

COURSE OUTLINE

Semester: Winter 2018
Class Dates: Wednesdays, January 10 – April 11; Exam: April 25
Class Time: 6:00 p.m. – 8:45 p.m.
Classroom: ED 514

INSTRUCTORS

Instructor: Bruce Anderson, MBA, CMC
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Office Hours:

Office hours are flexible. E-mail / call / text to make an appointment for a time to suit your schedule.

OVERVIEW

Course Description:

Management consulting is advice and services delivered independently and objectively to organizations in all sectors (Kuhr, 2002). The advice helps organizations solve problems, adapt and change, acquire new skills / learning, and address other needs. Management consulting services is a \$350 billion industry globally and has revenues worth \$12 billion in Canada (CMC-Canada, 2016 Industry Report).

This interactive course introduces students to the growing field of management consulting. Students will understand the five-stage consulting process and gain practical experience through an actual consulting project. The five stages are:

- a. Entry
- b. Diagnosis
- c. Action Planning
- d. Implementation
- e. Termination

The focus is on both internal (as an employee) and external, independent consultants; MBA graduates often fill both roles.

The globally-recognized professional standard is the Certified Management Consultant (CMC) designation. To earn the CMC designation, a consultant must demonstrate an Assurance of Knowledge and the Ability to Apply in core competencies. The nine elements of the CMC Competency Framework are:

1. Helping clients assess their business situation, challenges, and opportunities;
2. Helping clients develop strategies for improvement;
3. Helping clients to implement a recommendation;
4. Conducting a consulting assignment;
5. Demonstrating interpersonal competencies;
6. Demonstrating personal competencies;
7. Demonstrating ethical behaviour;
8. Demonstrating functional competency; and
9. Demonstrating management breadth.

While primary competencies are measured / evaluated through an Oral Assessment and Client References (based on applied practical client work experiences), secondary knowledge will be covered by this course's objectives and additional courses in your Masters programme.

Course Objectives:

The course objectives are to:

1. Understand the consulting industry in Canada and globally;
2. Recognize the role of management consultants;
3. Become familiar with an industry-tested, five-stage consulting approach that ensures consulting projects and activities are organized and methodical;
4. Provide practical experience through "live" consulting projects led by CMC(s);
5. Integrate functional areas, such as HR, Finance, Operations, IT, Marketing, and others;
6. Acquire consulting tools and techniques;
7. Gain a perspective of how both internal and external consultants interact with organizations;
8. Gain critical team work and client communication skills;
9. Build a strong understanding of change and change management theory and practice;
10. Understand how to deliver superior value for clients, within an ethical framework; and
11. Know how to help clients assess their current situation, develop strategies for addressing challenges and opportunities, and address change management processes in the implementation of recommendations.

To accomplish these objectives, the course will use lectures, in-class discussions, readings, case analysis, group activities / exercises, guest speakers, and a live consulting assignment.

RESOURCES

Required Textbooks:

1. Vandenbosch, Betty. *Designing Solutions for Your Business Problems: A Structured Process for Managers and Consultants*. San Francisco, CA: Jossey-Bass, 2003. For purchase in bookstore. (Note: A reserve copy is available at the Archer Library, for use in Library.)
2. Block, Peter. *Flawless Consulting: A Guide to Getting Your Expertise Used*, 3rd Ed. San Francisco, CA: Jossey-Bass, 2011. (Note: Ebook is free online through the Library.)

Additional Course Materials and Resources:

1. Review www.cmc-canada.ca to gain an understanding of Management Consulting profession.
2. Other readings may be assigned.
3. Course PowerPoint slides will be posted on UR Courses.

Optional Reading:

1. Kubr, Milan, ed. Management Consulting: A Guide to the Profession. Geneva, CH: International Labour Office, 2002.
(Note: This book is available in the library; it is the premiere resource for consulting.)
2. Greiner, Larry E., Thomas H. Olson and Flemming Poulfelt. Management Consulting Today and Tomorrow Casebook: Enhancing Skills to Become Better Consultants. New York, NY: Routledge, 2010.

Citations:

If you use others' work and ideas, you must cite your information properly. Plagiarism is a serious issue and plagiarizing others' work is considered academic misconduct. Refer to the 2017-18 Academic Calendar for the policy called **Academic Conduct and Misconduct Regulations Governing Discipline for Academic and Non-academic Misconduct**. Please ask the Instructor if you are unsure whether your usage is an issue.

For this class, you must use the MLA style of citations and you will *not* use footnote citation (e.g., citation¹). MLA style uses simple parentheses such as (Author last name, year if needed, page if needed). For information, please use resources such as <http://uregina.libguides.com/MLA7th>.

