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OPERATIONS MANAGEMENT
GOODS, SERVICES AND VALUE CHAINS

运营管理

产品、服务和价值链

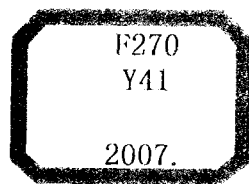
(第2版)

David A. Collier 著
James R. Evans



北京大学出版社
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北京市版权局著作权合同登记图字:01-2007-0415 号

图书在版编目(CIP)数据

运营管理:产品、服务和价值链:第2版/科利尔等著. —影印本. —北京:北京大学出版社,2007.5
(管理学精选教材·英文影印版)

ISBN 978-7-301-12091-0

I. 运… II. 科… III. 企业管理—研究生—教材—英文 IV. F270

中国版本图书馆 CIP 数据核字(2007)第 058904 号

David A. Collier James R. Evans

Operations Management: Goods, Services and Value Chains, 2nd edition

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978-7-301-12091-0

书 名: 运营管理:产品、服务和价值链(第2版)

著作责任者: David A. Collier James R. Evans 著

责任编辑: 石会敏

标准书号: ISBN 978-7-301-12091-0/F·1597

出版发行: 北京大学出版社

地 址: 北京市海淀区成府路 205 号 100871

网 址: <http://www.pup.cn> 电子邮箱: em@pup.pku.edu.cn

电 话: 邮购部 62752015 发行部 62750672 编辑部 62752926 出版部 62754962

印刷者: 北京宏伟双华印刷有限公司

经 销 者: 新华书店

850 毫米×1168 毫米 16 开本 54.25 印张 1002 千字

2007 年 5 月第 1 版 2007 年 5 月第 1 次印刷

印 数: 0001—3000 册

定 价: 69.00 元

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举报电话:010—62752024 电子邮箱: fd@pup.pku.edu.cn

作者简介

戴维·A. 科利尔 (David A. Collier) 教授，俄亥俄州立大学费歇尔商学院管理科学专业的教师。在俄亥俄州立大学获得运营管理专业博士学位。之前发表过三本服务与质量管理方面的著作。

詹姆斯·R. 埃文斯 (James R. Evans) 教授，辛辛那提大学商学院全面质量管理中心主任，定量分析和运营管理专业的教师。讲授决策论和质量管理的课程。埃文斯教授在决策论、仿真、质量管理和运营管理方面发表大量著作。其著作《质量管理与控制》(5e)在2003年获得了美国质量控制学会的菲利普·克劳斯比奖章。

关于本书

适用对象

本书可作为管理专业本科高年级、研究生（包括 MBA）《运营管理》课程的教材。也可用作运营管理、工业工程等领域的从业者和研究人员的参考书。

内容简介

本书分为以下三个主要部分：理解运营、设计运营系统和管理运营系统。第一部分理解运营，介绍运营管理的基本概念及其在企业环境中的应用。该部分包含四章内容。第二部分设计运营系统，说明如何设计有效的运营系统。该部分包括五章内容。第三部分管理运营，说明人们所接触到的运营管理。该部分包括九章内容。

作者简介

戴维·A. 科利尔（David A. Collier）教授，俄亥俄州立大学费歇尔商学院管理科学专业的教师。在俄亥俄州立大学获得运营管理专业博士学位。之前发表过三本服务与质量管理方面的著作。

詹姆士·R. 埃文斯（James R. Evans）教授，辛辛那提大学商学院全面质量管理中心主任，定量分析和运营管理专业的教师。讲授决策论和质量管理的课程。埃文斯教授在决策论、仿真、质量管理和运营管理方面发表大量著作。其著作《质量管理与控制》（5e）在 2003 年获得了美国质量控制学会的菲利普·克劳斯比奖章。

