

MANAGEMENT CONSULTING 94808/94408

FALL 2024

Heinz College, Carnegie Mellon University
Tuesday, 6:30 – 9:20 PM EST, HBH 1005

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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, 2023.

Block, Peter. *Flawless Consulting*, www.flawlessconsulting.com, 2024.

Brussalis, Chris W. (Ed.). *Management Consulting Class Reading Material*. Pittsburgh: Carnegie Mellon University, 2024.

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% |

OUTLINE AND READINGS

| <u>Date</u> | <u>Topic and Assignments</u> |
|-------------|------------------------------|
|-------------|------------------------------|

Aug. 27 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
- History and development of the profession
- Service quality
- Introduce client projects

Flawless Consulting, Chapters 1-4.

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, March 28, 2018.

Washburn, Stewart A. Challenge and renewal: A historic view of the profession. *Journal of Management Consulting*, 9(2), November 1996, pp. 47-53.

Sep. 3 Industry

- View of management consulting world, synopsis of industry, types of firms
- Key industry challenges
- Key success factors
- Assign client projects
- Introduce *Research Review*
- Introduce *Client Proposal*

Guest: Thomas E. Rodenhauser, Managing Partner, Kennedy Intelligence

Govdysh, Alexander. IBISWorld Industry Report 54161: Management Consulting in the US. *IBISWorld*, August 2024

Killing strategy: The disruption of management consulting. *CBInsights*, 2020.

Nesi, Chris. Firms Weigh in on 2020's biggest lessons and takeaways. *Consulting*, January 2021.

Sandberg, Robert and Werr, Andreas. The three challenges of corporate consulting. *MIT-Sloan Management Review*, 44(3), Spring 2003, pp. 59-66.

Webb, Michael. The case to embrace AI, parts 1 to 3. *ALM Consulting Magazine*, May 2024.

Weiss, Alan. The unjust (consulting) universe. *Consulting to Management*, 16(4), December 2005, pp. 30-32.

Sep. 10 Consulting Process – Entry and Contracting

- Types of projects and project cycles
- First client meetings
- Proposal development
- Consulting contract
- Introduce *Bonner case*
- **Research Review Due by 6:30 PM** (submit via Canvas)

Flawless Consulting, Chapters 5-9.

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.

Sep. 17 Consulting Process – Discovery and Dialogue

- Diagnosis
- Data gathering techniques
- On-site interaction
- **Client Proposal Due by 6:30 PM** (submit via Canvas)

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

Flawless Consulting, Chapters 12-15.

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.

Sep. 24 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*

Flawless Consulting, Chapters 16-18.

Guest: Travis Deschamps, President & CEO, The Hill Group, Inc.

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.

Oct. 1 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 6:30 PM** (submit via Canvas)

Guest: Daniel Jimenez PhD, Senior Director, Health Sciences and Wellness, EY Parthenon

Flawless Consulting, Chapters 19-20.

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.

Oct. 8 Consulting Process – Extension, Recycle, or Termination

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

Flawless Consulting, Chapter 21.

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

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

Oct. 15 No Class – Fall Break

Oct. 22 Change Management and Resistance

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

Guest: Shahfar Shaari, Director of PPMO and Organizational Transformation, University of Pittsburgh

Flawless Consulting, Chapters 10-11.

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.

Oct. 29 Project Status

- Interim project presentations
- Introduce *Case Study 2*

Nov. 5 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 6:30 PM** (submit via Canvas)

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.

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

Nov. 12 Legal and Ethical Issues

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

Guest: Morgan Hanson, Shareholder/Attorney, Dentons 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.

Nov. 19 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 (Retired), Microbac Laboratories, Inc.
Kenneth A. Zalevsky, Chief Executive Officer, Vigilant Ops Cybersecurity

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.

Nov. 26 Final Consulting Project Presentations

- Final presentations on consulting projects
- **Submit presentations and reports by 6:30 PM** (via Canvas)

Guests: Clients

Dec. 3 Final Consulting Project Presentations – Last Day of Class

- Final presentations on consulting projects
- **Submit presentations and reports by 6:30 PM** (via Canvas)

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 ACCOMMODATIONS

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 accommodations are required, please refer to the University's policy on accommodations and statement on student wellness and notify the instructor of any needs.

ACCOMMODATIONS FOR STUDENTS WITH DISABILITIES:

If you have a disability and have an accommodations letter from the Disability Resources office, discuss your accommodations and needs with the instructor as early in the semester as possible. The instructor will work with you to ensure that accommodations are provided as appropriate. If you suspect that you may have a disability and would benefit from accommodations but are not yet registered with the Office of Disability Resources, you are encouraged to contact them at access@andrew.cmu.edu.

USE OF TECHNOLOGY

This semester involves regular use of technology during class – both for in-person and remote students. Research has shown that divided attention is detrimental to learning, so you are encouraged to close any windows not directly related to what we are doing while you are in class. Please turn off your phone notifications and limit other likely sources of technology disruption, so you can fully engage with the material, each other, and the instructor. This will create a better learning environment for everyone. Since the class sessions will be delivered synchronously in-person and remotely, a laptop will be required for our in-person classes to enable collaboration with classmates who are remote.