ALFRED LERNER COLLEGE OF BUSINESS & ECONOMICS
UNIVERSITY OF DELAWARE

SYLLABUS

BUAD 899—Business Consulting Project

Section 50 Spring, 2012 (12S)

30 January 2012

The syllabus may change several times during the semester, so please check the professor's home page periodically to be sure you have the latest update.

Faculty Mentor: Dr. John Kmetz
Campus (302) 831-1773; Home office (302) 738-9340;
Mobile (302) 345-0408; Skype: johnkmetz
kmetz@udel.edu

Home page: http://www.buec.udel.edu/kmetzj/.

Required text: Linda K. Stroh and Homer H. Johnson, *The Basic Principles of Effective Consulting*. Mahwah, NJ: Lawrence Erlbaum Associates, 2006. ISBN 0-8058-5420-7.

Recommended text (especially for those seeking more depth in project management):
Samuel R. Mantel, Jr., Jack R. Meredith, Scott M. Shafer, and Margaret M. Sutton, *Core Concepts: Project Management in Practice (with CD), 4th ed.* New York: Wiley, 2010. Third edition also acceptable (ISBN 978-0-470-12164-1).

Additional readings: Hyperlinked items in this syllabus (readings, contract forms, and others). Many of these are supplemental to the texts and provide additional information helpful for specific purposes.

Description of the Course

The Business Consulting Project is a capstone practicum course offered by the MBA program in the Lerner College. The course provides the opportunity for MBA and other professional-program students to gain applied consulting project experience while providing a valuable service to the business community. Students work in teams of two to five people on significant business projects under the guidance of business professors with considerable professional experience. Student project groups will dedicate up to 500-1000 person-hours to a specific business project. Business projects may originate from large corporations, non-profit and government agencies, small businesses, entrepreneurs, and may include projects derived from students' employers.

The course is designed to meet the needs of the majority of students who work in existing organizations, where issues such as changes in strategy, changes in organization, process improvement, feasibility studies, quality certification, marketing projects, and many other kinds of challenges routinely arise and may require internal consulting skills. However, the course is also appropriate for new venture development and entrepreneurial projects. For those students who have career interests in consulting, whether working for a large global consultancy or striking out on their own, this is also an appropriate.

To the greatest extent possible, students are encouraged to form multidisciplinary groups. We all learn from each other most effectively when we have a mix of skills in our team and bring different points of view to the clients' problems and opportunities.

Appropriate consulting projects may come from any area of business and may support one or more of the concentrations or specializations in the MBA program. Three attributes of an acceptable project are: (1) the problem is one that has been sufficiently articulated by the client to define an initial scope of work; (2) the organization will allow the student group to implement and test their solution, or accept their recommendations if action is not possible; and (3) the organization will cover the necessary expenses of the project.

Students in the MBA program may elect to take BUAD 899 twice, for a maximum of six credits. The information below is provided for those students taking the course for the first time, and in the event that students are repeating, the initial orientation requirements will not apply, but rather, full course grading and credit will be placed on the second client project.

Students should keep records of out-of-pocket expenses not covered by regular course tuition or fees (travel, copying, special supplies, etc.). These are reimbursable to students from a special fund maintained for that purpose, created from fees to clients.

What to Expect

You are enrolled in a course that is probably unlike any you have experienced. Your responsibility for the semester will be to satisfy the business needs of a client—after our initial classes your work will be mostly with the client and driven by the client's schedule and needs. You will be working for them, often at their location, on problems that are very real to them and for which they seek a real and useful solution. You are expected to actually solve their problem, not tell your professors about a possible solution. Students take the lead in these projects—faculty mentors are responsible for providing tools for the course and organizing the teams and clients; after that, mentors have little interaction at all with clients, and in most cases will not see her the students or the client again until the final team project presentation.

Do not be misled by the lack of formal classroom structure. Even though there are only a few formal class sessions, expect to put in many hours of effort. There may well be times when you will wish for a more traditional lecture-type course that has more structure—there are no regular exams; clients may cancel or change meetings with your team and disrupt your schedule; client needs may not be well defined, especially at the beginning of the project; and more. Your clients will contribute significantly to the evaluation of the project for your grades; and, unlike many professors, they feel no obligation to be nice or to reward you for the "old college try." They are expected by their superiors to deliver results, and they will expect no less from you.

Class and Online Meetings

Regular class meetings will be the exception rather than the rule—there will be only three regular "classes," and two of those are primarily focused on working with the clients. Most meetings will be "virtual," where teams meet using electronic groups or consult with professor(s) by e-mail or through their e-groups (which are discussed below). Similarly, most assignments in the early part of the course are completed and submitted on line. Formation of electronic groups will be required, although the use of them will be determined by the needs of the group and the project. Meetings between project teams and faculty mentor(s) may also be held at times mutually suitable to team members and faculty mentors, and these may be at times other than regularly scheduled class times; students are encouraged to request such meetings at any time they feel they need them.

Client Meetings

Most meetings with clients will be held on the client's premises, and students should schedule those to be as compatible with both student and client schedules as possible. This usually requires some degree of accommodation on both parts. In the event that a client becomes overly demanding or inflexible, students should feel free to contact the faculty mentor for assistance; the same is true for clients if the situation is reversed.

Team Formation and Electronic Groups

Teams will be formed during the first class meeting. Electronic groups (usually Yahoo.com e-groups although others are acceptable) will then be formed for all teams, with one student in each team taking responsibility for this task. These are a very helpful medium for allowing team members and faculty mentors to work from different physical locations, and for allowing faculty mentors to stay in touch with teams quickly.

These e-groups will be the primary hub for project communication. All e-mail will go through the e-groups; all reports and deliverables will be posted to the e-groups. If there should be need for direct contact with faculty mentor(s) outside the e-group this is available, of course, but all normal project business will be reported through the e-group.

Course Grading

Your grade is primarily dependent on your project work (90 percent), and your project work will be evaluated on the basis of three important criteria:

1. "Technical merit." Your work is evaluated on how well you deliver the deliverables required in this course. Key to this is to develop the solution and the quality of that solution. As relevant to each client problem or need, the correct and appropriate application of business metrics, workflow mapping, project management, and other tools made available through the texts and readings will

be evaluated as part of the technical merit of the final product. Quality of writing and clarity of the final report is a significant part of technical merit. Client evaluations of the project final deliverables is also a significant component of this criterion.

2. "Implementation success probability." This is based on an assessment or best estimate of the real impact your effort will have on the client's operations and success. The best assessments are possible with the best quality of report.
3. "Professionalism." This takes consideration of how well you deal with your client, your teammates, and your faculty mentor(s). Submission of deliverables during the semester to the faculty mentor will be a significant factor in evaluation of this criterion, as will client evaluation of the students' work.

Several preparatory assignments will be given to students to familiarize them with two widely useful tools for this course: (1) workflow mapping, and (2) project management, the latter using MS *Project* software, which comes with the Mantel *et al.* text, and is also available in the computer labs in Purnell Hall, and on a trial-version disk that comes with new copies of the text. The use of project management thinking and tools will be a requirement for this course, and several short required problems will also be assigned, as shown in the syllabus. Each student should prepare and submit these individually. OpenProj software is also acceptable.

Finally, a brief take-home test of comprehension will be the final grading criterion. This will be based on the assigned readings from the texts and the hyperlinked readings in this syllabus. Ten (10) percent of the final grade will be determined by this test.

Student Deliverables

During the semester your progress will be monitored through the following required reporting mechanisms; these are to be uploaded to the electronic group page so that all project information is in one location and faculty and group members can gain access to it at all times. Due dates for these are shown in the syllabus:

- A brief resume at the beginning of the course; these are used for background information and for client selection of team members. *Due:* second class meeting.
- Individual problem assignments as shown; these are very brief and take little time to complete, but are important for familiarity with these tools. *Due:* on date shown.
- A take-home test of comprehension on assigned readings. *Due:* on date shown.
- A project proposal (detailed below), which describes very precisely the research project that you plan to do and serves as a written contract between you and your client, and an accompanying project plan in MS *Project*. *Due:* after meetings with client and definition of scope of project.
- A contract and a non-disclosure agreement with the client (detailed below). *Due:* after approval of the project proposal.
- Regular progress reports throughout the semester to update your faculty mentor on your progress. These will consist of (1) a brief verbal update of project progress, and (2) an updated **Tracking Gantt Chart** in MS *Project* or *OpenProj*.

Since these are our primary means of staying in touch, it is very important that these be done regularly and as required in the course schedule below. Due: on dates shown unless otherwise arranged.

