Multicultural Consulting
Leslie Lum
Course Syllabus – Winter 2008

Time and place	Time: M W 12:30 pm Room: A132
Contact	Telephone: 425-564-4063 Email: llum@bcc.ctc.edu Office mail: A242
Office hours	Office Location A255 **Office Hours: M W 11:30 am or by appointment**
Website	**http://facweb.bcc.ctc.edu/llum**
Required Readings	**Marketing, Managing, and Business Consulting in a Multicultural Environment** by Lum, Spratlen and Verchot. Available at BCC bookstore. You must buy a copy and have in class.
Outcomes	All outcomes are expected to be performed in a professional manner suitable in a consulting firm: Analyze a business problem or opportunity. Conduct secondary and primary research. Work effectively as part of a team and reflect on the team process. Plan and effectively manage a project. Use key business tools in synthesizing and analyzing the problem or opportunity. Communicate findings in a professional, oral presentation. Write a series of papers including an extensive final report which includes critical thinking, problem solving, and actionable recommendations.
Resources	This course requires that you demonstrate and develop your writing and research skills. We recommend that you consult the Reading/Writing lab (A262 http://www.bcc.ctc.edu/writinglab/ with the drafts of your assignments and that you make use of the Library Media Center (L Building http://www.bcc.ctc.edu/lmc/) in doing research. If you intend to and have not already done so, declare your business major. Make sure you have consulted with an advisor and laid out your courses. The Business Division recommends that you subscribe to the Business listserv which provides notices of application deadlines and events. To subscribe to the listserv, individuals should send a message to: lyris@list.bcc.ctc.edu. In the body of your message write SUBSCRIBE bccbusiness.
How to succeed in this course	• Attend ALL classes and be prepared for the class. • Devote sufficient time to the project. • Read the book. • Work well as a team and seek help when needed. • Plan your project well. • Work closely with your client.

- Do your work early.
- Make good use of your mentors and instructor.

Course requirements

Team Contract	25 points
Project Management Plan	50
Business Case Statement	50
Individual and Team Recommendations	35
Research Instrument	15
Draft Report	75
Presentation	75
Final Report	150
TOTAL	500

Assignment Policies

10% of the total possible points for each assignment will be deducted for each day the assignment is late.

Grading

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95 - 100%	A	4
90 - 94	A-	3.7
86 - 89	B+	3.3
83 - 85	B	3.0
80 - 82	B-	2.7
76 - 79	C+	2.3
73 - 75	C	2.0
70 - 72	C-	1.7
66 - 69	D+	1.3
60 - 65	D	1.0
Below 60	F	0

A pass grade will not be given unless all requirements of the course are completed.

Special Accommodations

Student requiring any special accommodations for the class should make arrangements at the beginning of the term through advisors/counselors in B233, Student Services Building or by calling 641-2498.

Policy Regarding Plagiarism, Stealing and Cheating

Cheating includes, but is not limited to, copying answers on exams, glancing at nearby exams, turning in assignments or papers that have been used in other classes, and giving or receiving help during an exam. Cheating includes, but is not limited to, purchasing or selling notes, assignments or examination materials.

Stealing includes, but is not limited to, taking the text, notes, exams, library books or other personal property of others without their permission.

Plagiarism is presenting the words, ideas, and/or work of others as if it is an individual's own work. It includes, but is not limited to, using other's papers as one's own and including parts of published works without giving credit where credit is due.

If you choose to cheat, steal or plagiarize, the following actions will be

take:
You will receive a failing grade for the course.
A report of the incident will be forwarded to the Dean of Student Services. He/she may file the report in your permanent record and/or take further disciplinary action.
If you feel you have been unfairly accused of any of the above, you may appeal. For a description of due process, see WAC 132H-120, available in the Dean's office.

Consulting Timeline – Assignment are Due on the Wednesday of the week noted.

Key Dates: Kickoff meeting January 16 WEDNESDAY
Final Presentation: March 17 MONDAY

Week	Jan 2	7	14	21	28	Feb 4	11	18	25	Mar 3	10
	Prepare for Kick-off Meeting Assign teams Team forming										
		Review and execute consulting contract Interview and research business Draft, revise and execute team contact									
			Draft and revise project management plan Start secondary research								
				Draft and revise business case statement Analyze and organize secondary research							
					Plan, draft and test primary research						
						Conduct primary research					
							Analyze and organize primary research Draft and revise preliminary recommendations				
								Draft final report			
									Draft, revise, rehearse presentation		
										Revise final report	
Due On Wed of week noted		**Consulting Contract**	**Team Contract**	**Project Manage-ment Plan**	**Business Case Statement including SWOT analysis**	**Primary Research Instrument**		**Preliminary Recommen-dations**	**Draft report**	**Final Presenta-tion**	**Final Report**

Team Contracts
Team Assignment
25 points

The goal of this team assignment is to facilitate quality communication between team members such that they can move from the forming to the norming phase. Teams who go through this assignment in a perfunctory manner may shortchange the transition. It is important that all team members participate in the discussion and agree to the ground rules outlined. More collaboration fosters the trust that leads to effective norming.

A typical code of cooperation which forms a baseline for most teams is as follows:

- Attend all meetings and be on time
- Listen to and show respect for the views of other members
- Critique ideas not persons
- There are no stupid questions
- Avoid disruptive or distracting behavior
- Carry out assignments on schedule
- Resolve conflicts constructively and always strive for win-win solutions
- All team members are responsible for the team's progress

Task issues to include:
What is the best way to reach team members on a regular basis and in case of emergency?
What are constraints on scheduling? (Include time away, other projects or studying for exams.)
How often, when and where will the team meet?
How will data collected and meeting minutes be archived and distributed?
How will work be circulated for review?
How will action items be followed up?
What is the standard for team work?

Relationship issues to include:
What is each team member's role? (Leader, facilitator, knowledge manager, etc.)
How will the team deal with members missing or being late to meetings?
What are the rules for discussion and decision making during team meetings?
How will team member developmental needs be addressed?
What mechanism will the team have for flagging problems?
How will a team member signal for help?
When will outside help be sought?
How will team members be rewarded?
How will the team experience be evaluated?

All team members should sign the contract signifying that they have contributed to the discussion and that they agree to abide by the contract.

To track team progress, monthly individual reflections with the diagnostic assessment provided in this chapter should be used.

Project Management Plan
Team Assignment
50 points

The Project Management Plan is a team assignment. The goal of this assignment is to enable the project team to plan its work for the quarter. By establishing a solid project management plan, the team will have identified the problem it is solving, the strategies and tactics it will use to address the problem, and the resources it needs to complete its work. Additionally, the team will have developed a mechanism for controlling the project and ensuring progress is being made to reach its goal.

The plan must include the following components:

a. A problem or opportunity statement: This statement should describe the business and summarize the problem or opportunity it faces.
b. A project mission statement: A mission statement identifies what the team will do, for whom, and how.
c. Project work objectives are a list of all deliverables that will be produced for the client. This includes reports, web sites, financial projections, and marketing materials.
d. Exit criteria. These criteria are used to determine when each milestone in the project has been reached. This may be combined with end-item specifications which follows.
e. End-item specifications: This is a list of the items that will accompany finished project. For example if a web site is being created, the end specifications would be the documentation that will be left with the business owner describing how the web site was put together and how changes can be made.
f. Task Breakdown Structure: This identifies all of the tasks that must be performed in order to achieve the objectives of the project. Tasks should be grouped and any tasks that rely on each other must be identified. MS Project may be used to complete this task.
g. Schedules: Give start and complete dates on each task along with estimated hours. Students should compile a Gantt chart or calendar showing all tasks. This can be done automatically on MS Project.
h. Budget: Team members will be assigned to each task and a projected budget of hours and cost will be compiled. Use an hourly billing rate of $10 for student and $50 for mentors. MS Project or Excel may be used to complete this requirement.
i. Control systems. Each team will be required to submit status reports showing actual against planned along with their monthly team reflections. Reports should show hours by task by team member. Create a reporting tool that lists all the tasks and allows team members to fill in their hours on a weekly basis. Ten copies of this status report should be made such that the team is recording this every week. MS Project or Excel may be used to complete this requirement. The final project accounting with hours by task by team member should be included in the appendices of the final report. Students working with the Small Business Development Centers are required to provide this information for reporting purposes.
j. Summary of Tasks by Team Member: Provide a list of what each team member is contributing to the project.
k. Risk areas with contingencies: Outline any risk areas and what will be done to mitigate the risk.

MS Project Checklist

Using MS Project to plan the project can assist in understanding all the steps in the process and allows for some automated functions to lay out tasks, produce calculations, and generate reports. This must be balanced against the time it takes to learn the software and dealing with the complexity that is not necessary in this project. Here is a quick checklist of steps to creating a project plan. A trial copy of MS Project is available http://office.microsoft.com/en-us/officeupdate/default.aspx.

1. Outline all project work objectives and order them by completion.
2. Break work objectives into tasks and break tasks into subtasks.
3. Create a project file in MS Project (templates can be found at http://office.microsoft.com/en-us/templates/CT011359421033.aspx.
4. Save the Project file.
5. Set your Project Calendar.
6. Enter Tasks
7. Sequence and Organize Task (Move/Insert additional/Delete) For more information go to http://office.microsoft.com/en-us/assistance/HA010773401033.aspx.
8. Organize Tasks into an Outline
9. Set up your Work Breakdown Structure
10. Create dependencies between tasks (for demo go to http://office.microsoft.com/en-us/assistance/HA010930891033.aspx)
11. Create and assign resources using Resource Sheet View (for more information go to http://office.microsoft.com/en-us/assistance/HA010973081033.aspx)
12. Review and correct project plan
13. Save a baseline
14. Keep the project up-to-date (for more information go to http://office.microsoft.com/en-us/assistance/HP453229611033.aspx).
15. To enter actuals http://office.microsoft.com/en-us/assistance/HP453199911033.aspx
16. To view project use Gantt Chart, Network Diagram, and Calendar.
17. To generate reports http://office.microsoft.com/en-us/assistance/CH010687121033.aspx

Business Case Statement
Individual Assignment
50 Points

The business case statement is a description and validation of the project based on the data gathered to this point. The main parts of the statement include the purpose of the project, a definition of the business (organization or client), a SWOT analysis or the identification of problems and/or opportunities facing your client, and an explanation of how this project will benefit the client. A brief indication of the new skills and knowledge that each student consultant is gaining is required.

This is an individual assignment. The length is in the four to five page range (single spaced). Parts of this business case statement (business history and definition and SWOT) can be used later for the final report.

Prior to submitting this to faculty for grading, the business case statement must be forwarded to advisors and/or mentors for their review and feedback. Do not submit a first draft. Mentors have little patience for incoherent description, poor organization, grammatical errors and typos.

Statement Elements

Purpose

Include here an indication of the problems that must be solved or deliverables provided such as a market and feasibility analysis or plans for increasing productivity or improving operations in the business. Individual articulation of purpose ensures that all team members have a clear direction in which to move forward.

Business Definition (What kind of business is your client in?)

Define or describe the type of business your client is in. Indicate the main goods and services produced or provided by the firm or organization (benefits being delivered), the market(s) or customer groups that are served and any particular technology being used or unique characteristics that may be identified. Articulate the business model.

SWOT Analysis

Describe the problems, opportunities, challenges or other circumstances facing your client.

Secondary Research Summary

At this point, you should have completed a substantial portion of your secondary research for the project. Summarize your findings and provide the sources for all your research. Where does your secondary research point to?

Value-Added Benefits to the Client

How will the deliverables help the client? What measurable results do you think you will be able to deliver to the client? How will the value-added be measured?

Value-Added Benefits to You

How will you gain skills and knowledge from working on this project?

Research Instrument
Team Assignment
15 Points

Primary Research Instrument

Many teams will be required to create a research instrument as part of fulfilling the consulting engagement objectives. This list provides a checklist of steps to guide the process:

1. Conduct secondary research first. Typical research instruments may be available or trade associations may have done research already.
2. Conduct preliminary research. If the survey involves customers, find a few customers to ask exploratory questions. If the primary research involves businesses, ask the client to recommend some representative businesses to speak to. The goal is to understand as completely as possible the issues that are to be studied, therefore, it is more helpful to ask open-ended questions.
3. Create a research instrument and review it with mentors and faculty. Specify the objective each question is addressing. Revise the instrument based on feedback.
4. Pretest the instrument on a few typical respondents. Revise the instrument based on observations and feedback.
5. Submit the instrument to faculty for final approval. Include a description of how many respondents and how the respondents will be selected.
6. Administer the instrument.

Report on Preliminary Recommendations
Individual Assignment
Points: 25 (Individual) 10 (Group Consensus)

Preliminary Recommendations

This assignment is intended to encourage individual and independent thinking on the problems, analysis and basic objectives of your portion(s) of the project. We recognize that at this point you have not fully analyzed all of the data that you have and may not have covered some aspects of all the deliverables that will be developed for your client. But working with what you have on an individual basis will ultimately increase and strengthen the group-based recommendations that will form the basis of the recommendations section of your written group project report.

Recommendations to the client will focus on the decisions, policies and actions that will address the issues and solve the problems that you have worked on. They should be clearly presented. In addition, they should be within the resource capabilities of the client and, by the time that they have been agreed upon by the group, have a "buy-in" from the client that indicates enough support for their acceptance and implementation. Effective recommendations must be measurable. When coming up with recommendations, create a metric for the business to determine whether or not it has achieved its goal. Read Module 7 to learn about effective recommendations.

The best preliminary recommendations are approximately three pages in length, expound on recommendations that can be backed by evidence gathered to date, and provide an action plan that moves the business forward yet is within the resource limitations of the business.

Requirements include:

- Detailed description and explanation of the recommendations including what decisions the business owner should make in response to the actions or changes proposed. (10)
- Persuasive content that provides evidence for the recommendations including the costs and benefits of each recommendation. (5)
- Recommendations grouped and ordered by importance and priority. (5)
- Writing in the correct voice, style and without grammatical or spelling errors. (5)

Once individual preliminary recommendations are submitted, faculty may require that your team come up with a consensus set of recommendations. It is important that the team sense out any such disagreements at this point so that it can move forward effectively with a consensus report. Read Module 3 on teaming and Module 7 on evaluating alternatives for strategies on resolving differences. Meeting notes from the consensus process will be required.

Final Presentation
Team Assignment
75 Points

Objective: The final presentation showcases the work of the team. It provides the business owner with an overview of the findings which will be discussed in detail in the final report and in follow-up discussions. It is important that the team has done its groundwork and briefed faculty and mentors on the recommendations prior to the final presentation. Unless this is done, the team may go through the embarrassment of presenting flawed analysis or solutions that are not completely thought through. This can be extremely detrimental to the business and, in the past, has caused businesses to reject outright all the work done by the student team.

Audience: The audience for the presentation will be the business, advisors, mentors, other industry professionals, government officials, and the faculty. Think very carefully about the needs of each of these groups. Organize your material so that it is relevant to the audience. A brief history of the business may be necessary orient members of the audience. There should be no more than three to five main points. Decide as a team what those main points should be. It is important for any visual display of information is appropriate. Large amounts of text or numbers is not appropriate for projection. The audience doesn't have the time to grasp details. Save those for the report. Although dark backgrounds and white fonts seem dramatic, they fade out in a room with any light. Don't use any pictures or graphics that do not make a point. They will only distract. As a general rule, very little use of animation (other than transition) is made in professional presentations. Be prepared for technical glitches with backup copies. Be aware that the most technically complex presentations are the most difficult to recover from if there are technical problems.

Preparation: The presentation deck of slides should be prepared well in advance of the presentation day and reviewed with mentors and faculty. It is important that the presentation be rehearsed many times. Reading off cards detracts from credibility. Some faculty require that student teams rehearse in class and incorporate any suggested improvements into the presentation. Watch body language such as fidgeting or stiffness. Know the material thoroughly and believe in what is said. Communication is most effective when passionate about the topic. Jokes are tricky as they can offend. It is best to leave them out.

Limit the amount of overhead in the presentation. This includes introductions and transitions between presenters. Do not include any slides that don't give information. Give out slides or handouts because it will help people remember but it is best to give out material after the presentation.

Never, never go over the time limit. The presentation might be part of a series of presentations and going over the limit will impact the presentations for the rest of the day. Additionally, going over time limits gives the impression that the team does not have control over the material.

There can be no errors, typos, or grammatical mistakes in the final presentation. The only way to prevent this is to review the presentation deck several times.

The team will be graded on:

- Organization (Main points were evident and organized so that the audience could follow, recommendations were supported)
- Visual Display (Clear, appropriate, efficient)
- Delivery (Well-rehearsed, knew material, projected credibility, connected with audience, able to field questions)
- Logistics (Finished on time, had back-up forms of presenting, hand-outs organized and available)

Draft and Final Written Client Report
Team Assignment
75 (individual) and 150 (final group) points

In order to expedite the report writing process, it is recommended that the team become familiar with the capabilities of MS Word to facilitate the revision process, create outlines and generate reports. If the draft report is set up correctly, MS Word can generate a table of contents.

1. Each and every team members must complete **individual draft section reports** for the task or area of study where they contributed the most. As a rule of thumb, these section reports (excluding appendices and exhibits) are a minimum of 10 pages. Having all team members participate in the writing process ensures that writing skills are developed.
2. Team members will review the draft for completeness and writing. As part of the process, the team may devise a writing style sheet to ensure that all writing is consistent and create a Word template for the final report. They will compile a **team draft report** including executive summary and recommendations. Be aware that often teams are synthesizing at the same time as they are writing. It is important to start the writing process well in advance of the due date so that drafts can be reviewed and issues can percolate. Often having a few days to mull over a large amount of data can yield much better solutions. Some faculty may request that individual section reports must be submitted with the team draft report and would factor into the grade for each team member.
3. The instructor and mentors will review the draft report and give feedback. Feedback is most efficiently given by using the Reviewing functionality on MS Word.
4. The team will incorporate all feedback and create a final report of professional quality. The report will be graded on the quality of the critical thinking, analysis, and recommendations that are made. This means that the data is not simply dumped but it has been carefully analyzed for significant patterns. Recommendations are backed by evidence and research. The final report will incorporate all changes recommended by your mentors and instructor. The instructor will give the copy to the business when it is thoroughly reviewed and approved. **No copies may be distributed to the business owner by the team prior to final review by faculty.** Two hard copies and one digital copy are required. These are professional reports directed to the business client and must provide all the information necessary to implement the recommendations. Student teams often provide extensive lists and data files in the appendices. This report serves as an important knowledge management and accountability tool for the program. It provides a record of what was done and how success should be measured.

Elements of the Final Report

Cover Letter

The cover letter, addressed to the business client, announces the topic and how the report was authorized, describes the project, highlights the findings, conclusions and recommendations, and closes with thanks to the client.

Executive Summary

This focuses on what managers/decision-makers need to know. Executive summaries are difficult to write and the team should take the time to think through all the findings and recommendations before tackling it. Typically executive summaries are drafted after the body of the report is complete. They must provide the highlights of the work and call for action. Good executive summaries undergo many revisions.

Table of Contents and Formatting

If headings are properly formatted, a table of contents will be automatically generated. This is helpful as often the team will move individual sections of the report in the drafting process. Make sure that fonts, headings and formatting are consistent throughout the report. Use the header/footer function to include page numbers.

Background/Introduction

This section includes an explanation of purpose and scope of the project and presents the methods of research and analysis. It provides background information on the company, financial performance and management biographies.

Body of the report

This main section of the report will include data analysis and presentation of findings on strategic and competitive analysis, business process analysis, and other discussion. Use effective visual display of information. Student teams are reluctant to put graphs and diagrams in the body of the report even though they greatly enhance the readability of the report. As these reports are quite long (50 to 100 pages), it is important to categorize and prioritize the findings. The quality of the research and analysis will determine the points allotted. Was the research sufficient or was key information not sought? Was the methodology sound? Was analysis (business process, marketing, financial, etc.) done correctly? Were the conclusions drawn supported by the evidence? Were patterns or conclusions missed? Were incorrect conclusions drawn?

Recommendations

This section presents the proposed actions, the feasibility of the actions, and the expected benefits and costs of these actions. Recommendations should be grouped by category and prioritized. Were the recommendations supported by the evidence? What benefits will the recommendations provide to the business? Do the recommendations fit with the mission and vision of the business? Does the business have access to the resources necessary to implement the recommendations? Were the recommendations time bound? Have the risks been analyzed? How will the business measure whether it had been successful in implementing the recommendations?

References and Sources of Information

These should be included appropriately within the report. This means that in some instances using footnotes are most appropriate and in others citing the source within the body of the report is most appropriate. These reference and sources should at least be used to demonstrate research completed and to substantiate recommendations. Use APA convention for bibliographies.

Illustrations, Exhibits, Appendices

Include copies of survey, summaries of results, transcripts of focus groups or significant interviews. Student teams often include data sets that provide valuable prospecting lists to the businesses.

A copy of the time log by task must be completed by all team members and included in the final report.

Writing Style

This includes an evaluation of the appearance, spelling, grammar of the report as well as the logic and flow of the presentation. There should be no grammatical or other errors in the final report. The report should be formatted such that there are headings and subheadings that guide the reader.