

GBUS 867- 001 | Management Consulting Essentials Fall 2022 - 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.*

CLASS TIME	7:00 p.m. – 9:45 p.m. / Mondays / Sept. 12 – Dec. 6, 2022
CLASS LOCATION	ED 514 or Zoom (hybrid: in-person or remote delivery options)
REMOTE ACCESS	If outside of Regina and area, contact the Instructor to get a Zoom link.
COURSE SITE	http://www.uregina.ca/urcourses/
INSTRUCTOR	Bruce Anderson, MBA, CMC, ICD.D, FCMC, AF-CMC
EMAIL	Bruce.Anderson@uregina.ca
TELEPHONE	+1 306-337-2985 office; +1 306-539-6311 mobile
OFFICE HOURS	Flexible, by appointment.

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, 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.

COURSE SUMMARY

This course introduces concepts and processes of management consulting, which is advice and services delivered independently and objectively to organizations in various sectors (Kuhr, 2002). The advice helps organizations solve problems, adapt and change, acquire new skills / learning, and address other needs. With graduate business degrees, students may be asked to fill consulting roles internally (as employees) or externally (as independent consultants), and this class will discuss both approaches. Students will also gain practical experience through actual consulting projects with local, not-for-profit organizations (clients).

Over 50 countries recognize the Certified Management Consultant (CMC) designation, which is a “right to title”. As Levene graduate programs are accredited by CMC-Canada, the courses and the consulting assignment earn exemptions towards the CMC designation’s course work and consulting hours required.

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 organized and methodical, and deliver superior value for clients, within an ethical framework;
3. Gained practical experience through “live” consulting projects overseen by CMC(s);
4. Acquired consulting tools and techniques, and enhanced team work and communication skills;
5. Gained a perspective of how both internal and external consultants interact with organizations; and
6. Learned how to help clients assess their 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, current events, 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 happens with other students, so you 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. Discuss your needs with the Instructor as soon as possible.

Class Delivery The class will be delivered in both in-person and remote formats. You will be **required to select which format you will use**. If you attend remotely, you will have your video on and be engaged at all times (or you be marked absent).

UR Courses Website contains all course materials, class tools, pre-recorded video, and PowerPoints. Available in advance, the video / slides *are not* substitutes for the required readings. Check UR Courses, before each class, for new content and / or updates.

Technical Support Contact IT Support for technical assistance (IT.Support@uregina.ca or +1 306-585-4685). 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., gmail.com) may not get through.

Required Attendance Students are **expected to attend all classes**, and **may only miss** (with advance permission), **a maximum of two classes**. If you are late, you are marked absent.

Due to U of R privacy concerns, the class will not be recorded and you may not record any portion of class.

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. Also, the Faculty values experiential learning (i.e., practical and applied), and this is done through a live project, cases/ exercises, guest speakers, etc.

Substantial pre-class work is needed to prepare 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 the final exam.

COURSE MATERIALS

Required textbooks:

1. Vandenbosch, B. (2003). *Designing Solutions for Your Business Problems: A Structured Process for Managers and Consultants*. Jossey-Bass. (ISBN: 978-0-787-96765-9.) 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. Instructions are available on UR Courses.)



Students are expected to ensure they have access to required readings. Inability to access Library collections or shared materials is not a valid reason for extensions, grade adjustments, or accommodations.

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 \$25.
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:

Table with 2 columns: Deliverables and Weighting. Rows include Consulting Final Report (and sub-deliverables) with sub-items a-e, Brief Cases, and Final (Case) Exam, totaling 100%.

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

Table with 4 columns: Grade, Range, Description, and another Description. Rows show performance levels from A+ to F.

DESCRIPTION OF COURSE ASSESSMENT

Detailed Course Assessment

- 1. Consulting Project: (Each part due before 11:00 p.m. on submission date – the day before class) The consulting project will be done in teams up to four (4) people. You may select your own team but you will be required to practice diversity in selecting your team – two members must be a different gender and / or ethnicity.

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 meeting with the client.
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 with (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 (like in this outline) but no right justification (i.e., square right margins).

