

**МІНІСТЕРСТВО ОСВІТИ І НАУКИ УКРАЇНИ  
ХАРКІВСЬКИЙ НАЦІОНАЛЬНИЙ ЕКОНОМІЧНИЙ УНІВЕРСИТЕТ  
ІМЕНІ СЕМЕНА КУЗНЕЦЯ**

**ЗАТВЕРДЖЕНО**

на засіданні кафедри  
менеджменту, логістики  
та інновацій  
Протокол № 2 від 31.08.2023 р



Каріна НЕМАШКАЛО

**ПЛАНУВАННЯ ТА ОРГАНІЗАЦІЯ ДІЯЛЬНОСТІ ПІДПРИЄМСТВА**

**робоча програма навчальної дисципліни (РПНД)**

Галузь знань	<b>07 "Управління та адміністрування"</b>
Спеціальність	<b>073 "Менеджмент"</b>
Освітній рівень	<b>перший (бакалаврський)</b>
Освітня програма	<b>"Логістика"</b>

Статус дисципліни	<b>обов'язкова</b>
Мова викладання, навчання та оцінювання	<b>англійська</b>

Розробник:  
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**Харків  
2023**

MINISTRY OF EDUCATION AND SCIENCE OF UKRAINE  
SIMON KUZNETS KHARKIV NATIONAL UNIVERSITY OF ECONOMICS

**APPROVED**

at the meeting of the department  
management, logistics and innovation  
Protocol № 2 of 31.08.2023.





Vice-rector for educational and methodical work

Karina NEMASHKALO

**PLANNING AND ORGANIZATION OF ENTERPRISE ACTIVITIES**

**Program of the course**

Field of knowledge	<b>07 "Management and administration"</b>
Specialty	<b>073 "Management"</b>
Study cycle	<b>first (bachelor)</b>
Study programme	<b>Logistics</b>
Course status	<b>mandatory</b>
Language	<b>English</b>
Developer: Associate professor PhD (Economics)	 Inna HERASHCHENKO
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## INTRODUCTION

Competitiveness and the development of a company depend on effective management of its operational functions, specifically planning and organization. Creating competitive advantages for each enterprise is possible through the efficient implementation of the management process, with planning being one of its crucial components. The essence of operations as a type of business activity, the role of operations management, the purpose of operational systems, and the tasks of operational strategies are revealed in this academic discipline. It highlights the specifics of designing and functioning of operational systems in enterprises, project management, and the efficiency of operational activities, among other aspects.

The study of the course "Planning and Organization of Enterprise Activities" aims to shape students' knowledge systems and holistic understanding of the principles and peculiarities of creative management of innovation in enterprises. Planning enterprise activities serve as the basis for making current and long-term management decisions and organizing planned activities of enterprises in modern economic conditions. This requires a comprehensive approach, knowledge of economic indicators, planning methods, and their skillful application.

The goal of the course is to acquire necessary theoretical knowledge and practical skills to ensure effective planning of enterprise activities and develop the ability to formulate operational strategies, create, and utilize operational systems in the modern development of a market economy as the basis for achieving the organization's mission and enhancing the quality of the overall management process.

The main objectives of studying the course "Planning and Organization of Enterprise Activities" include deepening and systematizing knowledge about the essence and peculiarities of planning enterprise activities.

The tasks of the course include:

familiarization with methods of organizing enterprise activities.

determination of methods and algorithms for planning and organizing enterprise activities.

formation of practical skills in planning and organizing enterprise activities.

The subject of study of the course is the theoretical foundations and practical skills of planning and organizing enterprise activities.

The object of the course includes methods and techniques for researching the planning and organization of enterprise activities.

The learning outcomes and competencies formed by the course are defined in table 1.