本版特色

本版具有以下鲜明的特色：

- 服务和制造运营的集成——不同于其他教科书，本书的每一章都阐述了服务和制造的运营问题，藉此，可使学生思考他们将面临的经济问题。

- 价值链的真正集成——本书给出了更为广泛的、跨学科的价值链集成观点。

- 激发学生学习的兴趣——每章开发都安排了三个情景短剧，用以说明该章所要阐述的概念及其在实际中的应用。

- 大量的习题，给教师以最大的选择余地。习题从简单到复杂，种类多，数量大，教师可以根据学生的水平做出相应取舍。

- 简明扼要的运营管理典范。饶有兴趣的短文解释了如何把运营管理原理应用到今天成功的组织，以此来吸引学生的注意力。

- 章后附有针对性强的案例。本书安排了超过 54 个饶有兴趣而又颇具挑战性的案例。

- 国际范围的实例扩展了学生的视野，同时，表明了运营管理原理的全部价值所在。

- 例题、丰富的总结与讨论题。通过例题、总结及讨论题的练习，将增加学生的理解力，增强他们的自信心，同时给学生更多的机会来测验对知识的掌握程度。

PREFACE

Operations management (OM) has evolved into one of the most important business disciplines over the last several decades. The roots of OM stem from industrial engineering, strategic management, quality control, and management science. Although OM began with a strong focus in production and manufacturing, one cannot deny the fact that about 80 percent of U.S. jobs are now in the service sector. Goods-producing industries (manufacturing, construction, fishing, forestry, mining, and agriculture) account for the remaining 20 percent but half of those jobs involve service processes. Therefore, 90 percent of the jobs in the U.S. economy involve designing and managing service-, information-, or entertainment-intensive processes. Consequently, most business graduates will work in the service sector, or in service-related aspects of manufacturing firms. The efficiency and effectiveness of goods and service creating processes are vital to our welfare as individuals and the global economy. In today's highly competitive business environment, the need for continual improvement of operations has never been greater.

Several textbooks have been written specifically for service operations management and every introductory OM text has a service component. However, none have truly integrated goods and services from the perspective of the value chain that cuts across the broad scope of business. This book is intended to accomplish this goal. The purpose of *Operations Management: Goods, Services, and Value Chains* is to provide students of business a sound understanding of the concepts, techniques, and applications of contemporary OM, with a strong emphasis on services. The book combines important managerial issues of OM with technical tools and quantitative applications, emphasizing the relevance to students' work and personal lives, and exposing them to state-of-the-art practices in business.

ORGANIZATION OF TOPICS

The book is divided into three major parts. *Part I, Understanding Operations*, focuses on the fundamentals of OM and its role in the business environment.

- Chapter 1 introduces the nature of OM; the differences between goods and services; the concept of a customer benefit package, process, and value chain; the role of quantitative methods in OM; and the history of OM and its current and future challenges.
- Chapter 2 provides an in-depth discussion of value chains and the way in which they support operations from a strategic perspective. This chapter also focuses on value chains in the global business environment and the challenges that organizations face in today's global society.
- Chapter 3 focuses on the importance of good performance measurement as a basis for good decisions, both at the strategic and operational levels of an organization. The principal measures used in operations and the design of

measurement systems are introduced, along with broad models of organizational performance—specifically, the Malcolm Baldrige framework, balanced scorecard, value chain model, and service-profit chain.

- Chapter 4 describes the role of operations strategy in supporting the overall business strategy of an organization. The notions of a customer-driven organization, segmenting markets, and competitive priorities are introduced, and approaches for strategic planning and operations strategy design are described. Special emphasis is given to operations design choice and making key infrastructure decisions to support chosen strategies.

Part II, Designing Operating Systems, addresses the design of operations.

- Chapter 5 builds students' understanding of technology in manufacturing and service operations and in value chains, and introduces several types of important integrated operating systems that students will undoubtedly encounter in the future careers.
- Chapter 6 focuses on the design of goods and services, their role in support the strategic mission of an organization, and specific practices generic to manufacturing product and process design and service delivery system and service encounter design. An integrative case study of Lenscrafters provides a broad view of how these ideas are implemented in practice.
- Chapter 7 focuses on process choice and selection. Both the classic product-process matrix and service positioning matrix are introduced; and tools and approaches used for process design, analysis, and improvement, including the analysis of bottlenecks and queues, and value stream mapping are also described.
- Chapter 8 deals with facility layout and work design issues. This chapter includes discussions of broad facility design issues, assembly line balancing, and human issues associated with workplace and job design.
- Chapter 9 focuses on key issues of supply chain design, including performance measurement, strategic choice, location decisions, and operational management issues. Several quantitative models are introduced for assisting in supply chain design.

Part III, Managing Operations, addresses topics that anyone involved in operations faces on a daily basis.

