Course Syllabus: Spring 2019
MBA 741.01: “Consulting Projects” Capstone Course (Evening Section)
Bryan Building; Room 106

Instructor Information:

Faculty: Dr. Mike Beitler, Faculty of Record
         Ms. Dianne Garrett
         Senior Lecturer, Management Dept.
         Lecturer, MEHT Department
Office:  Bryan 375
         Bryan 377
E-mail:  mabeitle@uncg.edu *
         drgarret@uncg.edu
*Read the “Communicating” section of the syllabus before messaging.

Office Hours: by appointment

Required Reading:
• Subscription to the Wall Street Journal: http://www.wsjuniversity.com/ ($15 for 15 weeks)

Suggested Readings & Resources:
• DGarrett’s “Guidebook for Successful Business Writing”: pre-draft edition: D. Garrett- Guidebook

• Watch CNBC throughout the day (and “Shark Tank” in the evening). Students will be called upon without notice to share their insights in to current events in the business world.


Electronic Devices:

Electronic devices are not permitted in class without permission from the instructor. All electronic devices (phones, laptops, tablets, etc.) must be out of sight until permission is received from the instructor. Only one warning will be granted; any student violating this policy after a warning will be dropped from the course.

Students are expected to show respect to whomever is speaking (faculty members, executive mentors, guest speakers, clients, fellow team members, and other teams).
Professional Behavior in the Classroom

Each class session will be run more like a staff meeting of a consulting firm rather than as a lecture-style class. Business-like behavior and professionalism is expected.

No political comments will be tolerated. Our goal as professionals is to add value for our clients, not to convert clients or fellow professionals to a particular ideology. Only one warning will be granted; any student violating this policy after a warning will be dropped from the course.

Faculty & Practitioner Resources Available to Students:

• Dr. Mike Beitler (see his bio in this syllabus)
  Dr. Beitler is responsible for the ultimate success of the course and the consulting engagements.

• Prof. Dianne Garrett (see her bio in this syllabus)
  Prof. Garrett is available with her expertise in presentation and writing skills.

• Steve Cramer (UNCG Business Librarian)
  Steve Cramer is available with his expertise in research & database usage.

• Executive Mentors (will be introduce in the second class session)
  Each student-consulting team will have a mentor assigned to provide guidance.

• Guest Speakers (for additional practitioner guidance)

Catalog Description:

Integration of tools and techniques of strategic analysis, formulation, and implementation of competitive and corporate strategy. Students engage in professional consulting with local organizations.

Course Prerequisites:  MBA703, 706, 707, 708, 716 & 717
Course Corequisites:  MBA703, 712

Student Learning Outcomes (SLOs):

Upon completing the course, the student should be able to:

1) Demonstrate integration of strategic analysis, strategy formulation and strategy implementation in an organization.
2) Assess the managerial activities to create sustainable competitive advantage for their companies.
3) Apply the tools of strategic and competitive analysis in the global business environment.
by analyzing a firm’s industry and strategy and developing recommendations.
4) Analyze the managerial task associated with formulating, implementing and executing company strategies and the actions managers can take to promote competent strategy implementation.
5) Synthesize the knowledge gained in a variety of different business and related courses, and the case discussions to provide a professional consulting advice to local organizations to solve a business problem in order to gain competitive advantage.

The Consulting Project is designed to fulfill SLOs 1, 2, 3, 4, and 5.

**Teaching Methods & Assignments for Achieving Learning Outcomes:**

The use of lectures, discussions, videos, exercises, and guest speaker presentations, as deemed appropriate. The "lecture" sessions will rely on the “Socratic” method to the extent possible. The descriptions of the assignments follow in this document.

**GRADED ASSIGNMENTS - Evening Section (MBA 741.01)**

<table>
<thead>
<tr>
<th>Assignment</th>
<th>Individual-graded</th>
<th>Team-graded</th>
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</thead>
<tbody>
<tr>
<td>&quot;Success Panel&quot; Reflection Memo</td>
<td></td>
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</tr>
<tr>
<td>Best Draft</td>
<td></td>
<td>5%</td>
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<tr>
<td>Finalization Submission</td>
<td></td>
<td>2.5%</td>
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<tr>
<td>Myers-Briggs Team-Building Exercise</td>
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<td>7.5%</td>
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<tr>
<td>Current Events Team Presentations</td>
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<tr>
<td>First Presentation</td>
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<td>5%</td>
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<tr>
<td>Second Presentation</td>
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<tr>
<td>Statement of Work (SOW)</td>
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<tr>
<td>Draft</td>
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<tr>
<td>Final</td>
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<tr>
<td>Gantt Chart</td>
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<tr>
<td>Industry &amp; Market Analysis</td>
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<td>5%</td>
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<tr>
<td>Final Written Report for Client</td>
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<tr>
<td>Executive Summary</td>
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<td>5%</td>
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<tr>
<td>Draft document</td>
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<td>15%</td>
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<tr>
<td>Final document</td>
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<td>5%</td>
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<tr>
<td>Project Presentation</td>
<td></td>
<td>25%</td>
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<tr>
<td>Contribution – Peer Evaluations</td>
<td></td>
<td>5%</td>
</tr>
<tr>
<td><strong>Totals</strong></td>
<td><strong>20%</strong></td>
<td><strong>80%</strong></td>
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</tbody>
</table>
1. “Success Panel” Reflection Memo (“Best Draft” & Final)

During the first half of the second class, Dr. Beitler will facilitate a “Success Panel” discussion with the class’ executive mentors, in which he will draw out the executive mentors’ vast knowledge and experience from the business world.

Each student must take notes during the panel discussion. These notes will become the basis for writing a reflection memo about what the executive mentors shared about leadership and success in the business world.

A “best draft” of the reflection paper is due to Professor Garrett the following week. Since business-world writing is her area of expertise, she will critique your paper and return it to you for final submission the following week.

The main purpose of the paper is to critique your business-writing skills. Professor Garrett will grade your final submission based on its business-writing quality. (Dr. Beitler may lower the grade, but not raise it, if he sees a lack of understanding of what the executive mentors shared.)

2. Myers-Briggs Team Building Exercise

One class will be devoted to emotional intelligence (self-awareness and other-awareness), in which Dr. Beitler will lead a discussion and exercises using the Myers-Briggs Type Indicator (MBTI). To earn the points for this assignment, the student must submit his/her results (4 letters and 4 numbers) from the online MBTI assessment by the due date on the Schedule of Classes & Assignments.

3. Current Events Team Presentation(s)

Each team will be given a date(s) to make a presentation about a significant current event in the business world. At the end of the formal presentation (with PowerPoint or some other presentation software), the team is responsible for leading a Q&A. Prof. Garrett has offered to preview your team’s PowerPoint slides. Email your PowerPoint slides to her long enough before your presentation to get her suggestions. **NOTE:** Any political comments during the presentation will result in a grade of zero for the team.

4. Statement of Work (“Best Draft” & Final)

A key component in the practice of consulting is the creation of the Statement of Work (SOW). It is a written agreement between the consulting team and the client that clearly states the project’s intent, expectations, protocols, timelines, and deliverables.

The first consulting project deliverable for this course is a final, signed SOW. Student teams are expected to meet with their client to discuss and agree on the SOW. **Before** a signed agreement is reached, each student team will need to secure an approval note on the scope of work, from the instructor and the executive mentor (to avoid over-commitment by the team).

Each team will be allowed to submit its “best draft” to Dr. Beitler and Professor Garrett for comments, before submitting its final version (which the client will sign).
5. **Gantt Chart**

Each team must submit a Gantt Chart to Dr. Beitler. The Gantt Chart provides a visual of what must be done when during the project. Dr. Beitler will share examples of Gantt Charts in class.

6. **Industry & Market Analysis**

The Industry & Market Analysis must be prepared by each team in preparation for the “State of the Project” discussion with its executive mentor. It is strongly advised that each team spend time with Steve Cramer (the UNCG Business Librarian) when preparing its Industry & Market Analysis.

7. **Written Project Report (Executive Summary, Draft, & Final Report)**

The written report is a critical component of the consulting project as it represents the final recommendations of the team to the client. Each team report must contain an executive summary describing the key recommendations. The main body of the report will describe the recommendations in detail and be heavily data-driven. Be sure to meet the deadlines for submitting the executive summary, draft, and final written report.

The report is expected to be a professional piece of work, presented clearly and concisely, free of grammatical, spelling, or syntax-related errors. The final written report should be handed to the client at the conclusion of the oral presentation.

The analysis should be of original thought. Therefore, no more than 20% of the final document submitted should be references from citations used (including charts/graphs). Exceeding this limit will negatively impact your grade significantly.

Each student-team is required to submit report draft, per the *Schedule of Assignments*. The final report must be a finished product and will be graded for the quality of work focusing on format, content, and grammatical composition.

Contact the MBA Office for assistance with copies of your final document (see Syllabus Addendum).

8. **Oral Presentation**

Each consulting team will make a formal presentation to the client on a date and time to be determined, near the end of the semester. The student-teams are responsible for scheduling the presentation date. All team members are expected to participate evenly in the presentation.

Presentations may be made at the Bryan School or the client’s location and should include no more than 30 minutes for the formal presentation and 30 minutes for questions and answers. Presentations are expected to include the use of visual tools (PowerPoint, Prezi, etc.) and handouts should be provided to the client.

Any delays in completing the oral presentation may, at the instructor’s discretion, result in a grade penalty.
*Important Note:* Grading of the document and presentation is team-based, but the instructor reserves the right to individually grade team members if, at his sole discretion, it is warranted due to lack of participation or effort by individual team members. The instructor will consider comments from the individuals’ team members in determining final grading. In that case, it is possible for team members to earn different grades for both assignments. The instructor also reserves the right to devalue a student’s class participation grade due to poor overall performance within his/her assigned team.

9. **Contribution – Peer Evaluations**

Points for the individual student’s team and class contribution will be determined by the student’s teammates.

The successful completion of a high-quality consulting project requires a great deal of work and cooperation across team members. For this reason, team members will determine a portion of each student’s grade based on their assessment of the student’s contribution to the project’s success and the course’s success.

Students should be prepared to proactively participate in classroom discussions, especially when guest speakers are involved. Class contribution and participation grading is based the usefulness of the observations and suggestions made by the student, the depth of understanding, and the student’s ability to put across ideas with clarity and conviction.

Class attendance alone will not earn a student class contribution credits. However, poor attendance will affect a student’s participation grade. That is, a student cannot participate/contribute if absent from the class. There are no “excused absences” in this class (for work-related activities, illnesses or otherwise). Each missed class will affect your contribution grade.

Three or more absences will result in a failing grade regardless of participation during the semester.

NOTE: The instructor reserves the decision to accept a late submission. If so, the instructor reserves the right to deduct grade points for each late submission(s) accepted.

**EVALUATION DESCRIPTIONS:**

- **A= Excellent:** indicates achievement of distinction. Student(s) exceed expectations and requirements as stated in the “Student Learning Objectives – SLO’s”. Completed work is of exceptional quality in the eyes of the instructor. The work demonstrates a clear understanding of the material under study, including materials and knowledge gained from previous class work, as well as a superior ability to articulate the material.

- **B = Good:** indicates general achievement superior to the acceptable standard of performance. The work demonstrates a solid understanding of the work under study and is prepared and presented effectively, with very few errors or omissions.

- **C = Average:** indicates the acceptable standard for meeting the course requirements. Work demonstrated a minimal understanding of the theory, application and/or concepts needed to successfully complete the assigned project(s). Work completed did not meet the expectation of the instructor and/or client company.

- **F = Failure:** indicates failure to perform to a minimum standard of performance. Work was not completed in a timely manner, or lacked little comprehension of the materials taught.
during the MBA program. Included here is the lack of participation of the student to any of the team-based projects.

<table>
<thead>
<tr>
<th>Grade</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>A</td>
<td>93% - 100%</td>
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<tr>
<td>A-</td>
<td>90% - 92.9%</td>
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<tr>
<td>B+</td>
<td>88% - 89.9%</td>
</tr>
<tr>
<td>B</td>
<td>80% - 87.9%</td>
</tr>
<tr>
<td>C</td>
<td>70% - 79.9%</td>
</tr>
<tr>
<td>F</td>
<td>Below 70%</td>
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</tbody>
</table>

*Note: Instructor reserves discretion to round fractions up or down to a whole number percentage.

**Team-Member Performance Evaluation & “Firing” Team Members:**

This section applies to all team activities.

In every teamwork situation, “people” issues appear. Yet, in today’s business environment, effective team “knowledge work” has become a competitive advantage. You are/will be required to work effectively with people of different skill levels, interests, and motivations to succeed in this course and in your career.

**“Firing” Process:** In the case where a team member consistently underperforms, action can be taken by the team, in sequential steps, as follows (underperformance includes but is not limited to missing scheduled meetings, not completing agreed-upon assignments in the time required, etc.):

1. Team members meet with the underperformer(s), discuss the issues and clearly delineates the expectations of the team. This meeting is documented and the notes of such are sent to Dr. Beitler.
2. If, after a reasonable period of time, determined by the team, performance does not improve, the team can request a meeting with Dr. Beitler to discuss the issues at hand. At that time, Dr. Beitler will request a meeting with the underperformer(s).
3. After such meeting and a reasonable amount of time to correct the issues has passed, the team will be given the authority to “fire” the under-performer(s), with the approval of Dr. Beitler (supporting “just cause”).

**If a student is “fired” from a team, he/she will receive a score of zero (0) for the entire consulting project and will fail the course, regardless of other scores earned in the class. No make-up work is available to counteract this failing.**

**General:**

**ACADEMIC HONOR CODE:**

By the singular act of registering for this course, you are agreeing to abide by the UNCG Academic Integrity Policy. All written work submitted must be original and produced by the student/team for this class only. If you are for any reason unfamiliar with the contents of the code, please review it on the school’s website link: [http://academicintegrity.uncg.edu/complete/](http://academicintegrity.uncg.edu/complete/). Violations will be pursued.

Academic Integrity applies to all aspects of MBA741. Please be aware that the following also constitute Integrity Violations in MBA741:
• Signing an attendance sheet for another student and/or failing to attend the entire class is a falsification of your attendance and an academic integrity violation.
• Falsification of any material used in the preparation or development of assignments is a code violation.

The Bryan School of Business and Economics has recently developed and accepted Faculty and Student Guidelines focusing on the expected performance of each. Since these guidelines are new, please take the time to review them. They can be found at the following link: http://bae.uncg.edu/assets/faculty_student_guidelines.pdf.

**Students with Disabilities:** UNCG seeks to comply fully with The Americans with Disabilities Act and section 504 of the Rehabilitation Act of 1973. Students requesting accommodations based on a disability must be registered with the Office of Disability Services in 215 Elliott University center, 334-5440, www.uncg.edu/ods.

**Communicating:**

Dr. Beitler will communicate with students between face-to-face classes through email (e-Spartan) and through Canvas Announcements.

Students must use Dr. Beitler’s UNCG email address (mabeitle@uncg.edu) to contact him between classes.

**NOTE:** Dr. Beitler will not respond to messages left on Canvas or on his business email account.

**Do Not** copy Dr. Beitler on team correspondence.

**Inclement Weather:**

UNCG will remain open during adverse weather conditions until and unless the Chancellor makes the administrative decision to postpone/cancel class. Students can obtain details on those decisions by calling the Adverse Weather Line at 336-334-4400 or accessing the website at: www.uncg.edu/iss/weather.htm.

