

Management Consulting Essentials | GBUS 867 Fall 2021 Course Outline

Synchronous (Remote delivery at scheduled class times)*

This Course Outline is subject to change. Please refer to the current version on UR Courses.

CLASS DETAILS

Times / Dates: 7:00 p.m. – 9:45 p.m., Wednesdays, September 1 – December 1
Classroom: Remote Learning Delivery - synchronously (at class scheduled times)
Course Site: <http://www.uregina.ca/urcourses/> and access through your UR account.

INSTRUCTOR CONTACTS

Name: Bruce Anderson, MBA, CMC, ICD.D **Office Hours:** By appointment (remotely)
Mobile: +1 306-539-6311 **Email:** bruce.anderson@uregina.ca

**When writing this outline, the University's policy on course delivery was synchronous delivery (remotely at scheduled times). This may switch to a hybrid model – both remote delivery and in-person delivery.*

LAND ACKNOWLEDGEMENT

The University of Regina is situated on Treaty 4 lands with a presence in Treaty 6. These are the territories of the nêhiyawak, Anihšînāpēk, 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.

COURSE SUMMARY

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: Entry, Diagnosis, Action Planning, Implementation, and Termination. A key feature of this course are “live” consulting projects with local organizations as “real” clients.

People with graduate business degrees often fill consulting roles internally (as an employee) or as external, independent consultants. The primary focus will be on the external consulting for the business, public, and not-for-profit sectors, but internal consulting will also be discussed.

The globally-recognized professional standard is the Certified Management Consultant (CMC) designation,



which in Saskatchewan and Canada is a “right to title” certification. 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. The Levene Graduate programs are accredited by CMC-Canada, meaning courses taken (including this one) earn exemptions towards the CMC designation’s course work. The consulting assignment counts towards consulting project hours needed.

LEARNING OBJECTIVES

Upon completion of this course, the student will:

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. Obtain 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 in the implementation of recommendations.

COURSE EXPECTATIONS

The course will use mini-lectures, class discussions, readings and cases, activities / exercises, and guest speakers. The class will be delivered remotely in a synchronous format (i.e., class offered during scheduled times). It will be delivered remotely, through Zoom technology. Every student is expected to be prepared for each class – having read all course materials and prepared the cases and / or assignments. Useful for reviewing class learning, PowerPoint slides contain extra content (and are NOT a substitute to reading the textbook and required readings). Also, everyone is also expected to participate fully in class, contributing to

your peers and your own learning. **Please be familiar with this course outline and its requirements.**

You must meet three (3) technology expectations to for this class, and these are:

1. *Ongoing access to a computer for all class and exam times, and for all assignments.*
2. *Access to Microsoft Word, Excel, and PowerPoint software for all course work. Students can access Microsoft Office365 online for free, or purchase MS Office from Microsoft. (Note: May use LibreOffice free open source tools for files with .docx, .xlsx, and .pptx extensions)*
3. *A webcam, or have a web camera with speakers and microphone.*

You do not need to have a Zoom account nor have downloaded the software or app. However, the free Zoom download will enable you to host your own group Zoom meetings (as you cannot meet in-person).

LEARNING APPROACH

This class is typically delivered in a case room, but that is not possible in the current pandemic situation. The class allows a synchronous format (scheduled at set class times) with some availability of some asynchronous learning (i.e., study at your own pace). Due to pandemic concerns, you will not meet with other students in-person during or outside of class.

This class is based on active participation so students are **expected to attend classes with video on and audio on continuously during all classes**, unless prior permission or instruction has been given. If you do not have video and audio on during a class, you will be considered to be absent from that class. Also, you are expected to attend classes online at the scheduled times. Students **must complete at least a minimum amount of course work to be in good standing (including attending at least 10 of 13 classes) to complete the course and write the final exam.**

Fortunately, the remote delivery will not affect the rigour of the class. However, it does require adaptation from both students and the Instructor. Here are four learning approaches to be used:

Case Study. Cases are used to put students into the role of decision-maker in the case. These improves analytical and decision-making skills, and allows application of course content in the analysis.

Live Client. Local not-for-profit organizations will be used for course projects. Guest speakers and panel discussions will help demonstrate consulting practices applicable to those projects and course materials.

Think, Pair, Share. The first part is individual reflection, then sharing with a partner to ensure you have considered all points, and the key part is sharing with class. Learning does not come from the textbook and Instructor only; your peers have perspectives and experiences, and you are expected to share yours too.

Read, Reflect, Do. This will be demonstrated as various times during the course. For example, you may get an assignment reading or a video to watch. Then, you will reflect on the learning. Finally, you will apply the learning, perhaps through a pre-class preparation, assignment, or a class exercise.

The class will not be recorded due to student privacy concerns and you may not record any portion of class (either in audio or visual formats) without prior permission.

BEING SUCCESSFUL IN THE COURSE

The Instructor's course notes will be available on UR Courses in advance of each class, but don't rely solely on the course notes. For example, the textbooks are useful in laying out the theory and concepts while the course notes may include resource material from outside the textbook. Students need to understand the concepts and recognize how they are used.

Substantial pre-class work is needed to prepare for each class. The intensive format of this class means much of the reading will have to be done before the class starts, though quick reviews will help retain the materials. Please plan your time accordingly.

The case analysis process offers insight into all cases. Past students have indicated that 1-2 hours of reading and preparation is needed for each classroom case while another hour is needed to review textbook and course note materials for each class. You are expected to have read and prepared **each** case.

By being prepared for the small-group and class discussion, you will build analytical and synthesis skills. Class discussion will bring out things 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 class to improve retention and understanding.

COURSE MATERIALS

The required textbooks are:

1. Vandebosch, B. (2003). *Designing Solutions for Your Business Problems: A Structured Process for Managers and Consultants*. Jossey-Bass. (ISBN: 978-0-787-96765-9. For purchase in bookstore.)
2. Block, P. (2011). *Flawless Consulting: A Guide to Getting Your Expertise Used*, 3rd Ed. Jossey-Bass. (E-book is free online through the Library.)

Students are expected to ensure they have access to required readings. Please note that resources in the Library may not be available in a timely manner, especially close to due dates and exams. Inability to access Library collections or shared materials will not be considered a valid reason for extensions, grade adjustments, or other accommodations.

Additional Course Materials and Resources:

1. Review <https://www.cmc-canada.ca/> to gain an understanding of Management Consulting profession.
2. Cases and other readings may be assigned. *Note: Students accounts will be charged for any licenses required but this charge is expected to be less than \$25.*
3. Course PowerPoint slides will be posted on UR Courses.

Additional Required Reading:

Appelbaum, S.H. & Steed, A. (2005, January). *The Critical Success Factors in the Client-Consultant Relationship*. Journal of Management Development.

https://www.researchgate.net/publication/235251700_The_critical_success_factors_in_the_client-consulting_relationship

Certified Management Consultants of Canada. (n.d.). *Code of Professional Conduct*. <https://www.cmc-canada.ca/codeofprofessionalconduct>



Osterwalder, A. & Pigneur, Y. (2010). *Business Model Generation*. Strategyzer. <https://strategyzer.com/books/business-model-generation> [Read Pages 14-41 as a minimum – note: you will see these are not text-heavy pages]

Naghasundharama, S.A. (n.d.). *Integrating Agile Methodologies into Traditional Project Management – A Blended Approach to Managing Information Technology Projects*. St. Mary’s University.

University of Minnesota. (2013). *The Communication Process*. <https://open.lib.umn.edu/communication/chapter/1-2-the-communication-process/>

van Beek, J. (2017, Summer). *Management Consulting: History and Future*. Consult Magazine. <https://www.cmc-canada.ca/consult/management-consulting-history-and-future>

Optional Reading:

1. Kubr, M. (Ed.) (2002). *Management Consulting: A Guide to the Profession*. International Labour Office. (Available as a used book on Amazon and other sites, and in U of R Library).
2. Greiner, L.E., Olson. T.H. & Poulfelt, F. (2010). *Management Consulting Today and Tomorrow Assignment 1 Skills Inventory Casebook: Enhancing Skills to Become Better Consultants*. Routledge.

