MANAGEMENT CONSULTING 94-808

SPRING 2021

Heinz College, Carnegie Mellon University
Monday, 6:00 – 8:50 PM EST, Section A, 12 Units

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Description

This is an applications course exploring the profession of management consulting and the art and science of providing management counsel to organizations in the public and private sectors. The course is designed to provide a framework for collaborating with organizations to solve problems and to execute projects efficiently and effectively. Students will explore and utilize practical tools that will enable them to solve problems and execute projects as external or internal consultants or as individual contributors or leaders within organizations. The course introduces frameworks as well as quantitative and qualitative methods that are typically used in management consulting.

Course Objectives

1. View problems from the perspective of practicing experts in the field.
2. Utilize quantitative and qualitative methods and interpersonal skills to collaboratively solve problems and execute solutions.
3. Expose students to the classical literature of the profession.
4. Prepare solutions through case studies utilizing technical expertise and experience.
5. Apply course theories and principles to provide consulting services to actual clients.

Learning Outcomes

1. Define management consulting and understand why and how consultants are utilized.
2. Apply a consulting process framework to an actual client engagement.
3. Understand the value of stakeholder engagement and how to apply it.
4. Develop a proposal and work plan for a consulting project.
5. Learn, practice, and refine skills for client engagement and project management.
6. Learn and apply discovery techniques and qualitative/quantitative research skills
7. Make effective presentations to client organizations

Resources

Block, Peter. *Flawless Consulting: A Guide to Getting Your Expertise Used*. San Francisco: Jossey-Bass/Pfeiffer, 2011.

Block, Peter. *Flawless Consulting*, www.flawlessconsulting.com, 2014.

Brussalis, Chris W. (Ed.). *Management Consulting Class Reading Material*. Pittsburgh: Carnegie Mellon University, 2020.

Evaluation

Student evaluation will be based on the following criteria:

Research Review	5%
Client Proposal	15%
Case Study 1	15%
Case Study 2	15%
Class Participation	20%
Consulting Engagement	30%

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OUTLINE AND READINGS

Date   Topic and Assignments

Feb. 1   Introduction to the Profession

- Introduction and purpose of course
- Review syllabus
- Definition, roles, purpose of profession
- Uses of consultants – public sector, private sector, and internal consulting
- Introduce client projects

Development of the Profession

- History and development of the profession
- Consulting roles and culture
- Professionalism and ethics

Flawless Consulting, Chapters 1-3, 7.

Price, Charlton R. Collaboration: The name of our game. *Consulting to Management*, 16(4), December 2005, p. 38.
Competency Framework and Certification Scheme for Certified Management Consultants, New York: Institute of Management Consultants, 2015
Institute of Management Consultants Code of Ethics. New York: Institute of Management Consultants, Feb. 3, 2005.
Washburn, Stewart A. Challenge and renewal: A historic view of the profession. *Journal of Management Consulting*, 9(2), November 1996, pp. 47-53.

Feb. 8   **Consulting Process – Entry and Contracting**

- Types of projects and project cycles
- First client meetings
- Assignment strategy and plan
- Proposal development
- Consulting contract
- Service Quality
- Assign client projects
- Introduce *Research Review*
- Introduce *Client Proposal*
- Introduce *Bonner case*

Flawless Consulting, Chapters 4-6

Green, Charles H. Create trust, gain a client. *Consulting to Management*, 17(2),
    June 2006, pp. 27-29, 36.
Hilditch-Roberts, Huw. A best practice guide for hiring consultants. *Strategic
    Direction*, 28(3), 2012, pp. 3-5.
Lantos, Peter R. Consulting hurdles 101: Avoiding disaster. *Consulting to
    Management*, *14*(1), March 2003, pp. 46-49.
Scanlan, Janice. The agile consultant. *Consulting to Management*, 17(2), June
    2006, pp. 22-24.
Sobel, Andrew. Break into your client's inner circle. *Consulting to Management*,
    14(1), March 2003, pp. 18-22.
Weiss, Alan. Why good clients turn bad. *Consulting to Management*, 16(1),
    March 2005, pp.25-27.

Feb. 15   **Consulting Process – Discovery and Dialogue**

- Diagnosis
- Data gathering techniques
- On-site interaction
- Proposal development
- Discuss *Bonner* case
- ***Research Review* Due 6:00 PM** (submit via Canvas and hard copy in class)

Guest: Mark F. DeSantis, Ph.D., Managing Partner, MIR Ventures; Adjunct
    Professor, Heinz College, Carnegie Mellon University

Flawless Consulting, Chapters 10-12.
Bonner case, www.flawlessconsulting.com

Hagerty, Michael R. A powerful tool for diagnosis and strategy. Journal of
    Management Consulting, 9(4), November 1997, pp. 16-25.
Weiss, Alan. Consultant, heal thyself. *Consulting to Management*, 17(2), June
    2006, pp.10-12.