**Extra Credit:**

There are no extra credit assignments scheduled for this course. If a situation presents itself during the semester, all students will be given equal opportunity to participate.

**Reimbursable Expenses:** Pertaining to your consulting engagement:

1. **Travel**

Students are expected to meet with their clients throughout the project. The Bryan School will reimburse students for mileage expenses for teams whose client’s principle location for the project is greater than 15 miles one way from the school. TRV-1 and TRV-S forms must be submitted one week before travel, and reimbursement will be for one vehicle per team, per visit. Please submit claims to Sara Pilling (slpillin@uncg.edu). The TRV-1 and TRV-S form can be found here: http://acb.uncg.edu/accounting-forms/.
2. Final Reports (multiple reports)

a) The MBA Office will be collecting electronic PDF copies of all reports. One student from each team will need to ensure a finalized copy is sent to the MBA Office by the day of the oral presentation. Please email this electronic copy to Sara Pilling (slpillin@uncg.edu).

b) It is expected that each team will present a final printed copy of their report to client representatives at the presentation. If needed, the MBA office will reimburse for two printed and bound copies of your report.

If you are seeking assistance with report printing and binding:

- Please contact Sara Pilling with your printing needs at least one week before you need the report. This will allow Spartan Printing plenty of time to accommodate your printing needs.
- Please send your report to Sara in PDF format with any special requests (e.g. due date, single or double-sided printing, etc.)

If you are seeking reimbursement for the printing and binding costs of two reports that you purchased on a personal credit/debit card:

- Please contact Sara for assistance with reimbursements. You will need to provide an original receipt from where you got the reports printed (Spartan Printing, FedEx, Staples, etc). This must be a receipt received after payment is complete – an order summary or statement of work is not an acceptable receipt.
- With the receipt, please also provide a note with your name, student ID number, and address to send reimbursement payment to.

Biographical Sketches of Instructors:

Dr. Mike Beitler (pronounced Bite-ler) began his career as a CPA with one of the Big-4 CPA/consulting firms in Baltimore. He then worked as a Chief Financial Officer in banking for 10 years.

After teaching a few evening courses, Mike decided to go to graduate school to earn his masters degree and Ph.D. (Leadership Development).

Dr. Beitler is a long-time faculty member in The Bryan School, where he has taught a wide range of courses, including Strategic Planning, Leadership Assessment & Development, and Organizational Behavior.

Dr. B continues to work in the business world as an executive coach, leadership team trainer, and as a strategic planning facilitator.

Mike is actively involved in the Triad Coaching Connection and the Institute of Management Consultants. He is happily married with three adult children. Mike is a mindfulness and meditation practitioner.
Ms. Dianne Garrett teaches full-time in the Bryan School of Business and Economics at the University of North Carolina at Greensboro. Her teaching focuses on Business Communication with foci on business writing and persuasive presentations. In the 2012-2013 academic year, Ms. Garrett was awarded the Bryan School Teaching Excellence Award. She holds an undergraduate degree in Business Administration with a Minor in Information Systems from Elon University and a Masters of Arts in Strategic Communication and Leadership from Seton Hall University. In 2007, she graduated from a personal and business coach training program. Additionally, Ms. Garrett completed a post-graduate certificate in the Neuroscience of Leadership at the Middlesex University in the United Kingdom. Prior to teaching, Ms. Garrett led software implementations teams and did corporate training in the higher-education industry. For a multi-organizational software conversion project, she led teams in their learning and business practice decision-making relative to student data.

**Schedule of Classes & Assignments: Spring 2019 (Evening Section)**

Mondays (6:30pm – 9:20pm) in Bryan 106

Note: Instructor reserves the right to change topics, assignments, and/or due dates.

<table>
<thead>
<tr>
<th>Date</th>
<th>Topic</th>
<th>Assignments (due on this date)</th>
</tr>
</thead>
</table>
| 1    | 1/14 “Consulting Projects” Course Overview  
Interviewing Skills – Active Inquiry - Dr. Beitler  
Initial Team Work  | Assignments: Subscriptions to Wall Street Journal  |
| 2    | 1/28 * Executive Mentors – “Success” Panel  
“ -- Work with Individual Teams  | Assignments: “Best-Draft” Reflection Memo - Uploaded to Canvas  
Team #1 Current Events Presentation  |
| 3    | 2/4  Academic-to-Business Transition (Writing & Presentations) – Prof. Garrett  
Reflection Memo Feedback – Prof. Garrett  
Creating the SOW Document – Dr. Beitler  | Assignments: “Finalized” Reflection Paper to Prof. Garrett  
“Best Draft” Statement of Work (SOW) – Uploaded to Canvas  
Team #2 Current Events Presentation  |
| 4    | 2/11 Research Support Available - Steve Cramer  
Discussion of SOW Documents – Dr. Beitler  
Creating the Gantt Chart – Dr. Beitler  | Assignments: “Finalized” Gantt Chart ready for Executive Mentors & for Dr. Beitler  
“Finalized” SOW ready for Executive Mentors  
(NOTE: SOW with Client Signature due to Dr. Beitler by 5pm on Feb 18.)  |
| 5    | 2/18 * Executive Mentors -- Work with Individual Teams  
Process Consulting – Dr. Beitler  | Assignments: “Finalized” Gantt Chart ready for Executive Mentors & for Dr. Beitler  
“Finalized” SOW ready for Executive Mentors  
(NOTE: SOW with Client Signature due to Dr. Beitler by 5pm on Feb 18.)  |
<table>
<thead>
<tr>
<th>Date</th>
<th>Event</th>
<th>Note</th>
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<tbody>
<tr>
<td>2/25</td>
<td>MBTI Team Building Exercises – Dr. Beitler</td>
<td>MBTI 4 Letters &amp; 4 Numbers Due to Dr. Beitler by Feb 17 @ 11:59pm</td>
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<td>Emotional Intelligence Discussion – Dr. Beitler</td>
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<tr>
<td>3/11</td>
<td>Guest Speaker – Abhiroop Dutta</td>
<td>Team #3 Current Events Presentation</td>
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<tr>
<td>3/18</td>
<td>Guest Speaker – Gary Fly</td>
<td>Team #1 Current Events Presentation</td>
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<tr>
<td>3/25</td>
<td>Guest Speaker – John Chapman</td>
<td>Team #2 Current Events Presentation</td>
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<tr>
<td>4/1</td>
<td>Guest Speaker – Lizzy Tahsuda</td>
<td>Team #3 Current Events Presentation</td>
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<td>Strategy Revisited – Dr. Beitler</td>
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<tr>
<td>4/8</td>
<td>* Executive Mentors -- Work with Individual Teams</td>
<td>Industry/Market Analysis ready for Executive Mentors</td>
</tr>
<tr>
<td></td>
<td>“State of the Project” Discussion</td>
<td>(NOTE: Industry/Market Analysis Uploaded to Canvas by 11:59pm April 9th.)</td>
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<tr>
<td>4/15</td>
<td>Developing the Client Document &amp; Presentation – Prof. Garrett</td>
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<tr>
<td>4/22</td>
<td>Guest Speaker – Joseph Erba, Jr.</td>
<td>Executive Summary Due</td>
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<tr>
<td>4/29</td>
<td>Team Practice Presentations</td>
<td>Draft of Client Document Due</td>
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<td></td>
<td>* Executive Mentors Attend</td>
<td>(NOTE: Finalized Written Document must be uploaded to Canvas before Presentation to the Client.)</td>
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<tr>
<td>5/1</td>
<td>Presentations to Clients</td>
<td>Final Document Due to Client at the End of the Presentation to the Client</td>
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<td>* Executive Mentors May Attend with Teams</td>
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<td>5/10</td>
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