BUSINESS CONSULTANCY CAPSTONE COURSES
DATA SHEET

Introduction

Welcome to University of Redlands Business Consultancy Capstone Courses.

The objective of these courses is to provide students with as realistic a field consulting experience as possible. The expectation is that students will be nearing the completion of their academic program before enrolling in this course. By doing so they will be prepared to successfully contribute to a team-based consulting project by virtue of their considerable level of academic knowledge, as well as individual work experience.

This course provides students with an opportunity to apply the knowledge gained through their studies and work experience to a practical consulting experience. Undertaking the consultancy with actual companies rather than textbook cases requires students to recognize the gravity and significance of their work. More important than merely earning a grade in a college course, the performance of each student will affect their assigned company and the lives of the people affiliated with that company.

A critical aspect of the consulting engagement is that students will be required to think “outside the box” and work “outside their comfort zone.” The issues they deal with and their respective solutions to those issues (if they even exist) will in all likelihood “not be in the book”. Furthermore students may be required to work in functional business areas they initially may know little about. As members of teams, students will be required to ascertain their respective team members’ strengths and weaknesses and delegate tasks accordingly.

Requiring each team to present its findings, conclusions and recommendations in both a verbal presentation to the executive leadership of their client organization, as well as through the creation of a professionally written report, will hone the students’ presentation and writing skills.

Please read the project guidelines carefully. In particular, whilst there is no reason why the engagement team cannot start preliminary investigations and seek information from other sources, you are specifically requested not to contact the client organization before the project week except for the purpose of making arrangements for the meeting on the Monday morning of engagement week.

Please also study the assessment criteria and methods closely and note that the presentation and final report should be in the style of a management report and of a length appropriate to the clients' requirements (i.e. fit for purpose).

Instructional Methodology

Based on their educational background and work experience, student delegates are placed into teams which conduct a full-time, weeklong consulting engagement for a small to medium-sized company in an international location. Each team will visit their assigned client company and will be presented with information regarding the challenges and/or opportunities presently facing the firm and their ideas for dealing with those challenges/opportunities. Upon conducting a thorough analysis, each team will develop a proposal to deal with the firm's issues and will present their findings, conclusions and recommendations to the assigned client company's executive leadership. Following the presentation each team will prepare and submit a written project report to the company regarding their findings and recommendations. If necessary, a "virtual" follow-up meeting with the client may be scheduled.

Objectives, Goals and Content

Objectives:

- Develop the capacity of student delegates to work together as a management consulting team through active participation in a group project.
- Enhance the student delegate's ability to communicate clearly, argue rationally, apply what has already been learned, and operate effectively in what may be an unfamiliar context.
- Provide the opportunity to put the academic theories learned in the classroom into practice and experience action learning in subject areas perhaps not fully familiar prior to project launch.

Goals:

On successful completion of this project participants should be able to:

- Develop and adhere to project terms of reference.
- Perform satisfactorily in a team consultancy role.
- Lead meetings and group discussion to solve problems and make decisions.
- Contribute to group discussions to solve problems and make decisions.
- Advise and inform others on project status and results.
- Contribute to the production of a formal, written project report.
- Take part in informal and formal presentations to clients.

Content:

- Teams of three to five student delegates undertake a live consultancy assignment in a small to medium-sized organization in an international location.
- Broad terms of reference are established in advance and refined during the project by negotiation.
- The consulting engagement lasts for one full-time week.
- Within two to four weeks after the engagement is concluded, a project report is completed and formally presented to the client.
- Actual subject areas developed depend on the nature of the project undertaken but will have a definite strategic content.

Deliverables:

- Presentation(s) to company management.
- Formal, written project report.
- Self-reflection paper.

Readings:

In addition to the required texts listed below, students may wish to consult materials relevant to the subject area(s) of the project, which will be included in the list(s) for the appropriate engagement(s). Three articles relating to consultancy in practice will be distributed prior to the engagement. Team members will read these and also familiarize themselves with the Consulting to Management Journal (www.C2M.com).

Required Texts:

Block, P. (2011) *Flawless Consulting: A Guide to Getting Your Expertise Used, 3rd Ed*. San Francisco: Jossey Bass (http://lp.wileypub.com/FlawlessConsulting/)

Engagement Guidelines

BEFORE the engagement week

Each client will already have agreed to provisional terms of reference with the University of Redlands faculty supervisor and will be aware of the need for access to company information and relevant personnel at agreed times. Work space accommodation arrangements and other facilities will also have been discussed. The Redlands faculty supervisor (or international partner university faculty supervisor for the global program) will normally introduce him/herself to the client in the weeks before the project and may make a brief visit(s). The team itself is responsible for appointing one of its members to arrange with the client and the faculty supervisor the venue (normally, but not always on the client's premises) and the actual time of the briefing meeting on the Monday morning of engagement week.

DURING the engagement week

The engagement starts with a Monday morning briefing session and involves all parties - client, all team members and the Redlands' (and international partner university as applicable) faculty supervisor. Its main purpose is the clarification and, if necessary, modification of the initial terms of reference, but should of course also include a profile of the organization and perhaps a tour of the premises. If there are changes to the brief then a final version should be typed up and circulated to all concerned. Individual confidentiality agreements should also be signed and handed over to the client by all team members and the faculty supervisor at this meeting. A modus operandi for the week - accommodation, staff access and so on - should be discussed and agreed. The meeting may take anywhere from an hour to as long as necessary.

Contact with the faculty supervisor during the week will largely be at the team's initiative except that he/she will normally make one visit mid-week to be updated on progress and to observe how the team has developed.

Presentation

On Friday of the engagement week, each team will make a presentation to the leadership of their assigned client company. Each team's faculty supervisor(s) will also attend the presentation. The presentation will take place at a time and place designated by the client. Given the nature of the course and the audience, it is expected each team's presentation will be professional in nature. Each team will use its discretion to determine how to best develop and present their findings. The team should be prepared to answer questions the client may have with regards to the presentation.

FINAL REPORT preparation and presentation

Following the engagement week, each team will have approximately three weeks in which to generate a written final report (minimum 3 copies) regarding their findings. The precise duration between the end of the engagement and delivery of the report must be negotiated with the client. This report should include an executive summary, as well as a detailed analysis of the problem and the proposed solutions. Thoroughness is of the essence with regards to the report. To this extent the team should attempt to incorporate answers to questions the client may have raised during the final presentation and anticipate questions the client may further raise. Analysis of ancillary issues should be considered.

Following the submission of the report to the client, the team faculty supervisor(s) will be in contact with the client. In the event the client finds that certain questions remain, it may be deemed necessary to conduct a follow-up meeting with the client.

The cost of printing and binding these report copies is borne by the student consulting team members.

If using mail service to deliver the report, please ensure that handling is properly recorded, and a receipt issued in accordance with postal regulations. Both the report and its presentation should be in a style, format and length to match the needs of the client.

Pre-engagement Workshops

Students must attend pre-engagement workshops (in-person and virtual) held before the consulting engagement begins. These workshops will cover a variety of topics including:

a) How to successfully conduct a consulting engagement, including preparation for consulting assignments and the delegation of responsibilities within a consulting team.
b) Project management.
c) Presentation and report writing skills.

Our pre-engagement sessions are typically conducted at the main campus of the University of Redlands or using virtual teleconference software.

Post-engagement Meetings

Students must conduct one mandatory post-consultancy meeting during the week after the engagement concludes. This meeting will be arranged by the consultancy team members themselves on a date, time and at a location convenient to the team. At this meeting students will decide on the strategies to be employed for completion of the final report and discuss the delegation of responsibilities to ensure successful completion of the course.

Team Composition and Selection

Each team will consist of 3 to 5 students selected by University of Redlands' faculty after an extensive application and interview process. The composition of each team will be determined by the faculty based on the students' educational background and work experience, with the goal of best meeting the needs of the assigned client.

Student Participation

Each student is expected to fully participate in his or her team's work. To this extent, students are expected to attend all pre-engagement sessions, engagement week activities and post-engagement meetings. All assigned tasks are expected to be completed in a timely fashion. Also incorporated into participation is the expectation that students will display professional behavior at all times. Failure to meet these expectations will have consequences for the student's grade.

Team Faculty Supervisors

Each team will be assigned a University of Redlands' faculty supervisor (and international partner university faculty supervisor for the global program) who will attend the team's initial meeting with the client company, view the team's presentation(s) and evaluate the team's work. The supervisor(s) will also be available periodically during the consultancy week in the event their team has questions related to the company and problem. Please note, however, the role of the supervisors is that of the "guide-on-the-side" rather than the "sage-on-the-stage". To this extent the supervisors will lead students to find the answers to their questions themselves rather than simply providing the answers.

Team Communicator

Within each team, one member will be selected the team communicator. The communicator's role will be, in part, to correspond with the team supervisors before the consultancy. The team faculty supervisors will establish the time/place of the initial meeting with the client company's leadership at start of the consultancy engagement. Furthermore, during the consultancy (but definitely not before) the communicator will be responsible for approaching the client regarding questions the team may have about their assignment and in doing so relay information to and from their respective teammates. While the client companies hope the consultancy benefits their respective organizations, students must remember that each team is a guest of their client company. As such, it is imperative the team NOT pester the client unnecessarily. Other than the team communicator, the other members of the team are asked to refrain from contacting the client company directly unless approval has been obtained from the instructors or their team supervisors.

Company Assignments

Approximately two weeks before the start of the engagement, each team will be notified of their assigned client. Included with the assignment will be a general description of the problem facing the company. At this point, teams will begin preliminary research regarding the company, industry, and the problem. In doing so, students are not permitted to directly contact the client. They may; however, gain information about the client via the internet and websites, and other sources.

Attire

While students are in the presence of clients and or on-site at the company, the students' attire should be business professional. If at some point the client indicates that more casual attire is acceptable, students may dress accordingly. Students should take into consideration that once on site it is much easier to make a professional wardrobe appear more casual than to make a casual wardrobe appear professional.

Workplace and Access to Technology

While each team will likely be on-site at the client organization's location on Monday morning of the engagement week, during the remainder of the consultancy the team may find itself working on-site or at our international partner university, at their hotel, or at other to-be-determined locations. Given the likelihood of working remotely, students are encouraged to bring their own laptop computers if they own such. In doing so, however, students must take into consideration issues such as security.

Logistics (Transportation and Accommodations)

This course is a meant to provide a "true to life" consultancy experience and **as such students are treated as independent consultants who will make their own transportation, accommodation and meal arrangements**. The cost of the program will for the most part be determined by the student delegates themselves depending on their individual travel and accommodation arrangements.

Students will be expected to spend the engagement week together at a hotel or other accommodation agreed upon by the team members in a location convenient to the client. Students are expected to arrive at the accommodation no later than the Sunday afternoon before the engagement week. The need to arrive early is based upon the expectation that students will need to be well rested and prepared for the very busy week ahead, consequently it is recommended global consultancy students arrive in country no later than the Saturday before consulting week. The live portion of the consultancy ends on the Friday of the engagement week.

Note, internet at the chosen accommodation may result in additional costs, but often hotels may have free wi-fi in their lobby. Students should verify internet access in advance as working online is crucial to the success of the project. Sharing of rooms is acceptable and may be a way in which to reduce expenses.