SEATTLE UNIVERSITY

## 2021 Spring Syllabus

# MGMT 5340: Business Consulting


***Professor:*** Robert Spencer, MUS

***Class:*** Online Synchronous on Tuesdays, 6:00 to 8:40 pm

***Office:*** By appointment via Zoom, https://seattleu.zoom.us/j/2052049360

***Phone:*** 206.605.8294

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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. The course is built around team projects that require analyzing economic, market and competitive forces that shape business strategy and performance. This advisory work is done working with a key leader or CEO.

The decisions your client will be considering, whether a business or nonprofit, 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 problems they face. 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 (whether online or in-person) with organization executives and staff, and participation in a commercially significant project on behalf of and in cooperation with a local area business or nonprofit organization.
- Provide a foundation for understanding the processes and practices of consulting to expand (or at least clarify) career options for the participating students.

- Expand for students their 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

This course is designed to give students a genuine consulting experience, from negotiating a scope of work through to the reporting results. Teams will work with clients on a significant organization issue or need. Teams will be guided in their work by a professor who has worked as a consulting partner to make this experience all the more real.

The class will be organized into project teams of two to five students each. Student teams will work together with a client organization in order to accomplish a project that will be described and selected prior to the first class. Insofar as possible, students will be given a choice of their project assignment but all projects have been curated for worthwhile consulting experiences.

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 and stakeholder 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 the second online session, 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 and/or most innovative 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 are still being developed and may differ from the examples below:

- **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. This might involve a cost-benefit analysis, including the triple bottom line of economic, community and environment considerations framed within the organization's mission and values. The final report would conceivably include an assessment of the current operating model and identification of changes required to meet the organization's goals.

- **Create an online 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 initiative 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 an understanding of online retailing for selling goods in the U.S. The final report would include a go-to-market strategy for the organization.

Please note that any of these projects could require significant change for an existing organization or special capabilities for a new entity.

Projects may be used to satisfy International or Entrepreneurship certificate requirements. Please see your adviser if this is desired and have them contact the professor to ensure you are mapped to a proper project.

## 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 that follow:

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

**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, a peer evaluation is used to encourage teams to maintain a shared understanding of the work requirements and discourage free riders. Be careful: <u>a poor peer evaluation could severely impact your grade</u>.**

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 <u>imperative</u> in all consulting work products. Your objective should be to provide your client with high quality work that their organization will find well thought out, practical and commercially useful, by providing them with <u>information and insights that they do not already have</u>. The grading criteria for work products:

1) *Arrangement Letter* – defines client objectives and deliverables, the general approach to conducting the project, and documents the consulting team's understanding of client expectations and a clear problem statement. This is signed by the professor and then the consulting team and client. This sets the project objectives and working conditions/terms.

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 the client signs off. This sets the scope so there is a baseline to measure changes against.

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 <u>and no more</u>. 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. This document organizes the team effort and should be updated as needed.

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 (45 minutes plus 15 for Q&A) and accommodate the client's schedule. These should be in PowerPoint (or comparable) format and be suitable for inclusion in a pitch deck. Presentations are ideally held to allow other employees to attend. We will practice presentations several times before presenting 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, **<u>not</u>** 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 <u>25</u> pages in length, with appropriate annotations, 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 product intended to have real commercial relevance!

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

## VI. Who should <u>Not</u> Register for this Course

Prior students cite this class as one of the most rewarding of their graduate programs. The work will test the commercial relevance of your academic work to date and many are surprised at the capabilities they have acquired. It constitutes a major achievement and potentially provides a reference for your resume. Comments from recent attendees:

- "This course is excellent but definitely very time demanding. I learned a lot in this course and I like that professor kept the momentum and expectations very high from the beginning which was essential for this course to be done effectively. Highly recommend this course."

- "A must have course. Learned a lot and applied a lot of my MBA learnings."

- "This is a great real-world course for students who (may or may not) want to pursue consulting as a career. The course gives opportunities for real research, analysis, insight synthesis, client interactions, teamwork, team building, presentation skill development and confidence growth."

- "Good class, will push you outside your comfort zone in all aspects."
- "I love the fact that we were able to help real organizations."

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 connect 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 in which your client has no interest. 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 can also be 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. If in doubt, contact the professor.

## VII. Class Schedule

| Week | Activity |
|---|---|
| Prework | 1. Review projects and return preferences to r.spencer@comcast.net<br>2. Review the course syllabus and other materials on Canvas<br>3. Review and sign the pdf Confidentiality Agreement |
| Week 1<br>30 March | **Signed Confidentiality Agreements due electronically on Canvas**<br><br>1. Technology orientation<br>2. Guest: Felipe Anaya on library resources for the projects<br>3. Introductions and course overview<br>4. Preview of the client e=welcome materials<br>5. How consulting is a different kind of work<br>6. Discuss Arrangement Letter and Statement of Work best practices<br>7. Status reporting fundamentals<br><br>Homework: prepare a status reporting template to review with your client next week; collect information on your client/client's industry and develop preliminary ideas for tasks in your Statement of Work to discuss with your client; draft "SMART" questions for client; and read SU Student Guidelines for Consulting Projects |

| Week | Activity |
|---|---|
| Week 2<br>6 April | Provide clients signed Confidentiality Agreements<br><br>1. Introduce clients and teams<br>2. Review the course organization and milestones<br>3. Discuss how projects fail, including client consulting experiences (+ and -)<br>4. Breakout to meet with clients to get input for the Statement of Work and Arrangement Letter<br>5. Debrief with professor on AL & SOW next steps<br><br>Homework: collect information available from your client; submit draft of Arrangement Letter and Statement of Work electronically to professor by Friday, 9 April; and read chapters 5 and 19 in *The Trusted Advisor* |
| Week 3<br>13 April | **Draft Arrangement Letters & Statements of Work are due electronically to r.spencer@comcast.net Friday, 16 April**<br><br>1. Guest: Felipe Anaya follow-up consultation on business research and resources<br>2. AL & SOW feedback<br>3. Team status reporting to class<br>4. Work planning fundamentals<br>5. Discuss what makes for a successful client relationship (re: Chapters 5 and 19)<br>6. Communication styles fundamentals<br><br>Homework: finalize AL & SOW; read chapters 16 and 22 in *The Trusted Advisor* to identify your client type and check off quick impact items your team is using; and project work |
| Week 4<br>20 April | **Signed AL & SOW are due to professor at r.spencer@comcast.net with Task Plans**<br><br>1. Work planning feedback<br>2. Team status reporting to class<br>3. Discuss client types and quick impact list to gain trust – how many items can you check off? (re: chapters 16 and 22)<br>4. Adoption/diffusion and change concepts<br><br>Homework: outline your presentation; prepare Problem and Approach slides; read chapters 4, 8 and 9 in *The Trusted Advisor;* and project work |
| Week 5<br>27 April | 1. Team status reporting to class<br>2. Discuss providing advice and the Trust Equation (re: chapters 4, 8 and 9)<br>3. Rehearsal 1: teams present their Problem and Approach (5 minutes)<br>4. Active listening<br>5. Vision fundamentals<br><br>Homework: get a tentative date and place for final presentation, ideally 2 June; prepare Findings slides; outline and start preparing draft report; read chapters 3 and 7 in *The Trusted Advisor*; and project work |
| Week 6<br>4 May | 1. Client feedback<br>2. Team status reporting to class<br>3. Rehearsal 2: Findings<br>4. Discuss earning trust and sincerity or technique (re: chapters 3 and 7)<br>5. Change planning<br><br>Homework: finalize presentation plans; complete your draft report; prepare Recommendations slides; and project work |

| Week | Activity |
|---|---|
| Week 7<br>11 May | **Schedule due for Client Presentations week of 2 June; Draft Report due – mandatory** (in Word sent to r.spencer@comcast.net - not graded)<br><br>1. Course navigation<br>2. Team status reporting to class<br>3. Valuing recommendations – applicable triple bottom line concepts<br>4. Rehearsal 3: Recommendations<br>5. Difficult conversations<br><br>Homework: prepare slides on implementation next steps; and project work |
| Week 8<br>18 May | 1. Finalize schedule for client presentations for week of 2 June<br>2. Draft report feedback<br>3. Team status reporting to class<br>4. Rehearsal 4: Implementation next steps<br>5. Planning change communications<br>6. Schedule professor consultations for week 9<br><br>Homework: complete draft final report; complete draft final presentation and prepare for delivery; identify any issues, questions, or concerns to discuss with the professor; and project work |
| Week 9<br>25 May | Scheduled project consultations with the professor<br><br>Homework: review your personal reflections to prepare for a discussion Week 10; complete preparations for final client meeting |
| Week 10<br>2 June | **Oral Presentation and Final Report due – will be graded**<br><br>Team meets at client site, SU or online as health guidelines permit and scheduled for the client's convenience<br>1. Oral Presentation (PowerPoint format or comparable, for projection and client)<br>2. Final Report (Word format, electronic copies for client and professor)<br><br>Homework: complete peer assessment of yourself and your teammates; review your personal reflections to prepare for a discussion Week 1 |
| Week 10<br>11 June | **Peer Evaluations due to professor at r.spencer@comcast.net; come prepared to share reflections and lessons learned**<br><br>1. Presentation debrief – "What went well and what could have been better"<br>2. Personal reflections on the course – "What I learned"<br>3. The life of a consultant (travel, work/life balance, etc.) |

## VIII. 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.

**IX. 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 https://www.seattleu.edu/academic-integrity/resources-for-students/
 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.

- **Notice Regarding Religious Accommodations**

It is the policy of Seattle University to reasonably accommodate students who, due to the observance of religious holidays, expect to be absent or endure a significant hardship during certain days of their academic course or program. Please see, Policy on Religious Accommodations for Students (https://www.seattleu.edu/media/policies/Policy-onReligious-Accommodations-for-Students---FINAL.PDF).

- **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**: oie@seattleu.edu; **phone**: 206.296.2824) University Resources and Policies.