COURSE ASSESSMENT SUMMARY

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

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	35%
Total for Consulting Project	49%
Brief Cases (3) – each worth 7%	21%
Final (Case) Exam	30%
TOTAL	100%

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

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



DESCRIPTION OF COURSE ASSESSMENT

The grading is further detailed as follows:

1. Consulting Project: (Each part due before 11:00 p.m. on submission date)

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 - including the agenda for a first meeting with the client.
- b. Letter of Understanding and Proposal
- c. Diagnosis Report - A written report will be submitted to the client outlining the findings from the analysis phase.
- d. Action Planning Report - A draft report will be discussed with the Instructor. This will be discussed in class.
- e. Final Report (including all previous elements and Implementation and Change Management Report).
- f. Presentation to Client

All of these items will be included in an overall consulting report. Reports have an 11-pt font using left-justified margins only (like in this outline); no right justification (or square right margins).

2. Case Briefs: (Due before 11:00 p.m. on submission date)

These are individual assignments, without discussion with anyone or any additional research. Do not look for previous case solutions; this is academic misconduct and frankly, the good students do not post their examples. Each case will follow the following format and be limited to three (3) single-spaced pages (in the same document) 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).

- a. Cover memo (One-page memo to client introducing and defining problem, what will be done and when, and key deliverables). This is like an executive summary, but follow topics in first sentence. Use this form, properly aligned as below:

MEMO

To: Bruce Anderson

From: Your name

Re: Case Brief (case name)

Date: Submission date *(Note: the alignment of the indenting to be professional)*

- b. Report (Maximum of two pages) containing required headings:

- i. Diagnostics (Analysis of situation and external context – ensure you give a summary statement of each part).
- ii. Alternatives (Mutually exclusive options asking “what” to do and not “how” to do it – either / or choices that will resolve the identified problem) and Discussion (Use decision criteria – not pros /cons – and how you chose the selected option based on criteria).
- iii. Recommendation (Brief explanation of alternative selected but don’t add “how’s” – actions or implementation steps).

- iv. Action Plan (Immediate, short-, mid-, and long-term actions needed to move forward; very specific and measurable. Outline who will do what, how much will it cost, and when will it be done – ideally in one sentence).
- v. Conclusion (What was problem, how was it solved, and what are a few key actions to implement the change).

The use of headings (as above) will make it easier for a reader to follow (and mark) your analysis.

Your written analysis will be graded on the: 1) quality of the written content, structure and flow of the writing, originality and creativity in your analysis and recommendations, 2) application of course content and understanding of the organization, 3) integration of relevant research, 4) quality of your analysis including options presented, and 4) the articulation of an appropriate solution consistent with the problem(s) expressed in the introduction. Please do not submit a rough draft of a number of independently written sections; take care that the entire paper reads well together, has a similar style, and is free of grammar and spelling errors.

3. Final Exam:

The final exam will be a comprehensive case and will be a take-home exam done on your own. The exam details will be confirmed closer to the exam date.

Delivery of Assignments

All assignments will be delivered electronically (in Word format only) via Assignment links (found in Assignment section on UR Courses). No PDFs are permitted.

Late Assignments

Any in-course assignment that is submitted late will be deducted 10% per day after the submission date. A late submission of the final project will receive a mark of 0%. Assignments received at 11:01 p.m. or later are considered already one-day late.

Citations:

If you use others' work and ideas, you must cite your information properly. Please ask the Instructor if you are unsure whether your usage is an issue. For this class, you will use the APA style of citations and you will *not* use footnote citation (e.g., citation¹). APA style uses simple parentheses such as (Author last name, year if needed, page if needed). Please use resources such as <https://uregina.libguides.com/APA6th>.

ACADEMIC REGULATIONS

Plagiarism and Misconduct

Students are encouraged to learn from others and even to discuss course deliverables with your cohorts. However, all students are expected to rigorously adhere to principles of intellectual integrity. Plagiarism is a form of intellectual dishonesty in which another person's work is presented as one's own. You may use other people's ideas but only with the appropriate citation. Plagiarism or cheating on examinations / assignments is a serious offence that may result in a zero grade on an assignment, a failing grade in the course, or expulsion from the University. For more information, please consult Graduate Calendar (<https://www.uregina.ca/gradstudies/current-students/grad-calendar/policy-univ.html>).

