

The University of Texas at Dallas
Naveen Jindal School of Management
COURSE SYLLABUS

COURSE INFORMATION

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| Number & Section | OB 6370.CW1 |
| Title | Foundations of Organizational Consulting |
| Term | Fall 2024 |
| Dates | August 19, 2024 – October 12, 2024 |

PROFESSOR INFORMATION

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| Professor | Van M. Latham, Ph.D. |
| Email address | van.latham@utdallas.edu |
| Office Hours | Please email the professor to set up an appointment |

COURSE QUESTIONS AND ADMINISTRATION

For questions, contact Dr. Latham by email. For academic advising questions, please reach out to the Program Manager for your program or concentration. For eLearning questions, contact Jaymes Gregory (jxg220050@utdallas.edu | 972-883-5922).

COURSE DESCRIPTION

This course explores the foundations of organizational consulting and the role of the consultant. Topics include the past, present, and future of consulting as well as differences in internal and external consulting. In addition, key activities and best practices for each step of the consulting cycle are reviewed (e.g., scoping and pricing projects, writing proposals and preparing contracts, entry and project kickoff, diagnosing and recommending solutions, designing and implementing solutions, evaluating interventions, and exiting the client system).

STUDENT LEARNING OBJECTIVES AND OUTCOMES

After completing this course, students should be able to:

1. Define consulting and the differences between internal and external consultants
2. Describe the types of work that consultants perform for organizations
3. Sequence the nine steps of the consulting process from scoping to exit
4. Identify important consulting activities within each step of the consulting process

REQUIRED MATERIALS

Articles/Cases: See the academic calendar and assignments section below. All case studies and HBR articles can be accessed through the Harvard Business Review website (hbr.org). An

additional benefit of your subscription is the ability to access the full HBR database. Please select a subscription plan that works best for you. At the end of the course, you can maintain or cancel your subscription. In addition, you can purchase articles through the HBR coursepack on the home page. Non-HBR articles will be uploaded to e-learning and posted as a PDF in the appropriate unit or a link to the article will be embedded in the Interactive Learning Module (ILM).

HS Talks Videos: HS Talks videos are lectures delivered by leading experts in industry and commerce and by academics who teach and conduct business research. To access HS Talks videos, log on to www.hstalks.com and use UTDallas as the username and obcc2021 as the password. For the best streaming, watch the videos through your internet browser instead of through eLearning.

Recorded Content: All interactive learning modules and micro lectures are available on eLearning.

ACADEMIC CALENDAR & ASSIGNMENTS

| Unit 1 | Week of Monday, August 19 |
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| Topics | Define organizational consulting and review why consultants are hired (or not hired) Differentiate how consulting differs from other ways of working Identify the benefits of using consultants Overview of the past, present, and future of organizational consulting Describe consulting specialties and the work of consultants Note: Quiz due Sunday, August 25 th , 11:59pm Central |
| ILM | Introduction to organizational consulting (V. Latham) Consulting: Yesterday, today, and tomorrow (V. Latham) |
| Videos | HS Talks – The experience of consultants (M. Gill) HS Talks – The structure of global management consulting firms (M. Boussebaa) YouTube – Assorted videos on consulting |
| Articles | Turner, A. N. (1982). Consulting is more than giving advice. <i>Harvard Business Review</i> , September. Herbold, B. (2013). Pros and Cons of Hiring Consultants. <i>Tweakyourbiz.com</i> , March 27. Kiechel, W (2012). The Management Century. <i>Harvard Business Review</i> , November. Streetofwalls.com Website (2013). Top Consulting Firms. O*Net Website. Summary Report: 13-111.00 Management Analysts Kesner, I. F. & Fowler, S. (1997). When Consultants and Clients Clash (Case Study). <i>Harvard Business Review</i> , November-December |
| Webinar | Thursday, August 22, 5p-6p Central: Class Kickoff Webinar |
| EF Library | Getting hired as a consultant + compensation consulting (Karen Mooney) Consultants in the gig economy (Tracy Burns-Martin) Large Consultancies + Assessing and Developing Executives – Part A (Bonnie Franz) |
| Unit 2 | Week of Monday, August 26 |
| Topics | Distinguish between internal and external consultants and how each is used by organizations |

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| | Understand when to engage an internal and/or external consultant Overview the advantages and disadvantages of internal and external consultants Note: Quiz due Sunday, September 2 nd , 11:59pm Central |
| ILM | Internal vs. external consulting (V. Latham) |
| Videos | HS Talks – Internal consulting (W. Trotter) HS Talks – Management consultants (S. Macdonald) HS Talks – Strategy professionals: Strategic planners and strategy consultants (R. Whittington) |
| Articles | Bernholz, M., & Teng, A. (2015) Why and how to build an in-house consulting team. <i>Harvard Business Review</i> . September. Rodenhauser, T. (1998). How to choose - and work with - consultants. <i>Harvard Business Review</i> . September. |
| Board | Which of the two consulting roles, internal or external, most appeals to you personally and why? (Post Deadline: Sunday, September 1, 11:59pm Central) |
| Expert Forum (EF) | Thursday, August 29, 5:30p-6:30p Central |
| EF Library | Internal consulting (John Schutt) |
| Unit 3 | Week of Monday, September 2 |
| Topics | Understand the macro consulting cycles of selling the work and doing the work Overview the high-level steps of the consulting cycle Identify representative activities for each step of the consulting cycle Review the handoffs and transitions between consulting cycle steps Note: Quiz due Sunday, September 8 th , 11:59pm Central |
| ILM | The consulting cycle (V. Latham) |
| Videos | HSTalks – The consulting project cycle (C. Markham) |
| Unit 4 | Week of Monday, September 9 |
| Topics | Understand the benefits of scoping from the client and consultant perspective Outline approaches to scoping projects and review the core components of a scope document Overview of different pricing strategies and models Offer up tips and strategies to improve payments and receivables Note: Quiz due Sunday, September 15 th , 11:59pm Central |
| ILM | Scoping and pricing (V. Latham) |
| Videos | Ted Talks – Know your worth and then ask for it (C. Brown) |
| Articles | Ribera, J. (2011). The project life cycle: Definition. <i>Harvard Business Review</i> , February. |
| Board | What steps in the consulting cycle are the easiest and the most difficult for you and why? (Post Deadline: Sunday, September 15, 11:59pm Central) |
| Webinar | Thursday, September 12, 5p-6p Central (Proposals) |
| Unit 5 | Week of Monday, September 16 |
| Topics | Learn how to organize and prepare a proposal |

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| | Provide tips and techniques on how to sell more effectively Detail how to prepare and deliver winning presentations Outline the various types of agreements/contracts that can be established with a client Note: Quiz due Sunday, September 22 nd , 11:59pm Central |
| ILM | Proposing, selling, and contracting (V. Latham) |
| Articles | Anderson, C. (2013). How to give a killer presentation. <i>Harvard Business Review</i> . June. Davey, D. (2015). Your new idea is worthless unless you know how to sell it. <i>Harvard Business Review</i> . November. |
| EF Library | Selling consulting solutions (Terry Jarvis) Writing a high-impact proposal (Susan Hampton) Consultative Selling (Robert Pritchett) |
| Unit 6 | Week of Monday, September 23 |
| Topics | Manage alignment with project sponsors and leaders Select, lead, and work with the core project team Conduct a quality project kickoff meeting and build a plan to make projects successful Understand the fundamentals of data collection including common diagnostic techniques Review approaches to organizing, analyzing, synthesizing, and bringing insights to data Highlight common organizational, team, and individual diagnostic tools Note: Quiz due Sunday, September 29 th , 11:59pm Central |
| ILM | Entry and kickoff (V. Latham) Diagnosis (V. Latham) |
| Videos | YouTube – Easy Projects Video on the Kickoff Meeting HSTalks – Fundamentals of data analysis (B. Blank) HBR – Big data and analytics (The Explainer) |
| Articles | Klein, G. (2007). Performing a project premortem. <i>Harvard Business Review</i> . September. Boudreau, J. (2014). Predict what employees will do without freaking them out. <i>Harvard Business Review</i> . September. |
| Board | What makes a project kickoff meeting successful (or unsuccessful)? (Post Deadline: Sunday, September 29, 11:59pm Central) |
| Expert Forum (EF) | Thursday, September 26, 5:30p-6:30p Central |
| EF Library | Working with qualitative data (Van Latham) |
| Unit 7 | Week of Monday, September 30 |
| Topics | Overview different formats and a sequence for an effective data read-out Learn techniques to prepare effective visuals and deliver an effective presentation Overview the steps of design thinking and how it is used in building consulting solutions Share tips for navigating the design process and creating solutions that resonate with clients Note: Quiz due Sunday, October 6 th , 11:59pm Central |
| ILM | Read out and decision (V. Latham) Solution design (V. Latham) |

