

PBL: A Proven Product Support Strategy

Location:	Knoxville, Tennessee
Duration:	4 Days
Tuition:	\$4,200 (\$3,570 for UT Supply Chain Forum members) Includes most meals and lodging; \$2,100 if repeating the course

Program fees are subject to change.

Check our website: <http://haslam.utk.edu/PBL> for the latest information.

PARTICIPANT PROFILE

- **Primary audience:** Aerospace/Defense industry OEMs and their subcontractor partners motivated to capture and implement outcome-oriented life cycle support strategies for complex systems
- **Secondary audience:** Department of Defense Acquisition, Technology, Logistics, and Contracting professionals (program managers, product support managers, contracting officers, logistics and sustainment managers, and acquisition professionals)

PROGRAM OVERVIEW

PBL: A Proven Product Support Strategy is a four-day course designed to provide an understanding of performance-based contracting business arrangements (AKA PBL) for sustainment of DoD (and international equivalent) defense programs, systems, subsystems, and components. The course is oriented toward the contractor community, and emphasizes the business model and return on investment objectives from the contractor's point of view.

KEY OBJECTIVES

Through the integration of classroom instruction and discussion, complemented by real-world examples, these are the key takeaways and capabilities we want you to have:

- Understand the “how and why” that leads to success with performance-based product support (a win-win construct) enabled by industry profit incentives and government performance improvements combined with long-term cost reduction

- Understand the government budget, funding, availability, and sustainment environment and challenges that can prompt government willingness to consider PB@
- Exploration of how PB@ is a capture tool with many degrees of freedom that can lead to more profitable contracts, for both new and legacy programs
- Familiarity with the government statutory, policy, and guidance supporting and constraining the use of PBL
- Exploration of how PB@ can be thought of as a contractor-managed DoD supply chain, inclusive of inventory management, maintenance and repair, transportation, reliability improvement, sustainability engineering, and technical support
- Awareness of the advantages of PB@ for both the customer and supplier in comparison with traditional product support methods and strategies
- A thorough understanding of business arrangements including roles, responsibilities, relationships, statutory requirements, risk allocation, work allocation, constraints, enablers, and the associated contracting types, terms, and conditions that enable success

METHODS OF INSTRUCTION

The program has been designed to ensure the active involvement of all participants. A balance of theory and application is provided through lectures, question/answer sessions, case studies, and small-group exercises. See the program schedule included with this profile sheet.

DISTINGUISHING FEATURES

- The only PBL program addressing the contractor's perspective
- The only university-based PBL program
- Four-day program focused on establishing and executing PBL contracts and programs
- Participants receive a copy of *Performance-Based Logistics: A Contractor's Guide to Life Cycle Product Support Management*, by Steve Geary and Kate Vitasek
- Boeing, Lockheed Martin, Northrop Grumman, Pratt & Whitney, Raytheon, and the U.S. Air Force sponsored the applied research for the program
- Defense Acquisition University (DAU) also partnered with UT on program development
- Class size is limited in order to ensure interaction with faculty and fellow participants.

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This program, like all Graduate and Executive Education open enrollment programs, is available as a customized, in-house program for organizations.

FACULTY

Program faculty consists of key experts in performance-based logistics, including:

- **Gerry Brown, MBA**, Supply Chain Visions. Gerry brings over thirty years of private sector, academic and public service experience to working with organizations, large and small, to help them achieve strategic, financial and operational goals across the supply chain. He's held positions with IBM-France, Hewlett Packard, Black and Decker, Accenture and JP Morgan Chase. For over a dozen years, Gerry has been teaching graduate programs in the Boston area – at Tufts and Northeastern Universities. In 2004-2013, at the Office of the Secretary of Defense, he worked with the Department's supply base to identify win/win arrangements in critical areas including strategic sourcing, anti-counterfeiting and continuous process improvement.
- **Jerry Cothran, MPA**, is widely recognized as one of the pre-eminent experts in the area of PBL. Most recently he was a senior manager in logistics engineering for Lockheed Martin, where he was a corporate focal point for providing logistics & sustainment advice, guidance, and support across the company. In his 30+-year federal career, Jerry has held a range of key leadership positions in the military departments and Office of the Secretary of Defense in both Acquisition and Logistics. He was program director for PBL at Defense Acquisition University. Jerry is level 3 certified in Life Cycle Logistics with the Department of Defense.
- **Stephen R. Geary, MBA, M.Eng.**, President, Supply Chain Visions, and our faculty leader for PBL. Steve has over 30 years of experience in supply chain management – as a manager, consultant, author, educator and speaker. He's held senior positions with Teradyne, PRTM, Emerson Electric, and IBM. Since 2002, Steve has worked extensively for the Office of the Secretary of Defense, helping drive transformation of military logistics to deliver more nimble, flexible, and responsive capabilities.

- **Wesley Randall, Ph.D.**, Associate Professor & Chair, Department of Marketing & Logistics, University of North Texas. Wesley focuses his research on modeling the profit potential of multi-year outcome-based sustainment strategies for the Aerospace sector. Dr. Randall (Lt Col, USAF, Retired) previously served in NATO, as a USAF Squadron Commander, and as a program/logistics manager. He currently teaches supply chain management, and performance analysis.

- **Stephen M. Rutner, PhD**, Professor of Practice/ Supply Chain Management, Texas Tech University. Dr. Rutner (COL, USA, Retired) also served for 30 years as an Army Officer serving in the Transportation and Logistics fields to include multiple tours in the Middle East. Previously, Steve was professor at Georgia Southern University and served as the director of the Southern Center for Logistics and Intermodal Transportation and director of the PhD program.

FACILITIES

Classes are held in the Graduate and Executive Education executive classrooms of the University of Tennessee's Haslam College of Business. These facilities are designed to promote group interaction in an environment conducive to applied discussion, feedback, and the development of relational networks that frequently continue well beyond the on-campus experience.

Accommodations are single-occupancy rooms at the nearby Knoxville Hilton Hotel. Transportation from the hotel to the University and to dining is provided.

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CONTACT

For more information on *PBL: A Proven Product Support Strategy*, please contact:

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WEBSITE

For current information about Graduate and Executive Education and its offerings, visit our website at <http://ExecEd.utk.edu>

RELATED ACTIVITIES:

- Customized 1- to 5-day PBL programs for organizations, internationally
- Customized PBL workshops
- PBL executive overviews
- PBL consulting
- PBL speaking engagements at conferences

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TYPICAL PROGRAM SCHEDULE

DAY 1	DAY 2	DAY 3	DAY 4
Introductions and Baseline Understanding of PBL (part 1 of 2)	Real World Case Study: F/A-18	Real World Case Study: APU	Real World Case Study: Shadow
	Interactive Learning Session: Identifying PBL Opportunity Areas <u>Breakout Group Exercise 2</u>	Partnering with and Managing Organic Providers	Business Case Analysis and Its Importance in Managing Risk
Baseline Understanding of PBL (part 2 of 2)	The PBL Business Model	Interactive Learning Session: Managing Organic Providers	Thinking through your PBL initiative
Shaping the Battlefield Read PBL Interactive Learning Case Study	Performance Management: It's Not Just Metrics	Finish Interactive Learning Session	Interactive Learning Session: Reengineering for Enhanced System Performance <u>Breakout Group Exercise 5</u>
		Managing with Constraints: How to Work within Statutory Requirements	
Interactive Learning Session: Shaping the Battlefield <u>Breakout Group Exercise 1</u>	Interactive Learning Session: Aligning Metrics <u>Breakout Group Exercise 3</u>	Managing Contracts: Types, Incentives, Flexibility	3 Things You Will Work on When You Go Back
Tenets of a Successful PBL	Alignment: The Role of a PSA	Interactive Learning Session: <u>Breakout Group Exercise 4</u>	Course Wrap-Up