



# GBUS 867- 001/011 Management Consulting Essentials Fall 2025 - Course Outline

## Levene School of Business' Mission

*We advance engagement in business and diverse communities through interdisciplinary thinking and research, experiential learning, and critical reflection for personal and professional fulfillment.*

<b>CLASS TIME</b>	5:30 p.m. – 6:45 p.m. / Mondays & Wednesdays / Sept. 3 – Dec. 3
<b>CLASS LOCATION</b>	
<b>REMOTE ACCESS</b>	If outside of Regina and area, contact Instructor to get a Zoom link.
<b>COURSE SITE</b>	<a href="http://www.uregina.ca/urcourses/">http://www.uregina.ca/urcourses/</a>
<b>INSTRUCTOR</b>	
<b>CONTACTS</b>	
<b>OFFICE HOURS</b>	Flexible, by advance appointment.

## LAND ACKNOWLEDGEMENT

The University of Regina is situated on Treaty 4 lands with a presence in Treaty 6 lands. These are the territories of the nêhiyawak, Anihšīnāpēk, Dakota, Lakota, and Nakoda, and the homeland of the Métis/ Michif Nation. Today, these lands continue to be the shared Territory of many diverse peoples from near and far. This acknowledgement is one act of reconciliation and reminds us of the need for action in understanding the truth of the horrific wrongs of the past and our responsibilities for reconciliation moving forward with indigenous peoples on whose territories we live, work and learn.

## COURSE SUMMARY

This course introduces concepts and processes of management consulting – objective and independent advice and services delivered to organizations in various sectors (Kuhr, 2002). The advice helps organizations solve problems, adapt and change, acquire new skills / learning, and address other needs. Those with graduate degrees may be asked to fill consulting roles internally (as employees) or externally. Over 50 countries recognize the Certified Management Consultant (CMC) designation. Levene programs are accredited by CMC-Canada. Courses and the consulting project earn exemptions towards the CMC designation.

This class is best for students who are near the end of their graduate program, as it builds on other classes; students that are new to the graduate program may not be successful. There is an expectation of subject-area expertise (in courses taken and work experience), case analysis competency, and research experience.

## LEARNING OBJECTIVES

Upon completion of this course, the students will have:

1. Understood the consulting industry and the role of consultants in Canada and globally;
2. Utilized the five-stage consulting approach that ensures consulting projects / activities are



3. organized and methodical, and deliver superior value for clients, within an ethical framework;
4. Gained practical experience through “live” consulting projects overseen by CMC(s);
5. Acquired consulting tools and techniques, and enhanced teamwork and communication skills;
6. Gained a perspective of how both internal and external consultants interact with organizations; and
7. Learned how to assess a current situation, develop strategies for addressing challenges/ opportunities, and address change management in implementing recommendations.

## COURSE EXPECTATIONS

The course will use lectures and guest speakers, cases and exercises, discussions, projects, audio-visual materials, online resources, and extra reading. Every student is expected to be prepared for each class and participate in each class. In a graduate class, the learning also comes from other students, so students are expected to contribute your knowledge, experience, and insight to other students’ learning.

**Special Needs** If you require an accommodation, contact Student Accessibility at +1 306-585-4631 or [accessibility@uregina.ca](mailto:accessibility@uregina.ca). Discuss your needs with the Instructor promptly.

**Class Delivery** The class will be delivered in both in-person and remote formats. You will **select one format that you will use. If you attend remotely, you will have your video on at all times during class and engage in class** continuously (or be marked absent). Hybrid classes require working hardware and software, plus good internet access. Due to privacy concerns, there is no recording of the class or any portion.

**UR Courses** The website contains all course materials, class tools, and PowerPoints. The content is *not* a substitute for the required readings. Check UR Courses weekly for updates.

**Technical Support** Contact IT Support for assistance ([IT.Support@uregina.ca](mailto:IT.Support@uregina.ca) or +1 306-585-685). Online assistance at <https://www.uregina.ca/remote-learning/technical.html>

**Contacting Instructor** Students are encouraged to contact the instructor for assistance. *Email is preferred; use your university email address as external emails (e.g., yahoo.kp) may not get through.*

**Required Attendance** Students **will attend all classes, and only with advance permission, may miss a maximum of four (4) classes**. If you are late, you are marked absent. If you do not meet attendance and other course requirements, you may not be eligible to complete the final exam, and you must pass the final exam to pass the course.