Request for Deferred Submission of Work

Formal requests for deferrals in course assignments must be made in writing and be supported by a reasonable rationale (e.g., illness, etc.). 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 can be found on the FGSR website at: <https://www.uregina.ca/gradstudies/forms.html>

STUDENT RESOURCES

Each student in business is assigned a faculty academic program advisor. Your advisor is a great resource if you have any academic issues or questions. Other university services include:

Accessibility Services

If you have a special accommodation need, please contact the Centre for Student Accessibility at (306) 585-4631 or e-mail: accessibility@uregina.ca. If you require an accommodation, please ensure the proper documents are provided by the Student Accessibility Office and discuss your needs with the instructor as early as possible.

Counselling Services

If you are experiencing personal problems that may be affecting your studies, please consider accessing the anonymous U of R Counselling Services. **Mental Health Wellness Hub** is at <https://www.uregina.ca/mental-wellness/>

UR International provides free academic and non-academic assistance (e.g., English language services, transition and adjustment to a new learning environment) to international students

The **Student Success Centre** provides personalized guidance and support to students in achieving their university, professional, and life goals. Students may also seek free writing assistance in person or access the Online Writing section on their web-site (www.uregina.ca/student/ssc).

The **U of R Library** staff are very helpful with research and assignments.

PREVENTION OF HARASSMENT POLICY

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>. Some situations do not constitute harassment and include, but are not limited to:

- The correction, grading, assessment or appropriate criticism of any student's academic efforts, even if they are adverse or if the student does not agree.
- Insistence on academic excellence or a reasonable quality of job performance.
- The free academic study, discussion and debate of controversial topics in an academic environment, including topics that may be offensive to groups or individuals.
- Practices required or permitted by law or contract; practices and procedures that are reasonable and bona fide in the circumstances.
- The statement of any opinion by a person who has been legitimately asked to state their opinion.
- Lively discussion of issues in the course of legitimate academic inquiry and scholarly research.
- Light-hearted banter and joking that is welcomed by the recipient(s).

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 or contact Coordinator, Respectful University Services at (306) 585-5400 or respect@uregina.ca.

FACULTY BIOGRAPHY

After senior leadership roles in the not-for-profit sector, Bruce Anderson became an entrepreneur, launching several businesses. He continues to operate **b-creative** group, a management consulting and design firm, primarily serving the association and business sectors. In 2007, Bruce pursued a life-long passion for learning and began teaching at the Hill / Levene Schools of Business, where he teaches strategy, consulting, introduction to business, and entrepreneurship classes. 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 working directly for the President and Vice-Chancellor as Associate Vice-President (Development). His research interests are in strategic thinking and Board development.

Bruce received his MBA from the University of Regina and a Honours Bachelor of Commerce (in Sports Administration) from Laurentian University. He holds the designations of Certified Management Consultant (CMC) and Institute of Chartered Directors, Director (ICD.D). Bruce also has Certificates in Adult Education and Project Management.

He serves on the Board of Directors with CAA Saskatchewan and as Chair of the Board of Directors for Habitat for Humanity Saskatchewan. He mentors several new entrepreneurs and recently served on Economic Development Regina's Council for Entrepreneurial Growth. Bruce 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.

Bruce and his spouse Lucie have two adult children and three grandchildren.

For a full CV, visit https://www.uregina.ca/business/faculty-staff/faculty/anderson_bruce.html

CLASS SCHEDULE

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

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

DATE	TOPIC	READING	DELIVERABLES
Sept. 1	<p>Overview of Course Expectations Consulting Industry and Roles of Consultants Ethics, Responsibility & Professionalism</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>Case Preparation Process Discussion of Case Brief (Sample on UR Courses)</p>	Course Outline van Beek: History of Consulting CMC: Code of Conduct FC Ch. 1, 7 DS Ch. 6 pgs. 89-90 Case Analysis PPs Read EOX Case	Worksheet 1 – Consulting Skill Inventory (UR Courses)
Sept. 8	<p>Nature of Consultant Project & Services Provided The 5 Phases and KSFs of Consulting Project</p> <ul style="list-style-type: none"> Understand Canadian/global consulting industry. Understand consulting business and environment. Recognize concept of value for money. Understand legal liability and professional responsibility. <p>Case Discussion: Social Focus Consulting</p>	FC Ch. 2, 3, 4 Applebaum: Successful Consulting Osterwalder: Business Model Canvas	Form Consulting Teams Prepare: Social Focus case
Sept. 15	<p>Consultant-Client Relationship</p> <ul style="list-style-type: none"> Understand key client stakeholders. Value Consultant-Client trusted / respected relationship Understand roles / responsibilities and expectations. Recognize how to create climate for change. Understand preparing for initial contacts / first meetings Recognize issues in a consultant-client relationship Know ways to resolve ethical issues, and how to avoid no-win consulting situations. <p>Marketing Research Guest Speaker: Doug Fast, CMC</p> <p>In-class Exercise: Meeting Preparation (OARR)</p> <p>Case Study Example</p>	DS Ch. 2 - 8	