2. 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; this is academic misconduct and frankly, the good students do not post their examples. Each case solution will use the following format (section b) and be limited to three (3) single-spaced pages (in one 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). You will submit any two cases out of the three available.

Two parts:

- a. *Cover memo* (one-page only). Use this format, 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*)

Memo is a summary to client with the following topics: introducing and defining problem, what will be done and when, and key deliverables. This is not a full Executive Summary.

- b. *Attachment:* Report (Maximum of two pages) containing these required headings:
 - i. **Diagnostics** (Analysis of situation and external context – ensure you give a summary statement of each part).
 - ii. **Alternatives** (Mutually exclusive options of “what” to do and *not* “how” to do it; either / or choices that will resolve the identified problem) and basic discussion (Using decision criteria – not pros /cons – 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 measureable. Outline who will do what, how much will it cost, how it will be funded, and when will it be done – ideally in one sentence).
 - v. **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.

3. Final Exam: (Due before 9:45 p.m. on Dec. 19 – no late exams accepted)

The final exam will be a comprehensive case and will be a take-home exam done on your own. The case and assigned questions will be distributed on last day of class.

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 are permitted.

Any in-course assignment that is submitted late will have a deduction of 10% per day or any portion of the day (e.g., 11:01 p.m. and later is considered one day late).

Citations

If you use others' work and ideas, you must cite your information properly, using the APA style of citations. APA style uses simple parentheses such as (Author last name, year, page if needed if quote) and have complete references as an Appendix. Please use <https://uregina.libguides.com/APA6th>.

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. Even if cited, other students' work will not be used in any course assignments. Note: **any** plagiarism will be referred to the Associate Dean – Graduate Programs and Research's office for investigation of academic misconduct. Cite correctly!

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>

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 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>. 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 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. In 2007, joined the Hill / Levene Schools of Business, where he teaches strategy, consulting, introductory 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 as Associate Vice-President (Development). His research interests are in strategic thinking and Board development.

He has a MBA from the University of Regina and an Honours Bachelor of Commerce (in Sports Administration) from Laurentian University. He holds the designations of Certified Management Consultant (CMC), the honorary designation (FCMC), and Institute of Chartered Directors, Director (ICD.D). Bruce also has Certificates in Adult Education and Project Management. He was recently named an Academic Fellow by CMC-Global. He is trained in ISO 20700 by CMC-Global.

He serves on the Board of Directors with CAA Saskatchewan and as Board Chair of 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.

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:** Vandenbosch, Betty (2003) **D**esigning **S**olutions for Your Business Problems
FC: Block, Peter (2011), **F**lawless **C**onsulting 3rd edition



