

Planning as a Management Function

SUBMITTED BY: Knowledge@Wharton Summer Educator

SUBJECT(S): Management

GRADE LEVEL(S): 10, 11, 12

≡ OVERVIEW:

In this lesson, students will explore the significance of one of the five functions of management: planning. Using the Knowledge@Wharton article: “The Bitter and the Sweet: How Five Companies Competed to Bring Chocolate to China,” students will learn about the chocolate industry’s attempts to introduce chocolate to a developing country. They will also analyze the strengths and weaknesses of the planning and implementation processes employed by the five chocolatiers. Using knowledge generated from this case study, students will create plans of their own in various business contexts.

≡ NBEA STANDARD(S):

- Management, I. Management Functions

The Five Functions of Management

- **Planning** – Managers are responsible for setting the course of actions that will best fulfill the company’s goals. Planning involves knowing what to do, when to do it and how to do it. Managers are responsible for consulting with different departments of the company in order to set the appropriate path for allocating capital in the right directions.
- **Management Decision-making & Strategy** – Managers must identify the activities to be completed, assign duties, create and authorize responsibility, and coordinate the different levels of operations.

- **Staffing** – Keeping individuals in the proper departments and finding talent to employ are also among the functions of management. Staffing includes recruitment, performance appraisal, promotions and transferring employees to the proper departments.
- **Directing** – Managers must supervise, motivate, lead and maintain communications with their employees.
- **Controlling** – Managers must control their departmental employees and operations to ensure that organizational goals are achieved.

Common Core Standard(s):

- *Speaking & Listening:* Initiate and participate effectively in a range of collaborative discussions (one-on-one, in groups, and teacher-led) with diverse partners on grades 9–10–11–12 topics, texts and issues, building on others' ideas and expressing their own clearly and persuasively.
- *Reading Standards for Informational Text:* Cite strong and thorough textual evidence to support the analysis of what the text says explicitly as well as inferences drawn from the text.
- *Reading Standards for Informational Text:* Determine a central idea of a text and analyze its development over the course of the text, including how it emerges and is shaped and refined by specific details, and provide an objective summary of the text.
- *CCR Speaking and Listening:* Present information, findings and supporting evidence clearly, concisely and logically in such a way that listeners can follow the line of reasoning, and the organization, development, substance and style are appropriate to the purpose, audience and task.
- *Writing Standards:* Conduct short as well as more sustained research projects to answer a question or solve a problem; narrow or broaden the inquiry when appropriate; synthesize multiple sources on the subject, demonstrating an understanding of the subject under investigation.

Objectives/Purposes:

- Students will be able to articulate that a relationship exists between planning and achieving positive outcomes.
- Students will gain practice in working collaboratively with others in developing a direction.
- Students will gain practice in learning to plan within a business context.

Knowledge@Wharton Article: “The Bitter and the Sweet: How Five Companies Competed to Bring Chocolate to China”

Other Resources/Materials:

- Butcher block paper
- Markers
- [PowerPoint on the Five Functions of Management](#) (optional)

Vocabulary Spotlight:

Planning: Managers are responsible for setting the course of action that will best fulfill the company’s goals. Planning involves knowing what to do, when to do it and how to do it. Managers are responsible for consulting with different departments of the company in order to set the appropriate path for allocating capital in the right directions.

Activities:

1. Inform students that they will be learning about the first of the five functions of management: planning. Ask the students what planning means to them. Let one or two students give personal examples of some planning that they have done (e.g., a party, going away on vacation, studying for an exam). Then introduce the definition of planning in the context of business. *(5-7 mins)*
2. Tell students that they will be examining the issue of planning in the business context by reading about how the chocolate industry emerged in China. Inform the students that you selected this article because it provides a great lesson on the importance of planning. Lots of money was lost and many setbacks occurred because people failed to do their homework first.
3. Have students read the Knowledge@Wharton article. *(10 mins)*
4. After everyone has read the article, lead the students in a discussion about all the things that went wrong for the chocolatiers. *(5-7 mins)*
5. Inform students that they will be given case studies to work on that are focused on the planning function. They must utilize some of the insights gained from the chocolatiers’ experiences in establishing a business in China to inform their thinking in addressing various situations.
6. Distribute [case studies](#) for students to work on in small groups (self-selected or teacher formed). Provide each group with markers and butcher block paper for them to record their ideas and prepare a presentation poster.

7. (Optional) If students have access to the Internet, allow them to do research on it to support their planning process.
8. (Optional) Depending upon the degree of detail and accuracy desired in the final product, teachers may need to give students additional class time to do research and assemble their presentations. Some of this can be completed as homework; however, it is important that teachers spend some time with the groups as they try to figure out their approach. As adults with more experience, teachers are able to point out things students might overlook. Also, students may have questions about the case studies.

Typing It All Together: In the next class session, students will present how they addressed the scenarios they were given. Students should also engage in a question-and-answer session with their peers and the teacher after each presentation.

What Worked and What I Would Do Differently: The students did a great job with these case study presentations. They were very creative and were obviously utilizing the knowledge they had gained from their other sessions in the program. The case scenario on higher education was a little difficult for students to think about. I had to keep reminding students that they represented the faculty in this scenario, so advocating the solution to simply cut jobs (which was often their first response) was likely to be a messy situation. Who among them would agree to get axed in this situation? I thought about cutting out this particular case study, but I think it was beneficial in introducing students to the notion that education, too, is a business where the five functions of management also apply.

The Q&A session that occurred after each presentation went very well. In my class of seniors, in particular, the students asked great questions about one another's plans. This was a talkative group of confident people, so they had no problem engaging with this aspect. The younger students contributed questions and comments after my lead. They, too, were pretty thoughtful.

It is important that the teacher walks around to offer support to each group as they come up with their solutions. In the context of our summer program experience, the students did not have enough research time to fully accomplish every aspect of their plan. Hence, a number of estimations were made about things, which was okay, but this project could certainly be elevated to something that involves real research that would give students great practice with information literacy and writing.

As for the Knowledge@Wharton article, it made the students think of themselves as really capable given some of the incredulous blunders made by industry giants. The students found the

article interesting in a lot of ways — especially with regard to the importance of understanding culture.

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