## LEARNING APPROACH AND BEING SUCCESSFUL

The class website is set up in the format of READ, REFLECT, and DO. *Read* what is required, then *reflect* on learning with questions asked. Finally, you will *do* (apply) through an assigned task or exercise. Substantial pre-class work must be done for each class. Please plan your time accordingly. By being prepared for and participating in the small-group and class discussion, you will build analytical and synthesis skills. Class discussion will bring out insights students may have missed or not understood. Therefore, it is important to add your own notes to the course notes (i.e., make them your own personalized notes) and review these after each class to improve retention and understanding, and to help with assignments and final exam preparations.



## COURSE MATERIALS

### Required textbook:

Block, P. (2023). *Flawless Consulting: A Guide to Getting Your Expertise Used*, 4th Ed. Wiley. (ISBN-13 978-1394177301). Is available through Indigo, Amazon or eBay; 3<sup>rd</sup> Edition or 2<sup>nd</sup> edition is a good substitute. This is a worthwhile investment – buying it used or as an e-book will reduce cost. *Students are expected to ensure they have access to required readings.*

### Additional Course Materials and Resources:

1. Cases and other readings will be assigned. Note: Students accounts will be charged for any licenses required but this charge is expected to be less than \$20.
2. Course PowerPoint slides will be posted on UR Courses.
3. See UR Courses for additional readings.

## COURSE ASSESSMENT SUMMARY

Learners will be evaluated based on the following elements:

Deliverables	Weighting
Consulting Final Report (and sub-deliverables)	
a. Entry Memo 2%	
b. Letter of Understanding and proposal 4%	
c. Diagnosis Report 8%	
d. Comprehensive Final Report and Presentation 31%	
Total for Consulting Project	45%
In-class Assignment or Quiz	5%
Brief Cases (any 2 out of 3) – each worth 10%	20%
Final Exam (Interview) - must pass final to pass course	30%
<b>TOTAL</b>	<b>100%</b>

For a description of the grading system, consult the Faculty of Graduate Studies and Research link: <https://www.uregina.ca/gradstudies/current-students/grad-calendar/grading-system.html#gradingsystem>

A+	95 – 100%	Exceptional performance	B+	75 – 79%	Good or satisfactory performance
A+	90 – 94%	Outstanding performance	B	70 – 74%	Minimally accepted performance
A	85 – 89%	Excellent performance	F	0 – 69%	Unacceptable or failing performance
A-	80 – 84%	Very good performance			

## DESCRIPTION OF COURSE ASSESSMENT

### Detailed Course Assessment

1. **Consulting Project:** (Each part due before 11:00 p.m. on the day of the assignment date)  
The consulting project will be done in teams up to 3-4 people. You may select your own team but you will be expected to practice diversity in selecting your team.

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** – Submitted to Instructor with agenda for a first client meeting.
- b. **Letter of Understanding (LOU) and Proposal** – Submitted to Instructor and client.
- c. **Diagnosis Report** – Submitted to Instructor outlining the analysis findings.
- d. **Action Planning Report** - Draft will be discussed, but not submitted to Instructor.
- e. **Final Report** (including all previous elements, Title Page, Executive Summary, Table of Contents, and an Implementation and Change Management Report) – Submitted to Instructor and client. May wish to wait for Instructor feedback before sending to client.
- f. **Oral Presentation to Client** – PowerPoint slides submitted to Instructor.

All items will be included in an overall consulting report. Reports are 11-pt font, single-spaced, using left-justified margins (as in this outline) but no right justification (i.e., no square right margins).

If you use others' work and ideas, you must cite your information properly, using the APA style of citations, which uses parentheses (Author last name, year, page if needed if quote) and has complete references in the Appendices. Follow <https://uregina.libguides.com/APA6th>.

## 2. In-class Assignment or Quiz

An assignment will be given by the Instructor on course content.

## 3. Case Briefs: (Due before 11:00 p.m. on submission date – the day before class)

These are individual assignments, without discussion with anyone or any additional research. Do not look for previous case solutions as used of outside resources is not permitted. Each case solution will use the following format and be limited to two (2) single-spaced pages with at least an 11-point font. All briefs will be left-justified margins only, like used in this outline; no right justification (or square right margins). You will submit any two cases out of the three available.

Format (with name and student number in header):

- i. **Problem Statement** – brief outline of case context, statement of problem faced by decision, and an outline of why issue has arisen.
- ii. **Diagnostics** – Concise analysis of situation and its external context – ensure you give a summary statement of each part (You may use one appendix for any in-depth analysis).
- iii. **Alternatives** – Provide creative and mutually exclusive options of “what” should be done, but *not* “how” to do it. Options are either/or choices to solve the identified problem. You will use decision criteria – not pros /cons and show how you chose the selected option based on criteria (and criteria may be in an appendix).
- iv. **Recommendation** – Provide a brief explanation of alternative selected but don't add “how” – actions or implementation steps.
- v. **Action Plan** – Outline 7-10 immediate to longer-term act actions needed to move the recommendation ahead. These actions are specific and measurable - who will do what, how will it be done, how much will it cost, how it will be funded, and when will it be done (stated in one sentence per action).
- vi. **Conclusion** – Summarize what was problem, how was it solved, and what are a few key actions to implement the change.



