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### BMKT 694.V62: Special Topics - Opportunities and Challenges in Logistics and Transportation

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**Fall 2021 Special Topics: Opportunities and Challenges in Logistics and Transportation (3 credits)**

**75983: BMKT 491-01 & 76011: MBA 694-V62**

**T/R 11:00-12:20 pm GBB 119**

**Dr. Simona Stan**

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**Office Hours:**

T 1-2 pm & R 4-5 pm

Or e-mail for appointment

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**Course Description:**

The North American logistics market generated about one trillion USD in economic value during 2020 and it is forecasted to grow about 5% annually given the increasing interdependence between logistics and firm-level business activities in the economy (Statista). In the US it is estimated that about 10% of GDP is logistics; and about 9 million Americans work in logistics related jobs with an expected growth of 4% annually. The current logisticians earn an average salary of about \$80,000 in the US and they are in high demand. So... Logistics is BIG! Logistics is IMPORANT. And now you have a great opportunity to learn what it means and how you could benefit professionally from it.

Logistics is defined as the movement and storage of goods, services, and related information between point of origin (suppliers) and consumption (customers). Therefore, the study of logistics is essential in today's global interconnected supply chains, where it brings companies together through transportation, warehousing, and inventory management. This course provides a practical, management perspective on the main areas of logistics that include distribution, transportation, inventory management, key operational and financial performance indicators, sustainable logistics practices and an introduction to logistics technology. The course is designed for students who have had little or no previous coursework or professional experience in logistics. This course is open to business majors with junior standing or higher, including graduate students at master level. With instructor and advisor consent, this course is also open to non-business majors.

**Learning Objectives:**

1. To gain a working understanding of logistics principles and the key activities performed and to expose students to the language of logistics
2. To gain an appreciation of logistics not as an operational business function but as a strategic function that creates value and competitive advantage for the client company and its partners in the value-added network
3. To understand current challenges faced by supply chain and logistics professionals and to provide a basis for thinking through these challenges
4. To expand applied data analysis skills by analyzing logistics operations data and making business decisions that results in key financial outcomes
5. To prepare students for career opportunities in logistics and transportation

### **Wilson Logistics Company:**

This course is sponsored by the Wilson Logistics Company (wilsonlogistics.com). A team of highly dedicated managers headed by Kameron Wilson, Vice President, will engage with the course and the students through guest speaking during class sessions and providing mentorship for the team project. The company is hoping that students will develop an understanding and appreciation for the critical role that logistics and transportation play in the US and global economy and that some students would become interested in pursuing careers in this field. To this end, Wilson Logistics is offering paid internships that have the option of resulting in job offers for interested and qualified students.

**Company Overview:** “Wilson Logistics is a family-owned and operated organization with a diverse portfolio of solutions to solve our clients’ logistical needs. We tailor our solutions for our clients and pride ourselves on our ability to be fast, effective, and flexible. Wilson Logistics began as Wil-Trans in 1980, a trucking company based in Springfield, MO. Through organic growth and the acquisitions of Jim Palmer Trucking in 2014, O&S Trucking in 2016, RJs Transportation in early-2017, Haney Truck Line in late-2017, and Market Transport in 2019, Wilson Logistics was formed. Today, Wilson Logistics operates as an asset-based third party logistics (3PL) provider with a range of transportation services including: Full Truckload (TL), Heavy Haul, High Cube, Yard Management Solutions, Dedicated Solutions, and Power Only Solutions. Our combined fleet of over 1,200 trucks supports our service offerings through several locations: Springfield, MO; Missoula, MT; Portland, OR; Pacific, WA; Dallas, TX, and Yakima, WA. Our service offerings touch many different points within the supply chain to serve our clients’ logistical needs.”

### **Grading Criteria:**

Tests (4 x 10%)	40%
Written Assignments (2 x 10%)	20%
Course Participation & Citizenship	15%
Team Project	25%

**Course grades are assigned on a plus minus scale as follows (grades are not curved):**

A (93% or more); A- (90-92.9%); B+ (87-89.9%); B (83-86.9%); B- (80-82.9%)  
C+ (77-79.9%); C (73-76.9%); C- (70-72.9%); F (below 70%)

**Tests:** The course covers eight substantive topics. Each of the four tests covers two topics. Expect multiple choice and true/false questions that cover the assigned readings (posted in Moodle), the course lectures and the content provided by the guest speakers. Everything covered in the time frame allocated to the two respective topics is fair game. Therefore, you should complete the readings diligently and pay attention in class. If you are a graduate student who is approved to take the course online, instead of live conference, you are expected to watch all class recordings as soon as possible after class conclusion. These tests will have limited time (1 hour) from the moment you open them until you submit your answers. The tests will be available in Moodle over a period of several days before the listed deadline when they close and will not be reopened anymore. Make sure to plan your time accordingly. The tests are open book - open notes, but you must work individually with no collaboration – failing to do so is cheating and will result in a failing grade in this class and possibly additional academic consequences.

**Written Assignments:** There are two written assignments to be completed individually. Specific instructions will be posted in Moodle at the appropriate time.

**Course Participation and Citizenship:** Note that you are expected to be personally in class, every class period. For graduate students, if you are located outside Missoula you are expected to connect to the live videoconference (link posted in Moodle), for every class, unless you work fulltime and are unable to accommodate the class time. If so, you need my approval, BEFORE course start, to take this course online, watch class recordings, and participate via online discussion forums. Missed class sessions (unless excused for special circumstances) will result in 3% grade deduction per session. This strict policy of class attendance is necessary due to the high level of involvement and course contribution by the Wilson Logistics company. We want to make sure that the Wilson Logistics managers have a highly interested audience to interact with each class session when they take time away from their busy schedules. In addition, I expect you to come to class prepared to ask good questions and engage with the Wilson Logistics team and with me in a highly professional manner. We expect you to make us all proud of the high quality of students at the College of Business at the University of Montana.

**Team Project:** The class will be split in four teams to include four or five undergraduate and MBA students each. Each team will be assigned to one of four Wilson Logistics business units and will be directed to focus on three of its publicly traded client companies:

<b><u>I-5</u></b> Starbucks Kroger/Fred-Meyer Home Depot	<b><u>Western 11</u></b> Caterpillar General Mills Molson Coors
<b><u>Heavy Haul</u></b> Costco Clearwater Paper Corp Ocean Spray	<b><u>Local Seattle</u></b> Pepsi Gatorade (separate division of Pepsi) Amcor PLC

Each team will be assigned a Wilson Logistics manager who will be a mentor for the team and liaison with the company. The student teams are expected to conduct extensive independent research online to answer the project questions. In addition, Wilson Logistics guest speakers and team mentors will help students acquire the company specific information needed. The project will be conducted in three stages. For each stage, specific questions and instructions will be provided in Moodle and discussed in class at the appropriate time.

#### Stage 1: Gaining a Strategic Perspective

**Learning Goal:** Understand the strategic role that logistics and transportation plays in the customer companies' supply chains/value-added networks.

In this stage, students will be required to map out and discuss the supply chains for the assigned companies and the logistics components and services that support the respective supply chains (e.g., warehouse locations, transportation modes employed, etc.) with a focus on the competitive position of the company in the marketplace. Students will critically identify and evaluate risks posed by the "weak links" in the SC, especially the logistics aspects, and outline possible strategic actions for mitigating those risks. Finally, students will focus on the role that WL plays in the client companies' value-added networks.

## Stage 2: Understanding Operations and Economic Outcomes

**Learning Goal:** Understand and learn how to manage transportation operations in order to achieve the best possible economic outcomes.

In this stage, students will be required to engage in a mini-simulation of managing a fleet of WL trucks for optimal revenue generation and cost control. Students will receive an Excel spreadsheet that contains information on customer tenders (loads to be transported) and available WL trucks. Students will make decisions on which loads to accept (and which customer tenders to reject or find alternative solutions) and which trucks to deploy in what ways over a given time frame. The WL team will also provide information on “unexpected” hurdles or crisis to overcome. At the end of this stage students will report results on key performance indicators (e.g., revenue per truck, asset utilization, customer satisfaction resulting from on time delivery, etc.) and reflect on the decisions they made.

## Stage 3: Moving Forward in an Uncertain Future

**Learning Goal:** Develop ability to forecast future demand and foresee near and long term marketplace condition changes that would affect a logistics company’s future success and require strategic corrective actions

In this final project stages students will go back to take a strategic perspective on figuring out what comes next. For example, students will reflect on what logistics company managers will need to consider as the world moves past the unique marketplace situation created by the pandemic, what industry disruptions and technological innovations will affect competitiveness, etc. Further, moving from broad to specific, students will make recommendations for how WL might better position itself to serve the client companies assigned to each team.

### **Graduate Increment:**

This course is designed to include both undergraduate students (from any major) and Masters students (specifically MBAs). As such it is expected that the MBA students perform at a higher level than the undergraduates. Specifically, MBA students will:

1. Answer different writing assignment prompts for the four assignments than the undergrads
2. Play a leadership role in the team project’s planning, execution and presentation
3. Be held at a higher level of accountability for class participation

### **Course Materials**

All the required course materials (readings, lecture notes) recommended additional resources, tests, and assignment questions will be posted in Moodle. The Moodle course is organized by topic as outlined in the course schedule. Make sure you complete all readings for each topic and submit the corresponding assignments by the listed deadlines.

Class Schedule					
Week	Class dates	Topic	Assignments	Guest Speakers (others TBD)	
1	T 8/31	Course and Wilson Logistics Introduction		Kameron Wilson WL team mentors	
	R 9/2				
2	T 9/7	T1. The Role of Logistics in the Supply Chain			
	R 9/9				
3	T 9/14	T2. Inventory Management: Planning, Scheduling, Control		Kameron Wilson	
	R 9/16				
4	T 9/21	T3. Transportation: Road, Air, Rail, Water, Intermodal	Test 1 (T1 &2)		
	R 9/23				
5	T 9/28	T4. Trucking: Industry Overview, Business Models, Compliance		Kameron Wilson & Brian Smith Brian Smith	
	R 9/30				
6	T 10/5		Project Stage 1 submission		
	R 10/7				
7	T 10/12	T5. Trucking: Operations and Economics (Cost/Revenue)	Test 2 (T3 &T4); Written Assignment 1	Kameron Wilson	
	R 10/14				
8	T 10/19			Jared Denniston	
	R 10/21				
9	T 10/26	T6. Storage and Warehousing			
	R 10/28				
10	T 11/2	T7. The Service Aspect of Logistics	Test 3 (T5 & T6) Project Stage 2 submission	JR Lanser	
	R 11/4				
11	T 11/9				
	R 11/11				
12	T 11/16	T8. Technological Issues and Innovation in Logistics		Kameron Wilson & WL Panel	
	R 11/18				
13	T 11/23		Project stage 3 submission Test 4 (T7 & T8); Written Assignment 2		
	R 11/25				
14	T 11/30	Careers in Logistics/Transportation		Kameron Wilson & WL Panel	
	R 12/2				
15	T 12/7	Team Project Presentations	Team ppt slides and oral presentations		
	R 12/9				

### **Disability Accommodations:**

Students with disabilities will receive reasonable accommodations in this course. To request course modifications, please contact me within the first two days of class. I will work with you and Disability Services in the accommodation process. For more information, visit the Disability Services website at <http://www.umt.edu/dss/> or call 406.243.2243 (Voice/Text).

### **Academic Integrity:**

Academic misconduct is any activity that may compromise the academic integrity of the University of Montana. Academic misconduct includes, but is not limited to, deceptive acts such as cheating and plagiarism. Please note that it is a form of academic misconduct to submit work that was previously used in another course. The following message about academic integrity comes from the Provost's office:

All students must practice academic honesty. Academic misconduct is subject to an academic penalty by the course instructor and/or a disciplinary sanction by the University. The University of Montana Student Conduct Code specifies definitions and adjudication processes for academic misconduct and states, "Students at the University of Montana are expected to practice academic honesty at all times." (Section V.A., available at <http://www.umt.edu/student-affairs/dean-of-students/default.php>). All students need to be familiar with the Student Conduct Code. It is the student's responsibility to be familiar the Student Conduct Code. Reference to the COB Code of Professional Conduct at <http://www.business.umt.edu/ethics/professional-conduct-code.php>.

### **Mission Statements and Assurance of Learning**

The College of Business at the University of Montana creates transformative, integrated, and student-centric learning experiences, propelling our students to make immediate and sustained impact on business and society. We nurture our students' innate work ethic to develop confident problem solvers and ethical decision makers. We pursue thought leadership and collectively create opportunities for a better life for our students, faculty, and staff.

COB Core Values:

- Students first: We educate the whole person
- Experiential learning: We create experiences that matter
- Thought leadership: WE create rigorous and relevant knowledge
- Stewardship: We value people, planet and profit

As part of our assessment process and assurance-of-learning standards, the COB has adopted the following learning goals for our undergraduate students:

Learning Goal 1: COB graduates will possess fundamental business knowledge in the core disciplines of Accounting, Finance, Management Information Systems, Management and Marketing.

Learning Goal 2: COB graduates will be able to integrate business knowledge.

Learning Goal 3: COB graduates will be effective communicators.

Learning Goal 4: COB graduates will possess problem-solving skills.