Table 1

## Learning outcomes and competences formed by the course

Learning outcomes	Competencies
LO3	GC4, GC5, SC4, SC5, SC7
LO4	GC12
LO7	SC1, SC2
LO8	SC5, SC7
LO9	SC8
LO10	GC11, SC4
LO11	GC3, GC8, SC11
LO17	GC11

Where

GC3. Ability for abstract thinking, analysis, synthesis;

GC4. Ability to apply knowledge in practical situations;

GC5. Knowledge and understanding of the subject area and understanding of professional activities;

GC8. Skills in using information and communication technologies;

GC11. Ability to adapt and act in a new situation;

GC12. Ability to generate new ideas (creativity);

SC1. Ability to define and describe the characteristics of the organization;

SC2. Ability to analyze the results of the organization's activities, compare them with external and internal environmental factors;

SC4. Ability to identify functional areas of the organization and relationships between them;

SC5. Ability to manage the organization and its units through the implementation of management functions;

SC7. Ability to choose and use modern management tools;

SC8. Ability to plan the organization's activities and manage time;

SC11. Ability to create and organize effective communication in the management process;

LO3. Demonstrate knowledge of management theories, methods, and functions, modern leadership concepts;

LO4. Demonstrate skills in identifying problems and justifying management decisions;

LO7. Demonstrate skills in organizational design;

LO8. Apply management methods to ensure the efficiency of the organization's activities;

LO9. Demonstrate skills in interaction, leadership, teamwork;

LO10. Have skills in justifying effective tools for motivating the organization's personnel;

LO11. Demonstrate skills in analyzing situations and conducting communication in various areas of the organization's activities;

LO17. Conduct research individually and/or in a group under the leadership of a leader.

# COURSE CONTENT

## **Content Module 1. Planning enterprise activities**

### **Topic 1. Planning and its significance in the enterprise's economy, the balance method of planning**

#### **1.1. Planning as one of the fundamental functions of management, the necessity of planned activities in the enterprise.**

Regularity and proportionality as objective features of social production. The role of planning in human activities.

#### **1.2. The essence of planning, stages of the planning process.**

Types of planning. Principles of planned activities. Planning methods. Organizational features of planned activities in the enterprise. Diversity of plans and planning work in the enterprise. A business plan as an element and extension of the enterprise plan.

#### **1.3. The essence of the balance method.**

Material, value, and labor balances. Planned balances at different levels of planning. The system of planned balances in the enterprise. Planned balances in the enterprise's economy. Balancing method application in cost planning. The balance method and financial planning.

### **Topic 2. Normative planning method. production efficiency planning**

#### **2.1. Concept of planning norms and standards, their types.**

The need to justify the possibilities of achieving qualitative and quantitative plan indicators. Norms and standards as a reflection of these possibilities. Labor and material norms and standards, their composition and characteristics. Financial norms, their purpose. Methods of developing norms and standards.

#### **2.2. Planning organizational and technical development of the enterprise.**

Increasing the efficiency of activities as the most important goal of the enterprise in the market conditions. Planning for product updates. The problem of stimulating the effectiveness of measures.

#### **2.3. Planning to increase production efficiency.**

Key performance indicators: profit and related indicators. Features of efficiency indicators in different forms of ownership.

### **Topic 3. Development of a production program and planning its material and technical support, production capacity planning**

#### **3.1. Content of the production and sales plan of the enterprise, methods, and stages of developing a production program.**

Indicators of the enterprise's production program. Natural and value indicators of the plan. Nomenclature and assortment of manufactured products. Nomenclature policy of the enterprise in transition to the market.

#### **3.2. Planning for the sale of products.**

Content and tasks of the material and technical supply plan. Planning for the need for material resources. Inventory planning. Determining the effective equipment operating time. Input, output, and average capacity.

**3.3. Indicators of the enterprise's production capacity.** Indicators of the use of production capacities and fixed assets. Planning to improve the use of production capacities and fixed assets.

#### **Topic 4. Planning labor, wages, personnel, and cost**

**4.1. Tasks and significance of planning labor, wages, personnel, and social issues at the enterprise.**

Planning staffing levels. Planned balance of working time. Planning the growth of labor productivity and absolute and relative labor release. Planning wages and the consumption fund. The composition of the wage fund and its planning. The composition of the consumption fund. State planning of personnel and employment. Sources of personnel needs coverage. The importance of solving social issues in modern conditions.

#### **4.2. Purpose, tasks, and content of cost planning.**

Controlling the cost plan. Classification of costs used in planning. Direct and indirect, basic and overhead costs. Conditionally constant and conditionally variable costs. Planning cost reduction based on technical and economic factors. Compilation of planned cost calculations for production.