- Chapter 10 focuses on understanding, measuring, and making both long- and short-term capacity decisions. We also include introductions to revenue management systems and the theory of constraints.
- Chapter 11 describes the important role that forecasting plays in managing capacity and demand, and introduces the common types of quantitative and qualitative forecasting approaches used in practice.
- Chapter 12 addresses inventory management systems and common tools used to manage inventories. The principal emphasis is on fixed quantity and fixed period systems for both deterministic and stochastic demand scenarios. Other special models used in inventory analysis are also introduced.
- Chapter 13 addresses resource management from an overall planning framework, focusing on aggregate planning decisions and strategies, and disaggregation of aggregate plans in both manufacturing and service systems.
- Chapter 14 provides an introductory treatment of operations scheduling and sequencing, with a variety of applications in both manufacturing and services, and discussions of practical tools and approaches for making good scheduling and sequencing decisions.
- Material in Chapters 15 and 16 deal with issues of quality. In Chapter 15, the basic concepts of quality management are introduced along with the philosophies of Deming, Juran, and Crosby, ISO 9000, and Six Sigma. The principal

tools used in quality management are also illustrated. Chapter 16 deals with technical issues in quality control systems, primarily statistical process control.

- Chapter 17 introduces the concept of lean operating systems in goods-producing and service-providing organizations. The philosophy of lean thinking is described and numerous tools and approaches for incorporating lean thinking into an organization are discussed. The chapter includes lean “tours” of manufacturing and service organizations and an overview of Just-In-Time.
- Chapter 18 addresses project management from both an organizational and technical viewpoint. Tools and techniques for planning, scheduling, and controlling projects are illustrated.

The CD-ROM accompanying this book contains supplementary chapters for quantitative methods: work measurement, queuing, linear optimization, simulation, and decision analysis. These topics are referred to in various chapters, and the supplements provide introductions to these techniques. In addition, Microsoft Excel spreadsheets used for examples in this book are included for student use.

PEDAGOGICAL FEATURES

This book is written with the student in mind. Each chapter begins with a summary of key learning objectives and opens with three real or fictitious *customer episodes* that are intended to illustrate practical issues associated with the chapter that students can easily understand and appreciate. Several discussion questions are posed to help students think about the key issues and relate them to their own experiences. *OM Spotlights* describe real organizations using the concepts and methods of the respective chapter to manage the company and peak student interest. Each chapter also has a summary of key terms and concepts, and a set of Review and Discussion Questions intended to provide a study guide for checking comprehension of the material or helping students stretch their thinking about important issues. Excel spreadsheets are used to illustrate quantitative applications throughout the book. Solved Problems are also included to provide additional practice and insight to help students tackle problems in each chapter. Finally, each chapter contains several original cases designed to provide opportunities for applying the principles learned through in-depth case discussions and analyses.

INNOVATIVE TOPICAL COVERAGE

Significant coverage of important contemporary issues in operations management will make the material interesting and accessible. Unique coverage includes:

- Defining value chains in terms of the traditional OM input-process-output model and a pre- and post-service production model.
- In-depth discussions of customer value creation through bundles of goods and services—called customer benefit packages—that require effective OM processes.
- Early focus on OM decisions and issues surrounding global value and supply chains.
- Early emphasis on performance measurement metrics, examples, frameworks, and issues.
- The importance of tying customer wants and needs to operations strategy and building the right infrastructure to gain and maintain competitive advantage.

- Overviews of integrated operating systems (IOS) such as supply chain management (SCM), customer relationship management (CRM), enterprise resource planning (ERP), and revenue management systems (RMS).
- An integrated framework for goods and service design focused on manufacturing and service encounter design.
- Process design and analysis emphasizing value stream mapping, Little's Law, and bottlenecks in goods-producing and service-providing processes.
- The role of the servicescape in service process design.
- Understanding and computing the cash-to-cash conversion cycle for supply chains.
- The GAP model of service quality with its application in an automobile service case study.
- Principles of lean operating systems applied to "lean services."
- Practical case studies focused on services such as assembly line balancing in banking, value chains in the music industry, service guarantees, quality management in a hospital's dietary food service, job workload analysis for an orthopedic surgeon, customer demand forecasting for a bank's help desk GAP analysis in automobile service, and hospital inventory management.

ANCILLARIES FOR STUDENTS

- A student CD is packaged free with each new text. It contains the five supplementary chapters shown in the Table of Contents. The CD also provides Microsoft® Excel data files and templates for use with the end-of-chapter problems. A time-limited version of the Crystal Ball® Professional Edition and Premium Solver for Education Excel add-ins are also included.
- ThomsonTMNOW! If your instructor has chosen to use ThomsonNOW, a ThomsonNOW slimpack will be bundled with your textbook. You may also purchase access online at www.thomsonedu.com. ThomsonNOW provides the innovative tool you need to learn faster and succeed. ThomsonNOW is a reliable, easy-to-use online suite of resources that will give you the help you need to grasp difficult concepts. For every chapter, personalized learning plans allow students to focus on what they still need to learn. Students can also choose how they read the textbook—via integrated digital ebook or by reading the print version.

ACKNOWLEDGEMENTS

Starting and completing a project as large as this one takes the support and input of many people. Professor Ruth Seiple, of the University of Cincinnati, and her students Amy Ingram and Bogdan Bichescu provided initial insight into the presentation of challenging material. Other important contributors are those colleagues who reviewed the manuscript and provided valuable suggestions as well as support and guidance. Colleagues at Thomson Business and Economics also deserve special thanks for their contributions to development and production of the book. Our regards go to senior acquisitions editor Charles McCormick, Jr., senior marketing manager Larry Qualls, senior developmental editor Alice Denny, production editor Brian Courter, art director Stacy Shirley and photo researcher Darren Wright.

Many lonely evenings and weekends were spent writing and improving this text and we are especially grateful to our families for putting up with our efforts.

We hope you enjoy this book about an important body of knowledge that we both sincerely care about. As one unknown source once said (and we quote), "Do not follow where the path may lead. Go instead where there is no path and leave a trail." We worked hard at trying to integrate and balance our focus on goods and services, and provide new ways of thinking about bundles of goods and services, and the processes that create and deliver them to customers. If you have any suggestions for improvement, please contact one of us.

David A. Collier
The Ohio State University

James R. Evans
University of Cincinnati

ABOUT THE AUTHORS

DAVID A. COLLIER

David A. Collier is a member of the Faculty of Management Science, Fisher College of Business, The Ohio State University. He holds a Bachelor of Science in Mechanical Engineering, a Master's of Business Administration from the University of Kentucky, and a Ph.D. in Production and Operations Management from The Ohio State University. Prior to his academic career, he worked in materials management for Babcock and Wilcox Company.

Dr. Collier is the author of three previous books on service management and quality management: *Service Management: The Automation of Services*, *Service Management: Operating Decisions*, and *The Service/Quality Solution: Using Service Management to Gain Competitive Advantage*. He has published in such journals as *Management Sciences*, *Decision Sciences*, *Journal of Operations Management*, *Production & Operations Management*, *International Journal of Operations and Production Management*, and *International Journal of Service Industry Management*. He is the recipient of five awards for outstanding journal articles and has written and published eight invited book chapters. In addition, seven of his cases have been reprinted in major marketing and operations management textbooks and he has over seventy refereed publications. A 2004 citation review found that over 200 journal articles have referenced his research.

Professor Collier was nominated and selected to the 1991 and 1992 Board of Examiners for the Malcolm Baldrige National Quality Award. He has worked with many organizations such as AT&T, J.P. Morgan Chase Bank, Child Health Corporation of America, Emery Worldwide, Motorola, John Glenn Institute at Ohio State University, and the United States Postal Service. He served as faculty leader for a Six Sigma Black Belt Blended (Clicks and Bricks) Executive Program at the Fisher College of Business. Professor Collier has taught in the Executive MBA program at the University of Warwick in England and in several other international programs.

JAMES R. EVANS

James R. Evans is Professor of Quantitative Analysis and Operations Management and Director of the Total Quality Management Center in the College of Business Administration at the University of Cincinnati. He teaches courses in decision sciences and quality management. He holds bachelor's and master's degrees in industrial engineering from Purdue and a Ph.D. in industrial and systems engineering from Georgia Tech. Dr. Evans is author or co-author of numerous refereed papers and textbooks in decision sciences, simulation, quality management, and operations

management. He received the ASQ Philip Crosby Medal for 2003 for *The Management and Control of Quality, 5e*.

Professor Evans has a wide range of professional experience and has served on the Board of Examiners for the Malcolm Baldrige National Quality Award from 1994–2001. He was appointed a Judge for a three-year term beginning in 2005. He also held numerous roles in the Decision Sciences Institute, including Past President in 1997–98, and received the Dennis E. Graowig Distinguished Service Award in 2000. During his 30-year professional career he has been active in the Institute of Industrial Engineers, INFORMS, and POMS, and has served on editorial boards for *IEEE Transactions on Engineering Management*, *Computers and Operations Research*, *Decision Sciences*, *Production and Operations Management*, *Journal of Operations Management*, *Quality Management Journal*, *Production and Inventory Management*, *INFORMS Transactions on Education*, and *International Journal of Services and Operations Management*.

His consulting experience includes work for Procter & Gamble, AT&T, The Kroger Co., American League of Professional Baseball Clubs, Cincinnati 2012 (Olympic Bid Committee), and various other organizations. The P&G project, of which he was a member of the analytical design team, was a finalist for the INFORMS Franz Edelman Award for Achievement in OR/MS in 1996.

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