

Appendix T

TRANSPORTATION, DISTRIBUTION AND LOGISTICS YOUTH APPRENTICESHIP

LOGISTICS/SUPPLY CHAIN MANAGEMENT (SCM) PATHWAY PLANNING & PURCHASING (UNIT 12)

Unit 12: Logistics/Supply Chain Management (SCM) Pathway Planning & Purchasing

Competency

1. Respond to customer inquiries

Performance Standard Condition

Competence will be demonstrated

- at the worksite

Performance Standard Criteria

Performance will be successful when learners:

- Collect information from records or customer
- Respond to customer comments and questions
- Update information accurately as applicable
- Process physical documents of service
- Solicit supervisor or co-worker support and advice when necessary to meet customer needs
- Follow up to ensure customer's needs were met
- Handle complaints tactfully without insult or conflict

Learning Objectives

- List the variety and range of services that your facility offers
- Identify the internal and external customers in your facility
- Compare needs of internal and external customers
- Define customer service
- Describe how customer service affects a company's "bottom line"
- List strategies for maximizing customer satisfaction
- Describe the functions of other departments or units to serve the customer
- Describe facility issues that may impact customer needs being met

Comments:

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Competency

2. Provide product and service information

Performance Standard Condition

Competence will be demonstrated

- at the worksite

Performance Standard Criteria

Performance will be successful when learners:

- Contact current and/or potential customers to market services
- Distribute product and service information to current and/or potential customers
- Assist worksite professional to keep internal and external customers informed of service progress and decisions that may affect them
- Input customer information and print documents as required

Learning Objectives

- List the variety and range of services that your facility offers
- Explain the components of a marketing plan
- Identify the steps of the selling process
- Relate marketing to distribution
- List the groups or demographics of the groups to be targeted
- Identify reasons customers would be interested in your product/service
- Compare product features and pricing of products/services offered at other like facilities
- Compare advantages and disadvantages of sales promotion methods and advertising media
- List methods to announce a new service
- Research to determine viability of global ventures
- Evaluate internal/external, local/global environments for threats or opportunities (economic, geography, history, political, competition, regulatory, cultural, technological)

Comments:

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Competency

3. Assist to process claims

Performance Standard Condition

Competence will be demonstrated

- at the worksite
- while assisting a worksite professional

Performance Standard Criteria

Performance will be successful when learners:

- Work with claimant to assess responsibility
- Address overage, shortage and damage claims
- Research cause of claim
- Communicate findings
- Resolve claims
- Track and monitor claims by customer or on carrier

Learning Objectives

- Describe the steps to follow when dealing with complaints
- Explain the purpose of freight claims
- Explain the difference between common and contract carrier liability
- Explain the elements of claims tracking
- Identify exceptions to common carrier liability

Comments:

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Competency

4. Collect and maintain data & files

Performance Standard Condition

Competence will be demonstrated

- at the worksite

Performance Standard Criteria

Performance will be successful when learners:

- Select appropriate forms/records
- Code documents as required
- File forms/records in appropriate location
- Retrieve and replace files in correct position
- Add, Edit, Verify and Query data in electronic files if applicable
- Use appropriate computer codes, formatting, macros, charts, spreadsheets, etc.
- Verify data prior to entry/storage
- Maintain files

Learning Objectives

- Demonstrate how electronic data is manipulated such as in a spreadsheet system
- Explain how data & files are backed up
- Identify and explain the role and function of software management systems
- Explain how planning software and systems (ERP, MRP, DRP, WMS) are utilized to manage logistics planning

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Competency

5. Process documentation & prepare reports

Performance Standard Condition

Competence will be demonstrated

- at the worksite

Performance Standard Criteria

Performance will be successful when learners:

- Determine required data and documentation needed
- Use the correct format to generate accurate reports
- Prepare reports as required
- Produce reports in a timely fashion
- Maintain record log
- Maintain electronic filing system
- Maintain security and confidentiality

Learning Objectives

- Describe the function of specific documents and forms in your company
- List typical documentation files necessary in planning & purchasing
- Discuss the need importance of security & confidentiality of records

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Competency

6. Compile customer & order information

Performance Standard Condition

Competence will be demonstrated

- at the worksite

Performance Standard Criteria

Performance will be successful when learners:

- Collect information from records or customer
- Record order information
- Verify order information with customer
- Solicit supervisor or co-worker support and advice when necessary to meet customer needs

Learning Objectives

- List the elements of a valid contract
- Compare contract elements with purchase order customer requests
- Describe methods for determining customer needs and requirements
- Explain the importance of customer service in the order process
- Describe how logistics process requirements are determined from customer expectations and requests
- Discuss the importance of accurate order taking

Comments:

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Competency

7. Process customer sales order

Performance Standard Condition

Competence will be demonstrated

- at the worksite

Performance Standard Criteria

Performance will be successful when learners:

- Receive sales order from customer
- Review order for proper codes, authorizations, etc.
- Document sales order
- Assist to develop plan for customer order

Learning Objectives

- Identify the sales order process
- Identify your range of services that meet customer requirements
- Explain how estimating and forecasting are used to determine the demand for services
- Describe special logistics accommodations customers may request

Comments:

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Competency

8. Assist to plan for customer order using production and logistics documents

Performance Standard Condition

Competence will be demonstrated

- at the worksite
- while assisting a worksite professional

Performance Standard Criteria

Performance will be successful when learners:

- Estimate the size, quantity, time, cost, and/or materials needed from customer order requirements
- Review production and logistics documents such as facility site constraints, production schedules, work orders, staffing tables, inventory levels, distribution routes, etc to plan for customer order
- Arrange for delivery and distribution of supplies and parts to meet production schedules

Learning Objectives

- Describe the purpose of a master production schedule
- Relate the master production schedule to the customer order plan
- Compare and contrast the different types of production process flow design advantages, constraints, and costs
- Compare production strategies make to stock vs. make to order
- Compare costs related to materials, structure issues, capacity, and staff performance and training
- Define common components of an exported or imported price
- Explain how production timetables are developed from planning for required tools, materials, equipment, numbers of workers needed, and cost projections
- Describe facility design issues and their impact on resource planning
- Describe how new order requests are planned
- Define and explain the major measures used by a logistics organization to manage and improve performance
- Explain the impact of global trade on the logistics industry
- Explain some of the global market trends your facility faces and the company's position in that market place
- Explain effects of currencies on movement of goods and services in the logistics industry
- Name four major components of logistics
- Explain supply chain management
- Summarize differences between logistics and supply chain management
- Define basic logistics terminology
- Discuss/evaluate logistics industry trends
- Explain the functions of each department or unit within the larger organization
- Describe the role of sales and marketing operations in your facility

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Competency

9. Purchase raw materials/services

Performance Standard Condition

Competence will be demonstrated

- at the worksite

Performance Standard Criteria

Performance will be successful when learners:

- Determine if inventory quantities are sufficient for needs
- Use re-order points to minimize back-orders
- Order more materials from qualified suppliers when necessary

Learning Objectives

- Describe the supplier qualification process at the worksite
- List basic ways purchase orders are transmitted to vendors
- Explain the process used to manage, order, receive, and delivery externally and internally within your facility
- Maintain knowledge of all organizational and governmental rules affecting purchases, and provide information about these rules to organization staff members and to vendors.
- Describe how to read bills of lading and routing sheets
- Explain how automated purchasing systems work to minimize waste
- Describe how purchasing costs are negotiated

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Competency

10. Track and maintain order and receipt schedules

Performance Standard Condition

Competence will be demonstrated

- at the worksite

Performance Standard Criteria

Performance will be successful when learners:

- Compare customer order status with receipt of raw materials
- Verify receipt of raw materials and distribution to production

Learning Objectives

- Discuss the purpose of tracking order receipt
- Describe organizational methods used to track orders and supply receipt
- Explain how order receipt and verification is commonly communicated

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Competency

11. Review requisition orders

Performance Standard Condition

Competence will be demonstrated

- at the worksite

Performance Standard Criteria

Performance will be successful when learners:

- Review requisition orders to verify accuracy, terminology, and specifications
- Verify that all required information is completed on the requisition order
- Prepare purchase order

Learning Objectives

- Describe the function of the requisition order
- List common elements required on a requisition order