#### **4.3. Budget planning for production costs.**

Planning prices for the enterprise's products.

#### **Topic 5. Profit and Financial Planning and Business Plan Development**

**5.1. Essence and significance of financial planning at the enterprise.** Planning financial indicators. Planning financial results and profit distribution.

**5.2. Essence and purpose of a business plan.** Structure of a business plan, sequence of its development. Marketing plan. Production plan. Organizational plan. Financial plan. Risk assessment. Discussion of the business plan and adjustments.

#### **Content Module 2. Organization of Enterprise Activities**

#### **Topic 6. Essence and Tasks of Enterprise Activity Organization**

**6.1. Concepts and main tasks of enterprise activity organization. Content of production organization.**

Main aspects of production organization theory. Essence and content of basic principles of production process organization: differentiation, specialization, proportionality, flow, continuity, parallelism, automation, optimality, flexibility, standardization.

**6.2. History of the formation and development of the science of production organization.**

Key moments that determined the formation of scientific foundations of production organization. Contribution of representatives of different scientific schools in the field of production organization to expanding the horizons of science.

#### **Topic 7. Operational Activity: Resources, Processes, and Results**

#### **7.1. Concept and content of enterprise operational activity.**

Elements of production activity. Products of production activity. Product,

service.

### **7.2. Concept and main elements of the production process.**

Composition and structure of the production process. Essence of main, auxiliary, and service processes. Composition and essence of stages of the main process at an industrial enterprise. Technological processes.

### **7.3. Concept of production type.**

Essence and characteristics of the organization of the production process over time. Concept of production cycle duration. Composition and structure of production cycle duration. Ways to shorten the production cycle duration.

## **Topic 8. Organization and Management of Labor Processes, Labor Standardization**

### **8.1. Concept and goals of labor organization.**

Work distribution, content, and structuring. Expansion of tasks, enrichment of task content, job rotation, group work. Work organization chart. Ergonomic requirements for equipment. Working conditions. Industrial aesthetics. Organization of the workplace. Systems for ensuring and servicing workplaces. Work and rest regime. Training and qualification improvement. Multi-machine servicing and job combination.

### **8.2. Concept of standards and their purpose.**

Prospective standards. Methods and organization of establishing technical and economic standards. Organization of material resource utilization. Identification of material savings reserves. Material cost standards.

### **8.3. Determination of material and labor resources for primary and auxiliary production.**

## **Topic 9. Quality control organization**

### **9.1. Total Quality Management (TQM).**

Concept, significance, and factors ensuring the quality of goods and services. Quality indicators and methods of their evaluation. Quality standards for goods and services.

### **9.2. Quality planning.**

Organizational quality assurance. Quality control tools. Analysis of quality assurance programs by W. E. Deming, D. Juran, P. Crosby, K. Ishikawa, Sh. Shingo. Methods by J. Taguchi. Total Quality Management approach. Development of quality assurance programs. Quality management groups and product quality assurance system.

### **9.3. Comprehensive approach to productivity issues.**

Performance indicators of operational system functioning. Modeling the process of operational system performance management. Factors influencing the dynamics of organization productivity. Ways to improve labor productivity in the organization.

## **Topic 10. Organization of production infrastructure for industrial and service enterprises**

**10.1. Concept of enterprise (in general), production, and social infrastructure.**

Conceptual approaches to the organization of enterprise production infrastructure. Basics of organizing and designing auxiliary production units of the enterprise.

**10.2. Functions of production infrastructure units of the enterprise.**

Content and tasks of organizing technical maintenance of production. State and trends in the development of production technical maintenance.

**10.3. Composition and tasks of the industrial enterprise repair economy.**

Concept of providing production with technological equipment and tools. Composition and tasks of the industrial enterprise tool economy. Planning the need for tools. Organization of storage, issuance, and restoration of tools. Improvement of the organization of the enterprise tool economy.

**Topic 11. Operational Strategy**

**11.1. Scope of strategic issues addressed in operations management.**

Basic strategies for developing operational strategy: corporate and market strategies. Issues posed by corporate and market strategies for operational strategy.

**11.2. Essence and stages of operational strategy development.**

Operational priorities. Priorities that determine the company's position in the market. Shifting competitive priorities. Forming the product manufacturing strategy.

**11.3. Process strategy development.**

Impact of the life cycle on operational strategy. Types of processes: focused on the process, focused on the product and process, repetitive. Comparison of process strategies. Features of service process strategies. Distinct competence and competitive advantages.

The list of practical (seminar), laboratory studies in the course is given in table2.

Table 2

**The list of practical (seminar) and laboratory studies**

Name of the topic and task	Content
Topic 1. Practical Assignment 1.	Practical (seminar) "Discussion on the Importance of Planning in Enterprises, its Types, and Organizational Features"
Topic 2. Laboratory Assignment 1.	Solving practical tasks related to determining indicators of production and product sales, calculating metrics that characterize the enterprise's material needs for executing the production program.
Topic 2. Practical Assignment 2.	Solving practical tasks related to determining indicators of production and product sales, calculating metrics characterizing the enterprise's material needs for executing the production program. Performing an individual assignment.
Topic 3. Laboratory Assignment 2.	Solving tasks related to determining indicators of production and product sales.
Topic 3. Laboratory Assignment 3.	Solving tasks related to determining indicators



	characterizing the enterprise's need for materials to fulfill the production program.
Topic 4. Laboratory Assignment 4.	Solving practical tasks related to determining the planned staff size of the enterprise.
Topic 4. Laboratory Assignment 5.	Solving practical tasks on calculating the payroll fund and determining the planned level of labor productivity.
Topic 5. Laboratory Assignment 6.	Discussion of the peculiarities of composing a business plan by sections.
Topic 5. Practical Assignment 3.	Quiz
Topic 6. Practical Assignment 4.	Definition of the principles of organizing the activities of enterprises
Topic 7. Laboratory Assignment 7.	Calculation of the production cycle of a simple process, determination of the production cycle of a complex process
Topic 8. Laboratory Assignment 8.	Organization of the workplace in service enterprises
Topic 9. Laboratory Assignment 9.	Definition of indicators of service and product quality
Topic 9. Practical Assignment 5.	Product quality systems
Topic 10. Laboratory Assignment 10.	Movement of work objects
Topic 10. Laboratory Assignment 11.	Determination of indicators of repair production
Topic 11. Laboratory Assignment 12.	Aggregate (comprehensive) planning
Topic 11. Practical Assignment 6.	Quiz

The list of self-studies in the course is given in table. 3

Table 3

**List of self-studies**

Topic name and/or task	Content
Topic 1-11	Studying lecture materials. Preparation for practical and laboratory classes
Topic 1	Preparation for seminar classes includes searching, selecting, and reviewing literary sources and information from the Internet on the specified topics.
Topic 1-11	Assignment documentation
Topic 2	Individual tasks
Topic 5, 11	Preparation for colloquiums

The number of hours for lectures, practical (seminar) and laboratory studies, and hours of self-study is given in the technological card of the course.

**TEACHING METHODS**

In the process of teaching an educational discipline, in order to acquire certain learning outcomes, to activate the educational process, it is envisaged to use such learning methods as:

Verbal methods (lecture – Topics 1-11).

Visual methods (demonstration – Topics 1-11).

Seminar methods (Topic 1), practical methods (tasks on Topics 1, 2, 5, 6, 9, 11), individual assignments (Topic 2), laboratory methods (Topics 2-5, 7-11).

## **FORMS AND METHODS OF ASSESSMENT**

The University uses a 100-point cumulative system for assessing the learning outcomes of students.

**Current control** is carried out during lectures, practical and laboratory classes and is aimed at checking the level of readiness of the student of higher education to perform specific work and is evaluated by the sum of points scored:

– for course with a form of semester control as an exam: the maximum amount is 60 points; minimum amount required is 35 points.

**The final control** includes current control and an exam.

**Semester control** is carried out in the form of a semester exam.

The maximum number of points that a student of higher education can receive during the examination (examination) is 40 points. The minimum amount for which the exam is considered passed is 25 points.

**The final grade in the course** is determined:

for disciplines with a form of exam, the final grade is the amount of all points received during the current control and the exam grade.

During the teaching of the course, the following control measures are used:

Current control: seminar presentations (8 points), Individual educational and research tasks (20 points), individual task (16 points), quizzes (16 points).

Semester control: Grading including Exam (40 points).

