. Approaches to Knowledge Management

2. Knowledge Management Process
   a. Knowledge Management Development Lifecycle
      * Describe the knowledge management systems life cycle.
   b. Codifying Knowledge
      * Identify the challenges of capturing tacit knowledge
      * List a variety of methods for capturing knowledge
      * Identify and describe methods of codifying knowledge and challenges associated with doing so.

3. Knowledge Management Systems
   a. Knowledge Management Systems
      * Describe the drivers of a Knowledge Management System.
   b. Business Intelligence/Collaboration/Support
      * Define Business Intelligence.
      * List the common barriers of a business Intelligence System.
   c. Collaborative Planning, Forecasting and Replenishment
      * Outline the requirement for collaborative planning, forecasting and replenishment.
      * Describe the approach, success factors, and benefits of collaborative planning.
   d. Group Presentations
      * Describe in detail the features and uses of at least one specific knowledge management system.

4. Managing Information Resources
   a. Professionalism and Ethics in Knowledge Management
      * Identify the ethical and legal considerations of information and knowledge management systems.
Knowledge Management (continued)
  b. Managing Information Resources
  c. Information Security
     • *Evaluate the security risks inherent in using knowledge management technologies and develop strategies to mitigate those risks.*

5. Information Quality, Sharing and Overload
  a. Information Quality & Reliability
     • *Understand the dimensions of information quality and determine ways to maximize information quality at your organization*
  b. Information Sharing – Issues & Opportunities
     • *Identify obstacles to information sharing and ways to overcome them.*
  c. Information Overload - Symptoms & Causes
     • *Assess the extent and impact of information overload and devise strategies to reduce it.*

6. Knowledge Management Tools & Implementing Knowledge Management Systems
  a. Knowledge Management Implementation
     • *Develop a knowledge management systems implementation plan.*
  b. Change Management
     • *Describe the key change management considerations and obstacles to its success.*
  c. Project Management
     • *Develop a working definition of Project Management.*
Competitive Bidding, Contract Preparation and Contract Management (continued)

**Competitive Bidding and Contract Management**

The goal of this workshop is to provide understanding of best practices across the contract management life cycle and enable supply chain professionals to improve the bidding and contracting processes at their organizations.

**Workshop Objectives**

- Discuss best practices across the contract management life cycle
- Describe the necessary conditions for successful competitive bidding
- Prepare a request for proposal (RFP) or a request for quotation (RFQ)
- Discuss the foundations of Canadian contract law and home province contract law
- Describe the implications of the United Nations Convention on Contracts for the International Sale of Goods (UN CISG) on Canadian purchasing and SCM
- Review and improve internal rules and policies for bidding and contracting
- Develop contract terms to protect against environmental uncertainty
- Outline a process for contract performance review and compliance
- Apply best practices in contract renewal situations at your organization

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Competitive Bidding, Contract Preparation and Contract Management (continued)

1. Competitive Bidding
   a. Procurement Life Cycle
      - "Discuss the best practices across the contract management lifecycle.
      - "Understand the contract management terminology.
   b. Internal Analysis and Requirements Gathering
      - "Describe the process for successfully preparing competitive bidding documentation.
   c. Supplier Identification and Market Analysis
      - "Describe how to invite qualified responses to an RFP.
   d. Inventory of Competitive Bidding Tools and Processes
   e. Reverse Auction
      - "Explain the potential application of e-business throughout the bidding process.

2. Introduction to Laws Applicable to Competitive Bidding
   a. Review of Competitive Bidding Law
      - "Discuss the foundations of Canadian contract law and contract law in your home provinces.
   b. UNCISG
   c. Review of Relevant Trade Agreements
      - "Interpret trade agreements in relation to tendering and contracting.

3. Introduction to RFP
   a. Sample review of an RFP
      - Apply key concepts covered during the session.
   b. RFP Risk Exercise

4. Contract Formation and Management
   a. Contract Formation
      - "Explain the key elements in the formation of a contract under common law and civic code.
   b. Contract Administration
      - "Outline a process for contract performance review and compliance."
Competitive Bidding, Contract Preparation and Contract Management (continued)

5. **Workshop Wrap-up and Final Project Requirements (RFP Policy Report)**
   
a. Discuss key concepts covered during the session.
   
b. Discuss how to apply the concepts in your organization.
   
c. Prepare a final report.
Global Sourcing

The goal of this module is to develop the abilities to become more acquainted with the issues and the strategy of global sourcing.

Module Objectives

- Understand major issues of the global sourcing environment, such as barriers and facilitators to global sourcing, with special reference to low-cost country sourcing.
- Conduct a total cost of ownership (TCO) comparison; including pre-transaction, transaction and post-transaction costs; of sourcing an item domestically versus from a low-cost country.
- Identify and discuss some critical business and social issues of sourcing from low-cost countries, including child labour and countertrade.
- Identify important issues in Canada's trade agreements, such as drivers and challenges to sourcing internationally.
- Determine the role of trade corridors and inland ports as facilitators to trade.
- Recommend direct or indirect distribution and (if indirect) a type of intermediary to support a specific global sourcing scenario.
- Describe the purpose and characteristics of Incoterms.
- Recommend when to use various means of payment available to importers/buyers.
- Discuss intellectual property and threats to it, including piracy and counterfeit goods. And, understand other security issues, including hijacking, bottlenecks, and terrorism.
- Identify risks and challenges associated with supply chains and sourcing in China, India, Latin America and Africa.
- Develop a supply chain methodology to support the sourcing of a product from a foreign country.

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<td>Improved Communication and Relational Skills</td>
<td>Develop a supply chain methodology to support the sourcing of a product from a foreign country.</td>
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<td>Enhanced Ethical and Social Responsibility Skills</td>
<td>Identify and discuss some critical business and social issues of sourcing from low-cost countries, including child labour and countertrade.</td>
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Global Sourcing (continued)

1. International Sourcing
   a. Global Sourcing
      * Understand the major issues of the global sourcing environment, such as barriers and facilitators to global sourcing.
   b. Low-cost Country Procurement
   c. Countertrade
      * Understand different forms of value exchange in international procurement practices
   d. Corruption Perception Index
      * Use the corruption perception index to identify risk with trading partners

2. International Cultures and Business
   a. Elements and Dimensions of culture
      * Understand the different elements that define a business relationship with global trading partners.
   b. National and Business Cultures
      * Recognize the differences between types of culture that impact trading relationships.
   c. Cultural Relativism and Imperialism
      * Discuss the impact of global business on indigenous societies and developing economies.
      * Understand the advantages of pursuing a policy of extreme cultural relativism or cultural/ethical imperialism.
   d. International Business

3. Global Supply Chain Intermediaries
   a. Agents and Merchants
   b. Subsidiaries
   c. Freight Forwarders
   d. Non-vessel Operating Common Carriers
   e. Export Management Companies and Other Intermediaries
      * Recommend direct or indirect distribution and (if indirect) a type of intermediary to support a specific global sourcing scenario.
   f. Inland ports and trade corridors
      * Determine the role of trade corridors and inland ports as facilitators to NAFTA trade.
Global Sourcing (continued)

4. Freight and Payment Terms and Security Issues
   a. Incoterms 2010 and Terms of Payment
      • *Recommend when to use different shipping terms available to trading partners.
      • *Recommend when to use various means of payment available to importers/buyers.
   b. Foreign Exchange and Hedging
      • *Discuss the impact of currency exchange on global sourcing risk, and execute a currency hedge.
   c. Security and risk Issues
      • *Understand other security issues, including hijacking, bottlenecks, and terrorism.
      • *Discuss intellectual property and threats to it, including piracy and counterfeit goods.
   d. Canadian Broker Services Agency
   e. Risk Management of Globalized Companies

5. Sourcing Around the World
   a. Towards a Code of Conduct
      • *Apply ethical decision making to international sourcing decisions
   b. Globalization Aftereffects
   c. Stages in an International Trade Deal
      • *Describe the natural evolution of international trade deals
   d. Culture’s Effect on Demand and Consumption
   e. Global Economic Systems
   f. Sourcing in China, India, Africa and Latin America

6. Strategic Global Sourcing
   a. Strategic Drivers of Globalization
   b. Risk Diversification
   c. International Business and Multicultural Skills as Competitive Advantages
   d. Canada’s Trade Agreements
      • *Identify important issues in the global sourcing environment, such as drivers and challenges to sourcing from trading partners.
Risk Management (continued)

Risk Management

One of the critical competencies required of supply chain professionals is the ability to identify, mitigate and manage risk. This workshop looks at risk management as a journey from simple identification of risks inside your own department to global risk avoidance, and supply chain resilience when avoidance is not possible. Candidates will explore tools used to identify, quantify, prioritize and properly communicate risk concerns.