- A final report and presentation to the client (detailed below) for the project that details the solution that you have developed for the client and provides complete documentation for the implementation of the project. *Due:* end of semester on date to be scheduled with client.
- At the end of the project, clients will provide an evaluation of the project to the faculty. Evidence of either superior performance or problems in performing the project will influence the ratings teams receive on these factors. *Due:* end of semester on date to be scheduled with client.
- In addition, students are required to provide an evaluation of their teammates; these evaluations also influence the final determination of individual grades. *Due:* end of semester on date to be scheduled with client.

Progress reports are "graded" as a group at the end of the semester. Every report should have information on Parts 1 - 3; Parts 4 - 6 may not be relevant to a specific report, and that can be noted. Generally, reports meeting the criteria above will receive "A" grades and contribute as such to the final grade. Missing or poorly done reports may result in a reduction of the final grade. Similarly, contracts, NDAs, and evaluations must be submitted for full credit.

The Project Proposal

Think of the proposal as a formal contract you are tendering to the client, but with additional information to show you understand the client's needs and also to persuade the client that you are the source of competence best suited to meet those needs. Depending on the client, most students will find that the Stroh and Johnson text outline and guidance for the proposal is best. A similar approach outlines five important elements for a business consulting proposal* as described in the hyperlinked document: (1) background information; (2) problem (or opportunity) statement; (3) objective of the project; (4) description of project, including the deliverables; and (5) the project plan.

The specific nature of the proposal will vary depending on the technical requirements, of course, but the majority of proposals are "business proposals," and have some important characteristics. Domain knowledge is an important part of the "situation" of the business, and often the most important part. What are the major variables that define "success" (often discussed as "critical success factors")? What *specific metrics* are used; what is the basis for measuring "success" or performance? However obvious this may seem in a business course, there are huge numbers of proposals written for scientific grants, hard science and social science grants and research, proposals to foundations, and many other types. Whether getting approval for a project within a company or winning business through competitive bids in a consulting firm, effective business proposals are a key requirement.

For this course, the project plan should be developed and presented using Microsoft *Project* software (now available in the computer lab, and which will be demonstrated during the class session on project management) or OpenProj software. As will be seen, this requires the project team to think the consulting project through in detail, and to schedule tasks in a way that meets both student and client timetables. In addition, it creates an excellent way to portray the project, and to communicate critical parameters about the project to team members, faculty mentors, and client stakeholders.

Client Relationships

All client organizations sign a contract to enable students to work with the client and assure mutual protection of client and student interests. All information to and from clients is to be held in confidence—students and faculty mentors are required to sign a non-disclosure agreement (NDA) with the client for all projects. There are no exceptions to the contract or NDA. Student teams are responsible for downloading these and having them signed by the client and faculty mentor. Students may be required to sign company forms or be required to meet other admission criteria, such as security or drug screening. Clients have the right to not accept students if employment or other affiliations might create a conflict of interest.

The Final Report and Presentation to the Client

The **final report** will be similar in format to the proposal, except you will describe what you actually did rather than what you plan to do; again, the text outline (Stroh & Johnson, Chapter 6) provides excellent guidance. It is important that your final report *sell* the project to the client, as did the proposal. “Selling,” of course, means a positive view of the project outcomes, but it also requires honesty and ethical reporting—sometimes what has to be “sold” is information the client would rather not hear. Whatever the situation, you should discuss why the solution is a good one and how the client will benefit from implementation of the solution. Limitations and shortcomings that may have a significant impact on the client should also be acknowledged.

The faculty mentor(s) must approve the final report before it is submitted to the client. The report should have a well-designed cover page; a table of contents; an executive summary; and then the full report. It will cover all the information in the proposal in addition to the outcomes (S&J Chapter 6). Project scope often changes from that in the original proposal, and this should be reported so that a history of the project is given. Technical appendices may be added if necessary, and the final update of the Microsoft *Project* or *OpenProj* plan should be attached.

It is very important that the final report provide complete documentation of the project so that the client may refer to it later, should the need arise. This means that a comprehensive list of all resources used (publications, interviews, government information, etc.) must be provided with full bibliographic information. This may be prepared using any consistent set of guidelines, such as the Turabian (University of Chicago) style manual, American Psychological Association, Modern Language Association, IEEE, etc.

