the Houston MBA
UNIVERSITY of HOUSTON

MARK/GENB 7393 and MARK/GENB 7394
BUSINESS CONSULTING LAB

Fall 2016

Gary Randazzo
Phone: (713) 743-4754
Cell: (713) 397-9250
Email: gary@gwrresearch.com
Office Hours: By appointment
Room MH 305

Learning Objectives:

This course provides a unique opportunity for the student to learn-by-doing with a real business or institution, solving real problems. While each project will provide very specific and unique learning opportunities, the primary areas of knowledge and skill development for each will be:

1. Business Analysis and Decision Making.
2. Consultative Business Relationships.
3. Project Management.
4. Communication, Both Written and Oral.
5. Teamwork.

The above will be developed against a backdrop of real business world dynamics. While the classroom allows for lively, one-dimension discussions around a controlled set of issues, these projects will begin with a greater level of ambiguity that will need to be addressed by the teams. As the semester progresses, some of the projects will experience changes or unexpected events and results that will allow the teams to experience real business and organizational dynamics. These issues will need to be understood and resolved expeditiously for the timely completion of a successful project.

This course will allow students to work in teams through the six-credit hours on a project operating much like a consultancy.

During the first 4 class sessions, students will be exposed to various important topics:

- Communication Skills.
- Focus on Proposals, Reports, and Presentations.
- Project Management Skills.
- Teamwork

Most of the time in the course will be devoted to working on a project in a team for a real-client.

Administrative Details:

1. Since the clients are real companies or institutions, all student teams are expected to demonstrate professional behavior. This involves appropriate dress code, arriving on time for meetings and proper communication with the client and the rest of the team.
2. There will only be 7 class sessions with specific topics but we will have class each week for project work. I will be in the classroom every Thursday to meet and coach teams. The topic assigned classes will cover:
   - Thursday 8/25; 6:00 – 9:00 (Introductions, syllabus, & assignments, project CPM charts) https://www.youtube.com/watch?v=NUXkThfQx6A Critical components of the text to review. Proposal/ Project Management/ Value Creation/Data Gathering and Analysis
   - Thursday 9/1; 6:00 – 9:00 –Letter of engagement, consulting process, data gathering and analysis
   - Thursday 9/8; 6:00 – 9:00 (Presentation skills and techniques)
   - https://www.youtube.com/watch?v=Iwpi1Lm6dFo
   - https://www.youtube.com/watch?v=9LSnINglkQA
   - http://www.ted.com/talks/nancy_duarte_the_secret_structure_of_great_talks
   - Thursday 9/15; 6:00 – 9:00 (Proposal presentations)
   - Thursdays 9/22 through 11/10; 6:00 – 9:00 Review of project progress, coaching and discussion of consulting process.
   - Thursday 11/17; Presentation Run-Through
   - Thursday 12/1; 6:00 – 9:00 (Final Report and Presentation)
   - Presentation to Client: Week of 12/6
   - The classroom and Faculty will be available on every Thursday evening.
3. Student teams will be expected to provide a brief progress report/update on the project to the instructors once a week by email (Monday mornings). The updates will follow a Gannt or CPM chart developed in the Scope phase of the project. Each update will describe each team member's responsibilities for the week, Deadlines missed, Actions to get project back on target etc. A Thursday class meeting with faculty can be scheduled at that time. Teams should also be meeting and interacting with the client on a frequent basis. Attendance by all members of the team at such meetings is expected but not mandatory.
4. Progress Reviews: Each team member will complete a team assessment at the 5 week, 10 week, and 15 week (end-of-semester) periods, providing feedback at the team, peer, self, and course level. These will be brief and high level in nature. This will assist the professor in determining how to guide and support each team.
5. Each team must identify a team member who will be responsible for interacting with the client and instructors.
6. Grading – Semester grades will be based on the following:
   a. Scope/Proposal/Engagement Letter – 20%
   b. Peer Reviews – 30% – (3 reviews at 10% each)
   c. Final paper and Presentation – 30%
   d. Client Feedback – 20%

Key Dates and Deliverables to Faculty:

Scope Statement	by 9/8
Project Proposal	9/15
5 Week Review	8/22
10 Week Review	10/27
Rough Run-Through of Presentation	11/17
Rough Draft of Report	11/17
Final Presentation and Report to Faculty	12/1
Final Presentation to Client	w/o 12/6

Reports and Presentations:

Scope

- Maximum 1 typed page (single-spaced, 12 point font)
- Faculty must approve prior to delivering to client.
- Format:
    - Background and problem statement. May include some discussion of industry background, company position, and relevant research.
    - Specific focus and scope of the project, what is included and excluded in deliverables.

Project Proposal

The proposal for the project should include:

A. Overview – An overview of the company, the competition and the environment.
B. Objective – The objective portion of the proposal will describe the challenge facing the client.
C. Scope – The scope will identify the areas that will be studied and analyzed, providing a specific limit to the scope of the project to avoid “scope creep”.
D. Methodologies – The methodology section will describe the approach(es) that will be employed to gather and analyze information as well as the communication structures to be used throughout the project.
E. Deliverables – This section will describe what the client can expect to receive from the team at the end of the project.

