BUSADM 3630 – Consulting Industry Cluster

Course Syllabus, Spring, 2017 v4

Fisher College of Business

The Ohio State University

Professor Information	Course information	Office Hours
Dr. Mark Sullivan	Thursday, #3632: 3:15-5:15pm	Monday: 2:30 – 4:00 pm
313 Fisher Hall	Fisher Hall - 800	Thursday: 1:30 – 3:00 pm
Email: sullivan.956@osu.edu	Thursday, #3632: 5:30-7:30pm	Or by appointment
	Fisher Hall - 800	

Teaching Assistant:

Eric Vinson: vinson.49@osu.edu

Course Description: Spring – Part II

The overall objective of this year-long, two-part course series in the *Consulting Industry Cluster* is to familiarize the consulting student with a working understanding of the consulting role, client engagement process, solution development and presentation techniques -- and its applicability in a diverse client business environment for any industry (i.e. commercial, health care, higher education, non-profit, military, family business, government, etc.). The Autumn track particularly focuses on consulting and client engagement with an emphasis on linking value to stakeholder needs. The Spring track, utilizes a cap-stone, signature project engagement crafted to address a real opportunity, aimed at growing organizational capability in a meaningful fashion.

The Spring curriculum is an action-based, experiential learning approach working with sponsors, stakeholders, customers, employees and managers in varied roles with varied interests and capabilities. The 10-12 week project is embedded in a broad range of organizations within the central and southern OH region. Student consultants will collaborate with client organizations on best ways to work (i.e. frequency of on-site versus remote); as well as developing a charter, work-plan / schedule, set of deliverables, interim and summary report with options and recommendations to be presented to their client leadership.

Regardless of setting, the learning will focus on identifying and analyzing organizational problems; developing and implementing relevant information-gathering mechanisms; and creating options and recommendations to address desired value. Specifically, the more finite project management requirements to apply in the consulting engagement include:
- **Problem Statement:** *Understanding, developing, and framing the real problem*
- **Issue Diagnostic:** *Decomposing key questions in separate lines of inquiry; Developing an issue tree*
- **Storyboard:** *Developing a logical flow for arguments; Beginning with the end in mind*
- **Workplan:** *Creating a plan with key milestones, task, timeline, risk factors and progress indicators*
- **Interviews:** *Gathering research from primary and secondary sources*

- **Insight:** *Synthesizing and creating insights from data; Developing a story*
- **Qualitative Insights:** *Presenting data and themes to address interaction effects or tacit but significant trends*
- **Quantitative Insights:** *Presenting data and insights visually: tables, graphs, charts*
- **Storyselling:** *Crafting key messages and themes in a compelling storyboard fashion*
- **Tools & Templates:** *Use of problem statement worksheet, issue diagnostic template, storyboard template, work plan template, interview guide template, synthesized interview notes template*

The Spring Track continues with an exploration on how best to identify, align or address organizational mandates, competing interests, cultural norms, resource constraints, process grid-lock and/or change dynamics with client interests. The focus is on thinking clearly, simply and thoughtfully to address issues. This will involve teams crafting a meaningful solution path that addresses the client opportunity through a set of actionable recommendations (for potential near term implementation).

The course is structured into student consulting business teams. Each of the ten teams will meet with their client organization every week for 1-2 hours. Additionally, the teams will meet Thursday afternoon/evening class for two hours (i.e. either in the Thurs 3:15-5:15pm class or in the 5:30-7:30pm class). Weekly classes will dedicate a large portion of their class time to working on their project. However, 20-30 minutes of each two-hour class also will focus on relevant best practice content and discussion from the assigned Project Management Tool-kit. Additionally, teams on occasion will need to meet for additional work sessions to address deadlines for either their interim and/or final summary report to their client.

Finally, it is each of the ten individual team leads and team members that are responsible for the relationship, value delivery and satisfaction of the client. The Professor's role is to create and guide the learning experience; the student's role is to observe, engage, develop, adjust, deliver and learn from each other and the client. Eighty percent of the grade is based on the project. Twenty percent is based on class participation.