Your written analysis will be graded on the:

- 1) Quality of the written content (without spelling and grammar errors), structure and flow of the writing, originality and creativity in your analysis and recommendations,
- 2) Application of appropriate course content and your understanding of the organization,
- 3) Quality of your analysis including relevant conclusions and options presented, and
- 4) Connecting an appropriate solution consistent with the problem(s) outlined in introduction.

**4. Final Exam:** (by Dec. 22 – scheduled exam date)

The final exam will be an individual interview with the Instructor to be scheduled between the first day of exams and the scheduled exam. This interview will be done on Zoom and recorded. You will not be writing a formal final exam on the exam date. This evaluation is a 5-10 minute interview with questions measured against a marking rubric, which will be available in advance. It will focus on the learnings during the class and the consulting process. The interview will be discussed in class.

**You must be in good standing (have met all course requirements and attendance policy) to do the final exam. You must pass the final exam to pass the course.**

### **Delivery of Assignments and Late Assignments**

All assignments will be delivered electronically (in Word format only) via Assignment links (found in Assignment section on UR Courses). No PDFs and no files with Apple extensions may be submitted. Any in-course assignment submitted late will have a deduction of 10% per day (or any portion of the day).

## **ACADEMIC REGULATIONS**

### **Academic Misconduct**

While you are encouraged to interact with and learn from other students in this class, you are expected to do your own work. Copying others' work constitutes academic misconduct. Plagiarism is using someone else's words or ideas as your own. If you are using someone's words or ideas, you must give them credit through proper APA citation. Please consult the Graduate Calendar (<https://www.uregina.ca/gradstudies/current-students/grad-calendar/policy-univ.html>).

Do not purchase or access past student assignments or use similar information online. Do not use an Artificial Intelligence tool (like Chat GPT) or use translation software or grammar software with an AI function included (like Grammarly) on assignments. Other students' work may not be used in any course assignments. Note: **any** incidence of plagiarism is referred to the Associate Dean, Graduate Program's office for investigation of academic misconduct, and application of any penalties, which could include failure.

### **Request for Deferred Submission of Work**

Formal requests for deferrals in course assignments are made in writing and be supported by a reasonable rationale. The final project submission date may not be delayed due to the nature of a deliverable being provided to a client at an agreed-upon date.

Extensions or requests for changes by students to the **final** exam will require the student to complete a formal request for deferral. The student completes the request, consults with the instructor who must sign the form, and the instructor then submits the form (and any supporting documentation provided by the student) to Faculty of Graduate Studies and Research (FGSR). The decision (approved or denied deferral) is made by FGSR and is usually only approved if there are extenuating circumstances (e.g., illness, death, etc.). The decision is sent by mail to the student, and it is the student's responsibility to ensure the deferred requirements are met within the outlined time frame. It is also the student's responsibility to follow-up with FGSR if they do not receive a response from FGSR on their submitted request. Requests for deferral received more than two (2) weeks after the final day of the examination period will be denied. The deferral form is on the FGSR website at: <https://www.uregina.ca/gradstudies/forms.html>

## SUPPORT SERVICES

Each business student may access a faculty academic program advisor, who is a great resource if you have any academic issues or questions. Other U of R services provided are:

- The **Student Success Centre** provides confidential guidance and support to students. Counselling services are also available for students experiencing anxiety, depression, other mental health-related issues, or chronic pain. Please visit <https://www.uregina.ca/student/counselling/>.
- **Mental Health Wellness Hub.** <https://www.uregina.ca/mental-wellness/>
- The **U of R Library** staff are always glad to help to students with research and assignments. Our business librarian, Kate Cushon is available to provide advice on your projects.
- **UR International** provides free academic and non-academic assistance (e.g., English language services, cultural transition, and new learning environment adjustment) to international students.