Workshop Objectives

- Identify risk by different methods.
- Critique your organization’s preparedness for risk management.
- Select appropriate applications for quantifying and mitigating risk.
- Differentiate between different risk-response strategies and know when to apply each.
- Develop risk management preparedness strategies.
- Describe critical steps and roles in the risk management process.

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<td>Develop risk management preparedness strategies.</td>
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<td>Demonstrated Strategic Thinking and Application</td>
<td>Critique your organization’s preparedness for risk management.</td>
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<td>Improved Communication and Relational Skills</td>
<td>Describe critical steps and roles in the risk management process.</td>
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<td>Enhanced Ethical and Social Responsibility Skills</td>
<td>Differentiate between different risk-response strategies and know when to apply each.</td>
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Risk Management (continued)

1. Introduction to Risk Management
   a. What is risk? What is risk management?
      ▪ *Define risk.
      ▪ *Understand the structure and process of identifying and responding to potential risk.
   b. A Risk Management Process
      ▪ *Describe the 7 steps applied to risk management.
   c. Risk Identification
      ▪ *Know how to identify risk in a structured manner.

2. Risk Management and Mitigation
   a. A Risk Management Framework
      ▪ *Develop a framework to manage risk.
   b. Risk Management Strategy
      ▪ *Develop risk management preparedness strategies.
   c. Complexity vs. Complication
      • *Understand the difference between a complex system and a complicated one.
   d. Risk Mitigation
      ▪ *Identify different strategies to reduce the impact of a risk event.

3. Risk Assessment Tools
   a. Global Risk
      • *Understand the unique nature of global supply chain risks.
      • *Discuss the World Economic Forum Global Risk Report and identify implications for your organization.
   b. Risk Identification Tools
      • *Practice using tools that assist with identifying risk elements.
   c. Risk Assessment Tools
      • *Practice using tools that assist with assessing the impact of risk elements.
   d. Communicating Risk
      • *Develop a communications plan to alert internal and external stakeholders to a risk event.
Risk Management (continued)
4. Flexibility and Resilience
   a. Resilience
      ▪ *Understand resistance capacity and recovery capacity.
   b. Business Continuity Planning

5. Enterprise Risk Management
   a. ERM
      ▪ *Create an ERM strategy for your company.
   b. ISO 31000
      ▪ *Familiarize yourself with the ISO 31000 Risk Management process
Supply Chain Management for the Public Sector

The goal of this module is to develop the abilities of participants to become more acquainted with the issues and strategy of public sector supply chain management.

Module Objectives
- Describe unique characteristics of public sector procurement.
- Identify the stakeholders of public sector supply chains.
- Understand the unique public (vs. private) sector perspective on SCM.
- Discover the advantages and disadvantages of cooperative and consortium purchasing.
- Explain the rationale for competitive bidding in public procurement.
- Describe alternatives to competitive bidding (e.g. negotiation and sole sourcing), and identify conditions under which these alternatives could or should be used.
- Identify the potential benefits and legal issues in public sector online bidding.
- Describe the unique aspects of ethics in the public sector.
- Identify lessons for the public sector from different scandals and Commission reports.
- Assume the role of “whistleblower,” and consider alternative courses of action.
- Identify unique challenges and opportunities associated with procurement and supply chain management by the federal, provincial and municipal governments.
- Understand unique aspects of procurement and supply chain management in the health care and education sectors.

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<td>Describe alternatives to competitive bidding (e.g. negotiation and sole sourcing), and identify conditions under which these alternatives could or should be used.</td>
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<td>Improved Communication and Relational Skills</td>
<td>Identify the stakeholders of public sector supply chains.</td>
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<td>Enhanced Ethical and Social Responsibility Skills</td>
<td>Describe the unique aspects of ethics in the public sector.</td>
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Supply Chain Management for the Public Sector (continued)

1. Public Sector Supply Chain
   a. Four Perspectives of SCM
   b. Public versus Private Views of Procurement
      ▪ *Describe unique characteristics of the public sector procurement.
   c. The Concept of Best Value
   d. Public Procurement - Overview and Trends
   e. Public Procurement Associations

2. Collaborative Procurement
   a. Cooperative Purchasing
      ▪ *Discuss the advantages disadvantages of cooperative purchasing.
   b. Enablers and Barriers to Collaboration
   c. Purchasing Cooperatives
      ▪ *Outline a plan to create a purchasing consortium.
   d. Public-Private Partnerships

3. Competitive Bidding in the Public Sector
   a. Rationale for Competitive Bidding
      ▪ *Describe alternatives to competitive bidding (e.g. negotiation and sole sourcing), and identify conditions under which these alternatives could or should be used.
   b. Sole Sourcing
   c. e-Procurement
      ▪ *Identify the potential benefits and legal issues in public sector on-line bidding.
   d. Advanced Contract Award Notices
   e. PWGSC Bidding Process
Supply Chain Management for the Public Sector (continued)

4. Ethics & Sustainability in Public Sector SCM

a. Fundamentals of Ethics
   - *Describe the unique aspects of ethics in the public sector.

b. Canada’s Public Service Values

c. The Gomery Commission

d. The Charbonneau Commission

e. The MFP Scandal: Pitfalls and Best Practices
   - Identify lessons for the public sector from the MFP scandal in Toronto.

f. Whistleblowers
   - *Assume the role of whistleblower and consider alternative courses of action.

g. Public Service Values and Ethics

h. Ethical and Sustainability Issues for the Public Sector

5. Public Sector Contexts

a. Government of Canada

b. Ontario Ministry of Government Services

c. Health Care and e-Supply Chain

d. Category Management
   - *Identify unique challenges and opportunities associated with procurement and supply chain management by various levels of government.

6. Public Sector Organization Exercise

a. Research and Group Presentation
   - *Describe a public sector supply chain situation and make recommendations for improvement.
   - *Create and deliver a presentation on public sector SCM as part of a team.
   - *Produce a written report on public sector SCM as part of a team.
Supply Chain Management for Services, Capital Goods and Major Projects

The goal of this module is to develop the ability to identify the issues and develop strategy regarding service sector supply chain management and large project supply chain management.

Module Objectives

- Describe the unique characteristics of services, and how they differ from manufactured goods.
- Understand the strategic importance of demand, capacity and yield management.
- Describe collaborative planning, forecasting and replenishment.
- Describe the differences and similarities in the capital equipment acquisition process relative to normal operating goods.
- Perform basic capital equipment investment analysis.
- Understand the process of project management for large projects, and the impact on the supply chain.
- Describe issues related to asset disposal and asset recovery.
- Develop a green supply chain strategy.

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<td>Demonstrated Leadership and Professionalism</td>
<td>Formulate a services strategy that includes demand, capacity and yield management.</td>
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<td>Understand the process of project management for large projects, and the impact on the supply chain.</td>
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<td>Improved Communication and Relational Skills</td>
<td>Describe the differences and similarities in the capital equipment acquisition process relative to normal operating goods.</td>
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<td>Develop a green supply chain strategy.</td>
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Supply Chain Management for Services, Capital Goods and Major Projects
(continued)

1. Services and Supply Chain Management
   a. Types and Characteristics of Services
      • *To describe the unique characteristics of services
   b. Implications for SCM
      • *Understand the similarities and differences in manufacturing and service sector supply chains.
   c. Customer Satisfaction
      • *Describe the measuring of the performance of service supply chains, and the implications for management.
   d. Services Supply Chain Mapping
      • *Outline the various steps in preparing a services supply chain map.
   e. Services Level Agreements
      • *Outline the various steps in preparing a services level agreement.

2. Services Strategy
   a. Demand and Capacity Management
      • *Understand demand, capacity and yield management as they relate to services.
   b. Yield Management & Interrelationship of Demand and Capacity
      • *Formulate a services strategy that includes demand, capacity and yield management.
      • *Discuss how yield management interacts with demand and capacity management.

3. Capital Goods and Equipment
   a. Capital Goods/Equipment Defined
      • *Distinguish Capital goods from normal operating goods.
   b. Acquisition
      • *Describe the differences and similarities in the capital equipment acquisition process relative to normal operating goods.
   c. Leasing
      • *Discuss the pros and cons of leasing.
Supply Chain Management for Services, Capital Goods and Major Projects (continued)

d. Used Equipment
   *Discuss the pros and cons of purchasing used capital goods.

e. Financial Investment Analysis
   *Apply the discounted cash flow methodology to an acquisition.