Learning Objectives:

1. To develop the capacity to identify presenting and underlying problems in varied direct/in-direct forms, levels and locations. To craft a problem statement; and shape a related value proposition, solution path and set of actionable recommendations.
2. To gain a clear understanding of strategic ways to use project management best practices to address a broad range of client issues and opportunities for effective execution.
3. To identify and manage expectations of clients, team members and course faculty at the beginning, middle and end of the project. Understand client engagement, relationship management and communication strategies.
4. To address (individual, team and organizational) conflict and operating constraints in a constructive manner.
5. Build functional ability to conduct applied research and select business analytic tools for addressing options for clients (i.e. root cause and data analysis).
6. Understand and practice analytical skills and methods as applied in a variety of organizational challenges
7. Be educated and skilled on the critical nature of proposal presentation and delivery techniques and approaches for multiple levels and types of clients
8. To develop enough experience and insight to be able to reflect on readiness and interest level of being a professional consultant or position in a related capacity (e.g. internal service consultant, internal functional generalist, or OD/ Organizational Development specialist, involved in cross-boundary work)

Required Materials: (Can be purchased at OSU Campus Barnes & Nobles for roughly $85.00 in total)

▪ Lang, Julie and Florentino, Amy. (2010) *__Guide to Consulting Project Management__**. Hanover, NH: Tuck School of Business at Dartmouth University

▪ ISBN #9781633690783: 20 Minute Manager. (2016) *Difficult Conversations*. Boston, MA: Harvard Business Review Press

▪ ISBN #9780814437360: Heagney, Joseph. (2016) *Fundamentals of Project Management*. (Fifth Edition) New York, NY: American Management Association

▪ ISBN #9780749475833: Young, L Trevor. (2016) *Successful Project Management*. (Fifth Edition) Philidelphia, PA: Kogan Page

* How to purchase your *__Guide to Consulting Project Management__* for BUSADM 3632 – sections 4824, 4942, 33777, and 33778:
The access to the course material (*Guide to Consulting Project Management)* is available through Barnes & Noble - The Ohio State University Bookstore website only. Please visit the Bookstore website at http://ohiostate.bncollege.com, click on the *Textbook* tab and then on the *Find Textbooks* link. Select BUSADM 3632 and your section and proceed with purchasing your Project Management Guide. Please select Pick up in Store as your delivery method even though the course materials will be distributed to you in class. You will receive an initial confirmation that we have received your order….this is not your receipt. As soon as the bookstore processes your payment, you will receive an emailed receipt. Please forward a copy of your receipt to me via email at Sullivan.956@osu.edu. Please send email under the name of "Consulting PM Guide Reciept".As soon as all students have completed their purchases, I will post the materials to Carmen. In the mean time, I will post the first two chapters on Carmen-Canvas so that you can immediately get started in the reading.

Supplemental Material: (For reference as needed – last semester's book listed below)

▪ Block, P. (2016) *Flawless Consulting: A Guide To Getting Your Expertise Used* (Third Edition), San Francisco: Pfeiffer

Course Expectations:

Each of us is responsible for the success of this class. I have designed the course to maximize learning and I am committed to creating a positive learning environment in both the classroom and project-site. What you get out of the course is, however, ultimately up to you the consulting student. Therefore, regular class attendance and project investment throughout the semester is critical. Keep up with the readings. Engage in regular reflection and engagement in the project and classroom. Apply the course material to your own experiences. Come ready for class. Be prepared for your client meetings and debriefs.

Also, I fully expect a high level of courtesy and professionalism in the classroom and at any project-site. As an aside, if you come in late to class or off-site meetings be sure that you do so in a way that does not distract your peers or guests. If you don't want to be in class, don't be in class. **When you're here, be <u>here</u>**. Discussions in class and in project team meetings can only be fueled by those individuals that are ready to ask relevant questions, provide feedback (objective, on topic, connective) and influence/defend their positions with logic and facts – just as you will have to do in a corporate environment.

In summary, this course is for your benefit and development and you will get the most out of the course (and ultimately be most successful) by making it relevant to your own life situation. If we both do our parts, this course will make a difference for you and be a positive learning experience for all of us

Grading:

*Individual Class Participation – 20%
*Interim Team Project Client Report and Final Summary Team Project Client Report – 80%

Attendance Policy:

Students are expected to attend all consulting cluster activities, project team meetings and classes. Remember missing schedules calls, classes and meetings translates to missing hard to replicate insights and knowledge, which are essential to master for consulting. Missing the interactive behavioral dimensions are impossible to make up. However, you are allowed one "free" pass. All other absences will be excused only in the case of health problems (doctor's note required) or significant life events (e.g. death in the family). Unexcused absence will result in reduction of points from the final course grade.