## PREVENTION OF HARASSMENT

The University of Regina promotes a learning, working and living environment that is respectful and free of harassment and discrimination. The University will neither tolerate nor condone any inappropriate or irresponsible conduct including any behaviour, which creates an intimidating, hostile or offensive environment for study through the harassment of and /or discrimination towards an individual or group. The Respectful University Policy may be found at <https://www.uregina.ca/policy/browse-policy/policy-GOV-100-015.html>. If you have concerns about any conduct, please discuss this with the instructor. You may also review the *Respectful University Policy Procedures (Revised 2017)* at [www.uregina.ca](http://www.uregina.ca) or contact Coordinator, Respectful University Services at [respect@uregina.ca](mailto:respect@uregina.ca).

## FACULTY BIOGRAPHY

After senior leadership roles in the not-for-profit sector, [REDACTED] became an entrepreneur, launching several businesses. He continues to operate b-creative group, a management consulting and design firm. In 2007, joined the Hill / Levene Schools of Business, where he teaches strategy, consulting, introductory business, and entrepreneurship classes. He is also the Academic Lead for the Faculty of Graduate Studies and Research's GATE Centre (Graduate Advance Training and Entrepreneurship). He has served in several administrative roles, including five years as the Director of the Faculty's Centre for Management Development – the business advisory services unit – and three years as Associate Vice-President (Development). His research interests are in strategic thinking and Board development.

He has an MBA from the University of Regina and an Honours B. Commerce (in Sports Administration) from



Laurentian University. He holds the Certified Management Consultant (CMC) designation, a honorary designation (FCMC), and the Institute of Chartered Directors, Director (ICD.D) designation. [REDACTED] also has Certificates in Adult Education and Project Management. He is an Academic Fellow by CMC-Global. He is also trained in ISO 20700 by CMC-Global.

He serves on the Board of Directors with CAA Saskatchewan and is immediate Past Chair (and Director) of Habitat for Humanity Saskatchewan. He mentors several entrepreneurs and has served on Economic Development Regina's inaugural Council for Entrepreneurial Growth. [REDACTED] is Past Chair of both the Regina and Sask. Chambers of Commerce. He is also the Past Chair of the Saskatchewan Science Centre, Past Chair of the Institute of Certified Management Consultants of Saskatchewan, Past Director of the Certified Management Consultants of Canada, and past Director of the Canadian Chamber of Commerce. (Full CV on Levene website).

## CLASS SCHEDULE

*The following schedule is subject to change. Please consult UR Courses for any changes.*

DATE	TOPIC	READING	DELIVERABLES
Sept. 3	<b>Overview of Course Expectations</b> <b>Consulting Industry and Roles of Consultants</b> <b>Ethics, Responsibility &amp; Professionalism</b> <ul style="list-style-type: none"> <li>Recognize roles and value of external &amp; internal consultants.</li> <li>Recognize code of conduct, ethical guidelines, CMC Values.</li> </ul>	Course Outline van Beek: History CMC: Code of Conduct Ch. 1 and 6 (pgs. 89-90)	<b>Worksheet 1 – Consulting Skill Inventory (Review)</b>
Sept. 8	<b>Case Preparation Process</b> Discussion of Case Brief (Sample on UR Courses)	Case Analysis PPs Read EOX Case	<b>Read EOX Case</b>
Sept. 10	<b>Nature of Consultant Project &amp; Services Provided</b> <b>The 5 Phases and KSFs of Consulting Project</b> <ul style="list-style-type: none"> <li>Understand consulting industry and consulting environment.</li> <li>Recognize concept of value.</li> <li>Understand legal liability and professional responsibility.</li> </ul>	Ch. 2, 3, 6, 7 Applebaum: Successful Consulting Osterwalder: Business Model Canvas	<b>Form Consulting Teams</b>
Sept. 15	<b>Consultant-Client Relationship</b> <ul style="list-style-type: none"> <li>Understand key client stakeholders &amp; set climate for change.</li> <li>Value trusted relationship &amp; recognize client issues.</li> <li>Understand roles / responsibilities and expectations.</li> <li>Understand preparing for initial contacts / first meetings.</li> <li>Know how to resolve ethical issues &amp; avoid no-win situations.</li> </ul>	Ch. 4,5,8, 9	
Sept. 17	<b>In-class Exercise: Meeting Preparation (OARR)</b> <b>Case Study Example</b>		
Sept. 22	<b>Managing Client Relationship</b> Guest Client: TBA		
Sept. 24	<b>Case Discussion: Social Focus Consulting</b>		<b>Prepare: Social Focus case</b>
Sept. 28	<b>1<sup>st</sup> Part of Project due before 11:00 p.m.</b>		
Sept. 29	<b>Entry Meetings between Clients and Teams</b>	U of M: Communication	



