UNIVERSITY OF SAN FRANCISCO

CHANGE THE WORLD FROM HERE

MGEM 5115 – U.S. Consulting
SYLLABUS - Summer 2015

Class: Mondays, 1:15 – 4:30pm, Room 527, (101 Howard), May 18th – August 10th
There is no class on May 25th (Memorial Weekend) - There will be make up classes on Wednesday, May 20th and May 27th from 10am to 1pm.

Office Hours: Mondays, 4:30 - 5:15 or alternate times by appointment.

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Course Outline and Philosophy:

This course is designed to be an experiential orientation to consulting industry methods and practices. Through classroom activities, real world projects with a diverse group of actual clients, sharing of best practices, and both team and individual deliverables, students will have not only an academic appreciation of the subject matter, but actual practical experience with designing, executing, and delivering value in a company consulting setting. This course is designed to develop students' analytical, problem solving, project management, teamwork, and communications skills in a real world context involving senior client executives and a current issue critical to the success of that organization.

In addition to classroom instruction, students have been divided into teams and matched with a local client organization to work on a specific set of deliverables. The goal of this class is to have the student consultants, as coached by each other and the instructional team, deliver a **superb project that meets and exceeds client expectations**. The additional goal of this class is for the students to learn how to build and manage a professional relationship with members of the business community. This is, therefore, a very important course for not only better understanding how to perform within a professional business environment, but also in building your network, work experience, and pool of future references.

Learning Objectives:

This course is designed for two primary purposes:

- For students to have a high quality experience in a real world consulting environment.
- For companies to interact with student teams in order to help address a critical need facing their organization.

Throughout the course, you will:

- Understand the consulting industry, best practices, frameworks, methods, techniques, tools, and skill sets, including:
  - Project scoping
  - Work planning
  - Data driven research, analysis, and problem solving
  - Client management
  - Storylines
  - Team effectiveness
  - Effective communication
  - Meeting management
- Design a deliverables-based consulting engagement with a client.
- Execute the consulting project plan to deliver value and results over a two-month timeframe.
- Work individually and in teams to meet stated objectives.
- Incorporate and meet self-established deadlines in coordination with class and client timelines.
- Improve written, verbal, and presentation communication skills to convey complex ideas in a compelling way.
- Interact with senior executives in the consulting, private, nonprofit, and academic sectors.

Meeting Times:

The class meets Monday afternoons from 1:15-4:30 at 101 Howard Street, room 527, unless other arrangements have been announced in advance. **Class attendance is crucial given that you will be presenting the progress of your consulting assignment each week.** If you miss more than two classes, you will automatically fail the course. Any absences must be excused in advance of class with prior instructor consent. Medical or family emergencies must have proper documentation. Outside of class times, student teams are expected to meet Wednesdays and Fridays at the company site or at USF to work on their consulting projects. In total, our mutual clients expect that the teams are spending approximately 40 hours per week, collectively, on the consulting projects, including class and client meeting time.

Consulting Groups:

You will be assigned to a consulting group by the teaching team based on the interests, strengths, and skill-set you indicated in the pre-course survey. If you would prefer to work on a team with a different client, you will have one week after the first day of class to seek permission from the instructor to switch clients. The first meeting with the client is during Class 1, Orientation, May 18th.

Required Class Materials:

Books:

- *Good to Great and the Social Sectors: A Monograph to Accompany Good to Great By Jim Collins (available in e-book form through Kindle, and in hard copy new and used from Amazon)*
- *Flawless Consulting: A Guide to Getting Your Expertise Used by Peter Block (available in e-book form through Kindle)*
- *Cases: You have a series of cases and readings through Harvard Study.net.* https://cb.hbsp.harvard.edu/cbmp/access/37235094

You need to register on the site to create a user name if you do not already have one. After you register, you can get to the coursepack at any time by doing the following:
1. Visit **hbsp.harvard.edu** and log in.
2. Click **My Coursepacks**, and then click https://cb.hbsp.harvard.edu/cbmp/access/27014974.

Grading Requirements and Procedures:

The breakdown of each student's final grade will be as follows:

10 % Project scope (proposal and work plan)
20 % Mid-term presentation
40 % Final Presentation
15 % Class participation
15 % Quizzes

- **Class Participation (15%)** You are expected to come to class each week prepared to be an active learner and contributor who can engage with the class and help to advance the class discussion, which means: having made progress each week on your consulting project, being prepared to present to the class (we suggest rotating the presenter so that each team member has an opportunity to boost his or her participation score); complete the readings, and analyze the cases. The best way to prepare for each class is to do the readings well in advance. Since this class is discussion driven, attendance is required and there is no “make-up” work for missed classes. Any student missing more than two (2) classes for any reason will receive a failing grade.

Participation extends to active listening to your peers and the lecture. Please silence your cell phones prior to entering the classroom. **During class, please close your computer and do not text or email; if you must communicate with someone outside of the classroom, you can leave the classroom and return when you are done.**

In addition, students will present the reading assignments to the class each week and help lead the associated discussion. These presentations can be done individually or in groups, but each student will give a minimum of one presentation during the semester.

- **Quizzes (15%)** You will be given four pop quizzes throughout the class, unannounced, based on the readings and cases. There will be no make-up quizzes administered unless your absence is excused through a medical note or family emergency.

<u>**Assignments:**</u>

- **Project scope and work plan (10%)** Your team will prepare a “**proposal**” to be approved by the client detailing the issue(s) to be addressed, the methodology to be employed, the timeline of the project, the deliverables/results to be achieved, and the composition of the consulting team, as well as what is expected of the client. Projects might include market research, new product/market feasibility studies, and other elements. In addition, an internal “**project work plan**” detailing how the team will accomplish its objectives is required, complete with assignment of responsibilities within the team and deadline dates.

- **Mid-term presentation (20%)** Your group will be expected to lead an interactive discussion with the client based on a 10 -15 minute PowerPoint presentation covering the “problem analysis and preliminary findings” of your work with your client to date, which will be an in-depth view of the problem you are working on, preliminary findings, and proposed next steps. What tools and frameworks have you used to approach the problem? What issues have you dealt with? What are you trying to accomplish? What are your preliminary conclusions?

  In addition to the presentation, you will be asked to submit a 3–5 page paper outlining the problem analysis and preliminary findings. The paper should include appendices and exhibits. The presentation and paper are due on Sunday, June 21st at 11:59pm. The in-class presentations will occur on Monday, June 22rd and should be scheduled by the student team with clients on Wednesday, June 24th, Friday, June 26th, or another agreeable date at either USF or the client site.

- **Final presentation (40%)** Your team will lead an interactive 30-40 minute presentation of your completed work and analysis with the client. The presentation should be in PowerPoint and will draw on themes learned in class. Also, you will turn in a 10–15 page final report with appendices and exhibits. The presentation and paper are due on Sunday, August 9th, at 11:59 p.m. The in-class final presentations will occur Monday, August 10th and final presentations with clients should be scheduled by the student teams after that date at USF or the client site. Full business attire and complete professionalism are expected in these final presentations.

Your grade will include client feedback and a peer review. We will take into consideration how your peers and clients judge your group's presentations and interactions, as well as how each of you individually perform, in a confidential survey that will be given to team members.

Guest Speakers:

Occasionally, guests will be invited to provide information concerning their particular consulting expertise, their type of practice, their firms, or particular issues in the world of consulting. Invited guest speakers are subject to change based on travel schedules. These will be updated throughout the semester.

Detailed Weekly Syllabus:

May 18th 2015 - 1st Class – 1.15pm to 4.30pm
Getting Started: Project Kickoff Meeting With Client Teams

Topics:
- Getting the question right
- Understanding who the client is
- Nonprofit vs. for profit structure
- Setting expectations
- Internal and external focus
- Proposal writing
- Work plan

Introducing the clients (second part of class – 3pm – 4.30pm):
- Introduction of consulting clients
- Break into teams, move to breakout rooms
- Discuss initial project topics, deliverables, timeline, meeting schedule (weekly check-ins suggested) with assigned student team lead guiding the conversation
- Gather relevant data to begin project and draft proposal.

Deliverables:
- Come with an understanding of your client and the industry they are in
- Come with specific questions to ask in order to prepare your project scope
- Be prepared to explain who you are and why you are here

Pre-reads:
- Project proposal template as provided via email to your team and the team leader
- Read Chapter 1, Flawless Consulting (FC)
- MBAs Gone Wild: http://www.ssireview.org/articles/entry/mbas_gone_wild/ (available through library access).
- Know Your Sector video: http://www.youtube.com/watch?v=0myNj8BHt_4

Career Service Workshops

May 20th 2015 – 1st Workshop Class – 10am to 12am
Career Services Overview and LinkedIn Lab

- Review of Career Services tools - 45 minutes
- LinkedIn Training and Hands-on Lab - 1 hour

- Advising Sign Up Instructions (optional) & Next Steps - 15 minutes

From 12am to 1 pm you will be taking Professional LinkedIn Picture
(Please come prepare by wearing appropriate clothing)

May 27th 2015 - 2nd Workshop Class – 10am to 12pm
Resumes & Interviewing Techniques

- Resume Tips - 1 hour
- Interviewing Tips - 45 hour
- Next Steps & Q&A - 15 minutes

May 27th 2015 – 2nd class – 12pm to 1pm
Getting Started – Proposal and Work Product

Topics:
- Review the draft proposal
- Touch base on project progress

Deliverables:
- Draft project proposal (bring to class). Work in class, in teams.

Discussion prep:
- What did you learn from the meeting with the client (team presentations)?
- What will success look like in this project (student, team, client)?
- What are our hypotheses going into this project, and how will we test them?
- What are the skill sets and interests of our team members?

June 1st 2015 - 3rd Class
Data Gathering & Analysis
Special Topic: Consulting for the Social Sector

Topics:
- Project mapping and planning
- Stakeholder identification and interview methodology
- Peer organization research and analysis
- The concept of "n="
- Best and "next" practices, lessons learned
- Market and industry research
- Ecosystem analysis

- Comparative advantage (“hedgehog,” “special sauce”)
- Partnerships

Deliverables:

- Final project proposal (due into Canvas, June 1st, 10:00 a.m.)
    - Present proposal
    - Present draft project work plan

Pre-read:

- Good to Great and The Social Sectors: A Monograph to Accompany Good to Great, by Jim Collins
- Read Chapters 2-4, Flawless Consulting (FC)
- Impact Makers (HBS Coursepack)
- McKinsey & Company: An Institution at the Crossroads (HBS Coursepack)

Discussion Questions:

- What are we going to accomplish for/with our client (team presentations)?
- What do we need to know that we don’t know now?
- How will we best get that information?
- Once we get the information (data), how will we know what it means (analysis)?
- Who will do what when (team contract)?

June 8th 2015 - 4th Class
Individual and Team Work Stream Management

Topics:

- Ends orientation vs. process management (results vs. buy in)
- Accountability
- Responsiveness
- Minimum Viable Product (MVP)
- Iteration

Deliverables:

- Final project work plan (present in class)

Pre-read:

- Read Chapters 9-12, Flawless Consulting (FC)
- Developing Professionals the BCG Way (A). (HBS Coursepack)
- Why the Lean Startup Changes Everything by Steve Blank (HBS Coursepack)

- Presentations 101 (HBS CoursePack)
- Schaffer&Combs startup webinar: 6 Tips to Succeed When Working at a Fast Growth Startup www.schaffercombs.com

Discussion prep:
- How are we going to get this project done (team presentations)?
- What lessons were learned from the team management part of the Barcelona projects?