Cell phone use:

Demonstrating good judgment in when and why to use your cell phone is required. Cell phone usage prevents full in-classroom and client engagement and focus, and is an overall distraction. During breaks or outside of classroom/client meetings, there is no problem on use of phones. Excessive/distracted use of a cell phone, will lead to reduced class participation points.

Screen Use:

Screens of any kind is allowed in the classroom for class and project - related activities …. ONLY (taking notes, charting, project slides, etc.). You may occasionally be asked to post your work, client reports or related material to a Canvas drop box for instructor review.

Class Participation:

Given that class participation is 20% of the overall grade, each student should be fully prepared each week for whatever is asked of them: The weekly classroom topics and content on project management and engagement best practices will be thought provoking; but bringing all this "to life and reality" can only come from having candid, detailed dialogues and readily sharing viewpoints and perspectives.

Participation does not mean you need to be the dominant force in the classroom, but it does mean that you need to come prepared with the right "mindset" to add value and thought leadership during each conversation to maximize the groups and your personal learning experience. You should come prepared with a series of well thought through key points you would like to make based upon the dynamics and flow of the classroom dialogue…or observations and experiences from your project.

Over time, it is expected you will stretch in new ways in demonstrating thoughtful questions, summarizing experiences and observations, spontaneously addressing challenging scenarios in a thoughtful manner, engaging constructively in group and team dialogue. The intent is to grow your capacity to "think-on-your-feet"; to quietly listen and observe; to quickly analyze for patterns and practices - for meaningful information and insight; to authentically support and challenge others for individual and collective benefit.

Academic Integrity:

This is an important area that is taken seriously by me and hopefully by you. Without personal and academic integrity there is little we can be proud of as an individual or as an institution. The Ohio State University and the Committee on Academic Misconduct (COAM) expect that all students have read and understand the University's Code of Student Conduct, and that all students will complete all academic and scholarly assignments with fairness and honesty. Students must recognize that failure to follow the rules and guidelines established in the University's Code of Student Conduct and this syllabus may constitute "Academic Misconduct."