Oct.1	<b>Consulting Process – Entry Data Collection</b>	Ch. 9, App. A & B Nonprofit Lifecycles
	<ul style="list-style-type: none"> <li>Understand client's activities &amp; perspectives</li> <li>Recognize symptoms, problems, and causes; define scope</li> <li>Select appropriate techniques for gathering info from clients</li> <li>Develop, present, and negotiate client proposals &amp; fees</li> </ul>	
Oct. 5	<b>1st Case Brief Due before 11:00 p.m.</b>	<b>Submit: Bei Capelli (A)</b>
Oct. 6	<b>Case Discussion: Bei Capelli (A)</b>	
Oct. 8	<b>Consulting Process – Diagnosis</b>	Ch. 10, 11
	<ul style="list-style-type: none"> <li>Assess environment &amp; challenges/opportunities</li> <li>Diagnose situation, use self-diagnostics, identify red flags</li> <li>Convey findings and conclusions</li> </ul>	
Oct. 13	<b>No Class – Thanksgiving Holiday</b>	
Oct. 14	<b>2<sup>nd</sup> Part of Project due before 11:00 p.m.</b>	<b>Submit LOU &amp; proposal</b>
Oct. 15	<b>Research and Diagnosis (continued)</b> Case Study Example	
Oct. 20	<b>Panel Discussion: TBA</b>	
Oct. 22	<b>Engagement Process</b>	Ch. 12, 13, 14, 17
	<ul style="list-style-type: none"> <li>Value independence of consultant</li> <li>Recognize engagement is critical to getting all info</li> </ul>	
Oct. 26	<b>2<sup>nd</sup> Case Brief due before 11:00 p.m.</b>	<b>Submit Bon Star case</b>
Oct. 27	<b>Case Discussion: Bon Star Hotel</b>	
Oct. 29	<b>Project Time in Class</b> Groups Meetings and Meetings with Instructor	
Nov. 3	<b>Consulting Process – Action Planning</b>	Ch. 15
	<ul style="list-style-type: none"> <li>Help client clarify objectives &amp; generate possible solutions</li> <li>Develop and evaluate alternatives and impacts</li> <li>Develop an action proposal for the client</li> </ul>	
Nov. 4	<b>3<sup>rd</sup> Part of Report due before 11:00 p.m.</b>	<b>Submit Diagnostic Report</b>
Nov. 5	<b>Consulting Process – Implementation</b>	Ch. 16
	<ul style="list-style-type: none"> <li>Describe various roles for consultant in implementation</li> <li>Plan and monitor the implementation</li> <li>Train and develop client staff to make changes in work</li> <li>Maintain and control new practices</li> </ul>	
Nov. 10	<b>No Class – Reading Week</b>	
Nov. 12	<b>No Class – Reading Week</b>	
Nov. 17	<b>Change Management</b>	
	<ul style="list-style-type: none"> <li>Identify forces resisting change &amp; create willingness to change</li> <li>Diagnose the resistant forces in organization change</li> </ul>	
Nov. 17	<b>Project Management</b>	
	<ul style="list-style-type: none"> <li>Define project schedule / accountability to deliver objectives</li> <li>Secure resources, coordinate project, and establish controls</li> <li>Define communications and reporting procedures for project</li> </ul>	Project Charter Template Naghasundharama:





- Manage budgets, objectives, and deadlines
- Manage client's expectations & capacity at all stages

#### Managing IT Projects

<b>Nov. 18</b>	<b>3rd Case Brief due before 11:00 p.m.</b>	<b>Submit Ergonomica case</b>
<b>Nov. 19</b>	<b>Case Discussion: Ergonomica Consulting</b>	
<b>Nov. 24</b>	<b>In-Class Project Time</b>	
	<b>Consulting Process – Termination</b>	
	<ul style="list-style-type: none"> <li>• Ensure skills transfer, sustainability of results, and knowledge</li> </ul>	
<b>Nov. 26</b>	<ul style="list-style-type: none"> <li>• Predict potential areas of deficit and how to address them</li> <li>• Close deliverables and transfer ownership to client</li> <li>• Evaluate project and plan to maintain relationship</li> </ul>	
<b>Nov. 30</b>	<b>Submit PowerPoint for Presentations</b>	<b>Submit PowerPoint</b>
<b>Dec. 1</b>	<b>Client Presentations</b>	
<b>Dec. 2</b>	<b>Submit Final Report &amp; Peer Evaluations before 11 p.m.</b>	<b>Submit Report, Evaluation</b>
<b>Dec. 3</b>	<b>Course Review and Course Evaluation</b>	
<b>Dec.</b>	<b>Final Exam – Individual Interviews (to be scheduled Dec. 6-22)</b>	