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Competency

12. Prepare purchase orders

Performance Standard Condition

Competence will be demonstrated

- at the worksite

Performance Standard Criteria

Performance will be successful when learners:

- Prepare purchase orders
- File copies of order as applicable
- Send purchase order to supplier
- Process or forward billing information

Learning Objectives

- Describe the function of the purchase order
- List common elements required on a purchase order
- Explain common methods used to send purchase orders
- Describe how purchase orders are linked to requisitions and payment

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Competency

13. Contact suppliers to verify shipment details

Performance Standard Condition

Competence will be demonstrated

- at the worksite

Performance Standard Criteria

Performance will be successful when learners:

- Contact suppliers to verify shipment details
- Verify shipment arrival and order correctness
- Report receipt of supply goods to correct parties
- Contact suppliers in order to schedule or expedite deliveries and to resolve shortages, missed or late deliveries, and other problems

Learning Objectives

- Discuss how shipment details are communicated
- Discuss the importance of frequent communication with suppliers

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Competency

14. Process supplier invoices

Performance Standard Condition

Competence will be demonstrated

- at the worksite

Performance Standard Criteria

Performance will be successful when learners:

- Receive invoice
- Compare invoice to purchase order copy
- Verify receipt of goods/services
- Contact suppliers to resolve discrepancies due to shortages, overages, damaged materials, and other problems
- Document and process invoices
- Forward to appropriate parties for payment

Learning Objectives

- Describe the role of the accounting department in processing purchase orders and invoices
- Explain how the warehouse communicates receipt, shipment, and discrepancies or problems with inventory
- List documentation critical to approval for payment
- Outline types of problems relating to invoicing and how they are solved

Comments:

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Competency

15. Monitor customer order status

Performance Standard Condition

Competence will be demonstrated

- at the worksite

Performance Standard Criteria

Performance will be successful when learners:

- Respond to customer and supplier inquiries about order status, changes, or cancellations
- Update records as required
- Communicate changes in a timely manner to applicable parties for changes or cancellations

Learning Objectives

- Explain the importance of tracking and documentation for inventory control and production processing
- Explain common methods used to track customer order production & progress
- Discuss the importance of timely communications for customer order changes or cancellations

Comments:

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Competency

16. Inform internal & external customers of order status

Performance Standard Condition

Competence will be demonstrated

- at the worksite

Performance Standard Criteria

Performance will be successful when learners:

- Coordinate production and shipping activities to resolve complaints or eliminate delays
- Track customer satisfaction data

Learning Objectives

- Identify common internal and external customers in a production facility
- Discuss the importance of frequent customer communication
- Describe processes used to inform customer of order status
- Explain how to inform a customer about order delays
- Describe how to maintain good customer relations in the vent of order problems
- Describe how plans are made to improve organizational performance including customer satisfaction and service/operations performance

Comments:

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Competency

17. Compile purchasing, production, & shipping information for status reports

Performance Standard Condition

Competence will be demonstrated

- at the worksite

Performance Standard Criteria

Performance will be successful when learners:

- Monitor in-house inventory movement
- Complete inventory transfer forms for bookkeeping purposes
- Compile information, such as production rates and progress, materials inventories, materials used, and customer information, so that status reports can be completed
- Record production data, including volume produced, consumption of raw materials, and quality control measures
- Compile and prepare documentation related to production sequences, transportation, personnel schedules, and purchase, maintenance, and repair orders
- Provide documentation and information to account for delays, difficulties, and changes to cost estimates

Learning Objectives

- Describe quality tools and methods used to monitor the logistics/supply chain process
- Evaluate movement of goods to maximize value and minimize costs
- Define the roles and parties involved in logistics communication and coordination of activities
- Explain the importance of measuring and managing the reliability and performance of logistics systems
- Discuss the company's commercial risk with customers as indicated by credit history and payment capacity of buyer/partner
- Discuss the impact of global marketing and servicing on a company's logistics activities
- Describe additional requirements when a company is engaged in international/global logistics such as documentation, harmonized codes, payment methods, import/export, international sourcing, legal and trade agreements
- Explain how ethical and cultural issues impact in global activities
- Determine legal and regulatory compliance to support global activities
- Discuss political economic risks involved in global logistics
- Determine impacts of foreign currency exchange on company risk

Comments: