



## 2018 Fall Syllabus

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### MGMT 5340: Business Consulting

<b>Professor:</b>	Robert Spencer, MUS
<b>Class:</b>	Pigott 105, Wednesdays, 6:00 to 8:40 pm
<b>Office:</b>	5 <sup>th</sup> Floor Adjunct Lounge, Wednesdays, 5 to 5:45 pm, or by appointment
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#### I. Purpose and Objectives

The goal of this course is to help you achieve an understanding of how to apply the business skills you have acquired to address organizational challenges. You will be involved in analyzing economic, market and competitive forces that shape business strategy and performance.

The business decisions your client will be considering are real. Students will be expected to use their knowledge and judgment in the spirit of stewardship in making suggestions that will help their clients solve real business problems. The clients of successful teams achieve their project objectives and find value in their interactions.

During the quarter students will need to use a variety of techniques to accomplish their work, including: negotiating, problem analysis, brainstorming, problem solving, role-playing, decision making, library research, report writing, executive briefings and presentations, and more. The objectives of the course are to:

- Understand and develop the ability to deal with the array of critical decisions managers face with either early stage operations or major changes.
- Develop a working familiarity with the availability and reliability of secondary data, both quantitative and qualitative, helpful in making strategic decisions.
- Provide an experiential base for learning business development and practices through research, direct contact with organization executives and staff, and participation in a commercially significant project on behalf of and in cooperation with a local area business or organization.
- Provide a foundation for understanding the processes and practices of consulting to expand the students' future career options.
- Expand the students' appreciation of the factors involved in business decisions that contribute to sustainable and socially just outcomes.

The course is also to provide an understanding of the choices business leaders face, such as: the organization's overall strategy; the choice of countries and/or markets in which to establish operations; the choice of market entry methods; the degree of decentralization or centralization, and standardization of production and/or operations; and, the structures and systems needed to improve coordination of operations and/or create a more innovative organization.

## **II. Class Procedures and Activities**

To a great extent, this will be a self-directed class wherein student responsibilities will be of a different scope and nature than in the normal classroom environment. This course is designed to give students a genuine consulting experience, from negotiating a scope of work through to reporting results. Teams will work with clients on a significant issue the client's organization faces. Teams will be guided in their work by a professor who has worked as a consulting partner to make this all the more real an experience.

The class will be organized into project teams of two to four students each. Student teams will work together with a client organization in order to accomplish a project that will be described and selected during the first class. Insofar as possible, students will be given a choice of their project assignment, and should come prepared to the first class prepared to discuss their specific capabilities and interests.

The teamwork that is required will differ from other team experiences in that the projects typically drive serious strategic business decisions for the client but often involve much ambiguity. Considerable interaction will be required between the student teams and their client organization to assess opportunities and implementation capabilities. There will also be a need to collaborate with other teams to test your approach and develop information that will provide clients with something they do not have or know already, and that will be credible, trustworthy and of tangible commercial value.

Material covered in class during the quarter will be directly and systematically linked to the projects that are being performed. The explanation and rationale for the techniques and skills required to successfully manage the projects and client relationships will be developed sequentially. The few lectures in the course focus on topics relevant to the life cycle stage of any consulting engagement.

Client executives will be invited to class, their schedules permitting, to describe their products/services and industry, and to discuss informally their plans, objectives, activities and experiences, as well as the issues which affect the choices and decisions that have inspired their projects. This is a tremendous opportunity to interact with senior executives from a variety of local organizations and ideal for those near graduation! Some of the largest employers in the region have sponsored our consulting projects.

## **III. Project Descriptions**

Student teams will perform the research, analysis, and evaluation required to advise their clients on a project similar to those described below. Actual projects will depend on the contracting organization's requirements and may differ from the examples given.

- Develop a viable market strategy

This type of project would start with research of products in the marketplace and customer requirements/expectations. A market offering would be designed, including an analysis of its costs and potential pricing given, in the case of international initiatives, tariffs and other restrictions. Finally, a market strategy for the target market would be developed.

- Analyze a strategic opportunity

This type of project will involve investigation of alternatives for developing a new operating capability. Typically this would involve a cost-benefit analysis, including the triple bottom lines of economics, the community and the environment, framed within the organization's mission and values. The final report would conceivably include an assessment of the current market, operating model changes required, and how the operation would enable the organization to meet its goals.

- Creating an on-line market strategy

This type of project takes a narrower view of a specific channel and would examine challenges the company should anticipate with a new retail venture such as an omni-channel delivery model. Research would include current market size, experiences of others, distribution opportunities, online advertising and social media influence. This project would require gaining a holistic understanding of on-line retailing in regards to selling goods in the U.S. The final analysis would result in a go-to-market strategy for the company.

Please note that any of these projects could require significant change for an existing organization.

Also, projects may be used to satisfy International or Sustainability certificate requirements. Please see your adviser if this is desirable and have them contact the professor to ensure a proper project can be identified.

#### **IV. Reading**

Required: David Maister, et. al., *The Trusted Advisor* (ISBN 0-7432-1234-7)

Students might find the following (and other) texts of use during the term:

- Peter Bloch, *Flawless Consulting* (for contracting)
- William Bridges, *Managing Transitions* (for change management)
- Ric Merrifield, *re-think* (for re-engineering)
- Douglas Stone, et. al., *Difficult Conversations* (for team and client interactions)

## V. Grading

Grades will be based on the criteria below:

Component	Points
Signed Arrangement (Word - paper)	5
Statement of Work (Word – paper)	5
Task Plan (Excel – paper)	5
Issues Management (at least 5 client meetings)	10
Oral Client Presentation (PowerPoint – paper)	70
Final Client Report (Word – electronic and paper)	
Reflections (debrief discussion last class)	5
Peer Evaluation* (Word - paper)	+/-

An “A” will require 94 points, a “B” at least 82 points.

**\* Because these projects have such a high profile and are so important to both the client and Seattle University, your individual score on a peer evaluation can significantly impact the Oral and Written team scores. Be careful: a poor peer evaluation could severely impact your grade. This is designed to make sure team members work with a shared understanding of how they will provide value to the client and to minimize the potential for discouragement free-riders can cause.**

In all your work, students should keep in mind that “you only get one chance to make a first impression.” As a consequence, correct grammar and spelling are imperative in all consulting work products. The objective of your work is to provide your client with high quality work that their organization will find well thought out, practical and commercially useful, by providing them with information and insights that they do not already have. The grading criteria for each work product:

1) *Arrangement Letter* – defines client objectives and deliverables, the general approach to conducting the project, and documents the student understanding of client expectations. This needs to be approved by the professor before finalizing with the client. Both students and client sign the Arrangement Letter binding both to it. This sets the scope so there is a baseline to measure changes against.

2) *Statement of Work* – describes the client’s problem and outlines in more detail the work the students will do and the deliverables they will produce to accomplish the objectives set forth in the Arrangement Letter. In a professional consulting project, this would be included in the contract with the client and be legally binding (and a reason why consulting firms have Errors and Omissions insurance!). For this course, this is an intermediate work product and the result of your first significant client negotiation. This also needs to be approved by the professor before finalizing with the client.

3) *Task Plan* – defines the tasks required to complete the Statement of Work. Among its important features: the estimate of time required, assignment to individual team members, due dates, and deliverables. In developing the task plan consideration should be given to access to clients and their resources – in general meetings should be scheduled as far out as possible, at least a month in advance.

Normally tasks are defined to a level that the assigned student can complete it within one or two weeks (and no more). Hence, the Task Plan becomes a promise to complete specific work by a date certain. It is important in creating the Task Plan to give consideration to the level of effort required to ensure a fair allocation of work among team members. This is likely to become the basis for peer evaluations as you consider if teammates delivered work when and of the quality expected.

4) *Issues Management & Client Meetings* – are critical to the success of any project. Clients should never be surprised by deliverables and the most effective consultants engage clients at every step of a project. No consultant, regardless of how experienced, can know everything going on in an organization so conferring with clients is important for both knowledge transfer and to socialize findings/recommendations. As a rule of thumb, students should maintain an objective of “No Surprises” in their work.

5) *Oral Presentation* – is one of two key client deliverables. Presentations should be scheduled for one hour, including time for Q&A, and accommodate the client’s schedule. Presentations should be in PowerPoint (or comparable) format and are typically held at the client’s offices to allow other employees to attend. We will practice your presentations several times before you present to your client, and you can expect to receive feedback and guidance from the professor and your peers, much as you might from a partner and team members on a consulting project.

6) *Written Report* – is a formal and structured document of your research, conclusions, and suggestions for your client building off of the Arrangement Letter to address the client’s problem, **not** chronicle the work done. It is expected that these reports will be prepared carefully, thoroughly, and in a manner consistent with high academic and professional standards. They will be double spaced and at least 25 pages in length, with appropriate appendices and a bibliography of sources used. The report should be complete enough that your client can take commercial action based on your work. Teams should have confidence that their work is sound enough to withstand scrutiny of all client executives, including those who may not have participated in the project. This is real work intended to have real commercial relevance!

Tip: develop presentation materials (i.e., charts, graphs, etc.) first, then write your report.

## **VI. Who should Not Register for this Course**

Prior students cite this class as one of the most rewarding of their graduate studies. The work will test the commercial relevance of your academic work to date and many are surprised at their development and capabilities. It also constitutes a major achievement and potentially provides a reference for your resume.

But there is no getting around it, consulting is demanding work constrained by client objectives, schedules, anxieties, and the rhythm of their operations and other commitments. You should expect to meet with your clients at their place of business whenever possible and at times that

are mutually convenient – normally outside of regular course hours. This is important to both build your relationships with your clients and also to understand the operating context for issues and project objectives.

You will need to put in time outside class to complete your work – sometimes working alone and sometimes as a team. Not all time is likely to be fruitful and you may find you have done considerable research on an aspect of your project that your client is not interested in. You should be aware that every day and in every client interaction the consultant is being scrutinized and expected to add value. Successful consultants find this very energizing but it is also quite demanding, requiring careful preparation, being open to discovery, and poise.

If you anticipate your personal circumstances – at work or at home – will be unusually demanding during this quarter – i.e., with overtime, business travel, perhaps special family demands like a new child, planned vacation or major surgery – do not take this course at this time.

## VI. Class Schedule

Week	Activity
Week 1 26 September	<ol style="list-style-type: none"> <li>1. Introduction of class members (be prepared with 1 min on your skills and interests)</li> <li>2. Orientation and review of the syllabus</li> <li>3. Review project descriptions, guidelines and expectations</li> <li>4. Select projects, form teams</li> <li>5. Communication styles primer – how to listen for what your client wants</li> <li>6. Discuss characteristics of a good Arrangement Letter and Statement of Work</li> <li>7. Discuss what makes for a successful client relationship (re: Chapters 5 and 19)</li> </ol> <p>Homework: collect information on your client and develop preliminary hypotheses for your Statement of Work; read SU Student Guidelines for Consulting Projects; read chapters 5 and 19 in <i>The Trusted Advisor</i>; draft “SMART” questions for client</p>
Week 2 3 October	<p><b>Research Review Requests are due Friday (April 13) to Felipe Anaya</b></p> <ol style="list-style-type: none"> <li>1. Introduce clients and teams</li> <li>2. Review the course organization and milestones how projects typically fail</li> <li>3. Discuss how projects fails, including client consulting experiences (+ and -)</li> <li>4. Meet with clients to outline the Statement of Work and Arrangement Letter</li> </ol> <p>Homework: collect information available from your client; submit draft of Arrangement Letter and Statement of Work electronically to professor by Friday, 5 October; read chapters 4, 8 and 9 in <i>The Trusted Advisor</i>; and send research questions to SU Research Librarian, Felipe Anaya, by Friday, October 5</p>
Week 3 10 October	<p><b>Draft Arrangement Letters &amp; Statements of Work are due electronically to <a href="mailto:r.spencer@comcast.net">r.spencer@comcast.net</a> Friday, 5 October</b></p> <p><u>Class meets in LEML 369 tonight</u></p> <ol style="list-style-type: none"> <li>1. Business research and resources – guest lecture by SU Research Librarian, Felipe Anaya</li> <li>2. Team status meetings with class</li> <li>3. Work planning fundamentals</li> <li>4. Building trust relationships (re: chapters 4, 8 and 9)</li> </ol>

	Homework: finalize AL & SOW; prepare summary presentation on your task plan and status reporting approach; read chapters 3 and 7 in <i>The Trusted Advisor</i> , and project work
Week 4 17 October	<p><b>Signed AL &amp; SOW are due with Task Plan (bring hardcopy to class)</b></p> <ol style="list-style-type: none"> <li>1. Team status meetings with class</li> <li>2. Teams present their delivery strategy – 5 minutes each</li> <li>3. Discuss: Earning Trust and Sincerity or Technique (re: chapters 3 and 7)</li> <li>4. Adoption/Diffusion</li> </ol> <p>Homework: prepare a report outline; read chapters 16 and 22 in <i>The Trusted Advisor</i> and identify your client type; and project work</p>
Week 5 24 October	<ol style="list-style-type: none"> <li>1. Team status meetings with class</li> <li>2. Discuss Client Types and Quick Impact List to Gain Trust – how many items can you check off? (re: chapters 16 and 22)</li> <li>3. Having difficult conversations</li> <li>4. Change planning workshop</li> </ol> <p>Homework: get a tentative date and place for final presentation on 5 or 6 December; storyboard presentation and start preparing draft report; prepare Problem and Approach slides; and project work</p>
Week 6 31 October	<ol style="list-style-type: none"> <li>1. Team status meetings with class</li> <li>2. Rehearsal: Problem and Approach</li> <li>3. Active listening</li> <li>4. Vision</li> </ol> <p>Homework: prepare Findings slides and project work</p>
Week 7 7 November	<p><b>Schedule due for Client-site Presentations for 5 or 6 December</b></p> <ol style="list-style-type: none"> <li>1. Team status meetings with class</li> <li>2. Rehearsal: Major Findings</li> <li>3. Designing and managing intrapreneurial change</li> </ol> <p>Homework: complete draft report; prepare slides on recommendations; and project work</p>
Week 8 14 November	<p><b>Draft Report due – mandatory</b> (in Word, sent to professor at <a href="mailto:r.spencer@comcast.net">r.spencer@comcast.net</a>, not graded)</p> <ol style="list-style-type: none"> <li>1. Finalize schedule for client presentations for 5 or 6 December</li> <li>2. Team status meetings with class</li> <li>3. Rehearsal: Recommendations</li> </ol> <p>Homework: complete draft report; prepare slides on change implications (i.e., impact evaluation) and next steps; and project work</p>
Week 9 28 November	<ol style="list-style-type: none"> <li>1. Team status meetings with class</li> <li>2. Draft report feedback</li> <li>3. Rehearsal: Change Impact Evaluation and Next Steps; review of key messages</li> </ol> <p>Homework: final project work; complete presentation and report</p>
Week 10 5 or 6 December	<p><b>Oral Presentation and Final Report due – will be graded</b></p> <p>Team meets at client site or SU as scheduled for the client's convenience</p> <ol style="list-style-type: none"> <li>1. Oral Presentation (PowerPoint format or comparable, for projection)</li> <li>2. Final Report (Word format, hard and electronic copies for client and professor for the Project Center)</li> </ol>
Week 11 12 December	<p><b>Peer Evaluations due</b> (Word format, paper) – individual assignment</p> <ol style="list-style-type: none"> <li>1. Class presentation debrief – “What went well and what could have been better”</li> <li>2. Personal reflections on the course – “What I learned”</li> <li>3. The life of a consultant (travel, work/life balance, etc.)</li> </ol>

## VII. Course Policies:

- **No late submissions, no make-ups, and no late work will be accepted.**
- The ability function as a consultant requires an ability to control client expectations and respond to emergent situations. The professor is available before class or by phone to discuss questions or issues emerging for students in the class. Please call at least 24 hours prior to any requested discussion to reserve time.
- Students are expected to participate actively in class discussions much like they would on a consulting team. Your insights and interpretations are a critical part of your work as a consultant. As for class attendance, you are expected to attend all the sessions and come to class before it starts. Most classes will start with a discussion of emergent issues or concerns.
- There is no reason students should need to use computers during the class. It is important for consultants to be “in the moment” with their clients and colleagues! Likewise, Cell Phones and PDAs must be turned off before entering the classroom.
- Academic Honesty Policy: This course includes a team project and encourages cooperative learning. Still, students using work authored or created by others anywhere (including the Web) are expected to provide appropriate reference and credit. Failure to do so will be treated as academic dishonesty resulting in dismissal from the course.

## VIII. University Resources:

### Academic Resources:

- Library and Learning Commons (<http://www.seattleu.edu/learningcommons/>)  
(This includes: Learning Assistance Programs, Research [Library] Services, Writing Center, Math Lab)
- Academic Integrity Tutorial (found on Canvas and SU Online)

### Academic Policies on Registrar website (<https://www.seattleu.edu/redhawk-axis/academic-policies/>)

- Academic Integrity Policy
- Academic Grading Grievance Policy
- Professional Conduct Policy (only for those professional programs to which it applies)

### Notice for students concerning Disabilities

If you have, or think you may have, a disability (including an ‘invisible disability’ such as a learning disability, a chronic health problem, or a mental health condition) that interferes with your performance as a student in this class, you are encouraged to arrange support services and/or accommodations through Disabilities Services staff located in **Loyola 100, (206) 296-5740**. Disability-based adjustments to course expectations can be arranged only through this process.

### Office of Institutional Equity

Title IX of the Education Amendments of 1972 (Title IX) prohibits discrimination based on sex in educational programs or activities that receive Federal financial assistance. This prohibition includes sexual misconduct, which encompasses sexual harassment and sexual violence. Seattle U remains committed to providing a safe and equitable learning, living, and working environment. Seattle U offers emergency, medical, and other support resources, as well as assistance with safety and support measures, to community members who have experienced or been impacted by sexual misconduct.

Seattle U requires all faculty and staff to notify the University's Title IX Coordinator if they become aware of any incident of sexual misconduct experienced by a student.

For more information, please visit <https://www.seattleu.edu/equity/>. If you have any questions or concerns, you may also directly contact the Title IX Coordinator in the Office of Institutional Equity (email: [oi@seattleu.edu](mailto:oi@seattleu.edu); phone: 206.296.2824) University Resources and Policies