DATE	TOPIC	READING	DELIVERABLES
Sept. 5	No Class – Labour Day holiday		
Sept. 12	<p>Overview of Course Expectations</p> <p>Consulting Industry and Roles of Consultants</p> <p>Ethics, Responsibility & Professionalism</p> <ul style="list-style-type: none"> Recognize roles and value of external & internal consultants. Recognize code of conduct, ethical guidelines, CMC Values. <p>Case Preparation Process</p> <p>Discussion of Case Brief (Sample on UR Courses)</p>	<p>Course Outline</p> <p>van Beek: History of Consulting</p> <p>CMC: Code of Conduct</p> <p>FC Ch. 1, 7</p> <p>DS Ch. 6 pgs. 89-90</p> <p>Case Analysis PPs</p> <p>Read EOX Case</p>	<p>Worksheet 1 – Consulting Skill Inventory</p>
Sept. 19	<p>Nature of Consultant Project & Services Provided</p> <p>The 5 Phases and KSFs of Consulting Project</p> <ul style="list-style-type: none"> Understand consulting industry and consulting environment. Recognize concept of value. Understand legal liability and professional responsibility. <p>Marketing Research</p> <p>Guest Speaker: TBA</p> <p>Case Discussion: Social Focus Consulting</p>	<p>FC Ch. 2, 3, 4</p> <p>Applebaum: Successful Consulting</p> <p>Osterwalder: Business Model Canvas</p>	<p>Form Consulting Teams</p> <p>Prepare: Social Focus case</p>
Sept. 26	<p>Consultant-Client Relationship</p> <ul style="list-style-type: none"> Understand key client stakeholders & set climate for change. Value trusted relationship & recognize client issues. Understand roles / responsibilities and expectations. Understand preparing for initial contacts / first meetings. Know how to resolve ethical issues & avoid no-win situations. <p>Managing Client Relationship</p> <p>Guest Client and Past Student - TBA</p> <p>In-class Exercise: Meeting Preparation (OARR)</p> <p>Case Study Example</p>	<p>DS Ch. 2 - 8</p>	
Oct. 2	1st Part of Project due before 11:00 p.m.		Submit Entry Memo
Oct. 3	<p>Entry Meetings between Clients and Teams</p> <p>Project Scoping and In-class Exercise</p>	<p>U. of Minnesota: Communication Models</p>	
Oct. 10	No Class – Thanksgiving Holiday		
Oct. 16	1st Case Brief Due before 11:00 p.m.		Submit: Bei Capelli (A)
Oct. 17	<p>Consulting Process – Entry Data Collection</p> <ul style="list-style-type: none"> Understand client's activities & perspectives Recognize symptoms, problems, and causes; define scope Select appropriate techniques for gathering info from clients Develop, present, and negotiate client proposals & fees <p>Case Discussion: Bei Capelli (A)</p>	<p>DS Ch. 1</p> <p>DS Ch. 9</p> <p>DS App. A</p> <p>DS App. B</p> <p>Nonprofit Lifecycles</p>	
Oct. 23	2nd Part of Project due before 11:00 p.m.		Submit LOU & proposal
Oct. 24	<p>Consulting Process – Diagnosis</p> <ul style="list-style-type: none"> Assess environment & challenges/opportunities Diagnose situation, use self-diagnostics, identify red flags Convey findings and conclusions <p>Case Study Example</p>	<p>FC Ch. 11-12</p>	



Oct. 30 2nd Case Brief due before 11:00 p.m. Submit Bon Star case

Engagement Process

- Value independence of consultant FC Ch. 17 & 19
- Recognize engagement is critical to getting all info

Oct. 31 Case Discussion: Bon Star Hotel

Group Meetings and Meetings with Instructor

Nov. 7 No Class – Reading Week

Nov. 13 3rd Part of Report due before 11:00 p.m. Submit Diagnostic Report

Consulting Process – Action Planning

- Help client clarify objectives & generate possible solutions
- Develop and evaluate alternatives and impacts DS Ch. 9
- Develop an action proposal for the client

Panel Discussion: TBA

Nov. 22 3rd Case Brief due before 11:00 p.m. Submit MacPhie case

Consulting Process – Implementation

- Describe various roles for consultant in implementation
- Plan and monitor the implementation
- Train and develop client staff to make changes in work
- Maintain and control new practices

Change Management

- Identify forces resisting change & create willingness to change
- Diagnose the resistant forces in organization change

Case Discussion: MacPhie and Company

In-class Time for Projects

Project Management

- Define project schedule / accountability to deliver objectives
- Secure resources, coordinate project, and establish controls
- Define communications and reporting procedures for project
- Manage budgets, objectives, and deadlines
- Manage client’s expectations & capacity at all stages

Project Charter Template
Naghasundharama:
Managing IT Projects

Consulting Process – Termination

- Ensure skills transfer, sustainability of results, and knowledge
- Predict potential areas of deficit and how to address them
- Close deliverables and transfer ownership to client
- Evaluate project and plan to maintain relationship

FC Ch. 8 - 9
FC Ch. 14 - 15
DS Ch. 10

In-Class Time for Projects

Draft Reports Discussed with Instructor

Bring draft report to class for discussion

Dec. 4 Submit Final Report & Peer Evaluations & PowerPoint slides before 11 p.m. Submit Final Report, Peer Evaluations, PP

Dec. 5 Client Presentations
Course Review

Dec. 19 Final Exam – Submitted before 9:45 p.m. Submit final exam

***Note: Semester only has 11 classes due to the positioning of two holidays and Reading week. This means assignments and deliverables are compressed. Plan accordingly.**