Additional Assistance:

If there is any learner who, because of a disability, may have a need for accommodation(s), please discuss this with the Instructor and / or contact the Coordinator of Special Needs Services at 306-585-4631.

GRADING AND DELIVERABLES

Mark Distribution:

Learners will be evaluated based on the following elements:

Deliverable	Weighting
Consulting Final Report (and sub-deliverables)	50%
a. Entry Memo	2%
b. Letter of Understanding and proposal	5%
c. Diagnosis Report	8%
d. Comprehensive Final Report	35%
Individual Learning Journal	25%
Final Case Exam	25%
TOTAL	100%

The grading is further detailed as follows:

1. Consulting Project:

The consulting project will be done in teams up to four (4) people and teams will be determined by the Instructor. Each team will interact with an actual client to address a real problem. A consulting report will be prepared with sub-deliverables, and these are:

- a. Entry Memo
A memo will be develop including the agenda for a first meeting with the client. **This is due January 24.** Where possible the client meeting(s) will be held during class.
- b. Letter of Understanding and Proposal
This will be submitted by Feb. 7.
- c. Diagnosis Report
A written report will be submitted to the client outlining the findings from the analysis phase. **This is due March 7.**
- d. Action Planning Report
A draft report will be discussed with the Instructor. **This is scheduled during class on March 21.**
- e. Final Report (including all previous elements and Implementation and Change Management Report). **This is due on April 4.**
- f. Presentation to Client (including Termination Report) **on April 4.**

All of these items will be included in an overall consulting report that will be presented to the client on April 4, 2018.

2. Individual Learning Journal:

The course content and readings, and classroom discussion will generate a variety of “takeaways”, items that you will want to keep. Also, the process of consulting will create some learnings, which will be packaged into a journal for submission of April 11, 2018. Specific guidelines will be discussed in the first several weeks of class.

3. Final Exam:

The final exam will be a comprehensive case and is tentatively scheduled for April 25, 2018 – 7:00 – 9:45 p.m. The location, time, and details of the exam will be confirmed closer to the exam date.

CLASS SCHEDULE (SUMMARY)

Key: **DS:** Vandenberg, Betty (2003) Designing Solutions for Your Business Problems
FC: Block, Peter (2011), Flawless Consulting 3rd edition

DAY	CLASS TOPICS	REQUIRED
Jan. 10	<p>Overview of Course Expectations Consulting Industry and Roles of Consultants Ethics, Responsibility & Professionalism</p> <p>Demonstrated Behaviour:</p> <ul style="list-style-type: none"> • Recognize roles of external and internal consultants • Understand value of Certified Management Consultants • Adhere to code of conduct and ethical guidelines • Demonstrate values of CMCs <p>FC – Ch. 1 - A Consultant FC – Ch. 7 - The Internal Consultant DS – Ch. 6 - pages 89-90 “How Many People and What Skills”</p> <p>Assignment 1: Complete the Consulting Skills Inventory (UR Courses). Fill in your skills and rating.</p> <p>Assignment 2: Reflect on the Ethics and Professional Conduct www.cmc-canada.ca/cmccacdesignatation/codeofprofessionalconduct</p> <ul style="list-style-type: none"> • <i>Please focus</i> “Responsibilities” • What do these standards mean to you personally? 	<p>Assignment 1</p> <p>Assignment 2</p>

DAY	CLASS TOPICS	REQUIRED
Jan. 17	<p>Nature of a Consultant Project and Services Provided The 5 Phases of a Consulting Project Key Success Factors for Effective Consulting Projects</p> <p>Demonstrated Behaviour:</p> <ul style="list-style-type: none"> • Understand the Canadian/global consulting industry. • Understand the consulting business and environment. • Recognize concept of value for money. • Understand legal liability and professional responsibility. <p>Readings: FC – Ch. 2 - Techniques are Not Enough FC – Ch. 3 - Flawless Consulting FC- Ch. 4 - Contracting Overview</p>	Consulting teams formed
Jan. 24	<p>Consultant-Client Relationship</p> <p>Demonstrated Behaviour:</p> <ul style="list-style-type: none"> • Identify key client stakeholders. • Form Consultant-Client relationship based on respect/trust. • Develop techniques for defining roles and responsibilities and clarifying expectations. • Create a climate for change. • Establish initial contacts and conduct first meetings • Draft terms of reference • Identify red flags in a consultant-client relationship, ways to resolve ethical issues, and how to avoid no-win consulting situations. <p>Meetings with Client will be held.</p> <p>Readings: DS – Ch. 3 - Building Relationships DS - Ch. 6 - Planning the Effort DS – Ch. 7 - Nurturing Commitment DS – Ch. 2 - Agreeing on the Objective DS - Ch. 4 - Determining the Scope DS – Ch. 5 - Constructing Hypotheses DS – Ch. 8 - Building the Logic</p>	Submit Entry Memo