All project reports will submitted to the client along with a **formal presentation** (text Chapter 7). In the majority of cases, the final report will be presented to the client on their premises, with the faculty mentor(s) in attendance. If necessary, client organizations may come to campus and receive their presentation and report there. (This is often the case for smaller companies and startup firms which do not have meeting facilities and equipment.)

SEMESTER SCHEDULE AND DUE DATES

Course text pre-reading assignments (complete as early as possible, definitely prior to second class):

Text: (1) Stroh and Johnson, *The Basic Principles of Effective Consulting*, all chapters. (2, optional) Mantel *et al.*, *Core Concepts of Project Management*, sections 1.1-1.4; 2.1, 2.2; 3.1 (important), 3.2, 3.4; skim Ch. 4 (budgeting); 5.1, 5.2, 5.4; skim Ch 6; 7.1, 7.2; skim Ch. 8.

Downloads: Each class meeting has several hyperlinked downloads for which students are responsible.

Download the take-home test of comprehension to take notes as you read.

30 Jan. - 9 Feb. Course pre-reading (Stroh & Johnson; C^3I download below; Workflow Mapping and Analysis download below). No class meetings.

10 Feb. Class meeting: Review of syllabus and texts

Course overview and introduction

Examine semester project opportunities

Reading assignment: C^3I — the Consultant's Essentials

Presentation and discussion: Workflow Mapping and Analysis; applications to knowledge management, process analysis, performance improvement, quality management.

Assignment: workflow mapping exercises

Reading assignments for next class:
Teams and performance

17 Feb. Class meeting: Review and tutorial of Project Management and MS *Project* and *OpenProj*, download Quick Guide to MS Project 2010

Presentation

Questions and answers, Stroh and Johnson and assigned readings. Students may also bring questions from the optional Mantel *et al.* text.

Group formation; final selection of clients; formation of e-groups

Assignment: 899 PM Problem Set

24 Feb.	Class meeting: Schedule individual team meeting for discussion of client project, proposals, and scope of work (These meetings may be any day of the week available to team and professor, and will be held in the professor's office. They may also be held in the classroom on Fridays if no other times are suitable.) Review and discussion of critical success factors and business metrics for business outcomes and results *Students may elect a fourth regular class meeting if they feel the need, or may elect to have team meetings with the faculty to deal with specific questions.*
9 Mar.	MS *Project* / *OpenProj* problems due (submit electronically to professor using filename format LAST NAME 899 ProjProbs 11f.xxx) Take home test of comprehension due; use filename format LAST NAME 899 ToC 11F.xxx (either doc/docx or pdf).
23 Mar.	Individual NDAs and client contracts due (Students working with Wilmington Trust will sign company forms and be required to take a drug screening.) First Progress Report, first project plan. *Be sure to save a **baseline** of this file, or else the Tracking Gantt Chart needed for Progress Report 2 will not work.* Electronic presentation of final project plan (approved by client, copy ready for faculty mentor signature); this must include a Microsoft *Project* or *OpenProj* plan of how the project will be accomplished.
6 Apr.	Post progress report 2 with updated tracking Gantt Chart
20 Apr.	Post progress report 3, project plan update using tracking Gantt chart Provide scheduled time for final project presentation proposed (preferred and alternate) due
9 May	First draft of final report due for faculty mentor review (Stroh and Johnson format recommended). Have final presentation to client scheduled and confirmed.
14 - 24 May	Final report presentations to client; submit team peer evaluations, have client complete client evaluation. If projects are completed earlier, presentations can be advanced to earlier dates. DO NOT POST evaluations to e-group—send these directly to faculty mentor by e-mail.
22 May	Final written report due. *No grades are released without all evaluations and final report.*

* Business proposal websites worth visiting:

www.captureplanning.com — very commercial, but also a source of many excellent articles and tips for proposal writers. Some of the links lead to excellent short articles, and others to sales pitches for their books and materials. It is a site well worth spending some time to explore.

http://facstaff.gpc.edu/~ebrown/infobr3.htm— a focus on proposal-writing for US Federal grants, but lots of good tips, checklists, and articles included.

www.proposalwriter.com — site set up by Deborah Kluge, a Columbia, Md. (USA) individual who is widely recognized as an expert proposal writer. Her site is primarily targeted toward US Federal organizations supporting the social sciences and USAID, but also has some very useful international links.

www.amazon.com — lots of books on business consulting and proposal writing if you want to spend money for the information, or want to have your own hard-copy library.