The proposal will be 6 to 8 pages (12 point, single spaced) and be accompanied by a PowerPoint presentation that will be used to present the proposal to the client. The scope and proposal will have to be agreed to and signed by the client before proceeding with the project.

Final Project Report and Presentation

The final project portion of the course should result in a team presentation and report that includes the following sections formatted as follows:

A. Executive Summary - this is a summary of the total report and is probably the last section of the report that is written.

B. Mission and Vision - this portion of the report describes the overarching reason for your client company's business focus (mission) and how your assigned objective creates value for collaborators, the company and customers (vision).

C. Situation analysis - this portion of the report will discuss the nature of the industry, the customer base and potential segments (key customers, under potential, and nonusers), competitors, potential disruptors, a "blue ocean" review along several of the product characteristics and a SWOT analysis. This is an expansion of the overview in the proposal.

D. Objective and Scope Parameters - A description of the objective (here discuss what job the customer is "hiring" the team to do) and the goal(s) you have been assigned. The goals will have a timeframe element (e.g. within 2 years) and performance benchmark element (e.g. create revenues of $1 million). It will be important to define the boundaries of the project (what was done and what was not done).

E. Methods and Process – Describe the approaches and the procedures used to gather information and develop a foundation for the recommendations.

F. Analyses and Findings – Include relevant data, charts and findings.

G. Recommendations – Specific recommendations based on the analyses and findings

H. Execution - This part of the report should discuss how cash, workforce etc will be planned for, organized, directed and controlled. This should also point out which individual, department or division should be responsible for leading the implementation process.

I. Financial Impact – Financial proformas projecting costs and revenues expected at various levels of success.

J. Deliverables – any promised analyses, charts or implementation schedules (including Gannt or CPM charts).

Final Report:

- Maximum of 30 typed pages (single-spaced, 12 point font)
- Additional material may be provided in the Appendix.
- Must be provided to faculty prior to client.

Final Presentation:

- Faculty - Plan for 45 minutes of presentation and 30 minutes of Q&A.
- Client – Individual consideration for client scheduling.
- Preferably the same as Faculty format PowerPoint presentation. It is recommended that one team member act as the presenter and defer questions to team members according to their area of focus.

Course Materials:

The Basic Principles of Effective Consulting, Linda Stroh and Homer Johnson, Routledge, 2009
ISBN: 0-8058-5420-7. Order online.

Project Weekly Update

Date______________ PERT STAGE___________

Activities initiated in past week:

Activities Completed in past week:

Project Status versus PERT, CPM or Gannt Chart:

Deadlines missed in past week:

Actions to be taken to get back on schedule:

Team member assignments completed in past week:

Research/Activities required in upcoming week:

Team member assignments for upcoming week:

Commentary on progress of overall project:

Peer/Course Feedback Form
5th Week

Please evaluate each member of your team on quality and quantity of their contribution to the **team project**. This evaluation is **strictly confidential** and will not be shared with anyone. You may enclose this evaluation in a sealed envelope.

Your name: ____

Client: _______________________________________

Name of team member	Quality of effort	Quantity of effort
Self appraisal on this line		

Grading Scale:

A	**Excellent**
B	**Above Average**
C	**Marginal – Not worthy of an MBA student**
D	**Unacceptable/Failing performance**

Using the grading scale above, how would you rate your team's performance to date and why do you say that?

Additional feedback (team member comments, professor suggestions) – What 1 thing can Gary do *right now* to improve the experience:

Peer/Course Feedback Form
10th Week

Please evaluate each member of your team on quality and quantity of their contribution to the **team project**. This evaluation is **strictly confidential** and will not be shared with anyone. Please turn in the evaluation at **final presentation**. You may enclose this evaluation in a sealed envelope.

Your name: ______________________________________

Client: ______________________________________

Name of team member	Quality of effort	Quantity of effort
Self appraisal on this line		

Grading Scale:

A	**Excellent**
B	**Above Average**
C	**Marginal – Not worthy of an MBA student**
D	**Unacceptable/Failing performance**

Using the grading scale above, how would you rate your team's performance between week 6 and week 10 and why do you say that?

Additional feedback (team member comments, professor suggestions) – What 1 thing can Gary do *right now* to improve the experience:

Peer/Course Feedback Form
Final

Please evaluate each member of your team on quality and quantity of their contribution to the **team project**. This evaluation is **strictly confidential** and will not be shared with anyone. Please turn in the evaluation at **final presentation**. You may enclose this evaluation in a sealed envelope.

Your name: ____

Client: _______________________________________

Name of team member	Quality of effort	Quantity of effort
Self appraisal on this line		

Grading Scale:

A **Excellent**
B **Above Average**
C **Marginal – Not worthy of an MBA student**
D **Unacceptable/Failing performance**

Comments: