



GBUS 867- 001 | Management Consulting Essentials Fall 2023 - 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	5:30 p.m. – 6:45 p.m. / Mondays & Wednesdays / Aug. 30 – Dec. 4
CLASS LOCATION	ED 514 or on 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
CONTACTS	<i>email:</i> Bruce.Anderson@uregina.ca; <i>office telephone:</i> +1 306-337-2985
OFFICE HOURS	Flexible, by advance 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 – 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 business degrees may be asked to fill consulting roles internally (as employees) or externally (as consultants),

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 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 assess a current situation, develop strategies for addressing challenges/ opportunities, and address change management in implementing recommendations.

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



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. 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 **select only 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 of the class.

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 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., yahoo.com) 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 textbooks:

1. Vandenberg, 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:

Deliverables	Weighting
Consulting Final Report (and sub-deliverables)	
a. Entry Memo 2%	
b. Letter of Understanding and proposal 5%	
c. Diagnosis Report 9%	
d. Comprehensive Final Report 30%	
e. PowerPoint presentation to Client 4%	
Total for Consulting Project	50%
Brief Cases (any 2 out of 3) – each worth 10%	20%
Final Exam (Interview) - must pass final to pass course	30%
TOTAL	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>

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 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). 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. **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 measureable - 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.

3. **Final Exam:** (before Dec. 16)

The final exam will be an interview with the Instructor to be scheduled between the last class and the exam. 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 and preparations will be discussed in class.

You must be in good standing (completed all course requirements and met the attendance policy to write 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 (e.g., 11:01 p.m. and later considered one day late).

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 on assignments / exams. Other students' work will not be used in any course assignments. Note: **any** incidence of plagiarism is referred to the Associate Dean, Graduate Programs and Research's office for investigation of academic misconduct, and application of any penalties.

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 or contact Coordinator, Respectful University Services at respect@uregina.ca.

FACULTY BIOGRAPHY (Full CV on Faculty website)

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 B. Commerce (in Sports Administration) from Laurentian University. He holds the designations of Certified Management Consultant (CMC), a honorary (FCMC), and Institute of Chartered Directors, Director (ICD.D). Bruce also has Certificates in Adult Education and Project Management. He is 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 is immediate Past Chair of Habitat for Humanity Saskatchewan. He mentors several new entrepreneurs and served on Economic Development Regina’s inaugural 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.

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
Aug. 30	Overview of Course Expectations Consulting Industry and Roles of Consultants Ethics, Responsibility & Professionalism <ul style="list-style-type: none"> Recognize roles and value of external & internal consultants. Recognize code of conduct, ethical guidelines, CMC Values. 	Course Outline van Beek: History CMC: Code of Conduct FC Ch. 1, 7 DS Ch. 6 pgs. 89-90	Worksheet 1 – Consulting Skill Inventory
Sept. 4	No Class – Labour Day		
Sept. 6	Case Preparation Process Discussion of Case Brief (Sample on UR Courses)	Case Analysis PPs Read EOX Case	Read EOX Case



Sept. 11	Nature of Consultant Project & Services Provided The 5 Phases and KSFs of Consulting Project <ul style="list-style-type: none"> • Understand consulting industry and consulting environment. • Recognize concept of value. • Understand legal liability and professional responsibility. 	FC Ch. 2, 3, 4 Applebaum: Successful Consulting Osterwalder: Business Model Canvas	Form Consulting Teams
Sept. 13	Consultant-Client Relationship <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 	DS Ch. 2 - 8	
Sept. 18	Managing Client Relationship Guest Client: John Bailey, CEO, Regina Food Bank		
Sept. 20	In-class Exercise: Meeting Preparation (OARR) Case Study Example		
Sept. 25	Case Discussion: Social Focus Consulting		Prepare: Social Focus case
Sept. 26	1st Part of Project due before 11:00 p.m.		Submit Entry Memo
Sept. 27	Entry Meetings between Clients and Teams	U of M: Communication	
Oct. 2	Consulting Process – Entry Data Collection <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 	DS Ch. 1 DS Ch. 9 DS App. A DS App. B Nonprofit Lifecycles	
Oct 3	1st Case Brief Due before 11:00 p.m.		Submit: Bei Capelli (A)
Oct. 4	Case Discussion: Bei Capelli (A)		
Oct. 9	No Class – Thanksgiving Holiday		
Oct. 11	No Class – Reading Week		
Oct. 16	Marketing Research		
Oct. 18	Consulting Process – Diagnosis <ul style="list-style-type: none"> • Assess environment & challenges/opportunities • Diagnose situation, use self-diagnostics, identify red flags • Convey findings and conclusions 	FC Ch. 11-12	
Oct. 23	Diagnosis (continued) Case Study Example		
Oct. 24	2nd Part of Project due before 11:00 p.m.		Submit LOU & proposal
Oct. 25	Engagement Process <ul style="list-style-type: none"> • Value independence of consultant • Recognize engagement is critical to getting all info 	FC Ch. 17 & 19	
Oct. 30	Panel Discussion: Larry Hiles, CMC; Phil Symchych, CMC; Doug McNair, CMC; Sherry Knight, FCMC		
Oct. 31	2nd Case Brief due before 11:00 p.m.		Submit Bon Star case
Nov. 1	Case Discussion: Bon Star Hotel		

Nov. 6	Project Time in Class Group Meetings and Meetings with Instructor		
Nov. 8	Consulting Process – Action Planning <ul style="list-style-type: none"> • Help client clarify objectives & generate possible solutions • Develop and evaluate alternatives and impacts • Develop an action proposal for the client 	DS Ch. 9	
Nov. 12	3rd Part of Report due before 11:00 p.m.		Submit Diagnostic Report
Nov. 13	Consulting Process – Implementation <ul style="list-style-type: none"> • 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 	FC Ch. 16	
Nov. 15	Change Management <ul style="list-style-type: none"> • Identify forces resisting change & create willingness to change • Diagnose the resistant forces in organization change Project Management <ul style="list-style-type: none"> • 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	
Nov. 20	Consulting Process – Termination <ul style="list-style-type: none"> • 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	
Nov. 21	3rd Case Brief due before 11:00 p.m.		Submit MacPhie case
Nov. 22	Case Discussion: MacPhie and Company		
Nov. 27	In-Class Time for Projects Draft Reports Discussed with Instructor		Bring draft report to class
Nov. 28	Submit PowerPoint for Presentations		Submit PowerPoint
Nov. 29	Client Presentations		
Dec. 3	Submit Final Report & Peer Evaluations before 11 p.m.		Submit Final Report, Peer Evaluations
Dec. 4	Course Review and Course Evaluation		
Dec. 5-16	Final Exam – Interviews (to be scheduled)		