Tues. Sept. 21 **1st Part of Project due before 11:00 p.m.** **Submit Entry Memo**

Sept. 22 **Entry Meetings between Clients and Teams** U. of Minnesota:
Project Scoping Communication
In-class Exercise Models

Tues. Sept. 28 **1st Case Brief Due before 11:00 p.m.** **Submit: Bei Capelli (A)**

Sept. 29 **Consulting Process – Entry Data Collection**

- Understand client’s activities & perspectives
- Recognize symptoms, problems, and causes
- Describe techniques for gathering info from clients
- Prepare assignment strategy; plan / define scope/risk
- Establish effective fee and payment structure
- Develop, present, and negotiate client proposals
- Recognize formal, verbal, and psychological contracts
- Evaluate effectiveness of data collection

DS Ch. 1
DS Ch. 9
DS App. A
DS App. B

Nonprofit
Lifecycles

Case Discussion: Bei Capelli (A)

Tues. Oct. 5 **2nd Part of Project due before 11:00 p.m.** **Submit letter of understanding & proposal**

Oct. 6 **Consulting Process – Diagnosis**

- Assess situation/environment, challenges/ opportunities
- Diagnose situation and use self-diagnostics
- Convey findings and conclusions
- Describe red flags in the diagnosis

FC Ch. 11-12

Case Study Example

Tues. Oct. 12 **2nd Case Brief due before 11:00 p.m. Use Assignment link.** **Submit Bon Star case**

Oct. 13 **Engagement Process**

- Value independence of consultant
- Recognize engagement critical to getting all info

FC Ch. 17 & 19

Case Discussion: Bon Star Hotel

Group Meetings and Meetings with Instructor

Tues. Oct. 19 **3rd Part of Report due before 11:00 p.m.** **Submit Diagnostic Report**



- Oct. 20**
- Consulting Process – Action Planning**
- Help client clarify objectives
 - Generate possible solutions with client
 - Develop and evaluate alternatives and impacts
 - Develop an action proposal for the client
- DS Ch. 9

Panel Discussion: TBA

Tues. Oct. 26 **3rd Case Brief due before 11:00 p.m.** **Submit MacPhie case**

- Oct. 27**
- Consulting Process – Implementation**
- Describe various roles for consultant in implementation
 - Plan and monitor the implementation
 - Train and develop client staff
 - Introduce changes in work methods
 - Maintain and control new practices
- FC Ch. 16

Case Discussion: MacPhie and Company

- Nov. 3**
- Project Management**
- Define project schedule / accountability to deliver 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 project plan and evaluate results
 - Manage consulting project effectively ensuring budgets, objectives, and deadlines are met within context established
 - Manage client’s expectations at all stages of project
- Project Charter
Template
Naghasundharama:
Managing IT
Projects
- Bring draft report to class
for discussion**

In-Class Time for Projects

Nov. 10 **Reading Week – No Classes**

- Nov. 17**
- Change Management**
- Identify internal forces causing resistance to change
 - Recognize strategies that increase willingness to change
 - Diagnose the resistant forces in organization change
- Consulting Process – Termination**
- 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
- FC Ch. 8 - 9
FC Ch. 14 - 15
DS Ch. 10



- Close deliverables and transfer ownership to client
 - Evaluate project (benefits to client, & consulting process)
- Nov. 17 (con't)**
- Close documents and complete termination report to client
 - Follow up & maintain the relationship

Draft Reports Discussed with Instructor

Tues. Nov. 23	Submit Final Report Submit individual Peer Evaluations	Submit Final Report
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**Nov.
24** **Presentation Preparation
Wrap-up and Course Review**

Dec. 1 **Client Presentations
Evaluations**

Dec. 22	Final Exam – Comprehensive, Open-book Exam must be submitted before 9:45 p.m.
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