

**The Marshall School of Business
University of Southern California
Los Angeles, CA 90089-1421**

**MOR 557
Strategy and Organization Consulting
Summer, 2012, M nights, 6:00-10:00**



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MOR 557 - Strategy and Organization Consulting

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General Description:

This course is designed to initially overview the management consulting profession with a subsequent emphasis on strategy and organization consulting issues. Effort will be placed on developing proficiencies in a range of skills required to practice consulting. The course is relevant to those 1) who are specifically interested in consulting careers and / or 2) whose current or future jobs involve staff consulting or line management using consultants.

Instructional Objective: The overall objective of this course is to provide you with an overview of the 'world' of strategic and organization general management consulting and to help you develop a basic understanding of that world and the skills and knowledge to be successful in it.

Specific Learning Objectives:

- 1) Gain knowledge of strategic and organization management consulting practices.
- 2) Improve your ability to define key factors and issues relevant to a consulting engagement and examine their inter-relationships and learn to 'massage' them conceptually.
- 3) Gain practice in conducting a field-consulting project.
- 4) Improve your ability to present analyses of issues and organizational problems in a concise, accurate, clear and interesting manner from the perspective of a consult.
- 5) Gain exposure to a variety of processes and interventions involved in the arenas of strategic and organization management consulting.
- 6) Learn how to match your individual strengths, weaknesses, likes, dislikes, personality and goals with consulting opportunities, demands and behaviors so as to help you enhance placement and career opportunities in strategic and organization management consulting.

A primary objective of this course is to provide you with an opportunity to become familiar with the typical phases in a typical strategy / organizational management consulting project. These phases include: selling a project, entering the client firm, gathering data, diagnosing issues, implementing solutions and leaving. In addition to discussing these phases in class, we will learn about how similarly, and how differently, consultants work with their clients. A third objective will be to learn about the strategic and organizational functional specialty areas in which most consultants practice. We conclude the course with discussions of ethical issues, career concerns and expert witnessing of consultants.

Evaluating Student Learning:

The following sources will be used to stimulate student learning:

- 1) Lectures, Exercises and Class discussions
- 2) Cases analyses
- 3) Workshops
- 4) Consulting field project and presentation by student teams
- 5) Guest lectures by practicing consultants
- 6) Individual research paper
- 7) Quizzes

Students will be evaluated as follows:

1) 4 2-page written case analyses (individual)-choose any 4 identified *	20%
2) 1 5-page written case analysis paper (individual)-choose 1 of 2 identified *	10
3) 4 Workshops-(each member assessed) included in #4	
4) Individual contribution to class discussions including quizzes	25
5) Client field project presentation slides (team)	35
6) Individual written or presented self assessment paper	<u>10</u>
	<u>100%</u>

** Also, please note that the best papers are single spaced, minimum 2 (or 5) pages, and written in 'depth and breadth' (with references). You must use citations from the course (e.g., Block and G&P and other appropriate readings, lectures, ppt presentations) to earn 'A' scores.*

* For written case analyses: If anyone is absent and does not turn in a written case when due, you'll have 24 hours to get that case submitted to me by e-mail with a hard copy delivered and date stamped to a staff member in the MOR Department office.

Please note that for a late case to be accepted it must have been completed by the class meeting day and time in which is assigned.

I will confirm this by checking the properties of your e-mail document.

If the case is not completed by the class meeting date, it will not be counted and the following applies.

If a case is not submitted, written case analyses will need to be completed, but lesser credit will be awarded (may be no better than the lowest of the scores of those submitting cases on time).

See 'Note 3' below (after the Course Outline and Assignments) regarding absences and the effect absences can have regarding participation / quiz evaluations. Anyone will be allowed one (1) 'no-questions-asked' absence during the semester. To 'make up' for this absence, one will be required to submit a written analysis of the case(s) assigned for that class session. This written analysis will not count as one of the analyses identified in 1) and 2) above. Please be mindful that case analyses are due at the class session on the date assigned as noted in the syllabus or changed by confirmation with the entire class.

Class Component on Cultural & Ethical Issues:

Individual cases and readings from the tests and handout materials focus on these issues. Also, one single class session is specifically allocated and designed to address ethical issues in the consulting profession.

Guest Lecturers on Content, Process and Ethical Issues:

Occasional guest lectures will be given by practicing consultants who are invited to provide information relevant to their firms and their particular expertise in the consulting profession. They will cover a variety of issues in consulting, including practice areas, change process and professional skills.

READING LIST

Required:

1. Block, Peter. *Flawless Consulting, 2nd edition*. University Associates, La Jolla.
2. Greiner, Larry E. and Poulfelt, Flemming. *Management Consulting Today and Tomorrow- Perspectives and Advice from 27 Leading World Experts*. Routledge Publishing, 2009/2010.
3. Greiner, Larry E., Olson, Thomas H. and Poulfelt, Flemming. *Management Consulting Today and Tomorrow Casebook*. Routledge Publishing, 2009/2010.

ELC Schedule:

Date	Start	End Room	Status
6/4/2012 Mon	6:00 PM	10:00 PM JKP - ELC JKP 301 ALL ELC	ELC Exercise
6/18/2012 Mon	6:00 PM	10:00 PM JKP - ELC JKP 301 ALL ELC	ELC Exercise
7/2/2012 Mon	6:00 PM	10:00 PM JKP - ELC JKP 301 ALL ELC	ELC Exercise
7/16/2012 Mon	6:00 PM	10:00 PM JKP - ELC JKP 301 ALL ELC	ELC Exercise
7/23/2012 Mon	6:00 PM	10:00 PM JKP - ELC JKP 301 ALL ELC	ELC Exercise
8/6/2012 Mon	6:00 PM	10:00 PM JKP - ELC JKP 301 ALL ELC	ELC Exercise

Strategy and Organization Consulting

Course Outline and Assignments

<u>Date</u>	<u>Topic & Assignment</u>
WEEK 1 5/28	HOLIDAY WEEK - Memorial Day - Enjoy NOTE: Pre-reading required for first formal meeting class session on 6/6
Subject 1 5/28	The Changing Consulting Industry Agenda: <ul style="list-style-type: none">- Objectives of the course- Course schedule and expectations- Structure of a changing industry- Types of firms Readings: <ul style="list-style-type: none">- Greiner and Poulfelt: Ch. 1, <i>The Changing Global Consulting Industry</i>
Subject 2 5/28	Consultants: Types, Skills and Values Agenda: <ul style="list-style-type: none">- The 'truly professional' consultant- Required skills for consultants- Integrity issues Readings: <ul style="list-style-type: none">- Greiner and Poulfelt: Ch. 2, <i>Professionalism in Consulting</i>- Block: Ch. 1, <i>A Consultant by Any Other Name...</i> Create consultant teams for field project
Subject 3 5/28	Consulting as a Profession and Client Engagement Assignments Agenda: <ul style="list-style-type: none">- Development of Professional Consulting- Identifying and getting started with Client Engagement assignment Case: no written analysis due <ul style="list-style-type: none">- Greiner, Olson and Poulfelt: <i>McKinsey & Co</i> Readings: <ul style="list-style-type: none">- Block: Ch. 2 & 3, <i>Techniques Are Not Enough & Flawless Consulting</i>
WEEK 2 Subject 4 6/4 (ELC)	<u>MEET in Classroom first to discuss Subjects 1-3, 6-8pm</u> WORKSHOP #1: Entry, Contracting and Proposal Writing Client engagement skills practice (8-10pm) Agenda: <ul style="list-style-type: none">- Learn about, and gain practice with, entry as a (arguably 'the') critical stage- Begin to practice writing effective proposals and making winning presentations Readings: <ul style="list-style-type: none">- Block: Chs. 4, 5 & 6, <i>Contracting Overview, The Contracting Meeting and The Agonies of Contracting</i> Case: to be distributed in the ELC; no pre-reading required

Subject 5
6/4 (ELC)

WORKSHOP #1 continued: (*Conclude Debriefing / Presentations*)
Discussion of Data Gathering Methods (after workshop #1)

Agenda: Review learning about the following

- Getting started with your client
- Using different methods for gathering data
- Interviewing issues
- Internal consulting

Case: 2 page written class discussion analysis due (select this as 1 of 4 due)

- Greiner, Olson and Poulfelt: *Bob Baker: MBA and Internal Consultant*

Readings:

- Block: Chs. 7, 8 & 9, *The Internal Consultant, Understanding Resistance and Dealing with Resistance*

WEEK 3

Subject 6
6/11

Marketing and Selling of Consulting Services

Guest Consultant: Nevin Kamath, formerly McKinsey & Co.

Agenda:

- Understanding buyer values
- Matching client expectations with firm strategy
- Internal and external marketing
- Advertising PR and relationship management
- Writing successful proposals

Case: no written class discussion analysis due; be prepared for quiz

- Greiner, Olson and Poulfelt: *Marketing at Bain*

Readings:

- Greiner and Poulfelt: Ch. 3, *The Marketing and Selling of Consulting Services*

Subject 7
6/11

Strategy in Organizations Consulting

Guest: USC Emeritus Professor Larry Greiner, McKinsey Award Recipient

Agenda:

- History of strategic and organization planning
- Alternative approaches to strategic planning: value creation models

Case: no written analysis due

- Greiner, Olson and Poulfelt: *Mega Corporation (A) – bring part (B)*

Readings:

- Greiner and Poulfelt: Ch. 5, *Strategy and Organization Consulting*

Subject 8
6/11

Strategies in Organizations Consulting (Continued)

Agenda:

- Alternative approaches to strategic planning and use of value creation models
- Development of strategy & org. consulting: design to transformational change

Case: no written analysis due

- Greiner, Olson and Poulfelt: *Mega Corporation (C) – bring part (D)*

Readings:

- Greiner and Poulfelt: Ch. 5, *Strategy and Organization Consulting*

WEEK 4

Subject 9 Strategic Operations Management Consulting

6/18 (ELC)

Agenda:

- Understanding OM consulting issues and requirements: definition & history
- Providers of OM services and different contexts for OM consulting
- Key elements and concepts of the OM consulting engagement

Case: 2 page written class discussion analysis due (select this as 1 of 4 due)

- Greiner, Olson and Poulfelt: *Vandelay Industries, Inc.*

Readings:

- Greiner and Poulfelt: Ch 7, Operations Consulting

Subject 13 Human Resources in Organization Consulting

Guest Consultant: Mr. Eric Perry, USC MBA alum 2001, formerly at Disney, now at Mattel

6/18 (ELC)

Agenda:

- Specialty areas of HR consulting
- Outsourcing and HR
- HR Consulting firms and their future

Case: 5 page analysis due

- Greiner, Olson and Poulfelt: *Western Casualty*

Readings:

- Greiner and Poulfelt: Ch. 8, *Human Resources Consulting*

Due: this case or the other identified herein; select this as 1 of 2 5-page cases

WEEK 5

Subject 10 Strategic Marketing Consulting

6/25

Guest Consultant: Theodore Garcia | Partner, Entertainment, Media and Communications | PricewaterhouseCoopers

Agenda:

- Typical marketing consulting issues addressed
- Types of marketing consulting firms
- Future of marketing consulting

Case: 2 page written class discussion analysis due (select this as 1 of 4 due)

- Greiner, Olson and Poulfelt: *Hunter Business Group*

Readings:

- Greiner and Poulfelt: Ch. 6, *The Marketing Consultant*

Subject 11 Analyzing and Framing Problems – Bench Marking

6/25

Agenda:

- Looking for patterns
- Remembering strengths of client
- Feeding data back to the client: different methodologies
- Pushing the engagement forward

Case: no written analysis due; be prepared for quiz

- Greiner, Olson and Poulfelt: *Integron Incorporated*

Readings:

- Block: Chs. 10, 11, 12 & 13, *From Diagnosis to Discovery, Getting Data, Whole-System Discovery and Preparing for Feedback*

Due:

Team Written Proposal - for field project client

WEEK 6

Subject 12
7/2 (ELC)

WORKSHOP #2 Strategic & Organization Technology Consulting

Guest Consultant: Tim Clark, Partner, Booz and

Tentative Guest Consultant and/or Facilitator from USC's Institute for Creative Technologies / USC Graduate School – interactive client

engagement skills practice – Consulting to DANGEROUS BUSINESS

Agenda:

- History of IT / IS consulting - issues and growth
- Various Technology Consulting services
- Technology and the value chain
- Drivers of future growth

Case: 2 page written class discussion analysis due (select this as 1 of 4 due)

- Greiner, Olson and Poulfelt: *BAE Automated Systems*

Readings:

- Greiner and Poulfelt: Ch. 4, *Information Technology Consulting*

WEEK 7

Subject 14
7/9

Managing Engagements

Guest Consultant: Bain & Co. – to be confirmed

Agenda:

- Project management skills
- Involving client in the process
- Moving from analysis/diagnosis to implementation

Case: no written analysis due; be prepared for quiz

- Greiner, Olson and Poulfelt: *Deloitte & Touche Consulting Group*

Readings:

- Block: Chs. 14, 15, 16 & 17, *Managing the Feedback Meeting, Implementation, Strategies for Engagement and Some Tools for Engagement*

Subject 15
7/9

WORKSHOP #3 - Interim Reports on Problem Diagnosis in Field Project

Team Workshop Slides Due - TBD: Initial diagnosis of client issues in field project (reports verbal or summary written depending on the number of teams)

Agenda:

- Make interim report on client project - slide presentation of issues
- Work in teams to build consensus on client problems in field project

WEEK 8

Subject 16 Consulting to CEOs and Boards

7/16

Agenda:

- Various consulting services to CEOs and Boards of Directors
- Understanding the diversity of consulting roles
- Consulting to the Board: unique process issues and transformation challenges

Case: 2 page written class discussion analysis due (select this as 1 of 4 due)

- Greiner, Olson and Poulfelt: *Case of the Retiring CEO*

Readings:

- Greiner & Poulfelt: Ch. 9, *Consulting to CEOs and Boards*

Subject 17 Consulting to Global Clients

7/16 (ELC)

Agenda:

- Growth in globalization consulting
- 'Nine steps' framework for analysis
- Diverse issues related to globalization consulting

Case: no written analysis due; be prepared for quiz

- Greiner, Olson and Poulfelt: *Bain & Company: International Expansion*

Readings:

- Greiner & Poulfelt: Ch. 10, *Globalization Consulting*

Subject 18 Consulting in the Public and Not-for-profit Sector

7/16 (ELC)

Agenda: Guest Consultant – John Moran, Non-Profit Organizations

- Uniqueness of public sector consulting
- Volunteerism in the non-for-profit sector
- Key services in demand
- Managing multiple stakeholders

Case: 5 page written analysis due

- Greiner, Olson and Poulfelt: *Bridgespan Group*

Readings:

- Greiner & Poulfelt: Ch. 11, *Realities of Public Sector Consultation*

Due: this case or the other identified herein; select this as 1 of 2 5-page cases

Individual 5 page Written Case Analysis #2 - *Bridgespan Group*

WEEK 9

Session 19 Intervention and Change

7/23 (ELC)

Guest Consultant: Dr. Peter Kim

- Key dimensions in consulting interventions: delivery and content focus
- Alternative intervention strategies
- Implications for consultants, clients and the profession

Case: no written analysis due; be prepared for quiz

- Greiner, Olson and Poulfelt: *Datavision (A)*

Readings:

- Greiner & Poulfelt: Ch. 12, *Intervention Strategies in Management Consulting*

Subject 20 **Merger and Acquisition Integration**
Guest Consultant: Invited Principal / Partner from Mercer – confirming
7/23 **Agenda:**
- Dynamics of M&A consulting: advising vs. integration services
- Common issues: due diligence, capturing synergies, retaining talent
- Intervention strategies & techniques and the future of M&A work
Case: no written analysis due; be prepared for quiz
- Greiner, Olson and Poulfelt: *Mercer Management Consulting*
Readings:
- Greiner and Poulfelt: Ch. 13, *Consulting to Integrate Mergers and Acquisitions*

WEEK 10

Subject 21 **Managing Consulting Firms - Performance Problems**
7/30 **Agenda:**
- Strategy, goals and people success factors
- Leading for best performance
- Developing culture, aligning success factors
- Collusion between consultant and client
- Managing ethical and practice challenges
Case: no written analysis due; be prepared for quiz
- Greiner, Olson and Poulfelt: *Herlach (A) – bring parts (B-D)*
Readings:
- Greiner and Poulfelt: Ch. 16, *High Performance Consulting Firms*
- Block: Ch. 18, *Ethics and the Shadow Side of Consulting*

Subject 22 **You as a Transformational Change Agent**
7/30 **Guest Consultant: Dr. Terance Wolfe, Change Consulting**
Agenda: (possible case as meets the interests of the class – TBD)
- Developing more informed sense of self as change agent
- Benefits to being more process focused
Case/Assessment:
- Potentially use one of several available assessment questionnaires - TBD
Readings:
- Greiner and Poulfelt: Ch. 14, *On Becoming a Transformational Change Agent*

Subject 23 **WORKSHOP #4 – TBD - Implementation Planning for Field Project**
7/30 **- Team Workshop Slides Due:** Suggested action plan for client
(Depending on the number of teams, reports may be verbal or summary written)
*This Workshop may be suspended in lieu of
providing time to work in client teams.*
Preparing for Client Presentations
Agenda:
- Work with team members, professor and clients to complete engagement
- Review key elements of the consulting engagement and major practice areas
Readings:
- Block: *Appendix, Another Checklist You Can Use*

Subject 24 **Managing Consulting Firms - The Growth Problem**
7/30 **Agenda: (Possibly shifted to 7/23 if class decides to work in client teams.)**
- Stages and crises of growth
- Developing leadership to grow 'successfully'
Case: 2 page written class discussion analysis due (select this as 1 of 4 due)
- Greiner, Olson and Poulfelt: *Diamond in the Rough (A)*
Readings:
- Greiner and Poulfelt: Ch. 15, *Managing Growth Stages in Consulting Firms*

WEEK 11

Subject 25 **Managing Consulting Firms - The Knowledge Sharing Problem**
8/6 **Agenda: Overview possible if teams interested following client presentations**
- Knowledge creation for competitive advantage
- Knowledge practices at other firms such as Accenture, McKinsey and IBM
- Problems in sharing knowledge
Case: 2 page written class discussion analysis due (select this as 1 of 4 due)
- Greiner, Olson and Poulfelt: *Integral Consulting*
Readings:
- Greiner & Poulfelt: Ch. 17, *Knowledge Creation and Management in Consulting*
- Block: Ch.19, *The Heart of the Matter (Learning over Teaching)*

Subject 26 **The Future of Consulting**
8/6 **Agenda: Overview possible if teams interested following client presentations**
- Determinants of future consulting-client relationships
- Future consulting research agenda
- Issues in conducting research
Case: no written analysis due BUT conduct web search of Agency.com
- Greiner, Olson and Poulfelt: *Agency.Com (A) & bring (B) to class*
Readings:
- Greiner and Poulfelt: Ch.18 & 19, *Will Consulting Go Online? And Research on Consulting and Consultants*

Subject 27 **Presentations of Projects Due**
8/6 (ELC) **Agenda:**
Final Exam / Team Field Project Report to Class and Client
Individual Written Self-Assessment Paper - What did you learn about
.consulting and your skills from the project?

This is your 'final examination' session and your presentation and paper are due then.

Notes

1. The course schedule is subject to change depending on pace of class. **It is the collective responsibility of all class members to take note of any course changes to the syllabus as well as to assist the course to move at an acceptable pace.** Please periodically check e-mail and *Blackboard* for messages and / or presentation materials.
2. Additional cases will be distributed/made available depending on interest and time.
3. **Attendance is very important** to your performance in this course. Therefore, **each non-excused absence will result in a reduction of performance assessment for participation / quiz contribution. This would most likely result in a substantive adverse affect to this element of evaluation.**
4. **Your participation will be assessed using the attached behavior anchored rating scale.**
5. **School policy and guidelines require that you have your laptops closed during class and you turn off other electronic devices and phones. All cell phones must be turned off before the start of class; no text messaging is allowed during class.**
All phones, PDAs, pagers, etc. should be off the desktop and out of sight.
With prior approval, computers may used only for note taking; no internet surfing or working on other documents or e-mail is allowed. Students will be excused from class for violation and the class session will be counted as an absence.

Academic Integrity

Academic Integrity is a critical value of the University Community. Integrity violations destroy the fabric of a learning community and the spirit of inquiry that is vital to the effectiveness of the University. Academic integrity policies, the description of prohibited behavior, and the appropriate sanctions are described in SCAMPUS.

The use of unauthorized and/or not properly referenced material, collaborating with others on an individual assignment or communication with fellow students during an examination, attempting to benefit from the work of another student, and similar behavior that defeats the intent of an individual assignment / examination or any other class work / assignment is completely unacceptable to the University. Should a violation occur, I will 'disqualify' the student's work as unacceptable and assign a failing mark. The student behavior will be reported to the relevant University Office of Student Affairs.

Student Work

Returned paperwork, unclaimed by a student, will be discarded after 4 weeks and hence, will not be available should a student pursue a grade appeal following receipt of his/her course grade.

Students with Disabilities

Any student requesting academic accommodations based on a disability is required to register with Disability Services and Programs (DSP) each semester.

A letter of verification for approved accommodations can be obtained from DSP.

Please be sure the letter is delivered to me as early in the semester as possible.

DSP is located in STU 301 and is open 8:30 a.m. - 5:00 p.m., Monday through Friday.

The phone number for DSP is (213) 740-0776.

MOR 557 - Strategy and Organization Consulting Client Field Project (Team)

This major field project requires that you develop a client engagement and perform consulting services for that client. Its purpose is to improve our consulting skills through the actual performance of a consulting assignment.

You are asked to work in a minimum of three person teams. (The usual team size is four.) Your team will identify a potential project, negotiate a defined assignment, enter the client organization, gain access to needed data and employees, identify and diagnose issues / problems, and deliver a report with recommendations intended to result in positive and lasting changes.

You should have your team formed and hold sufficient meetings to discuss and decide on a potential client by the end of the fifth class session. The client should be secured through a written proposal, a copy of which is due in class as noted in the syllabus. Work for the client should begin no later than mid semester.

Your client contact must be a responsible individual in an organization that has a problem / opportunity / issue in need of study. Such study areas can range from marketing to business strategy to organization and system issues. The project should be sufficiently focused so as to be completed within the limited time of the course.

A professional oral presentation (with printed copies of overheads or power point slides) will provide the basis for evaluation and feedback. The oral presentations will be made on the last class day. Your client is invited to hear your presentation at that time. If your client cannot make it that day, an audience of student peers will listen to and critique your presentation, and it will be videotaped for review and evaluation. The oral report should be approximately 30 minutes in length, and if your client cannot make it, your report should be presented as if the client was the primary audience. I ask that in addition to your presentation you describe issues/problems that arose during your engagement. If your client cannot make it, you are required to make this same presentation to your client before the end of the semester.

Based on requirements developed with your client, I ask that you provide a written report provided for your client and for me as well. Your report should include a description of (1) the client organization, (2) how you entered and what you contracted to do, (3) your methodology and (4) your identified problems / issues and recommendations. In the report provided to me you need to include a fifth section describing what you have learned about consulting as a result of performing this project. Your grade on the team project is a 'team grade' that will be assigned equally to all members of the team unless otherwise determined by differences in evaluations by team members (which will be collected at the end of the semester).

Fifteen to twenty power point slides (or more is OK) for your presentation should be prepared in line with our classroom discussion on professional presentations. Include a 'notes' page with each slide of your presentation.

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Individual Paper Assignments

In this required assignment, you should choose from one of two general alternatives on which to write your paper:

1. **A self assessment of your consulting skills based on your experience in the field project.**

What skills did you perform well? Which were you deficient? Was this what you expected at the outset? How have your views changed or remained the same about consulting? What would you have to do to improve your skills if you were to pursue a career in consulting? Use examples and evidence from your project to support your conclusions. Try to make it an honest assessment that can be useful to you in the future.

2. **An essay on some aspect of consulting that interests you.**

This could involve, for example, some predictions about future developments in the industry, or a new market opportunity that you've identified, or a new approach to consulting, or a proposal for developing better consultants, etc. *Develop and support your essay as if your paper would be published in a trade magazine on consulting.*

The paper must be printed and is due in class on the last class day. It should be 10-15 pages in length. The style of presentation and format is your own choice - through it should be interesting and readable. Whichever alternative you choose, you should ask one other student/colleague to read your completed paper and comment on it before you submit it. Please note that the best papers are written in 'depth and breadth'. You must use citations from the course and other appropriate readings to earn 'A' scores.

Additional Reference Consulting Books

Please refer to the list of references in the Greiner and Poulfelt text, *The Contemporary Consultant*, on page 359. Additional references not included in Greiner and Poulfelt are the following books. While all of the additional reference texts are not required reading, they may prove helpful for those who are interested in learning more about consulting.

Barcus, Sam W., & Wilkinson, Joseph W. (Editors). *Handbook of Management Consulting Services*. New York: McGraw-Hill, 1995.

Bell, Chip R. and Leonard Nadler. *Clients and Consultants: Meeting and Exceeding Expectations*. 2nd Edition. Gulf Publishing Company, Book Division, Houston.

Cockman, Peter, Evans, Bill, & Reynolds, Peter. *Client-Centered Consulting: Getting your Expertise Used When You're Not in Charge*. New York: McGraw Hill Book Co., 1996.

Cohen, William A. *How to Make it Big as a Consultant*. AMA, New York, 1991.

Connor, Dick. *Increasing Revenue From Your Clients*, John Wiley & Sons. New York.

Connor, Dick & Davidson, Jeffrey. *Marketing Your Consulting and Professional Services*. New York: John Wiley & Sons, 1990.

Cveljo, Katherine. *Management Consulting*. New Jersey, Scarecrow Press, 1993.

Dun's Consultants Directory, latest edition; Library reference HD69.C6.D86.

Greenbaum, Thomas L. *The Consultant's Manual*. New York: John Wiley & Sons, 1990.

Greenfield, W.M. *Successful Management Consulting: Building a Practice with Smaller Company Clients*. Prentice Hall, Englewood Cliffs, New Jersey, 1987.

Grossman, Lee. *The Change Agent*. Amacom, A Division of American Management Association, New York.

Holtz, Herman. *Choosing and Using a Consultant*. New York: John Wiley & Sons, 1989.

Holtz, Herman. *The Complete Guide to Consulting Contracts*. Enterprise, Dearborn Publishing, 1994.

Holtz, Herman. *The Consultant's Guide to Hidden Profits*. New York: John Wiley & Sons, 1992.

Holtz, Herman. *How to Succeed as an Independent Consultant*. New York: John Wiley & Sons, 1993.

Holtz, Herman. *The Independent Consultant's Brochure and Letter Handbook*. New York: John Wiley & Sons, 1995.

Kelley, Robert E. *Consulting: The Complete Guide to a Profitable Career*, Revised Edition. Charles Scibner's Sons, New York.

Margerison, Charles J. *Managerial Consulting Skills: A Practical Guide*. Brookfield, VT: Gower Publishing Company, 1988.

Maister, David. H. *Managing the Professional Service Firm*. New York: The Free Press, 1993.

Price Waterhouse Change Integration Team. *Better Change - Better Practices for Transforming Your Organization*. Irwin, Chicago, 1995.

Schein, Edgar H. *Process Consultation: Its Role in Organization Development*. Addison-Wesley Publishing Company, Menlo Park, Ca.

Shenson, Howard L. *The Contract and Fee-Setting Guide for Consultants and Professionals*. John Wiley & Sons. New York in association with University Associates, Inc., San Diego, Ca.

Shenson, Howard L. *How to Select and Manage Consultants*. Lexington, MA: Lexington Books, 1990.

Shenson, Howard L. *Shenson on Consulting*. New York: John Wiley & Sons, 1990.

Tepper, Ron. *The Consultant's Proposal, Fee and Contract Problem Solver*. New York: John Wiley & Sons, 1993.

Tobias, Lester L. *Psychological Consulting to Management: A Clinician's Perspective*. Brunner Mazel, New York.

Tuller, Lawrence W. *The Independent Consultant's Q&A Book*. Bob Adams, Inc. Publishers, 1992.

Weiss, Alan. *Million Dollar Consulting* (Revised Edition). New York: McGraw-Hill, 1997.

Weinberg, Gerald M. *The Secrets of Consulting*. New York: Dorset House Publishing, 1985.

Participation Behavioral Anchor Rating Scale

Excellent Performance

- Initiates information relative to topics discussed
- Accurately exhibits knowledge of assignment content
- Clarifies points that others may not understand
- Shares personal experiences or opinions related to topic
- Offers relevant / succinct input to class
- Actively participates in simulations and class exercises
- Demonstrates ability to apply, analyze, evaluate & synthesize course material.
- Demonstrates willingness to take risks in attempting to answer unpopular questions.

Good Performance

- Regularly participates in discussions
- Shares relevant information
- Gives feedback to classroom discussions
- Consistently demonstrates knowledge of reading assignments
- Demonstrates ability to analyze / apply course material
- Demonstrates willingness to attempt to answer questions

Fair / Average Performance

- Participates in group discussions when asked
- Demonstrates knowledge of course material
- Offers clear, concise, “good” information on class assignments
- Offers input, but tends to reiterate the intuitive
- Attends class regularly

Poor Performance

- Occasional input, often irrelevant, unrelated to topic
- Reluctant to share information
- Not following the flow of ideas
- Personal applications only
- Drains energy from the class

Unacceptable Performance

- Fails to participate even when specifically asked
- Gives no input to discussions
- Does not demonstrate knowledge of the readings
- Shows up to class: does nothing
- Distracts group / class
- Irrelevant discussion

PEER EVALUATION FORM

Class: _____ Your Name: _____

Team Identification: _____

Directions: Evaluate yourself and each of your team members on their contributions to the team using the rating categories and competencies below. This evaluation is adopted with permission from an actual evaluation used by the Hallmark Corporation.

Rating Categories:

- 5 = this team member shows outstanding skills in this area and far exceeds expectations
- 4 = this team member performs strongly in this area, and consistently exceeds expectations
- 3 = this team member is competent in this skill meeting and, at times, exceeds expectations
- 2 = this team member meets many, but not all, of the expectations
- 1 = this team member fails to meet the expectations

Team members (include yourself):

- A = _____
- B = _____
- C = _____
- D = _____
- E = _____
- F = _____
- G = _____

COMPETENCIES:

RATINGS

TEAM EFFECTIVENESS

	A	B	C	D	E	F	G
1. Deals fairly and equitably with teammates and other people with whom the team interacts.							
2. Meets commitments reliably and on time.							
3. Is committed to the team's goals and objectives.							

LEADERSHIP

	A	B	C	D	E	F	G
1. Encourages the ideas of others							
2. Motivates team members, particularly by offering praise & encouragement when appropriate.							
3. Shows initiative and helps the team succeed by volunteering for assignments.							
4. Provides leadership and vision to help the team develop long-term direction.							

COMMUNICATION

	A	B	C	D	E	F	G
1. Provides others with honest, adequate and timely communication							
2. Listens openly and effectively to other individuals							
3. Is clear when communicating ideas, expectations, or needs.							

INTERPERSONAL EFFECTIVENESS

	A	B	C	D	E	F	G
1. Shows respect for ideas/suggestions of others.							
2. Admits mistakes and is open to feedback on his/her decisions or actions.							
3. Creates a climate in which others can feel comfortable and safe when surfacing concerns.							

MANAGING CHANGE

	A	B	C	D	E	F	G
1. Adapts easily to new situations and unexpected changes							
2. Maintains a positive, constructive outlook							
3. Continues to operate effectively during periods of high stress							
4. Is willing to take appropriate risks.							

PLANNING & EXECUTING

	A	B	C	D	E	F	G
1. Develops logical plans, with specific objectives when needed to achieve goals.							
2. Focuses effort on the most important task(s) at any given time.							
3. Allows others an appropriate amount of time to complete related or supportive tasks.							
4. Follows through effectively when a course of action is chosen.							
5. Is persistent in overcoming obstacles when they arise.							

PROBLEM SOLVING & DECISION MAKING

	A	B	C	D	E	F	G
1. Takes initiative, not only to identify, but also to solve problems.							
2. Involves appropriate individuals in seeking the best solution.							
3. Finds imaginative, creative solutions to work-related problems when appropriate.							

SUMMARY QUESTIONS:

	A	B	C	D	E	F	G
1. Create an average score for each team member and yourself by summing the scores on each of the competencies (by summing the scores and dividing by the number of competencies you rated).							
2. Provide your subjective overall evaluation for each team member. This may or may not agree with the average score above.							

In the matrix below, provide some summary comments that can be fed back to each of your team members:

Greatest strength

A =
B =
C =
D =
E =
F =
G =

Areas for improvement

A =
B =
C =
D =
E =
F =
G =