June 15th 2015 - 5th Class
Tools, Frameworks, & Synthesis

Topics:
- Models used to analyze clients
- Impact framework: inputs=>outputs=>outcomes=>impact
- Looking for patterns within the data
- Conveying insight through visuals and PowerPoint presentations
- Elegant and compelling communication
- Tools of the trade (Venn diagram, SWOT, SMART, 2x2 matrix, flow chart, strategies vs. tactics, etc.)

Deliverables:
- Draft mid-term presentation (progress review storyline)
- Scheduled meeting with client and professor for mid-term presentation

Pre-read:
- Consulting is More Than Giving Advice (HBS Coursepack)
- Schaffer&Combs strategy webinar: www.schaffercombs.com
- Presentation template/example

Discussion prep:
- What are our preliminary findings (team presentations)?
- Are we ready for the client review session?
- What are our goals for the client review and what tactics will we use to achieve them?
- What are our next steps?
- How do we expect the client to respond?

June 22nd 2015 - 6th Class
(Presentations & paper due into Canvas at 11:59pm on June 21st)
Mid-term Presentations and Feedback

July 6th 2015 - 7th Class
Leadership & Handling Resistance

Topics:

- Authority vs. influence
- Challenges and opportunities of working in teams
- Overcoming resistance and inertia
- What will be different going forward

Deliverables:

- Revised project work plan

Pre-read:

- Read Chapter 5-8, Flawless Consulting (FC)
- When Clients and Consultants Clash, by Idalene Kesner and Sally Fowler (HBS Coursepack)
- Managing Client Conflict (HBS Course Pack)

Discussion prep:

- What did we learn from the client review session (team presentations)?
- What will we do differently as a result of client feedback?
- Are we on track to achieve our objectives (student, team, client)?

July 13th 2015 - 8th Class
Ethics & Performance

Topics:

- Managing sticky situations
- Giving the “right’ advice
- Being bold, courage, and telling truth to power

Deliverables:

- Come to class prepared to discuss and ethical dilemma you have faced in a business or consulting context

Pre-read:

- Read Chapters 17-18, Flawless Consulting (FC)
- Sherif Mitayas at A.T. Kearney: Negotiating a Client Service Predicament Cases A, B, C & D (HBS Coursepack)

Discussion prep:

- How do you give difficult answers to a client?

July 20th 2015 - 9th Class
Consulting as a Career

Topics:

- Strategic planning
- Marketing/Social media
- Communications
- Technology
- Career paths
- Lifestyle
- Required skills

Deliverables: *none*

Pre-read:

- Bain & Co., Inc.: Making Partner (HBS CoursePack)
- Slideshare: The McKinsey Way http://www.slideshare.net/drpalan/the-mc-kinsey-way-2556611

Discussion prep:

- Is consulting something that you're contemplating as a career?

July 27th - 10th Class
Implementation

Topics:

- Involving clients in the process
- Moving from analysis to implementation
- How to get there from here

Deliverables:

- Draft final presentation storyline
- Scheduled meeting with client and professor for final presentation

Pre-read:

- Read Chapter 16, Flawless Consulting (FC)
- Lost Opportunities: Discovering the Path to Consistent Performance (HBS Coursepack)

Discussion prep:

- What capabilities are essential to implementing our emerging recommendations?
- Does our client have these capabilities, and if not how will they acquire them?

August 3rd 2015 - 11th Class
Preparing a Compelling Presentation

Topics:

- Storyline & format
- What to include/not include

Deliverables:

- Draft final presentation

Pre-read:

- Read Chapter 13 – 15, 19, Flawless Consulting (FC)
- Four Truths of the Storyteller (HBS Coursepack)
- Presentation templates/examples
- Guy Kawasaki "10-20-30 Rule" blog: http://blog.guykawasaki.com/2005/12/the_102030_rule.html

Discussion prep:

- What will be different from the mid-term presentation (team presentations)?
- Does our presentation give the client what they asked for?
- What questions can we expect?
- What will happen next?

August 10th 2015 - 12th Class

(Presentations & paper due into Canvas at 11:59pm on August 9th)

Final Presentations & Final Class!

About the Professor:

James Lee is currently Managing Partner at the consulting firm Schaffer&Combs (www.schaffercombs.com). He has a deep background in both the nonprofit and business communities, having led innovative for-profit and non-profit organizations, built a business as a private sector entrepreneur, and developed strategy, programs, and organizations as a senior executive, board member, and consultant.

Prior to joining Schaffer&Combs, James worked in the charter school education sector, helping both KIPP and Leadership Public Schools in a strategic fundraising capacity. Previously, James helped lead The BizWorld Foundation as its Vice President Programs and was with The Junior Statesmen Foundation, where he served as a board member, Program Director, and Director of Alumni Relations and Development.

A graduate of Princeton University, James began his career at McKinsey & Company and then ran his own multi-million dollar business. James is also a cofounder of Knowmia, an award-winning Y Combinator education technology company, and is an active member of the Full Circle Fund, a venture philanthropy organization. He also serves as a board member for a variety of Bay Area organizations.

Honor Code:

University of San Francisco is a community dedicated to academic excellence, student-centered education, and the Jesuit traditions. As such, the University expects all members of its community to act with honesty and integrity at all times, especially in their academic work. Academic honesty respects the intellectual and creative work of others, flows from dedication to and pride in performing one's own best work, and is essential if true learning is to take place. Examples of academic dishonesty include, but are not limited to, the following: all acts of cheating on assignments or examinations, or facilitating other students' cheating; plagiarism; fabrication of data, including the use of false citations; improper use of non-print media; unauthorized access to computer accounts or files or other privileged information; and improper use of internet sites and resources.

Policy Review:

1. **Academic Integrity:** Learning is both an individual and a cooperative undertaking. Asking for and giving help freely in all *appropriate* setting helps you to learn. You should represent only your own work as your own. *Personal integrity* is the basis for intellectual and academic

integrity. Academic integrity is the basis for academic freedom and the University's position of influence and trust in our society. University and school rules and standards define and prohibit "academic misconduct" by all members of the academic community including students. You are asked and expected to be familiar with these standards and to abide by them.

2. **Course Grade:** The completion of ***each*** of the requirements stated above represents the ***minimum performance*** required to pass this course. The quality of the work done to meet ***each*** of the course requirements specified will determine the specific grade earned. Any assignments not completed will result in a failing grade for the course. Assignments will not be accepted for credit until any previous assignments have been completed. For each day the assignment is late, a half grade deduction will be made; the first deduction begins if the assignment is late on the day that it is due (past the time deadline).

3. **Grades:** Grades will be available on Canvas. Grades reflect careful consideration of student performance and will not be changed unless a recording or calculation error is revealed. It is your responsibility to monitor your grades in Canvas and provide immediate feedback in the case of any discrepancy. Guidelines for grades are as follows:

A	Significantly exceeds expectations (100-90%)
B+	Consistently, fully and adequately meets expectations (89-80%)
B	Meets Expectations (79-70%)
C+	Minimally meets expectations (69-60%)
C	Does not meet expectations (59-50%)

4. **Disability Disclosure Statement:** SPECIAL ACCOMODATIONS – Any student who currently has a documented disability (physical, learning, or psychological) needing academic accommodations should contact the student disability office.

5. **Classroom Behavior:** Students are expected to be respectful of one another and the professor in classroom discussions. The goal is to foster a safe learning environment where students feel comfortable discussing concepts and applying them in class.

6. **Cell phones**: Cell phone usage and texting are not permitted during class, and you will be asked to leave the class if you continue to use your cell phone during class.