



THE UNIVERSITY of NORTH CAROLINA
GREENSBORO
Bryan School of Business and Economics

Fall 2022 Syllabus
MBA 741.01: Capstone Consulting Project (In-Person Section)
Thursdays at 6:30pm in Bryan 206

Instructor Information:

Faculty: Dr. Michael Beitler (pronounced Bite-ler)
Director of MBA Projects & Senior Lecturer
Instructor of Record

Richard Rorrer, MBA
Co-Instructor

Office: Bryan 375

E-mail: mabeitle@uncg.edu * rarorrer.uncg.edu

*Do not leave messages on Canvas. Use our UNCG email accounts.

Office Hours: Thursday afternoons and by appointment

Required Reading:

This course involves a capstone consulting to project. No textbooks or written materials need to be purchased.

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

Electronic Devices

We will have several guest speakers, who are busy professionals, joining us. Electronic devices must be handled in a professional manner. You must be on-camera during our Zoom sessions. If your camera is not working, buy one from Amazon for \$20.

Everyone is expected to show respect (by paying attention) to whomever is speaking (faculty members, guest speakers, fellow team members, and members of 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.

Confidentiality & NDAs

Our consulting projects in MBA 741 are with real-world clients. Our clients are paying the Bryan School for us to help them with their real-world problems. Our clients deserve our professionalism in addition to our knowledge.

Your clients may ask you to sign a non-disclosure agreement (NDA) because of the confidential nature of the information they will be sharing. They are not questioning your trustworthiness. NDAs are a standard business practice.

“Multiple Voices in My Head”: Faculty & Practitioner Resources

In this course, I (Dr. B) have had students say, “I have multiple voices in my head.” I tell them, “I know a psychotherapist you can talk to.” They usually do not find that amusing, so I explain that there are multiple resources in this course. You need to know the role of each one.

1. Dr. Mike Beitler (Instructor of Record)

Dr. Beitler is responsible for the ultimate success of the course and the consulting engagements. He is responsible for overseeing the progress of the projects, facilitating classroom activities, and grading assignments.

2. Richard Rorrer (Co-Instructor)

Mr. Rorrer brings his expertise in corporate management, and as an MBA 741 executive mentor. He will provide his “feed forward” throughout the semester. “Feed forward” will be explained during the first class. He will work with Dr. B to assure the success of all of our projects.

3. Executive Mentors (will be introduced during the second class session)

Each student-consulting team will have an executive mentor assigned to it to provide guidance throughout the project.

NOTE: Dr. Beitler will explain the process/content distinction early in the course. Understanding this distinction is critical when receiving feedback from your executive mentors and the two faculty members.

4. Steve Cramer (UNCG Business Librarian)

Professor Cramer is available with his expertise in research & data mining. He will be a critical part of your Industry/Market Analysis.

6. Guest Speakers (for additional practitioner wisdom)

We will invite several guest speakers to class. They will provide practitioner guidance on general principles for your success; they may (or may not) be able to give specific guidance on your project.

7. Your Team's Client

You will be working with, and learning from, successful clients. We know they are looking forward to working you and being as cooperative as possible. But, keep in mind, they are paying for these projects, so they expect a professional presentation and an actionable, well-written report.

Feedback is a Gift

Feedback can be frustrating and embarrassing. But it is critical if you want to get better at any skill. When you receive feedback, be sure to say "thank you." People who argue when they receive feedback are left to wallow in their own mistakes. Behave as if feedback is as a gift.

Academic-to-Business Writing

In this course, you must use business-style writing. Business-style writing is different than academic-style writing. Be sure to follow our advice on this.

Students in this course often say, with frustration in their voices, that we are requiring them to write with a style that is opposite of what they have been taught in the academic world. That is understandable because business-style writing and academic-style writing follow very different formats. We will talk about these differences in class.

If business-style writing is new to you, think of it as a new tool for your success. Similar to a carpenter with a hammer and screwdriver is his or her toolbox, each tool has a different purpose. The key is to know when each tool should be used.

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 various managerial activities to create sustainable competitive advantage for organizations.
- 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 greatest extent possible. The descriptions of the assignments follow in this document.

Evaluating/Grading:

A = Excellent: Indicates achievement of distinction. Student(s) exceed expectations and requirements as stated in the "Student Learning Objectives –SLO's". Completed assignments and client deliverables are of exceptional quality in the eyes of the instructor. The work demonstrates excellent performance on submitted assignments and client deliverables.

A- = Very Good: Indicates high quality work, but less than excellent. Student(s) failed to follow some suggestions from the various course advisors that would have resulted in excellent assignments and client deliverables.

B = Good: Indicates acceptable work, but below what Dr. Beitler expects of MBA capstone students. The performance demonstrates an understanding of the work, but it contains errors and/or omissions.

F = Failure: Indicates failure to perform at a minimum standard of performance. Work was not completed in a timely manner and/or lacked minimum comprehension of the materials taught during the MBA program. The quality of the work is unprofessional and unacceptable in an MBA capstone course.

A	95% - 100%	B	80%-89.9%		
A-	90% - 94.9%				
		F	Below 80%		

*Note: Do not ask the instructors to “round up” or give you a grade that you have not earned. Ethics matter in the business world. You are expected to be both ethical and professional in this capstone course.

GRADED ASSIGNMENTS –Fall 2022

	Individual	Team
DISC Team-Building Assessment & Exercises	5%	
Statement of Work (SOW) 20%		
“Best Draft”		7.5%
Final		12.5%
Gantt Chart		5%
Industry & Market Research & Analysis		10%
Written Report for Client 25%		
Executive Summary		5%
“Best Draft”		15%
Finalized Document		5%
Project Presentation 25%		25%
Contribution to the Team		5%
Contribution to the Class	5%	
Totals	10%	90%

1. DISC Team-Building Assessment & Exercises

The second-class session will be devoted to emotional intelligence (self-awareness and other-awareness), in which Dr. Beitler (and a guest speaker) will lead a discussion and exercises using the DISC assessment. See the *Schedule of Classes & Assignments* for the due for completion of the assessment.

Our guest speaker, Wanda Swain will lead the discussion and exercises involving the DISC assessment.

2. Statement of Work (“Best Draft” & Finalized)

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, timelines, and deliverables.

The first consulting project deliverable for this course is a finalized, signed SOW. Student-teams are expected to meet with their clients to discuss the project before creating an SOW.

Each team must meet with its executive mentor to get his or her help in narrowing the focus and determining the wording of the SOW.

After meeting with the team’s executive mentor, each team must upload (to Canvas) its “best draft.” Be sure this is not a rough draft. Dr. Beitler and Mr. Rorrer will provide “feed forward” for the team to use in preparing its “finalized” version.

Before the finalized version of the SOW is presented to the client for signature, each student-team must secure an approval from the instructor(s) and the executive mentor (to avoid over-commitment by the team).

3. Gantt Chart

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

4. Industry & Market Research & Analysis

An Industry & Market Analysis must be prepared by each team in preparation for discussion with its executive mentor. It is strongly recommended that each team spend time with Professor Steve Cramer (the UNCG Business Librarian) when researching and preparing its Industry & Market Analysis.

5. Written Project Report (Executive Summary, “Best Draft,” & Finalized 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’s 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, “best” draft, and finalized 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 a “best draft” of the team’s written report. The finalized written report, utilizing previous “feed forward,” must be a finished product and will be graded for the quality of work focusing on format (business style), content, and grammatical composition.

6. 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 and location. All team members are expected to participate evenly in the presentation. The instructor has the right to grade the team members individually.

Presentations may be made at the Bryan School, the client’s location, or via Zoom. The client is expecting a presentation of up to 30 minutes. Presentations of less than 20 minutes or over 30 minutes will cost the team points. A dress rehearsal will take place during a regular class; multiple practice sessions will be necessary to ensure a professional presentation.

Presentations are expected to include the use of visual tools (PowerPoint, Prezi, etc.). Be sure to get “feed forward” from Dr. Beitler, Mr. Rorrer, and your team’s executive mentor.

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 instructors reserve 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.

7. Contribution to the Team

Points for the individual student’s contribution to the team 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 course grade based on their assessment of the student’s contribution to the team and the project’s success.

8. Contribution to the Class

Points for the individual student's engagement in the class will be determined by the instructor.

The instructor will consider the following:

- contributing to class discussions
- being “present” (not just physically) during class
- asking questions of the guest speakers
- being sure the team submits high-quality based on previous “feed forward”
- sending video links, articles, etc. to instructor to share with class
- contributing value to the “round robins” at the end of class sessions

“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:

1. Team members meet with the underperformer(s), discuss the issues and clearly delineate 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 (o) 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.

“Underperformance” includes, but is not limited to, missing scheduled meetings, not completing agreed-upon assignments in the time required, etc.

Beware the “A Bully”

An “A Bully” is as dangerous to productivity (maybe more so) than a slacker. An “A Bully” is only concerned about securing an “A” for himself/herself, showing disregard for his/her team members. If your team has an “A Bully,” discuss the situation with Dr. B as soon as possible. Firing the individual may be necessary for your team's success.

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 Tuisha Frenades-Stack.

The TRV-1 and TRV-S form can be found here: <http://acb.uncg.edu/accounting-forms/>.

- For the TRV-1: Fill out the top "Travel Authorization" portion of the form and sign/date in the two places indicated for "Traveler's Signature."
- If you are a non-resident alien, you must also complete the Foreign Visitor Information (NRA-001) Form. Please send Sara this completed form with **all supporting documents** listed at the top of the form. The NRA-001 can be found here: <https://payroll.uncg.edu/wp-content/uploads/2016/03/NRA001-Foreign-Visitor-Form-Rev-3-16.pdf>

2. Copies of Finalized Written Reports

a) One member of each team must ensure that a finalized electronic copy of the team's written report is sent to the MBA Office by 11:59pm on the day of the oral presentation to the client. Please email this electronic copy to Tuisha Fernandes-Stack.

b) Each team will present a finalized electronic copy of its report to the client contact person at the end of its oral presentation.

(If needed, the MBA office will reimburse for **two** printed and bound copies of your report. We recommend contacting Spartan Printing for fast and cost-efficient printing, but will also reimburse for off-campus printing from FedEx, Staples, Office Depot, 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 Tuisha 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.

MISSED CLASSES:

If the student misses a class, the student is responsible for contacting other team members concerning assignments or materials that were missed.

ACADEMIC INTEGRITY POLICY:

Each student is required to comply with the Academic Integrity Policy on all work submitted for the course. Refer to the following URL: <https://osrr.uncg.edu/academic-integrity/>.

ACCOMMODATIONS:

UNCG seeks to comply fully with the Americans with Disabilities Act (ADA). Students requesting accommodations based on a disability must be registered with the Office of Accessibility Resources and Services (OARS) in 215 Elliott University Center, 334-5440, oars.uncg.edu.

Students may request accommodations for religious holidays under applicable laws. See <https://catalog.uncg.edu/academic-regulations-policies/university-policies/> for more information.

Students should remind the instructor in advance when accommodation affects course activities, e.g., before taking exams, to ensure that the instructor has updated systems accordingly.

HEALTH AND WELLNESS:

Your health impacts your learning. Throughout your time in college, you may experience a range of health issues that can cause barriers to your learning. These might include physical ailments, illnesses, strained relationships, anxiety, high levels of stress, alcohol/drug problems, feeling down, or loss of motivation. Student Health Services and The Counseling Center can help with these or other issues you may be experiencing. You can learn about the free, confidential mental health services available on campus by calling 336-334-5874, visiting the website at <https://shs.uncg.edu/> or visiting the Anna M. Gove Student Health Center at 107 Gray Drive. Help is always available.

ATTENDANCE AND LATE WORK/MAKEUP POLICIES:

Students with university-related or requested absences, e.g., field trips in other courses or multiple exams during finals week, must make prior arrangements in advance for any conflicts with their schedule and due dates for the course.

Students should review the following [Bryan School Faculty and Student Guidelines](#) to understand the roles and responsibilities of both students and faculty.

UNCG DISRUPTIVE BEHAVIOR POLICY:

The instructor may withdraw a student from a course for behavior that is deemed by the instructor to be disruptive to the class. The grade assigned will be “W” if the behavior occurs before the deadline for dropping a course without academic penalty, and the instructor has the option of giving a “W” or a “WF” if the behavior occurs after the deadline.

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.

Required UNCG Syllabus Language for Fall 2022

As we return for Fall 2022, all students, faculty, and staff and all visitors to campus are required to uphold UNCG's culture of care by actively engaging in behaviors that limit the spread of COVID-19. While face-coverings are optional in most areas on campus, individuals are encouraged to wear masks. All individuals and visitors to campus are asked to follow the following actions:

- Engaging in proper hand-washing hygiene.
- Self-monitoring for symptoms of COVID-19.
- Staying home when ill.
- Complying with directions from health care providers or public health officials to quarantine or isolate if ill or exposed to someone who is ill.
- Completing a self-report when experiencing COVID-19 symptoms, testing positive for COVID-19, or being identified as a close contact of someone who has tested positive.
- Staying informed about the University's policies and announcements via the COVID-19 website.

Students who are ill, quarantining, or isolating should not attend in-person class meetings, but should instead contact their instructor(s) so alternative arrangements for learning and the submission of assignments can be made where possible.

As we continue to manage COVID-19 on our campus, we are following the lead of the local health department and we will adjust our plans to balance student success, instructional requirements, and the hallmarks of the collegiate experience with the safety and wellbeing of our campus community.

Instructors' Brief Biographies

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 ten 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. He has authored two popular business books: "Strategic Organizational Change" and "Strategic Organizational Learning."

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

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. He is available for a glass of beer or wine.

Mr. Richard Rorrer has 32 years of management experience, including 15 years with Food Lion Inc. and 17 years with TE Connectivity (Tyco Electronics). His experience includes the following positions: Senior Manager-IT Systems, SAP Implementation Manager, Manager of Business Analysis, Senior Business Analyst, Master Production Scheduler, and Operations Manager.

Richard earned his MBA from The Bryan School. He is a Certified Professional Coach.

Mr Rorrer has served as an MBA 741 executive mentor for several years; his projects have included Interstate Batteries, Flynt Amtex Manufacturing, Truliant Federal Credit Union, and Minerva Lithium.

Fall 2022 MBA 741.01 (In-Person) Tentative Schedule of Classes

Thursday Evenings 6:30-9:20pm in Bryan 206

Note: Instructors reserve the right to change topics, assignments, and/or due dates.

Revised: August 19, 2022

	Date	Topic	Assignments (due dates)
1	8/18	“Consulting Projects” Course Overview Interviewing Skills Initial Team Work	Complete DISC assessment online by August 21 @ 11:59
2	8/25*	Team-Building Exercise – DISC – Wanda Swain <u>Executive Mentors</u> – Work with Individual Teams	Initial interview with client before 11:59pm, August 31
3	9/1	Academic-to-Business Writing Creating Your SOW Document	“Best Draft” Statement of Work (SOW) – <u>Uploaded</u> to Canvas by NOON, Sept 6
4	9/8	Steve Cramer, UNCG Business Librarian - Research Support Available for Our Projects Discussion of SOW Documents Creating Your Gantt Chart	Gantt Chart Ready for Executive Mentors; <u>Uploaded</u> to Canvas by 11:59pm, Sept 15
5	9/15 *	<u>Executive Mentors</u> -- Work with Individual Teams SOW & Gantt Chart Process Consulting Skills	“Finalized” SOW Ready for Executive Mentors; <u>Uploaded</u> to Canvas by 11:59pm, Sept 15 <u>NOTE:</u> SOW with Client Signature emailed to Instructors by 9pm on Sept 19.
6	9/22	Guest Speaker – Abhiroop Dutta – “The Sum of the Parts: A Structured Approach to Understanding Your Client’s Needs” The SOW – Your Project’s Foundation	
7	9/29	Steve Cramer, UNCG Business Librarian – “Researching With Your Client in Mind” Q&A about Your Industry/Market Analysis Preparing Your Industry/Market Analysis	Industry/Market Analysis, Reviewed by Executive Mentor, and <u>Uploaded</u> to Canvas by 11:59pm, October 6.

8	10/6 *	Guest Speaker – Scott Whitt – A Former Deloitte Partner and Former MBA Capstone Client “Successful Capstone Projects” <u>Executive Mentors</u> -- Work with Individual Teams	
9	10/13	Developing the Final Client Document	
10	10/20 *	Guest Speaker – Joe Erba – Former CEO of 2 Companies - “Expectations of Executives” <u>Executive Mentors</u> -- Work with Individual Teams “State of the Project” Discussion	Executive Summary Ready for Executive Mentors; <u>Uploaded</u> to Canvas <u>next day</u> (October 21) by 11:59pm
11	10/27	Reviewing SOW - Client Expectations Anticipating Client Reactions to Your Recommendations Developing Your Presentation Slides Preparing for “Dress Rehearsals”	“Best Draft” of Client Document <u>Uploaded</u> to Canvas by October 28 @ 11:59pm
12	11/3 *	2 Team Practice Presentations (“Dress Rehearsals”) <u>Executive Mentors for Presenting Teams</u> Attending	
13	11/10 *	1 Team Practice Presentation (“Dress Rehearsal”) Finalize Work on Written Document & Presentation	“Finalized” Written Document <u>Uploaded</u> to Canvas by November 12 @ 11:59pm
14	11/17	Course Wrap Up with Instructors	
	11/17 thru 12/5	Presentations to Clients	Final Document Due to Client at the End of the Presentation to the Client