More detailed information about the assessment system is provided in the technological card of the course.

An example of an exam card paper and assessment criteria.

### **An example of an examination paper**

Simon Kuznets Kharkiv National University of Economics  
First (bachelor) level of higher education  
"Management" specialty  
Study programme "Logistics".  
Course: Planning and Organization of Enterprise Activities

#### Task 1 (10 points)

1. The focus of the enterprise is:
  - a. all types of operations,
  - b. the main function of the enterprise,
  - c. the management system,
  - d. enterprise integration.
2. The operational system ensures:
  - a. competitiveness of the production,
  - b. competitiveness of the enterprise,

- c. competitiveness of both the enterprise and the production,
  - d. competitiveness of production.
3. Corporate strategy influences:
    - a. the level of management automation,
    - b. technological process,
    - c. operational strategy,
    - d. the life cycle of a product.
  4. The operational strategy of a service enterprise includes decisions about:
    - a. designing services,
    - b. determining the process of creating services,
    - c. determining customer contact,
    - d. all of the above.
  5. Which of the following operations is not considered fundamental:
    - a. preparatory,
    - b. finishing,
    - c. control,
    - d. servicing.
  6. The labor intensity of providing services compared to industrial production is:
    - a. insignificant,
    - b. lower,
    - c. higher,
    - d. the same.
  7. The assortment of products is:
    - a. the composition and ratio of products in the overall volume,
    - b. both definitions are correct,
    - c. a list of products by names, types, profiles in a given quantity.
  8. Which planning principle involves considering the objective laws of economic system functioning in the process of planning the production and economic activities of enterprises?
    - a. substantiation,
    - b. scientific,
    - c. flexibility.
  9. A set of operations arranged in their technological sequence. What is this?
    - a. Technological process,
    - b. Batch method,
    - c. mass production,
    - d. Flow line.
  10. Rhythm is:
    - a. strict uniform execution of the plan,
    - b. uniform work,
    - c. strict execution of the plan,
    - d. strict execution of the production program.

**Task 2 (15 points)**

Evaluate the rhythm of the department's work sub-decadal, taking into account the average daily output method, if in the first decade (7 working days) 100 products were produced, in the second (8 working days) - 120 products, in the third (6 working days) - 140 products.

**Task 3 (15 points)**

Calculate the calendar-planned norms for a multi-item variable-flow line, where parts of three names are manufactured. The line operates in a two-shift mode, with 20 working days per month. Line setup costs - 5%, setup time - 40 minutes. Initial data for calculations are provided in the table:



4. Великих К. О. Використання бізнес-плану та стратегічного планування в якості інструментів, які створюють конкурентну перевагу / К. О. Великих // Комунальне господарство міст. Серія : Економічні науки. - 2019. - Вип. 4. - С. 10-13.

5. Захаров В. А. Конкурентне середовище промислового підприємства та його вплив на операційний менеджмент / В. А. Захаров // Вісник Одеського національного університету. Серія : Економіка. - 2019. - Т. 24, Вип. 1. - С. 54-58. – [Електронний ресурс]. – Режим доступу: [www.repository.hneu.edu.ua/handle/123456789/21326](http://www.repository.hneu.edu.ua/handle/123456789/21326)

6. Кондратюк О. М. Бізнес-планування в підприємницькому середовищі: теоретичний аспект / О. М. Кондратюк, В. І. Пшеничний // Науковий вісник Ужгородського національного університету. Серія : Міжнародні економічні відносини та світове господарство. - 2019. - Вип. 26(1). - С. 90-94.

### **Information resources**

7. Офіційний вісник України (база нормативних документів) [Електронний ресурс]. – Режим доступу : <http://ovv.com.ua>

8. Ліга Бізнес Інформ. – Режим доступу: [// www.liga.net](http://www.liga.net).

9. Нормативні акти України [Електронний ресурс]. – Режим доступу : [www.nau.kiev.ua](http://www.nau.kiev.ua).

10. Сервер Верховної Ради України. – Режим доступу : [www.rada.gov.ua](http://www.rada.gov.ua).

11. Сервер Державного комітету статистики України. – Режим доступу : [www.ukrstat.gov.ua](http://www.ukrstat.gov.ua).