BCOR 4003
TEAM CONSULTING PROJECT GUIDELINES

The purpose of this assignment is to provide you with the opportunity to apply the business skills you have learned over the past four years in a real organizational setting. The goal is to integrate what you have learned from ALL of your classes into a consulting report that will make a real difference for the organization with which you're working. Doing so benefits you by helping you "put all the pieces together," not to mention creating a deliverable that should enhance your ability to find a good job upon graduation. Along the way, you'll also continue honing your skills in working in a task group—an absolutely essential skill for most management jobs.

The project involves working as a consulting team to help an organization develop a sustainable competitive advantage based on their management acumen. In many cases, the initial point of contact with the organization revolves around a problem or issue that they are experiencing. In other cases, an organization may agree to work with you to analyze their functioning without specific reference to a particular problem— that is, they may simply be interested in a "check-up." Either is fine. In fact, it's quite common that the initial "presenting symptoms" have relatively little to do with the fundamental issues that you will end up addressing. It's also quite common that organizations don't want to initially admit to any particular problems, and use the "check-up" as a face-saving way to have you address issues about which they were actually quite aware.

How do we find a problem/issue?

The two textbooks for the course both suggest that we are on the cusp (if not the midst) of a sea change in how organizations must operate in order to be successful. The essence of this message is distilled in the first few chapters of each book, so you should first make sure that you are comfortable with them before contacting an organization. In contacting the organization, let them know that your assignment is to apply everything you've learned at the Leeds School to help them address a management-related challenge they may be facing. (We don't want to think too much in terms of "functional silos", but the intent is not to deal with issues that are primarily about marketing, finance, etc. challenges. The issue should be primarily about "management" though I do expect you to address related areas as they impact the issue you've selected.) At that point, your contact may immediately identify an issue/problem they would like you to address. If not, you might instead offer to conduct an overall assessment based on what you've learned, with a particular focus on the issues raised by *Firms of Endearment* and *A Whole New Mind*. Be prepared to offer a brief summary of what these books suggest, to help the manager get a better sense of what you have to offer. (Of course, it's fine to let them know that you've only begun to cover this material and will have much more to offer them as the semester proceeds.)

How do we find an organization to work with?

It's entirely your decision what sort of organization to work with. It can be private- or public-sector, for-profit or not, publically- or privately-held. In general, though, it's much more likely that your recommendations will be taken seriously in smaller organizations (or fairly autonomous units of larger organizations), and if your contact person has the power to implement them. It's very frustrating to be working on issues and potential solutions in a context where you know things can't or won't be changed regardless of what you suggest.

It's very common for teams to want to work with organizations with which someone in the team has a connection. Commonly that means an organization in which one of you currently works, or with which there is a family connection. While this usually makes for easier entry, keep in mind that it can present some significant challenges. Many experts argue that it's impossible to be an effective consultant to an organization for which you work:
- You can't really be objective about a company and culture that you're part of. Once you've been around for a while, you develop subconscious blinders that affect what you see (and don't see) and how you interpret things. Actually, this may not be as serious an issue for this class project,

because it's being done by a group and the other members of the team aren't like to share the same biases. (Nonetheless, you should acknowledge and take steps to minimize the bias.)
- The "shoot the messenger" problem. It's quite possible that you will be presenting the organization with information and advice that they don't entirely want to hear. That can be doubly difficult to do if you're worried about your job (or your relationship with Dad or Aunt Martha.)

Of course, if these issues were insurmountable organizations wouldn't have internal consultants. Being part of an organization also has advantages: not only is it easier to get in, but it's also often easier to understand the organization and to gather information. Nevertheless, you should also consider alternative approaches:
- Cold-call organizations that you're curious about. Having a sincere interest in them may be what it takes to get them to agree to let you work with them. (Just be sure that your interest doesn't cloud your judgment.)
- Consider past employers with whom you still have good relationships.
- Check with the university alumni relations folks, as well as the Leeds Career Connections and Deming Center staff, to see if they can put you in touch with alumni and friends of the university. They may be particularly willing to help out students with projects like these.
- Watch the local news to find a firm that appears to be having problems of an appropriate sort.
- Don't overlook CU itself for opportunities. While CU is certainly something of a bureaucracy, many departments/offices have a fair amount of flexibility to adopt initiatives that are "internal".

How do we gather information?

As we'll discuss in class, whether you're presented with a specific problem or are being asked to do an overall assessment, you need to determine the underlying issues/problems that may not be immediately apparent. This means that you will need to analyze the "big picture" and develop a diagnosis of the group/organization's strengths and weaknesses. In doing so, you should rely not only on the material from this class, but also what you've learned in ALL of your other classes. Remember SWOT analysis from MGMT 4000, the 4 Ps of Marketing, leadership principles, HR procedures, and in some cases even financial or accounting principles?

How you go about collecting this information will of course depend on the issue you're addressing and the nature of the organization. In general, data collection methods may include interviewing, observation, questionnaires, or analysis of documents and records. See (and refer to) the article by Aldefer (that we will discuss in class) on organizational assessment for more ideas. I've also placed *Diagnosing Organizations: Methods, Models, and Processes* by Michael Harrison on reserve in the Business Library.

Any or all of your group may participate in these interviews and observations. I strongly encourage everyone to get involved in the data collection process, but I insist that if the organization is one in which one or more group members are working at least one "outside" member of the group participate in every data collection step.

What should our report include?

- The organizational context (e.g., the goals, structure, history, philosophy, players, stakes, etc.-- whatever is relevant to your analysis).

- How you collected your data. Why did you use the methods you did? How do you know your information is valid?

- Your formulation of the problem(s). Be careful to distinguish givens from assumptions and inferences; both may be necessary, but it is important to accurately identify each. Also clearly distinguish among symptoms, problems and causes.

- Discussion of alternative solutions.

- Evaluation of the alternatives, and the selection of a preferred solution (which may represent a combination of more than one of the alternatives you identified). Be sure to present the rationale for your decision, explicitly citing sources in the texts, lecture, class discussion or other references to defend your choices. (Note: if there is a strong minority position, it may also be included here.)

- An implementation plan that considers likely contingencies.

Thoroughness will be assessed primarily in terms of the demonstrated application of material from this and other courses. You should be explicit in describing how your recommendations rely on what you've learned in ALL of the courses you've taken—don't make me guess! (One way to do this might be an appendix or table in which you very explicitly describe the concepts, tools, or skills from the courses you've taken and how they apply to this project.)

Remember that the oral presentation should be less detailed than the written report and should focus on the interests of the class (see separate handout). That generally means much less attention to how the data were collected than on the problem, solution and implementation.

Working with the host organization

When interacting with the organization that you have chosen, it is imperative that you conduct yourself in a completely professional and ethical fashion. Think of yourselves as a consulting team that seeks to offer assistance while taking care not to disrupt your client's functioning. Take the time to develop a thorough understanding with the organization of what each party is committing to. They should be willing to commit their time (both of the manager and of employees—and perhaps customers or other parties) to you as you interview or observe them at work. This is likely to involve at least 5 – 10 hours of their time. On your part, you need to commit to being on-time for any meetings you have scheduled, to be diligent about not wasting the organization's time or other resources, to maintain confidentiality, and to provide them with a written (and, optionally, an oral) report based on the highest quality work you can possibly do. On the line is not only your own reputation, but that of the University of Colorado and the Leeds School.

As you are gathering information, you may need to develop means of protecting the confidentiality of your "sources." You should let both management and the employees you talk with know this up-front (and of course you should follow through with any promises of confidentiality).

Remember that it is REQUIRED that you provide your host organization with a written copy of your report. This may be either a duplicate of what you turn in to me, or a version that is more tailored to a management audience. While it is not required, I strongly recommend that you meet with your organizational contact to review the written report. You're also welcome to invite the person to your presentation in class; if you do so, please let me know in advance.