Feb. 22   Industry

- View of management consulting world, synopsis of industry, types of firms
- Key industry challenges
- Key success factors
- Introduce *Case Study 1*

Guest: Thomas E. Rodenhauser, General Manager, ALM Consulting Inteligence

Czerniawska, Fiona. The new business consulting landscape. *Consulting to Management*, 16(4), December 2005, pp. 3-6.
Kornik, Joseph. *2018 Executive Outlook. Consulting,* January 2018.
Krell, Eric. Special feature: How recruiters work. *Consulting Magazine*, 7(4), July/August 2005, pp. 28-33.
Lifschutz, Marisa. IBISWorld Industry Report 54161: Management Consulting in the US. *IBISWorld*, August 2018.
Sandberg, Robert and Werr, Andreas. The three challenges of corporate consulting. *MIT-Sloan Management Review*, 44(3), Spring 2003, pp. 59-66.
Weiss, Alan. The unjust (consulting) universe. *Consulting to Management*, 16(4), December 2005, pp. 30-32.

Mar. 1   Consulting Process – Analysis and Decision to Act

- Developing and gathering alternatives
- Presenting action proposals to the client
- Work plans and project costing
- Introduce Case Study 1
- ***Client Proposal* Due by 6:00 PM** (submit via Canvas and hard copy in class)

Flawless Consulting, Chapters 13-15.

Guest: Jordan Pallitto, Vice President, The Hill Group, Inc.

Andrews, Margaret. 6 tools every business consultant should know. Harvard Division of Continuing Education, *The Language of Business* blog, January 2012.
Courtney, Hugh, Lovallo, Dan, and Clarke, Carmina. Deciding how to decide. *Harvard Business Review*, September 2013
Frick, Walter. An introduction to data driven decisions for managers who don't like math. *Harvard Business Review* blog, May 2014.
Klingel, Jeremy. Improving process across dynamic business portfolios. *Consulting*, 11(3), May/June 2009, pp. 46-47.
Spradlin, Dwayne. Are you solving the right problem? *Harvard Business Review*, September 2012.
Turner, Arthur N. Consulting is more than giving advice. *Harvard Business Review, 60*(5), Sept/Oct 1982, pp. 120-129.

Mar. 8   **Consulting Process – Engagement and Implementation**

- Management of projects
- Presentations and communicating with clients
- Implementing your recommendations
- Ongoing client contact and service
- Team effectiveness
- *Case Study 1* **Due by 6:00 PM** (submit via Canvas and hard copy in class)

Guest: Joseph M. Grant, Vice President and Senior Operations and Business
Support Manager, PNC Financial Services Group

Flawless Consulting, Chapters 16-17.

Merron, Keith. Masterful consulting. *Consulting to Management,* 16(2), June
2005, pp. 5-11, 54-58.
Liberatore, Matthew J., Stout, David E., and Robbins, Jack. Key project
management concepts for accountants. Management Accounting Quarterly,
8(2), Winter 2007, pp. 15-23.
Polzer, Jeffrey T. Making diverse teams click. *Harvard Business Review.* July-
August 2008.

Mar. 15   **Consulting Process – Extension, Recycle, or Termination**

- Time for withdrawal
- Final reporting
- Evaluation
- Discuss *Case Study 1*

Guest: Lauren N. Schuetz, Consultant, The Hill Group, Inc.

Kubr, Milan. Management Consulting: A Guide to the Profession. Geneva:
International Labour Office, Chapter 11, 1996.

Mar. 22   **Change Management and Resistance**

- Leadership
- Stakeholder engagement
- Utilizing resources
- Developing support
- Institutionalizing change

Guest: Ned Laubacher, Principal, Health Spectrum Advisors

Flawless Consulting, Chapters 8-9.

Brenowitz, Randi S. and Manning, Marilyn. How consultants help leaders get buy-in. *IMC Times*, *33*(3), Fall 2002.

DeVito, Liz. Kennedy Corner: Change Management; Easier Said Than Done. *Consulting,* December 10, 2012.

Larcker, David F. and Tayan, Brian. Trust: The unwritten contract in corporate governance. Stanford Closer Look Series, July 2013.

Larcker, David F. and Tayan, Brian. Leadership challenges at Hewlett-Packard: Through the looking glass. Stanford Closer Look Series, October 2011.

Mar. 29   **Project Status**

- Interim project presentations
- Introduce *Case Study 2*

Apr. 5   **Easter Break – No classes**

Apr. 12 **Creating Value for Yourself and the Firm**

- Firm growth strategies, sales skills
- Managing a firm
- Professional development and staying current
- Developing areas of unique expertise
- ***Case Study 2* Due by 6:00 PM** (submit via Canvas and hard copy in class)

Flawless Consulting, Chapters 18-19.

Bliss, John and Wildrick, Meg. How to build a personal brand. *Consulting to Management*, 16(3), September 2005, pp. 6-10.

Maister, David H. How's your asset? Maister Website, 1996, pp. 1-6.

Markham, Calvert. Developing consulting skills. *Consulting to Management*, 16(4), December 2005, pp. 33-37.

Schaffer, Robert H. Consulting for results. *Journal of Management Consulting*, 8(4), Fall 1995, pp. 44-52.

Scheer, Jess. Diminishing Returns for Senior IT Consultants. *Consulting*, 13(2), March/April 2011, pp. 28-29.

Taminiau, Yvette, Smit, Wouter, and de Lange, Annick. Innovation in management consulting firms through informal knowledge sharing. *Journal of Knowledge Management*, 13(1), 2009, pp. 42-55.

Washburn, Stewart A. Establishing referral sources: A case study. *Journal of Management Consulting*, 10(1), May 1998, pp. 11-17.

Apr. 19 **Legal and Ethical Issues**

- Legal risks and management
- Client privilege issues
- Professional ethics
- Discuss *Case Study 2*

Guest: Morgan Hanson, Director/Attorney, Cohen & Grigsby, P.C.

In re Grand Jury Matter, No. 91-832, 142 FRD 82, 1992.

Panitz v. Behrend, 632 A.2d 562, Pa. Super, 1993.

LLMD of Michigan v. Jackson-Cross, et. al. J-196, Pa. 1998.

Allen, K. P. (2007) *The Attorney-Client Privilege in Pennsylvania*. 3-8.

Briscoe v. LaHue, 460 U.S. 325, 75 L.Ed.2d 96, 103 S.Ct. 1108, 1983.

Eyres, Patricia S. The top seven legal risks for consultants. *Consulting to Management*, 17(1), March 2006, pp. 9-10, 20.

MacDonald, Elizabeth and Paltrow, Scot J. Ernst & Young advised the client but not about some big conflicts. The Wall Street Journal, August 10, 1999.

Rodenhauser, Tom. Kennedy Corner: Placing a Price on Ethics. *Consulting*, June 28, 2011.

Silverman, Arnold B. The attorney-client privilege. *JOM*, 49(6), 1997, p. 62.

Apr. 26   **Client's Perspective**

- Selection of consultants
- Effective management of consultants
- Evaluation of performance
- Use of consultants
- Maintaining independence and objectivity

Guests:
  Gary L. Evans, Senior Vice President, Microbac Laboratories, Inc.
  Lisa Scales, President & CEO, Greater Pittsburgh Food Bank
  Kenneth A. Zalevsky, Director of Technology, Bayer HealthCare, LLC

Flawless Consulting Fieldbook, Chapters 22, 36-37.

Czerniawska, Fiona. Consultant: good, consulting firm: bad. *Consulting to Management*, 17(2), June 2006, pp. 3-5.
Gable, Julie. Eight tips for working with a consultant. *The Information Management Journal*, July/August 2007, pp. 42-48.
Jackson, Stuart E. Making consultants earn their keep. Journal of Business Strategy, 31(3), pp. 56-58.
Shapiro, Eileen C.; Eccles, Robert G.; and Soske, Trina L. Consulting: Has the solution become part of the problem? *Sloan Management Review*, Summer 1993, pp. 89-95.
Kesner, Idalene F. and Fowler, Sally. When consultants and clients clash. *Harvard Business Review*, Nov. 1997, pp. 22-38.

May 3   **Final Consulting Project Presentations – Last Day of Class**

- Final presentations on consulting projects

Guests: Clients

ACADEMIC INTEGRITY

Plagiarism and other forms of academic misrepresentation are taken extremely seriously. Misrepresentation of another's work as one's own is widely recognized as among the most serious violations. The violation is clearly flagrant when it occurs as plagiarism on a required paper or assignment or as cheating on an examination, regardless of whether it is a take-home or in-class examination. The punishment for such offenses can involve expulsion from the program. There are many other ways in which a violation can occur.

Academic Dishonesty: Students are expected to maintain the highest ethical standards inside and outside the classroom. Cheating on exams and term papers (i.e. plagiarism and unauthorized collaboration) is obviously discouraged and will be treated appropriately. The usual penalty for violations is a failing grade for the particular assignment in question; however, in some instances, such actions may result in a failing grade for the course. All violations will be reported to the Associate Dean in accordance with Heinz College and University policies.

DEADLINES AND ACCOMODATIONS

All assignments are due by the dates shown in this syllabus unless modified in class by the instructor. If it is anticipated that an assignment may be turned in late due to an extenuating circumstance, such as illness, contact the instructor immediately. If special accomodations are required, please refer to the University's policy on accomodations and statement on student wellness and notifiy the instructor of any needs.