4. Major Projects

   a. Project Management in SCM
      *Define project management and its importance to large projects.
      *Understand the process of project management for large projects, and the impact on the supply chain.

   b. Approaches
      *Identify the steps in defining and organizing a project.

   c. Construction Project Management
      *Discuss the practices of supply chain management in the building construction industry.

5. Major Projects

   a. Potential Benefits of Partnership Agreements

   b. Collaborative Planning, Forecasting and Replenishment
      *Outline the requirement for collaborative planning, forecasting and replenishment.
      *Describe the approach, success factors, and benefits of collaborative planning.

   c. Managing Multiple Vendors
      *Discuss the practices of supply chain management in a complex project.

6. Disposal and Sustainability

   a. Disposal and Asset Recovery
      *Outline the general steps in disposal/recovery programs.
      *Identify the benefits and issues related to disposal/recovery programs.

   b. Green Procurement and Green Supply Chain
      *Describe the benefits of a green procurement program and the steps involved in creating a green procurement project.

   c. Carbon Footprint
      *Understand how to measure the carbon footprint of a supply chain.

   d. Reverse Logistics
Ethical Behaviour and Social Responsibility

The goal of this workshop is to create awareness and advance knowledge about issues in business ethics and supply chain social responsibility.

Workshop Objectives

- Describe the different perspectives on ethics and social responsibility.
- Explain the relationship between business ethics and corporate social responsibility.
- Critique an organizational ethics statement.
- Identify the various stakeholders with interests in ethical issues.
- Discuss the rationale and potential benefits of sustainable supply chains.
- Identify opportunities for your organization to create a greener supply chain.
- Evaluate your organization’s policy on discrimination and harassment.
- Create a social responsibility policy for your organization.

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<td>Identify opportunities for your organization to create a greener supply chain.</td>
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Ethical Behaviour and Social Responsibility (continued)

1. Introduction to Business Ethics and Social Responsibility

   a. Ethics: Definition and Tradition
      ▪ *Define business ethics and describe different perspectives on ethics.
      ▪ *Critique an organizational ethics statement.

   b. SCMA Code of Ethics

   c. Stakeholders
      ▪ *Identify various stakeholders with interests in ethical issues in the context of their organizations.

   d. Social Responsibility
      ▪ *Explain the relationship between business ethics and corporate social responsibility.

   e. Ethical Decision Making
      ▪ *Explain the framework for determining ethical decision making from multiple perspectives..

   f. The Polluter's Dilemma

2. Discrimination and Harassment: The Law

   a. Defining Discrimination and Harassment
      ▪ *Know the federal and provincial laws covering discrimination and harassment.

   b. Organizational policy
      *Comment on your organization’s policy on discrimination and harassment.

   c. Sexual Harassment Mini-case
      ▪ *Discuss the impact of discrimination on organizational productivity.

3. Environmental Sustainability

   a. Sustainable Supply Chains and Social Responsibility
      ▪ *Discuss the rationale and potential benefits of sustainable supply chains.

   b. Carbon Footprint
      ▪ *Identify opportunities for your organization to create a greener supply chain.
      ▪ Calculate the carbon footprints.

   c. ISO 14000
      ▪ *Evaluate the potential of ISO 14000 for their organization and supply chain.
Supply Chain Management Association
Supply Chain Management Professional Designation Program
Content Map and Learning Objectives

Ethical Behaviour and Social Responsibility (continued)

4. Social Issues

a. International Labour Organization (ILO) standards
   - *Explain the ILO standards

b. ISM Principles
   - *Identify safety and security issues within your organization, and among key members of your supply chain

c. Free Trade versus Fair Trade
   - *Be familiar with distinctions between free trade and fair trade, and determine your organization’s view on free versus fair trade.

d. Canada and the World Trade Organization
   - *Discuss Canada’s position and policies in relation to WTO

5. Community Involvement

a. Community and the Organization
   - *Identify opportunities for their organizations to become more involved in the local community.

b. Humanitarian Logistics
   - *Discuss best practices from business logistics that might be useful in humanitarian logistics.

6. Social Responsibility Presentations

a. Propose a statement of social responsibility to a group of their peers.

b. Question and or Comment on statements delivered by your peers.

7. Social Responsibility Report and Workshop Wrap Up

a. Begin preparation of the workshop final report.

b. Discuss the key concepts covered during the session.

c. Discuss how to apply the concepts in your organization.

d. Prepare a final report.