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| Videos | Ted Talks – Designers – Think big! (T. Brown) HS Talks – Creativity (C. Shalley) |
| Articles | Stikeleather, J. (2013). How to tell a story with data. <i>Harvard Business Review</i> . April. Brown, T. (2008). Design thinking. <i>Harvard Business Review</i> . June. |
| Webinar | Thursday, October 3, 5p-6p Central (Diagnostic Tools) |
| Paper | Integrative paper due (Post Deadline: Friday, October 4, 11:59pm Central) |
| Unit 8 | Week of Monday, October 7 |
| Topics | Assess organizational readiness and use “field ready” tools for implementation Discuss how consultants coordinate work with company project management offices (PMO) Identify how to monitor the implementation of consulting work and make adjustments Discover how to effectively close down a consulting project Identify ways to end projects on a high note when exiting the client system Note: Quiz due Wednesday, October 9th, 11:59pm Central *Note the earlier date. |
| ILM | Readiness, implementation, and monitoring (V. Latham) Exit (V. Latham) |
| Videos | Kiefer Consulting – Ready, fire aim! Making the case for project readiness (G. Kiefer) |
| Articles | Porter, T.W. & Harper, S.C. (2003). Tactical implementation: The devil is in the details. <i>Harvard Business Review</i> . January. Matta, N.F. & Ashkenas, R.N. (2003). Why good projects fail anyway. <i>Harvard Business Review</i> . September. Lewison, M. (2011). Project closure template – Key steps to closing a project. Mymanagementguide.com. January. |
| Board | What, in your opinion, is the single most important thing a consultant can do to ensure a successful project? (Post Deadline: Wednesday, October 9, 11:59pm Central). *Note the earlier date. |
| Case Study | Case study analysis due (Post Deadline: Wednesday, October 9, 11:59pm Central). *Note the earlier date. |
| EF Library | Implementing consulting solutions (Arfan Quershi) |
| Note | Important – All work for the course is due by Wednesday, October 9, 11:59pm Central. No work will be accepted after this date. |

EVALUATION AND GRADING

Knowledge Checks (Percent of correct items, 20 out of 100 points, 20% of grade)

Most units will have a True-False knowledge check based on the content covered in the unit (e.g., recorded lectures, articles, videos, etc.).

Web Conference and Expert Forum Participation (4 webinars, 5 points each, 20 total points, 20% of grade)

The intent of the web conferences and expert forums is to share information, content, and data relevant to the theory and practice of organizational consulting. Attendance at web conferences and expert forums is a core requirement of this course. In addition, your active participation and engagement during the web conference is also expected.

Discussion Board Participation (4 boards, 5 points each, 20 total points, 20% of grade)

One of the most powerful experiences in education is learning from other class members. Discussion boards provide a forum for you to present your ideas and insights to your classmates and learn from their experiences. You should review all content for the unit (lectures, videos, readings, etc.) before making a post on the discussion board. For each discussion board question, post a 300-350 word original thought on the question and also integrate the unit's articles or video content into your post. Also, please comment on other classmates' posts. Your discussion board posts must be completed by 11:59pm Central Time Zone on the day and date listed on the syllabus.

Integrative Paper (1 paper, 20 total points, 20% of grade)

An eight to ten page integrative "thought" paper is required at the end of the course. The topic for your paper is up to you but must be related to the content of the course. Your paper should include the following four elements: a statement of the topic or problem you are writing about and why it is important to you as an organizational consultant, relevant research or expert commentary on the topic, key insights you have reached based on your study of the topic and best practices related to your chosen topic. Evaluation and grading are based on four equally-weighted standards: 1) quality of content and insights, 2) paper structure, flow, and art direction, 3) readability including sentence structure and grammar, 4) quality of research including number of references and adherence to APA guidelines. Papers are limited to no more than eight pages to focus your writing because the quality of your work is more important than the length of your work. Please submit your papers in PDF format with your last name as the first word in your file name.

Integrative Case Study (1 case, 20 total points, 20% of grade)

The integrative case study serves as an avenue for your case study team to practically apply course content, theories, frameworks, and methods. The case allows you the opportunity to analyze issues, propose and evaluate options, display integrative thinking, communicate insights, and recommend actions. For the case study, you will work in teams and prepare your case analysis as a team. The structure of your case analysis is up to the team but ensure your analysis is structured, on-point, and grounded in theory, data, or best practice frameworks. Please submit your analysis in PDF format.