DAY	CLASS TOPICS	REQUIRED
Jan. 31	<p>Consulting Process – Entry Data Collection</p> <p>Demonstrated behaviour:</p> <ul style="list-style-type: none"> • Understand client`s activities, performance, & perspectives • Recognize symptoms, problems, causes of ineffectiveness • Describe various techniques for gathering info from clients • Prepare assignment strategy and plan and define scope/risk • Establish an effective fee and payment structure • Develop, present, and negotiate client proposals • Recognize formal, verbal, and psychological contracts • Evaluate the effectiveness of data collection <p>Readings: DS – Ch. 1 - Understanding the Situation DS – Ch. 9 - Designing the Solution DS – Appendix B -Interviewing to Collect Data DS – Appendix A - Mapping Processes</p>	
Feb.7	<p>Consulting Process – Diagnosis</p> <p>Demonstrated behaviour:</p> <ul style="list-style-type: none"> • Help client to assess business situation and environment, challenges and opportunities • Diagnose situation and use self-diagnostics • Convey findings and conclusions • Describe red flags in the diagnosis <p>Readings: FC – Ch. 10 - Diagnosis to Discovery FC – Ch. 11 - Whole System Discovery</p>	Submit letter of understanding and proposal
Feb. 14	<p>Engagement Process</p> <p>Demonstrated behaviour:</p> <ul style="list-style-type: none"> • Value independence of consultant • Recognize engagement is critical to getting all information <p>Readings: FC – Ch. 17 - Elements of Engagement FC – Ch. 19 - The Heart of the Matter</p>	-
Feb. 21	Holiday – No Class	-

DAY	CLASS TOPICS	REQUIRED
Feb. 28	<p>Consulting Process – Action Planning</p> <p>Demonstrated behaviour:</p> <ul style="list-style-type: none"> • Help client clarify objectives • Generate possible solutions with client • Develop and evaluate alternative solutions and their impacts • Develop an action proposal for the client <p>Readings: DS – Ch. 9 - Designing the Solution</p>	
Mar. 7	<p>Project Management</p> <p>Demonstrated behaviour:</p> <ul style="list-style-type: none"> • Define project schedule and accountability for delivery of objectives • Secure resources and coordinate project and activities • Build client capability • Establish project change control procedures with client • Define communication plan and reporting procedures for project • Define disengagement plan for project and evaluate results • Manage consulting project effectively ensuring objectives, deadlines, and budgets are met within context established • Manage client’s expectations at all stages of project 	Diagnosis Report submitted
Mar. 14	<p>Consulting Process – Implementation</p> <p>Demonstrated behaviour:</p> <ul style="list-style-type: none"> • Describe various roles for the consultant in implementation • Plan and monitor the implementation • Train and develop client staff • Introduce changes in work methods • Maintain and control new practices <p>Readings: FC – Ch. 16 - Implementation</p>	

DAY	CLASS TOPICS	REQUIRED
Mar. 21	<p>Change Management</p> <p>Demonstrated behaviour:</p> <ul style="list-style-type: none"> • Identify internal forces causing resistance to change • Recognize strategies that can increase willingness to change • Diagnose the resistant forces in organization change <p>Readings:</p> <p>FC – Ch. 8 - Understanding Resistance FC – Ch. 9 - Dealing with Resistance FC – Ch. 14 - Preparing for Feedback FC – Ch. 15 - Managing The Meeting for Action DS – Ch. 10 - Driving Execution DS – Conclusion</p>	Draft reports will be discussed with Instructor
Mar. 28	<p>Consulting Process – Termination</p> <p>Demonstrated behaviour:</p> <ul style="list-style-type: none"> • Choose appropriate time for withdrawal • Work with client to ensure skills transfer, sustainability of results and knowledge capture as appropriate for project • Review and predict any potential areas of deficit, addressing them before the engagement ends • Close deliverables and transfer ownership to client • Evaluate project (benefits to client, & consulting process) • Close documents and complete termination report to client • Follow up & maintain the relationship <p>Readings: TBA</p>	
Apr. 4	<p>Project Presentations</p> <p>Demonstrated behaviour:</p> <ul style="list-style-type: none"> • Prepare effective consulting reports and present effectively <p>Readings: TBA</p>	Submission of final consulting report
Apr. 11	Wrap-up and Course Evaluation	Submission of learning journal
Apr. 25	<p>FINAL EXAM</p> <p>Comprehensive – All readings. This is an “open book” exam using course materials and laptops will be used for electronic exam.</p>	-