The Ohio State University's Code of Student Conduct (Section 3335-23-04) defines academic misconduct as: "Any activity that tends to compromise the academic integrity of the University, or subvert the educational process." Examples of academic misconduct include (but are not limited to) *plagiarism, collusion* (unauthorized collaboration), *copying the work of another student, submitting the same or similar work for credit in more than one class, and possession of unauthorized materials during an examination.* Ignorance of the University's Code of Student Conduct is never considered an "excuse" for academic misconduct, so you need to review the Code of Student Conduct and, specifically, the sections dealing with academic misconduct.
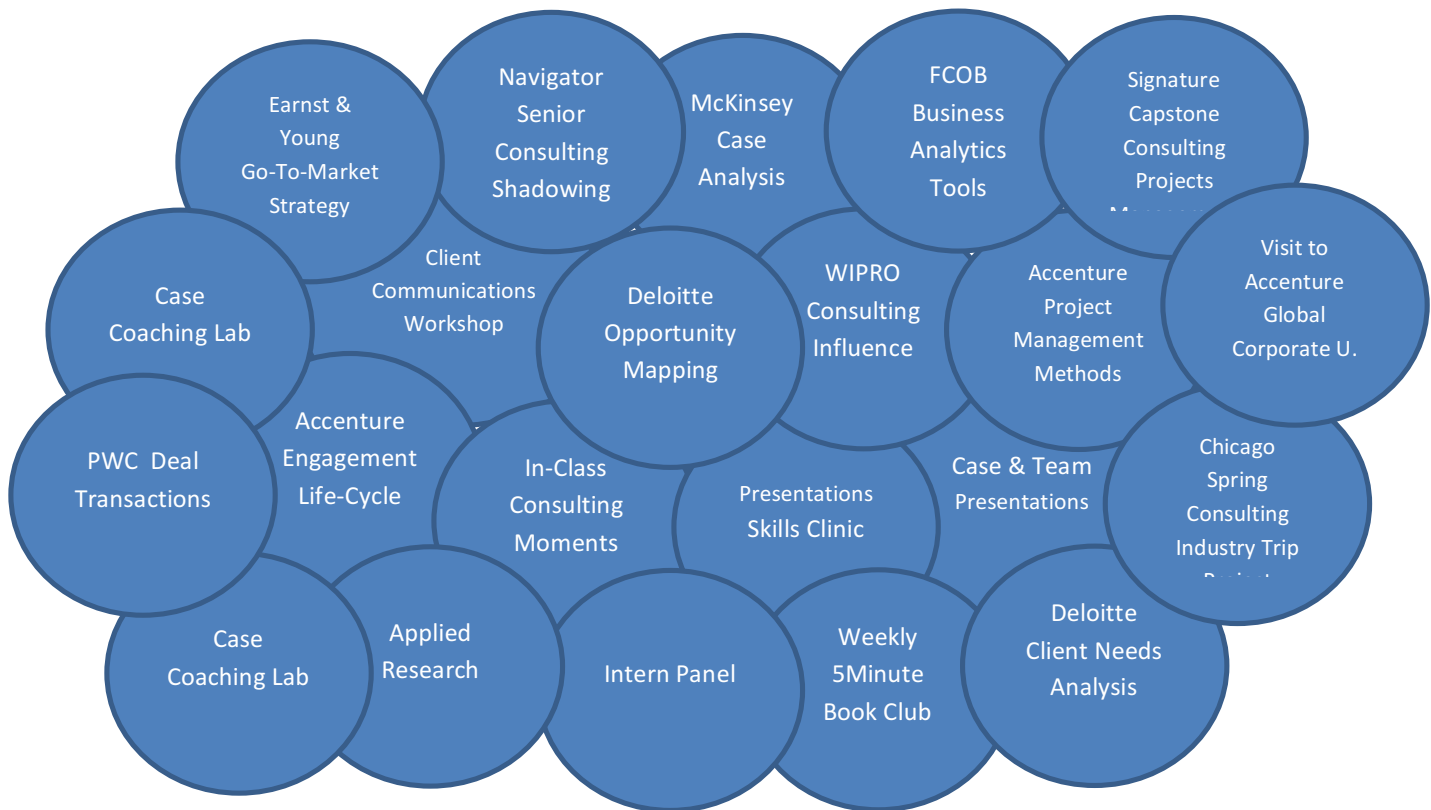
If I suspect that a student has committed academic misconduct in this course, I am obligated by University Rules to report my suspicions to COAM. If COAM determines that you have violated the University's Code of Student Conduct (i.e., committed academic misconduct), the sanctions for the misconduct in this class could include a failing grade for the course, disciplinary probation, suspension or dismissal from the University. If you have any questions about the above policy or what constitutes academic misconduct in this course, please contact me or review the Code of Student Conduct http://studentlife.osu.edu/csc/." Please do not even think of testing me or your fellow colleagues on the seriousness of the Code and the consequences thereof.

Disability Services:

"Students with disabilities that have been certified by the Office for Disability Services will be appropriately accommodated and should inform the instructor as soon as possible of their needs. The Office for Disability Services is located in 150 Pomerene Hall, 1760 Neil Avenue; telephone 292-3307, TDD 292-0901; http://www.ods.ohio-state.edu/."

Key Elements to the OSU Fisher Student Consulting Industry Cluster

(Activities and Experiences Include Fall and Spring Semester)

- Earnst & Young Go-To-Market Strategy
- Navigator Senior Consulting Shadowing
- McKinsey Case Analysis
- FCOB Business Analytics Tools
- Signature Capstone Consulting Projects
- Case Coaching Lab
- Client Communications Workshop
- Deloitte Opportunity Mapping
- WIPRO Consulting Influence
- Accenture Project Management Methods
- Visit to Accenture Global Corporate U.
- PWC Deal Transactions
- Accenture Engagement Life-Cycle
- In-Class Consulting Moments
- Presentations Skills Clinic
- Case & Team Presentations
- Chicago Spring Consulting Industry Trip
- Case Coaching Lab
- Applied Research
- Intern Panel
- Weekly 5Minute Book Club
- Deloitte Client Needs Analysis

Spring Course Outline and Assigned Reading*

Week	Lecturer	Topics	Learning Objective Summary	Readings and Assignments
#1 (1/12)	**NO CLASS**	**FIRST CLASS IS THURS, JANUARY 19th** *(Professor Teaching Final Sessions of the Executive MBA Class on Jan. 12th)*	**Course Pre-Read:** *Guide to Consulting Project Mgmt.* - High level overview of Consulting Process - Problem statement: Context, Success criteria, Scope, Constraints, Stakeholders, - Sources of insight	**G**uide to Consulting **P**roject **M**anagement **(GPM) Ch 1:** - *Introduction* - *Problem Statement* P 5-12
#2 (1/19)	Sullivan Vinson	- Course introduction and overview - Course Pre-Read Discussion - Signature Capstone Projects - Business Consulting Teams - Prep for Project Sponsor Night	- Review of course topics, projects, teams and sponsor night. - First "**G**enuis **B**ar **H**uddle" **(GBH)** – Review readings: Ch 1	(GPM), Ch 2 & 3: - *Issue Diagnostic* - *Storyboard* P 13-26
#3 (1/26)	Sullivan Vinson	- Sponsor Project Night: 10 Teams - Introductions - 10 Team Huddle Sessions - Summary Session Highlights	-Review consulting opportunity and organizational context - Discuss who, how, when and where to work on what - Review "Project Spec" and "Team Charter" document	(GPM), Ch 4: *Work Plan* P 27-32
#4 (2/2)	Sullivan Vinson	- **G**enius **B**ar **H**uddle (**GBH** Idea Mixer): Topic Focus - GPM Ch 2-4 - Project Team Work Out Sessions - Team Report Outs to Class	▪ Project Team Work Out ▪ GBH Content Topics: - Issue diagnosis: Issue tree, - Primary/secondary research - Storyboard (stb): How to stb – 3 steps (adapt, elaborate, create) - WBS: Four phase work plan	(GPM), Ch 5: *Interviews* P 33-39
#5 (2/9)	Sullivan Vinson	- Genius Bar Huddle (GBH Idea Mixer): Topic Focus - GPM Ch 5 - Project Team Work Out Sessions - Team Report Outs to Class	▪ Project Team Work Out ▪ GBH Content Topics: -5 Step interview process (strategize, plan & prepare, Interview, debrief, integrate)	(GPM), Ch 6, *Insight* P 41-44
#6 (2/16)	Sullivan Vinson	- Genius Bar Huddle (GBH Idea Mixer): Topic Focus - GPM Ch 6 - Project Team Work Out Sessions - Team Report Outs to Class	▪ Project Team Work Out ▪ GBH Content Topics: -Synthesizing general data to meaningful, contextualized points of difference (Answering the "So-What"!)	(GPM), Ch 7, *Qualitative Insights* P 45-48
#7 (2/23)	Sullivan Vinson	- Genius Bar Huddle (GBH Idea Mixer): Topic Focus - GPM Ch 7 - Project Team Work Out Sessions - Team Report Outs to Class	▪ Project Team Work Out ▪ GBH Content Topics: -Charting qualitative data themes in varied flow diagrams	(GPM), Ch 8, *Quantitative Insights* P 49-52

			Project Team Work Out / GBH Content Topics	
#8 (3/2)	Sullivan Vinson	- Genius Bar Huddle (GBH Idea Mixer): Topic Focus - GPM Ch 8 - Project Team Work Out Sessions - Team Report Outs to Class	▪ Project Team Work Out ▪ GBH Content Topics: - Reviewing +/- of quantitative data representations in 7 charts and 7 figures/tables	(GPM), Ch 9, *Story-selling* P 53-56
#9 (3/9)	Sullivan Vinson	- Genius Bar Huddle (GBH Idea Mixer): Topic Focus - GPM Ch 9 - Project Team Work Out Sessions - Team Report Outs to Class	▪ Project Team Work Out ▪ GBH Content Topics: -Discuss 7 story-selling approaches: 1/evidence- based Q&A, 2/collaborate with client, 3/keep client informed—no surprises, 4/identify client concerns, 5/pre-sell to your client, 6/keep team informed, 7/deliver presentation from client's perspective	(GPM), Ch 10, *Appendix: Tools* P 57-62
#10 (3/16)	NO CLASS	SPRING BREAK – CONSULTING CLUSTER	CHICAGO BUSINESS TRIP	
#11 (3/23)	Sullivan Vinson	- Genius Bar Huddle (GBH Idea Mixer): Topic Focus – GPM Ch 10 - Project Team Work Out Sessions - Team Report Outs to Class	▪ Project Team Work Out ▪ GBH Content Topics: - Review 6 tools aimed at organizing information/ideas in a compelling fashion. They include: Problem statement worksheet template, issue diagnostic template, storyboard template, work plan template, interview guide template, synthesized interview notes template	Fundamentals of PM Ch 10-11: *Project Control, Evaluation and Change Control* P 133-160
#12 (3/30)	Sullivan Vinson	- Genius Bar Huddle (GBH Idea Mixer): Topic Focus - GPM Ch 13 - Project Team Work Out Sessions - Team Report Outs to Class	▪ Project Team Work Out ▪ GBH Content Topics: - Determine effective project control, change and evaluation mechanisms to maintain alignment between performance, goals and value delivery	Fundamentals of PM Ch 12: *Project Control Using Earned Value Analysis; P 161-173*
#13 (4/6)	Sullivan Vinson	- Genius Bar Huddle (GBH Idea Mixer): Topic Focus - GPM Ch 12 - Project Team Work Out Sessions - Team Report Outs to Class	▪ Project Team Work Out ▪ GBH Content Topics: -Explore ways to measure progress, project performance/ quality; Review earned value analysis on cost, time, variance	Successful Project Management Ch 7: *Managing the Risks; P 111-127*
#14 (4/13)	Sullivan Vinson	- Genius Bar Huddle (GBH Idea Mixer): Topic Focus - Ch 7 and 10 - Project Team Work Out Sessions - Team Report Outs to Class	▪ Project Team Work Out ▪ GBH Content Topics: -Reviewing the risk mgmt. process and items; qualifying and quantifying risks, constraints and opportunities	Successful Project Management Ch 10: *Closure & Post Project Evaluation* P 194-201

#15 (4/20)	Sullivan Vinson	- Genius Bar Huddle: Difficult Conversation Tools - Project Team Client Presentation Highlights - Year-In-Review: Class Reflections	▪ Project Team Work Out ▪ GBH Content Topics: -Recognizing project drift, completion alignment, process checklist, close-out meeting, post-project evaluation -Reflecting on tools for difficult conversations: 1) assess the facts, 2) address the emotions, 3) acknowledge you as part of the problem, 4) identify range of positive outcomes, 5) develop strategy, not script - Reflections on key learnings	*Difficult Conversations:* Tips and Tools P 29-46

* I reserve the right to make changes to the readings, topics and assignments, as needed. In the event that I do make changes, I will announce these changes in class and via Canvas.

About the Professor:

Dr. Mark Sullivan, an organizational psychologist, nationally recognized thought-leader and core MBA and EMBA faculty member of the OSU Fisher College of Business, brings 38 years of industry and executive educational expertise.

He has held C-level, cross-industry leadership positions as an executive manager of a $1B product portfolio, Dow 30 business incubator executive lead; chief learning officer; Fortune 50 consulting partner; chief talent officer; lead business negotiator and Pacific Rim expatriate for a legacy G-1000 airline conglomerate; and advisor/coach to a broad range of senior executives.

His motivational speaking and consulting engagements have included NASA, U.S. State Department, CIA, Soviet Military Defense, Accenture, McKinsey, Honeywell, Battelle, United Airlines and Harvard Business School. His book in development: "*THRIVE…When Trouble Visits! Being Your Best in Tough Times*" will be out in 2018 (by Kendall-Hunt Publishers).

About the Teaching Assistant:

Mr. Eric Vinson, a senior Finance major in the OSU Fisher College of Business, has been involved in consulting at Ohio State in varied roles since his freshman year. In academics, he helped revive the Fisher Emerging Consultants program, won several consulting case competitions, and was a member of the first Integrated Business & Engineering Honors program.

As the current Buckeye Undergraduate Consulting Club (BUCC) President, he led BUCC in hosting OSU's first Consulting Networking Fair, bringing in 15 consulting houses to network with students. His project experience includes clients that range in revenue from $3MM to $800MM and has worked across industries such as property management, retail, large-scale packaging, and more.