PitchVantage Video Introduction Assignment (1 video, 0 points)

This assignment is a personal video introduction of two to four minutes. Your presentation can include a description of your current job role, your previous jobs, your educational background, your family, and what you like to do in your spare time. You can even include an unusual fact about yourself. You will prepare your "pitch", practice it, and deliver it using a new presentation training software called PitchVantage, a presentation simulator designed to improve public speaking skills by providing real-time feedback. PitchVantage records video and audio of your recording so that you can watch and hear yourself. The software

also automatically analyzes the tone of your voice, your pauses, your pace, and several other delivery elements, provides real-time feedback to help you identify weak points in your delivery, and makes suggestions on how you can improve your pitch. This software is supplied to you by the university, and this assignment is designed to introduce you to a tool that you likely will find useful in other courses. Look for a registration link and a PitchVantage instructions folder in Blackboard. If you run into any issues, please check the [support website](#) for solutions or reach out to Jaymes Gregory, eLearning Manager (jxg220050@utdallas.edu), or directly to PitchVantage at support@pitchvantage.com. The presentations will be accessible on Blackboard so you can get to know your classmates a little better.

GRADING POLICIES

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| Knowledge checks (Quizzes) | 20 points |
| Web conference attendance and participation | 20 points |
| Discussion board participation | 20 points |
| Final integrative paper | 20 points |
| Case study analysis | 20 points |
| Total | 100 points |

Grading Scale

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| A | 93-100 |
| A- | 90-92 |
| B+ | 87-89 |
| B | 83-86 |
| B- | 80-82 |
| C | 70-79 |
| F | 69 or below |

Important Note: No Incomplete ("I") will be given. Students must complete all requirements of the course by the end of the session so grades can be submitted during the university's grading window. Note there is not an opportunity to improve your grade by submitting extra work.

COURSE POLICIES

Assignment Submission

All assignments should be submitted to the course via eLearning by 11:59pm Central Time Zone on the day noted on the class syllabus. Please do not wait until the last minute to submit your assignment because you may encounter technology problems and not be able to post and thereby miss the deadlines. Assignments posted after the due date will be accepted but marked down due to late submission (see below).

Webinar Participation

Participation grade is based on both attendance and contribution to the webinar discussions.

Late Assignments and Non-Participation

If you need to miss an assignment deadline, you must pre-notify the professor before the deadline. You should provide the reason for missing the deadline and an alternative date for submitting the assignment. The

instructor must approve the extension and the new deadline (with the appropriate grade deduction). If you do not pre-notify the instructor, the instructor will determine the grade deduction for the assignment. Students who do not participate in team assignments (e.g., case study discussions) will not receive credit for the assignment.

Use of AI-based applications in course assignments: AI-based content generation applications such as ChatGPT, GPT-4, Bard AI, and others, while widely available, are deemed inappropriate for use in completing class assignments. Students are prohibited from using AI applications to complete any course assignment. Doing so is considered a breach of the University's academic integrity policies. The only exception to this policy is when their use is included as a formal part of the course curriculum, acknowledged in the syllabus, and used as an instructional tool.

Course Evaluation

The completion of a UTD course evaluation is recommended. A link will be provided via eLearning for completing the course evaluation.

PROGRAM POLICIES

Program Policy on Sourcing and Plagiarism

Students are expected to write at a professional level. This includes using proper grammar and syntax, having a logical flow, and giving credit to sources of information used in developing reports and papers. Students shall not copy the work of others and represent it as their original work.

All submitted work is subject to checking for the above. Should plagiarism happen and become known to the professor or program director there will be formal consequences. The document will be submitted to Judicial Affairs and the program will adhere to their judgment.

Program Policy on Attendance

Students must attend all intensive classes and web conferences offered for their particular class.

Program Policy on Instructor Expectations

Business professionals have important legal and ethical duties to investors, creditors, and to non-investor stakeholders who rely on their comments, analyses, forecasts, and representations. Students in this course are expected to act with personal integrity at all times. Academic dishonesty is incompatible with preparation for a career as a responsible business professional. As such, academic dishonesty will not be tolerated in this course. Any offenders will be subject to appropriate sanctions and discipline, a process that begins with a referral to Judicial Affairs. For purposes of this course, the instructor will always seek a score of zero for any exam or assignment in which the student has engaged in academic dishonesty.

UNIVERSITY POLICIES

University Policies

The information contained in the following link constitutes the University's policies and procedures segment of the course syllabus. Please go to <http://go.utdallas.edu/syllabus-policies> for these policies.

Academic Dishonesty

Academic dishonesty includes but is not limited to cheating, plagiarism, collusion, facilitating academic dishonesty, fabrication, failure to contribute to a collaborative project, and sabotage. All cases of suspected academic dishonesty will be reported to the Office of Student Conduct for investigation.

Comet Creed

This creed was voted on by the UT Dallas student body in 2014. It is a standard that Comets choose to live by and encourages others to do the same: *“As a Comet, I pledge honesty, integrity, and service in all that I do.”*

A Final Note

The descriptions and timelines contained in this syllabus are subject to change at the discretion of the Professor.