

USC Marshall School of Business
MOR 462-69: MANAGEMENT CONSULTING
FALL 2021
Monday & Wednesday
10:00 to 11:50 AM
August 23 to December 1, 2021
Meets in JFF 102
4.0 Units

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Office Hours: All in-person office hours are by appointment only.
All virtual office hours are by appointment only and will be conducted via Zoom.
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Meeting ID: 977 9082 4605

Please read this syllabus carefully and completely. It your responsibility to be familiar with and knowledgeable of the course design, requirements, grading and assessment processes, assignments, readings and cases and overall course performance expectations.

“Great consulting is part art, part technical, part analytical, and always about the client.”

COURSE DESCRIPTION

MOR 462 is a *professional practice* course designed to help prepare you for a career in the management consulting profession. MOR 462 is intended for those who aspire to enter the profession of management consulting and/or for those who have or will have responsibility for engaging, using, and managing management consultants.

MOR 462 is designed to train and position you for the realities of actual consulting...the course is demanding, challenging and rigorous. MOR 462 provides you with a progressive immersion in the subject matter, content, issues, dynamics and process of contemporary consulting. By the completion of this course, you will know what it is like to be a management consultant, what is expected of you as a consultant, and how to think, act, and perform as a consultant.

MOR 462 provides a robust treatment of the consulting industry and industry structure, consulting frameworks, firm management practices, firm financial performance, competitive dynamics and project management. We also explore career navigation strategies, firm governance structures and client relationship management. Central to the course is our study of the widely used Mische-3-Part Consulting Model, as well as the various roles and responsibilities associated with marketing, performing, delivering and managing consulting services.

If you are successful in this course, then you could be well ahead of your competition by two to three years!

COURSE OBJECTIVES

The primary objective for this class is simple: *prepare you and place you in a more competitive position with respect to management consulting, than before you took the class.* At the completion of this course you should be able to constructively engage any practicing consultant on a wide range of consulting subjects and be positioned to respond to substantive questions about the consulting industry and professional practice of consulting. MOR 462 is intended to provide you with exceptional knowledge, insight and the cognitive and critical thinking skills necessary to function as a professional management consultant. Using these objectives, and the resources of this course and USC, upon successful completion of this course, students will be able to:

MOR 462- COURSE OBJECTIVES & SCOPE	
1.	Apply basic consulting competencies & professional acumen.
2.	Properly use knowledge & application of consulting phases.
3.	Apply consulting critical thinking & project performance skills to client situations.
4.	Develop & present a responsive consulting proposal using the "7-Cs."
5.	Develop & present a responsive consulting reports.
6.	Apply consulting project management practices & calculate KPIs.
7.	Develop & present a responsive consulting reports.
8.	Properly apply consulting terms & vocabulary.

Some of the key questions that are addressed in this course include: how management consulting firms are organized and managed, how consulting firm manage their internal economics and set professional rates, how consulting firms compete, market, and secure clients, the types of services consulting firms provide, service delivery methods and practices, engagement management and progress reporting, deliverable development and content, value-added consulting services, managing client relations and expectations, and specialized consulting situations for strategy, operational improvement, acquisitions and turnarounds. We also study the Code of Professional Conduct as per the AICPA, the CFA's Code of Ethics and the IMC's Code of Ethics and learn the 5 major ethical dilemmas confronting all management consultants and various methods to diagnose those dilemmas and address them.

COURSE DESIGN

3.1 USC Required Format

This course is taught using a variety of formats, including Before Class, During Class, Before Class and flipped formats. In addition to the course materials that can be found in Blackboard (<https://blackboard.usc.edu>), this course requires a textbook and supplemental course reader which can be purchased directly by students from HBSP.

This course is divided into modules, and each module is intended to cover one or more class session meetings (see Course Calendar). Module activities may include reading assignments, weekly lessons, interactive exercises, homework assignments, Blackboard discussion forums, class discussion sessions, and quizzes or exams. It is expected that students will have completed all required activities and assignments before attending their class session each week. Be prepared for class as I will cold call on you, push your analysis and challenge your thinking and solutions.

3.2 Course Design

MOR 462 is organized into four modules and includes two mini-boot camps. Each module builds on prior work to form an integrated course design, and a progressive exposure to and immersion in management consulting, the consulting process, consulting industry and firms, client dynamics, and the consulting profession:



Complementing the academic and lecture concepts of course are a series of assignments, exercises, and ELC simulations (ELC varies by semester). In each of the modules we will introduce and learn new terms and definitions that are unique to the consulting profession and commonly used among consultants. Specific course content by module includes, but is not limited to:

INTRODUCTION: BOOT CAMP- 1

This is an intensive class session designed to immerse you in important consulting topics and knowledge as a pre-requisite/orientation to the in-depth discussions of course topics. There are two boot camps planned for this semester.

MODULE 1.0: INDUSTRY STRUCTURE

Module1 is organized into 7 segments:

- 1.1- Understanding management consulting;
- 1.2- Attributes of a management consultant;
- 1.3- Industry structure & history of consulting;
- 1.4- Understanding clients & why clients use consultants;

- 1.5- Competitive rivalry & differentiation in consulting;
- 1.6- Operational, organizational and governance structures of consulting firms, and
- 1.7- Consulting services & lines of practice.

In Module 1, we also survey and discuss the key dynamics of the profession, industry structural costs, and the different roles of consultant v. contractor v. employee.

MODULE 2.0: MANAGING THE FIRM

In Module 2, we learn the essentials of managing and working in a formal professional services firm (PSF) practice. In this module we discuss firm economics, ethics and professional responsibilities, marketing the firm and securing clients, how rates are determined and set, types of rates, various organizational structures and consulting business models and legal issues in consulting. In this series of classes, we explore the profitability drivers of consulting, learn how to set rates and understand utilization and cash flow measures. Chief among the topics that we address:

1. Planning for firm growth
2. Determining firm staffing level needs
3. Understanding revenue and profitability drivers in the firm
4. Understanding firm governance structures, operational and legal structures
5. Learning how to set hourly rates and profit margins
6. Managing firm risk and ethical dilemmas

PERFORMING WORK: BOOT CAMP- 2

This is an intensive class session designed to immerse you in important consulting topics and knowledge as a pre-requisite/orientation to the in-depth discussions of course topics. There are two boot camps planned for this semester.

MODULE 3.0: THE CONSULTING PROCESS

In Module 3, we learn a 3-stage, 9-part consulting process life cycle model that spans from marketing (practice development) to delivering the final product to the client. Module 3.0 is organized into 4 segments:

- 3.1- Overview of the consulting process
- 3.2- Marketing Professional Service Firms
 - a. Prospecting
 - b. Proposal Writing
 - c. Closing & Contracting
- 3.3- Performing Professional Services
 - a. Planning the Engagement
 - b. Performing the Engagement
 - c. Delivering Results
- 3.4- Managing Professional Services
 - a. Managing the Client
 - b. Managing the Project
 - c. Managing the Firm

In this module, we study engagement management processes, staffing and budgeting methods, entering and exiting the client and how to deliver extraordinary results to clients. We also learn Mische's 7 C's of effective proposal writing, how to write a proposal, the key elements of all proposals, project management, the challenge of managing scope changes v. scope creep, and most importantly, how to develop and apply critical thinking and *hypothesis-driven* problem-solving methods to complex client problems. Included in Module 3 are in-depth discussions and analysis of several key topics, including, but not limited to:

1. Marketing methods,
2. Elements of service delivery,
3. Diagnosing the problem,
4. Critical thinking, determining data requirements & sources,
5. Building the Service Delivery Model (SDM),
6. Forming the project team,
7. Entering the client,
8. Designing the work plan,
9. Performing the work,
10. Delivering results,
11. Applying methodological framework & models for adaptation to client projects.

MODULE 4.0: NAVIGATING YOUR CAREER IN CONSULTING

In **Module 4**, we explore your career as a management consultant. In these class sessions we discuss career issues, what it means to be a “professional,” promotion paths, compensation, career strategies, and your “life as consultant.” We learn what it takes to become a partner and what the roles and responsibilities of the partner are. Some topics in this module include:

1. Career levels & responsibilities
2. Compensation
3. Expectations
4. Lifestyle
5. Career management & navigation tips & traps
6. “Making” partner & the partner selection & admissions process
7. Career exiting points
8. Career strategies
9. Work/Life balances & choices
10. Career derailment and failure

REQUIRED COURSE TEXT & MATERIALS

MOR 462 readings, course content and exercises have been carefully selected and structured to support course objectives and the desired learning outcomes. MOR 462 requires a textbook and Harvard Course Reader.

Textbook:

The textbook is MANDATORY. I have authored a textbook specifically for case analysis based on management consulting critical thinking and reasoning processes. You’ll also find this text useful in preparing for case interviews.

- Mische, Michael A. *CasePro: The Consultant’s Critical Thinking Approach to Case Analysis*. (Preliminary Edition), published and distributed by Cognella, Inc. (2022).
- Textbook URL: <https://store.cognella.com/83137-1A-007>

Course Reader:

The Course Reader is MANDATORY. I update the Course Reader each semester for new articles and readings that are more “on point” and or more appropriate for the evolving needs of the course. The Course Reader may be purchased and downloaded by pasting the link below into your browser:

- Course Reader URL: <https://hbsp.harvard.edu/import/849230>

Note, if for some reason, you are having problems accessing the HBSB via the provided link, then change browsers or shut-down your current browser and re-start it and try again using the link above...the link should work. Also, if you have problems with ordering the textbook, please contact Cognella directly at: orders@cognella.com.

Throughout the semester, I may also post an occasional ad-hoc reading, or additional information, or content on BB. The intent of these ad-hoc materials is not to increase course loads, but to embellish and advance the learning process and improve your educational experience at Marshall...therefore...read them!

Course Calendar, Weekly Assignments & Assignment Due Dates

This course is designed in modules. The design allows for extreme flexibility in introducing new materials. For compliance purposes, the Course Calendar specifying dates, assignments, exams, schedules, etc. is provided herein. A more user-friendly version, in Excel, is available for your use on **Blackboard > Syllabus > Course Calendar & Assignments**.

Additional Resources (Recommended, but Not Required)

Additional, but not required resources that may be used or referred to in this course can include, but are not limited to:

- a. Mische, Michael A. *Strategic Renewal: Organizational Change for Competitive Advantage*. Prentice-Hall. (2000). ISBN-0-13-021919-3.
- b. Poulfelt & Olson. *Management Consulting: Today and Tomorrow- Perspectives and Advice from Leading Experts*. Routledge. (2018). ISBN-978-1-138-12428-8.
- c. USC’s Statement of Ethics https://about.usc.edu/files/2011/07/USC_Code_of_Ethics_2004.pdf
- d. AICPA Code of Professional Conduct-
<http://www.aicpa.org/InterestAreas/ForensicAndValuation/Resources/Standards/DownloadableDocuments/SSCS.pdf>.
- e. Institute of Management Consultants: <http://www.imcusa.org/?page=ETHICSCODE>.
- f. USC’s Final Examination Schedule: <https://classes.usc.edu/term-20213/finals/>

PERFORMANCE ASSESSMENT & GRADING

Grading

Grading will be competitive and rigorous. Not everyone will earn an “A” or “A-” and effort, although appreciated and enthusiastically encouraged, may not always be indicative of your final grade and/or your effort. This is a professional competency class and therefore, is highly competitive class and your final grade is performance and results based.

Your final grade will be reflective of your individual and team performance in the various grading components for this class and your quantitative performance ranking based on your total grade points earned/ scored in those grading events as compared to the other students. Thus, your final grade is a reflection of your work and where you rank, in total points, in comparison to other students. As with all semesters, there may or may not be a curve for final grading. The use of a curve is entirely at the discretion of the instructor.

Final grades for this class are not based on any USC mandated GPA target. Historically, the average grade for this class is about a “B+” (3.3 to 3.4). However, each semester and each class are different and there are no guarantees that this class and this semester will perform at, below, or above that historical average.

Grading Components

This course has four grading components:

- (1) Exam 1- Quiz,
- (2) Exam 2- Midterm,
- (3) Exam 3- Final, and
- (4) Project Case Team Assignment.

All course grading components are required of each enrolled student in order to receive a grade. Failure to take any of the exams may result in a failing grade for the exam and/or course.

MOR 462- GRADE COMPOSITION		
GRADING COMPONENT	Percent	Date
Exam 1- Quiz	15	9/20
Exam 2- Midterm	25	10/13
Exam 3- Final	35	12/13*
Sub-total:	75	
Team Project	25	11/29
*= Confirm Date		
Total:	100	

(All dates are “approximate” and subject to change. Based on schedules, class performance and other factors, I may adjust the grading criteria, assignments, weightings, etc. subject to our collective agreement as expressed by a majority vote of the class.)

Please see the Course Calendar provided herein, which is also posted on BB under “Syllabus,” for all weekly assignments, readings, and the planned due-dates of the exams and exercises. Please watch for any updates to the Course Calendar and dates.

Project Case Team Assignment

In addition to the exams, MOR 462 has a Project Case Team Assignment component as part of your final grade. For this class:

- Students are randomly assigned to teams by the professor.
- Teams are limited to 4 students per team.
- Students are expected to work collegially and collaboratively.
- Teams are provided with a complex, real-life consulting project case to which they apply the concepts, theories and methods of MOR 462.
- Teams are provided individual coaching sessions.
- Teams are also provided a separate, optional coaching session held on a non-class day.
- Individual team performance and contribution is subject to peer assessment by members of the team. In this manner, students experience the process of performing formal performance assessments and also receiving assessments.
- See Team Self-Assessment Rubric for example criteria and explanations.

Project Case Assignments are team graded and are assessed using multiple criteria that are similar to internal review processes in management consulting. As provided below, each criterion is weighted and a composite total score is generated and provided.

POLICIES

Exam Information

- a. **Exams Format & Process.** As noted, all exams are multiple choice. All exams are electronically administered, delivered and graded using Blackboard. Specific instructions are provided for each exam. All students must take the exams for this class.
- b. **Study Guides (SG).** As noted, a comprehensive study guide is published ahead of the midterm and final exams. The SG is intended to help you prepare for the key concepts, cases and material that will subject of the examination. What's in the SG is on the exam...simple.
- c. **In-class Review.** Time permitting, I will try to conduct an in-class review on the class immediately preceding the scheduled midterm or final examination.
- d. **Special Final Exam Review.** Time permitting, for final exams, I usually schedule an optional and fully voluntary special review session for the final exam during USC "study days" period. I reserve a classroom and go over the exam material, content, design and cases/readings. Times, date and location are to-be-determined and will be posted on BB.
- e. **Dates for Exams.** Dates for exams are scheduled in "Course Calendar & Assignments" of this syllabus. If you are unable to take an exam, please let me know ahead of time and we'll coordinate an alternative date and time. See also the USC schedule of final exams for the date of the final exam for this class.
- f. **All Exams are Required.** No student is permitted to omit or anticipate a final examination and no instructor is authorized to permit a student to do so. As per USC rules, no exceptions to taking the final exam shall be granted unless previously approved, in writing, by the appropriate USC academic unit.
- g. **Make-up Exam.** Make-up exams are subject to prior approval or approval due to technical issues with Blackboard. Make up exams for the midterm must be taken within a ten (10) business day period of the scheduled date. A make-up for the final exam requires special scheduling arrangements.

Exam Policies

- a. **Your Responsibility for Exams.** Unless specifically notified in writing, you are required to take all scheduled exams. You are completely responsible for attending the final examination on the date published by USC...please do not ask me for any special consideration unless you specifically satisfy the conditions established by USC for scheduling conflicts, religious observances, illness, hardships, documented emergencies, etc. Students should plan in advance to avoid scheduling conflicts in their final examinations. If a student is scheduled for more than two final examinations in one day, the student may request to take one of the exams on a different day or time. In either situation, the student must contact the professors involved no later than two weeks prior to the scheduled examination date and request an accommodation. If an accommodation cannot be arranged, the student should contact the USC Testing Services (213-740-7166 or testing@usc.edu) for assistance.
- b. **Exceptions for Religious Observance Conflicts.** When a final examination is scheduled at a time that conflicts with a student's observance of a holy day, faculty members should accommodate a request for an alternate examination date and time. A student must discuss a final examination conflict with the professor no later than two weeks prior to the scheduled examination date to arrange an acceptable alternate examination date and time. The student and/or professor may reach out to the Office of Religious Life (213-740-6110 or vasoni@usc.edu, Dean of Religious Life) for guidance.
- c. **Exceptions for Documented Emergency.** In the case of a documented emergency that occurs after the withdrawal date and/or during the final exam period, students should consult the professor about receiving a grade of Incomplete (IN) for the semester. Faculty and students alike should refer to the rules regarding the mark of Incomplete at the time of the request. The Registrar's recommended definition of emergency: "*An unforeseeable situation or event beyond the student's control that prevents her from taking the final examination or final summative experience.*" Based on this definition, a student may not request an "IN" before the withdrawal deadline. The rationale is that the student has the option to drop the course until the withdrawal date. The grade of IN exists so there is a remedy for illness or emergency which occurs after the deadline to withdraw.

Grade & Exam Questions, Issues & Challenges

- a. **Grade Questions, Concerns & Challenges.** I will do my best to communicate my expectations for the various assignments as clearly as possible. I am fully responsible for assigning a grade to you based on your performance in the class and I will work very hard to give you the best and fairest grade that I possibly can.
- b. **14-Day Challenge Period.** No one and no exam is perfect. If you have questions, issues, or concerns about the grading of any assignment or exam, including your final exam and/or your final grade for the course, then please let me know within fourteen (14) calendar days of the date the assignment, or the date of your exam that your grade is returned, or made available to you.
- c. **Grade Question & Challenge Procedures.** If you have questions about your grade or exam, all you have to do is write me an email to me within the 14-day challenge period to request a meeting to discuss your questions and grade. In your email you must follow these directions: in the Subject box of your email you must use the following language: “Course #-Days-Grade Question,” example: “462- Grade Question.” Failure to use the proper submission format could result in a non-response from me.

MISCHE’S COACHING TIPS- PREPARING FOR & PERFORMING IN CLASS

Preparing for class is essential to performing in class. Below are some coaching tips to help you prepare for class and performing in class:

<u>Activity</u>	<u>Description</u>	<u>Est. Time Commitment</u>
(1) Pre- Class:	Before class preparation	As needed, per assignment.
(2) During Class:	In-class participation	As incurred.
(3) In-class Breakouts:	Reading or Case Discussion Questions	8 to 10 minutes per breakout.
(4) In-class Discussion:	Summarize & present your discussions	5-7 min discussion by each team.

a. Pre-Class Preparation

Pre-class preparation requires your commitment and dedication to learning before class. Pre-class activities include:

1. Reviewing the course syllabus and topic for the week/class session.
2. Reviewing the assigned class discussion questions or “Class Pack” posted on BB under “Assignments > Discussion Questions.”
3. Reading the assigned case and articles.
4. Creating personal notes to capture your thoughts, at a level appropriate, about the reading/case as related to the discussion questions for your use in class discussions.
5. Developing 3 questions for each reading/case and bring those to class.

b. During Class

1. Come to class, relaxed and ready to participate and contribute.
2. Quickly review the assigned class discussion questions posted on BB under “Assignments > Discussion Questions.”

c. In-class Breakout

1. Upon in-class team discussion assignment, organize your team. Your discussion team number corresponds to the question that your team is assigned to discuss.
2. Discuss your assigned question. In your discussion, incorporate elements of the lecture, any related videos and readings, and apply key course concepts.
3. Generate notes sufficient to lead a discussion of your question with the full class.
4. Designate a person to lead a discussion of your question with the full class. All members may contribute.
5. Wrap-up your team meeting by developing two additional discussion questions.

d. In-class Discussion

1. Review your notes.
2. Lead discussion of your question.
3. Generate questions for follow-up classes or office hours, if necessary.
4. Have fun leading the discussion.

CLASS CONTRIBUTION & PARTICIPATION

Class engagement, contribution and participation are extremely important parts of the learning experience in this course as the richness of the learning experience will be largely dependent upon the degree of preparation by *all* students prior to each class session. My expectation and those of your classmates are that you are prepared for *all* classes and will actively participate in and meaningfully contribute to class discussions.

In-class contribution and participation are also a critical part of this course's learning experience. Cold calling may take place to encourage active participation and to gain multiple perspectives and points of view, thus lending itself to the richness of the learning experience. In-class participation grading will be based on students' demonstrated willingness to participate and the quality of the comments expressed, rather than quantity. While some students are far more comfortable than others with class participation, *all* students should make an effort to contribute meaningfully...and I'm open to various methods.

Students will offer their opinions in group settings many times in their careers; thus, class participation serves to prepare students for this business experience.

The evaluating of in-class participation is based on the following:

- *Preparation* – Are you prepared for the class.
- *Relevance* – Does the comment or question meaningfully bear on the subject at hand? Irrelevant or inappropriate comments can detract from the learning experience.
- *Responsiveness* – Does the comment or question connect to what someone else has said?
- *Analysis* – Is the reasoning employed consistent and logical? Has data from course materials, personal experience, or general knowledge been employed to support the assertions/findings?
- *Value* – Does the contribution further the understanding of the issues at hand?
- *Clarity* – Is the comment concise and understandable?
- *Mindfulness* – Are you efficient and mindful of time that you are using with respect to other students and are not monopolizing or diverting class discussions.

During class sessions, I frequently assume the role of a facilitator to encourage a discussion that includes perspectives from a variety of viewpoints and, secondly, to help pull together prevailing analyses and recommendations. The direction and quality of a discussion is the *collective responsibility of the class*. The below Class Participation “Behavioral Anchor Rating Scale” is provided for guidance and example purposes:

Excellent Performance

- Initiates information relative to topics discussed
- Is prepared
- 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 class exercises
- Demonstrates ability to apply, analyze, evaluate & synthesize course material.
- Demonstrates willingness to attempt to answer unpopular questions
- Builds on other students' contributions

Average Performance

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

Unacceptable Performance

- Fails to participate even when directly asked
- Is unprepared
- Provides no input to discussions

- Does not demonstrate knowledge of the readings
- Shows up to class: does nothing
- Distracts group/class
- Monopolizes class discussions
- Asks superfluous and non-relevant questions or makes comments not relevant to topic
- Engages in or provides irrelevant discussion, comments or insights

COMMENTS & GUIDANCE ON GRADING

GPA Expectations

For this course, you can expect an overall class GPA of **3.3 to 3.4**, therefore, competition for high grades will be very intense. Grading is based on your total score for exams, projects and contribution, which is then ranked highest to lowest to determine your final grade assignment.

General Tips & Comments on Grading Standards for Case Analysis & Written Exercises

Impress me...simple. Your formal written work will be evaluated based on the course objectives and requirements, as provided for each individual assignment. As a general guideline for your use, when assessing and grading your written work and contributions, I generally use multiple criteria and dimensions including, but not limited to:

1. **Hypothesis Driven Problem Solving & Critical Thinking** – Solving complex client problems requires hypothesis driven problem-solving skills using abductive, deductive and inductive reasoning methods, as well as critical thinking:
 - a. **Diagnostics & Definition-** Have you properly and accurately diagnosed the case and its dilemmas and problems and have you adequately and clearly described/defined the results of the diagnostic?
 - b. **Causality** – Have you demonstrated a correlation between the data, analysis and conclusion/comments and have you established causality?
 - c. **Perspective** – Did you establish a context & did you provide perspective for your finding, thought or conclusion...does that context reflect contemplative thinking and does it ‘paint a picture’ (going above & beyond the obvious correct answer)?
 - d. **Application** – Have you applied the appropriate course materials and concepts correctly and have you demonstrated linkage to the course materials?
 - e. **Relevance** -- Does your work or comment bear on the subject at hand? That is, are you staying within the scope of the assignment or exercise? (Comments that do not link up with what the discussion is focusing on can actually detract from the learning experience.)
2. **Associative Thinking/Linkage** – To what extent are your work and comments logical to or with the issue or problem at hand, or scope and objectives of the assignment or project? To what extent are you successfully linking other concepts, readings, events, and precedent and reflect the “Medici Effect” in your thinking? Are you effectively applying and/or integrating the course concepts in your problem-solving methods?
3. **Responsiveness** – To what extent is work responsive to the needs of the assignment? Does your work align with and satisfy requirements of the issue or problem at hand, or scope and objectives of the assignment or project? Is your work responsive and compliant to the requirements, scope and objectives of the assignment? Did you follow the instructions and does your work satisfy the directions for the assignment?
4. **Analysis** – Have you employed the proper set of frameworks and analytical methods? Why did you elect to use a certain framework? To what extent have you properly used and applied key course concepts, method and frameworks and those of other disciplines in responding to the assignment or exam? Have you appropriately used or integrated concepts and methods from other courses?
5. **Data** - Have you effectively identified the data required to address your assignment? Have you used data from the case, from personal experience, from citable third-parties, from general knowledge to support the assertions made and or conclusions?

6. **Interrogative** – Have you thoroughly investigated/interrogated the issues, situations, problems and dilemmas? Have you used critical thinking and hypothesis-driven problem-solving methods in your analysis? Are your solutions supportable and responsive?

CLASSROOM POLICIES

1. **In General.** Come to class prepared, stay focused in class, and engage in class discussions. I expect Marshall students to stay current with business issues by accessing CNBC, Bloomberg, Fox Business and other business news services. All students are expected to:
 - a. Come to class prepared to discuss the readings and cases.
 - b. Feel free to participate and constructively contribute to all classes at all times.
 - c. Bring your energy.
 - d. Bring your curiosity and questions.
 - e. Participate and contribute when called upon.
2. **In the Classroom.** Class attendance and participation is important in developing a coherent view of the materials covered in the course. In-person attendance involves:
 - a. Being socially responsible and respectful.
 - b. Being present and engaged in the class and not texting or emailing during lectures.
 - c. Not using your cell phones or listening to other material or content using your ear plugs.
 - d. Avoid eating food in class.
 - e. Coming to class on time.
 - f. Acting like a responsible adult and Trojan.
 - g. Be Happy!
3. **Copyrights & Permission.** “Notes or recordings made by students based on a university class or lecture may only be made for purposes of individual or group study, or for other usual non-commercial purposes that reasonably arise from the student’s membership in the class or attendance at the university. This restriction also applies to any information distributed, disseminated or in any way displayed for use in relationship to the class, whether obtained in class, via email or otherwise on the internet, or via any other medium. Actions in violation of this policy constitute a violation of the Student Conduct Code, and may subject an individual or entity to university discipline and/or legal proceedings.”¹

COURSE NOTES, PPTs & POSTINGS

My teaching style is direct and therefore, lectures are **critical**. Announcements, key dates, shared information, general feedback, commentary, lecture documents, notes, articles, supplemental course documents are posted on Blackboard (BB).

- a. It is your responsibility and **SOLELY** your responsibility to frequently check Blackboard (BB) for announcements, updates and materials and to also check your email for communications from me and to verify the date, time and location of assignments, exercise, ELC sessions, exams and the final exam.
- b. **DO NOT** rely on posting of notes or Power Point slides. Do the readings!
- c. **DO NOT** video tape me, record me or transmit, post or stream my likeness, lectures, exams, exercises assignments, etc., on any media, to anyone else or entity, in any way, using any technology, including but not limited to electronic or otherwise, unless you have my specific written permission. Lecture material and likeness are proprietary to me and are my intellectual and personal property.
- d. Either USC or I will post video content of the lectures for you on BB.

ASSIGNMENT SUBMISSION, EXAMS & MAKE-UP POLICIES

General Policies

- a. **Assignment Submission Policy.** Assignments must be turned in at the posted due date/time. Any assignment turned in late may be subject to an automatic full grade deduction (for example, if your work is a B+ grade, you will be given a C+ grade).

¹ <https://policy.usc.edu/scampus-part-c/>. See also, USC Faculty Announcement, Charles F. Zukoski, Provost & Senior Vice President Academic Affairs, August 2, 2020.

- b. **Contribution & Participation.** For class session engagement and participation, students may submit make-up work as per the instructions and guidance provided herein.
- c. **ELC Sessions (If Applicable).** ELC sessions are scheduled far in advance and require the coordination and oversight of USC's ELC's experts and specialists. ELC sessions are unique and therefore, sessions cannot be re-scheduled and there are no make-up sessions or make-up assignments. Attendance at scheduled ELC sessions is mandatory and missing a session may adversely affect your final grade.
- d. **Retention of Graded Coursework.** Final exams and all other graded work, which affected your course grade, will be retained for one year after the end of the course, *if* the graded work has not been returned to the student (i.e., if I returned a graded paper or exam to you, it is your responsibility to retain it...no exceptions).

ACADEMIC CONDUCT & SUPPORT SYSTEMS

Academic Conduct

Students are expected to make themselves aware of and abide by the University community's standards of behavior as articulated in the Student Conduct Code. Plagiarism – presenting someone else's ideas as your own, either verbatim or recast in your own words – is a serious academic offense with serious consequences. Please familiarize yourself with the discussion of plagiarism in *SCampus* in Part B, Section 11, "Behavior Violating University Standards" policy.usc.edu/scampus-part-b. Other forms of academic dishonesty are equally unacceptable. See additional information in *SCampus* and university policies on scientific misconduct at <http://policy.usc.edu/scientific-misconduct>.

Students and Disability Accommodations:

USC welcomes students with disabilities into all of the University's educational programs. The Office of Student Accessibility Services (OSAS) is responsible for the determination of appropriate accommodations for students who encounter disability-related barriers. Once a student has completed the OSAS process (registration, initial appointment, and submitted documentation) and accommodations are determined to be reasonable and appropriate, a Letter of Accommodation (LOA) will be available to generate for each course. The LOA must be given to each course instructor by the student and followed up with a discussion. This should be done as early in the semester as possible as accommodations are not retroactive. More information can be found at osas.usc.edu. You may contact OSAS at (213) 740-0776 or via email at osasfrontdesk@usc.edu.

Support Systems:

Counseling and Mental Health - (213) 740-9355 – 24/7 on call

studenthealth.usc.edu/counseling

Free and confidential mental health treatment for students, including short-term psychotherapy, group counseling, stress fitness workshops, and crisis intervention.

National Suicide Prevention Lifeline - 1 (800) 273-8255 – 24/7 on call

suicidepreventionlifeline.org

Free and confidential emotional support to people in suicidal crisis or emotional distress 24 hours a day, 7 days a week.

Relationship and Sexual Violence Prevention Services (RSVP) - (213) 740-9355(WELL), press "0" after hours – 24/7 on call

studenthealth.usc.edu/sexual-assault

Free and confidential therapy services, workshops, and training for situations related to gender-based harm.

Office for Equity, Equal Opportunity, and Title IX (EEO-TIX) - (213) 740-5086

eeotix.usc.edu

Information about how to get help or help someone affected by harassment or discrimination, rights of protected classes, reporting options, and additional resources for students, faculty, staff, visitors, and applicants.

Reporting Incidents of Bias or Harassment - (213) 740-5086 or (213) 821-8298

usc-advocate.symplcity.com/care_report

Avenue to report incidents of bias, hate crimes, and microaggressions to the Office for Equity, Equal Opportunity, and Title for appropriate investigation, supportive measures, and response.

The Office of Student Accessibility Services (OSAS) - (213) 740-0776

osas.usc.edu

OSAS ensures equal access for students with disabilities through providing academic accommodations and auxiliary aids in accordance with federal laws and university policy.

USC Campus Support and Intervention - (213) 821-4710

campussupport.usc.edu

Assists students and families in resolving complex personal, financial, and academic issues adversely affecting their success as a student.

Diversity, Equity and Inclusion - (213) 740-2101

diversity.usc.edu

Information on events, programs and training, the Provost's Diversity and Inclusion Council, Diversity Liaisons for each academic school, chronology, participation, and various resources for students.

USC Emergency - UPC: (213) 740-4321, HSC: (323) 442-1000 – 24/7 on call

dps.usc.edu, emergency.usc.edu

Emergency assistance and avenue to report a crime. Latest updates regarding safety, including ways in which instruction will be continued if an officially declared emergency makes travel to campus infeasible.

USC Department of Public Safety - UPC: (213) 740-6000, HSC: (323) 442-120 – 24/7 on call

dps.usc.edu

Non-emergency assistance or information.

Office of the Ombuds - (213) 821-9556 (UPC) / (323-442-0382 (HSC)

ombuds.usc.edu

A safe and confidential place to share your USC-related issues with a University Ombuds who will work with you to explore options or paths to manage your concern.

Occupational Therapy Faculty Practice - (323) 442-3340 or otfp@med.usc.edu

chan.usc.edu/otfp

Confidential Lifestyle Redesign services for USC students to support health promoting habits and routines that enhance quality of life and academic performance.

COURSE CALENDAR & ASSIGNMENTS BY CLASS SESSION & WEEK

The Course Calendar specifies the dates, assignments, exams, schedules, etc. A more user-friendly version, in Excel, is available for your use on **Blackboard > “Syllabus > Course Calendar & Assignments.”**

IMPORTANT!

Please note the topics, subjects, content, exam dates, and weekly assignments are dynamic documents and therefore, are, from time to time, subject to minor updates, adjustments and changes... Check BB for updates!

I will make announcements in class regarding changes and updates to the syllabus, calendar, assignments, exams, grading, etc., but it is also your responsibility to regularly check Black Board (BB) for the formal notifications of updates, instructions, changes, modifications, announcements and other important information.

THANK YOU!

See you in class!

(Course Calendar is also posted separately on BB under Syllabus.)

MOR 462-69-MW			
PROFESSOR MICHAEL A. MISCHE			
FALL - 2021- WEEKLY ASSIGNMENTS & READINGS			
UPDATED: 9/1/21			
REQUIRED COURSE MATERIALS			
	Textbook:	Mische, Michael A. "The Consultant's Critical Thinking Approach to Case Analysis"	
	URL:	https://store.cognella.com/83137-1A-007	
	Course Reader:	HBSP Course Reader: 462 Fall- 2021	
	URL:	https://hbsp.harvard.edu/import/849588	
AUGUST			
SESSION	DATE	DAY	TOPICS & ASSIGNED READINGS
1	8/23	M	INTRODUCTION TO 462
			Welcome and Overview of 462
			Meet Your Prof.
			Course Materials
			Course Calendar & Schedule of Events
			Assignments & Exams
			Before Class Assignment- Read Articles & Cases
			<i>CasePro</i> : Chapters 1 and 2
			Management Consulting Industry- 2021- Mische Perspectives
			Paper is posted on BB under "Contents"
			Does It Pay to Hire Consultants? Evidence from the Bordeaux Wine Industry
			Product #: H03NZZB-PDF-ENG
			Prepare 3 Questions to Ask in Class on Day 1
2	8/25	W	CONSULTING BOOT CAMP-1
3	8/30	M	MODULE 1.0- CONSULTING FIRMS & INDUSTRY DYNAMICS & STRUCTURE
			Before Class Assignment- Read Articles & Cases
			Consulting Is More Than Giving Advice
			Product #: 82510-PDF-ENG
			3 Traits of a Strong Professional Relationship
			Product #: H0528K-PDF-ENG
			Confessions of a Trusted Counselor
			Product #: R0509C-PDF-ENG
			In-class Assignment
			Questions Posted for Blackboard Discussion

SEPTEMBER			
4	9/1	W	Consulting Firms- Industry Dynamics & Evolution
			Before Class Assignment- Read Articles & Cases
			McKinsey and the Globalization of Consultancy
			Product #: 806035-PDF-ENG
			McKinsey & Company
			Product #: 413109-PDF-ENG
			Cap Gemini Ernst & Young: A Global Merger (A)
			Product #: 903056-PDF-ENG
			In-class Assignment
			Questions Posted for Blackboard Discussion
5	9/6	M	Labor Day- No Class
6	9/8	W	Consultant Evaluation & Selection
			ELC SESSION - Consultant Evaluation & Selection Simulation
			Before Class Assignment- Read Articles & Cases
			How to Choose--and Work with--Consultants (<i>Posted on BB</i>)
			Product #: U9809A-PDF-ENG
			Meet at the ELC in JFF
			Project Team Assignments Announced
7	9/13	M	Consulting Firms- Unique Business Models
			Before Class Assignment- Read Articles & Cases
			MacPhie & Company: The Growth Imperative
			Product #: W16499-PDF-ENG
			A.T. Kearney: The Push to Become a Management Consulting Titan
			Product #: W20848
			Cap Gemini Ernst & Young: A Global Merger (B)
			Product #: 903057-PDF-ENG
			In-class Assignment
			Questions Posted for Blackboard Discussion
8	9/15	W	Consulting Firms- Globalization & The Future
			Before Class Assignment- Read Articles & Cases
			Consulting on the Cusp of Disruption
			Product #: R1310F-PDF-ENG
			Eden McCallum: Consulting Redefined
			Product #: LBS130-PDF-ENG
			In-class Assignment
			Questions Posted for Blackboard Discussion
9	9/20	M	QUIZ 1- M/C on BB under "Assessments"

MODULE 2.0: MANAGING THE CONSULTING FIRM			
10	9/22	W	Structure & Positions in Consulting Firms
			Before Class Assignment- Read Articles & Cases
			Ownership Structure in Professional Service Firms: Partnership vs. Public Corporation
			Product #: 905038-PDF-ENG
			Titles & Positions in Elite 8 Firms- Mische
			Posted on BB under "Contents"
			Consulting Project Announced
11	9/27	M	Revenue & Staffing Issues in Consulting Firms
			Before Class Assignment- Read Articles & Cases
			Staffing in Professional Service Firms
			Product #: 905026-PDF-ENG
			Planning in Professional Service Firms
			Product #: 903085-PDF-ENG
			Profitability Drivers in Professional Service Firms
			Product #: 904064-PDF-ENG
			In-class Assignment
			Questions Posted for Blackboard Discussion
12	9/29	W	Professional Ethics & Comportment - Part A
			Before Class Assignment- Read Articles & Cases
			Essence of Professionalism: Managing Conflict of Interest
			Product #: 903120-PDF-ENG
			Ethics: A Basic Framework
			Product #: 307059-PDF-ENG
			AICPA Code of Professional Ethics (Posted on BB under Assignments)
			Sections 201 & 202
			In-class Assignment
			Questions Posted for Blackboard Discussion
OCTOBER			
13	10/4	M	Professional Ethics & Comportment - Comparative Dilemmas- Part B
			Before Class Assignment- Read Articles & Cases
			McKinsey & Co.-Protecting its Reputation (A)
			Product #: 415021-PDF-ENG
			McKinsey & Co.-Protecting its Reputation (B)
			Product #: 415022-PDF-ENG
			KPMG (A): A Near-Death Experience
			Product #: 408073-PDF-ENG
			KPMG (B): Risk & Reform
			Product #: 409075
			In-class Assignment
			Questions Posted for Blackboard Discussion
14	10/6	W	Client Management Issues
			Before Class Assignment- Read Articles & Cases
			Managing the Client Portfolio
			Product #: 410139-PDF-ENG
			Consultant's Comeuppance (HBR Case Study)
			Product #: R0302X-PDF-ENG
			In-class Assignment
			Questions Posted for Blackboard Discussion
15	10/11	M	Midterm Review Session (In-class session)
16	10/13	W	EXAM -2: MIDTERM- M/C- 33-40 QUESTIONS ON BB

MODULE 3.0: PERFORMING CONSULTING SERVICES			
17	10/18	M	CONSULTING BOOT CAMP-2
18	10/20	W	Phase 1.0-A: Marketing Consulting Services- The Need to Market
			Before Class Assignment- Read Articles & Cases
			Marketing at Bain & Co.
			Product #: M290-PDF-ENG
			Making Your Proposal Count
			Product #: C0207A
			The Art of Persuasion Hasn't Changed in 2000 Years
			Product #: H0510C
			Marketing Concepts & Key Terms
			Consulting Marketing Process & Selling Cycle (Posted on BB)
			In-class Assignment
			Questions Posted for Blackboard Discussion
19	10/25	M	Phase 1.0-B: Marketing Consulting Services- Client Buyer Values
			Before Class Assignment- Read Articles & Cases
			Understanding Client Needs & Buyer Values
			How to Choose--and Work with--Consultants (Posted on BB)
			Product #: U9809A-PDF-ENG
			In-class Assignment
			Questions Posted for Blackboard Discussion
20	10/27	W	Phase 1.0-C: Marketing Consulting Services- Proposals & Service Delivery Models
			Before Class Assignment- Read Articles & Cases
			Example Proposal Table of Contents
			Mische- Blackboard
			Mische's 7-C's of Proposal
			Mische- Blackboard
			How to Give a Killer Presentation
			Product #: R1306K-PDF-ENG
			How to Write an Executive Summary (Mische)
			Mische- Blackboard
			In-class Assignment
			Questions Posted for Blackboard Discussion

NOVEMBER			
21	11/1	M	Phase 2.0-A: Performing Services- Planning, Performing & Delivering
			Planning the Project
			Before Class Assignment- Read Articles & Cases
			Example Statement of Work Example
			Mische- Blackboard
			Example Work Plan
			Mische- Blackboard
			The Project Life Cycle: Planning
			Product #: IES429-PDF-ENG
			In-class Assignment
			Questions Posted for Blackboard Discussion
22	11/3	W	Consulting Project Team Considerations & Dynamics
			Before Class Assignment- Read Articles & Cases
			Making Star Teams Out of Star Players
			Product #: R1301E-PDF-ENG
			The New Science of Team Chemistry
			Product #: R1702B-PDF-ENG
			Launching and Leading Intense Teams
			Product #: BH687-PDF-ENG
			Team Assessment Form
			Blackboard - "Content"
			In-class Assignment- See Blackboard for Details
			Questions Posted for Blackboard Discussion
23	11/8	M	Consultant's Role on a Project
			Before Class Assignment- Read Articles & Cases
			Deloitte & Touche Consulting Group
			Product #: 696096-PDF-ENG
			KPMG M&A Case: Integration & Separation Case
			Posted on BB under "Assignments- Team Cases"
			In-class Assignment
			Questions Posted for Blackboard Discussion
			<i>Come prepared & do not miss this class</i>
24	11/10	W	Performing Work & Critical Thinking & Problem Solving
			Critical Thinking & Problem Solving in Consulting - Part A
			Before Class Assignment- Read Articles & Cases
			Bain & Company Chairman Orit Gadiesh on the Importance of Curiosity
			Product #: F0909D-PDF-ENG
			The Path to Insight: Cognitive Abilities for Dealing with Ill-Structured Problems
			Product #: ROT126-PDF-ENG
			Managerial Problem Solving: A Congruence Approach
			Product #: 2430BC-PDF-ENG
			In-class Assignment
			Questions Posted for Blackboard Discussion
25	11/15	M	Critical Thinking & Problem Solving in Consulting - Part B
			Before Class Assignment- Read Articles & Cases
			CasePro: Critical Thinking in Case Analysis (Mische)
			Chapter 3
			CasePro: Case Analysis Process (Mische)
			Chapter 5
			In-class Assignment
			Questions Posted for Blackboard Discussion
26	11/17	W	Client Problem Diagnosis & Solution Formulation: Case Analysis
			Before Class Assignment- Read Articles & Cases
			CasePro: Hypothesis Driven Case Analysis (Mische)
			Chapter 4
			Using Hypothesis-Driven Thinking in Strategy Consulting
			Product #: UV0991-PDF-ENG
			In-class Assignment
			Questions Posted for Blackboard Discussion
27	11/22	M	Delivering Consulting Services & Results- Reporting to Client
			Project Team Presentations
			See BB for Details
			Example Table of Contents for a Final Report (Mische)
			Mische- Blackboard
			In-class Assignment
			Questions Posted for Blackboard Discussion
28	11/24	W	Thanksgiving- No Class

DECEMBER			
30	12/1	W	Career Navigation
			Before Class Assignment- Read Articles & Cases
			Bain & Co., Inc.: Making Partner
			Product #: 899066-PDF-ENG
			Developing Professionals: The BCG Way (A)
			Product #: 903113-PDF-ENG
			In-class Assignment
			Questions Posted for Blackboard Discussion
30	12/1	W	COURSE WRAP-UP
			Before Class Assignment- Read Articles & Cases
			Review for Final Exam
DECEMBER			
31	12/13		FINAL EXAMINATION- ON BLACKBOARD- MANDATORY OF ALL STUDENTS
			It is your responsibility to check BB & confirm the final exam date!
			The Final Exam is mandatory for all students
			Only valid USC exceptions, needs, etc. will be granted...see Syllabus
			Usually multiple choice w/ 40 to 50 questions, electronically administered on BB
			See Syllabus for further information regarding final & weightings
			See USC Exam Schedule at: https://classes.usc.edu/term-20213/finals/

EXAMPLE TEAM SELF-ASSESSMENT FORM

PROVIDED FOR GUIDANCE & INFORMATION PURPOSES ONLY...SUBJECT TO CHANGE

Rubric for Assessing Group Members: Ability to Participate Effectively as Part of a Team

Rater: _____

Group: _____

Date: _____

Topic: _____

(Circle the appropriate score for each criterion for each member of your group.)

Member Rated (Be sure to rate yourself, too!)	Listening Skills	Openness to others' ideas	Preparation	Contribution	Leadership
	0 1 2 3 4 5	0 1 2 3 4 5	0 1 2 3 4 5	0 1 2 3 4 5	0 1 2 3 4 5
	0 1 2 3 4 5	0 1 2 3 4 5	0 1 2 3 4 5	0 1 2 3 4 5	0 1 2 3 4 5
	0 1 2 3 4 5	0 1 2 3 4 5	0 1 2 3 4 5	0 1 2 3 4 5	0 1 2 3 4 5
	0 1 2 3 4 5	0 1 2 3 4 5	0 1 2 3 4 5	0 1 2 3 4 5	0 1 2 3 4 5
	0 1 2 3 4 5	0 1 2 3 4 5	0 1 2 3 4 5	0 1 2 3 4 5	0 1 2 3 4 5
	0 1 2 3 4 5	0 1 2 3 4 5	0 1 2 3 4 5	0 1 2 3 4 5	0 1 2 3 4 5
	0 1 2 3 4 5	0 1 2 3 4 5	0 1 2 3 4 5	0 1 2 3 4 5	0 1 2 3 4 5

Criterion	Excellent (5)	Good (4)	Fair (3)	Needs to Improve (2)	Unacceptable (1)	Missing (0)
Listening Skills	Routinely restates what others say before responding; rarely interrupts; frequently solicits others' contributions; sustains eye contact	Often restates what others say before responding; usually does not interrupt; often solicits others' contributions; makes eye contact	Sometimes restates what others say before responding; sometimes interrupts; sometimes asks for others contributions; sometimes makes eye contact.	Rarely restates what others say before responding; often interrupts; rarely solicits others' contributions; does not make eye contact; sometimes converses with others when another team member is speaking	Doesn't restate what others say when responding; often interrupts; doesn't ask for contributions from others; is readily distracted; often talks with others when another team member speaks	Never shows up and never contributes.
Openness to others' ideas	Listens to others' ideas without interrupting; responds positively to ideas even if rejecting; asks questions about the ideas	Listens to others' ideas without interrupting; responds positively to the ideas even if rejecting	Sometimes listens to others' ideas without interrupting; generally, responds to the ideas	Interrupts others' articulation of their ideas; does not comment on the ideas	Interrupts others' articulation of their ideas; makes deprecatory comments and/or gestures	Never shows up and never contributes.
Preparation	Always completes assignments; always comes to team sessions with necessary documents and materials; does additional research, reading, writing, designing, implementing	Typically completes assignments; typically comes to team sessions with necessary documents and materials	Sometimes completes assignments; sometimes comes to team sessions with necessary documents and materials	Sometimes completes assignments; sometimes comes to team sessions with necessary documents and materials	Typically, does not complete assignments; typically comes to team sessions without necessary documents and materials	Never shows up and never contributes.
Contribution	Always contributes; quality of contributions are exceptional	Usually contributes; quality of contributions are solid	Sometimes contributes; quality of contributions are fair	Sometimes contributes; quality of contribution is inconsistent	Rarely contributes; contributions are often peripheral or irrelevant; frequently misses team sessions	Never shows up and never contributes.
Leadership	Seeks opportunities to lead; in leading is attentive to each member of the team, articulates outcomes for each session & each project, keeps team on schedule, leads collaboration, integration of	Is willing to lead; in leading is attentive to each member of the team, articulates general direction for each session and each project, attempts to keep team on schedule	Will take lead if group insists; not good at being attentive to each member of the team, sometimes articulates direction for sessions, has some trouble keeping team on schedule	Resists taking on leadership role; in leading allows uneven contributions from team members, is unclear about outcomes or direction, does not make plans for session or project	May volunteer to lead but does not follow through; misses team sessions, does not address outcomes or direction for sessions or projects, team	Never shows up and never contributes.

