



# Rotman Commerce UNIVERSITY OF TORONTO

## Course Outline

### **RSM 495 H1F (L0101)**

Management Consulting

Fall 2023

Course Meets: Monday: 9am-11am, RT

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Instructor:	Prof. Jan Klakurka ( <i>Off Campus</i> )
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## Course Scope and Mission

This course examines the role of the management consultant and how the consulting industry serves to enhance the effectiveness of the organizations it serves. From an internal perspective, the course examines what it means to act as an external advisor, what skills are necessary to develop a successful consulting business model, and how to professionally engage clients to assist them in successfully reaching their goals through design/implementation of novel approaches for competitive advantage. These skills are not just learned through theory and texts, but using an experiential pedagogy uniquely developed and delivered by Professor Klakurka. The Real-Life Consulting Project<sup>®</sup> (RLCP<sup>®</sup>) is an opportunity to work with real executives in solving real business issues.

Emulating the skills necessary to be a successful consultant, this course will aid in development of problem-identification and solving abilities, communication and influencing skills, and introduce a project-based management mindset. These components lead to success in the consulting marketplace by balancing formal processes, methodologies, and models with the spontaneous creativity of a high-performance team, which manifest as true innovation for clients and firm alike.

By following the consulting lifecycle, course participants will learn the nuances of the consulting business from uncovering issues, to framing problems, analyzing issues, presenting recommendations, and planning for the ever-important "Phase 2". Students will see the industry from both perspectives, both as future consultants on a career-path to partner and as future industry managers maximizing use of external resources. The course's 50:50 mix of lecture and in-depth case analysis will put to practice traditional strategic, process, & functional analyses with taking on the role of innovative consultant.

This course covers the actions of the consultant, consulting competencies, profession of consulting, consulting careers, interactions with clients, and professional services firm

management. It is *NOT* a consulting survey course, nor a “field project”/“live case” course, but rather more analogous to the multi-course offerings of more traditional business disciplines “rolled-into-one”.

## Course Prerequisites

RSM392H Strategic Management (formerly MGT492H1)

## Course Exclusion

RSM416H Management Consulting

## Delivery Mode and Recommended Technology

For Fall 2023, my course will be delivered in person. Students should also expect that a significant majority portion of their Real-Life Consulting Project<sup>©</sup> will similarly be undertaken in person. In consultation with clients, teams will agree the nature of a mutually-agreeable model to execute their project. To participate fully and to complete the course successfully, you must ensure you have access to a computer with a working webcam, microphone and reliable access to an internet connection.

## Readings

**Required Texts for Book Review – Available Free from Archive.org (Wayback Machine: Free Registration is necessary for online book access) (Select ONE of five below)**

- **Book Review Option #1: The McKinsey Mind**  
[https://archive.org/details/mckinseymindunde00rasi\\_0](https://archive.org/details/mckinseymindunde00rasi_0)
- **Book Review Option #2: The McKinsey Way**  
<https://archive.org/details/mckinseywayusing0000rasi/page/n9/mode/2up>
- **Book Review Option #3: The McKinsey Engagement**  
<https://archive.org/details/mckinseyengageme00frig>
- **Book Review Option #4: The back of the napkin: Solving problems and selling ideas with pictures**  
[https://librarysearch.library.utoronto.ca/discovery/fulldisplay?docid=alma991105930347006196&context=L&vid=01UTORONTO\\_INST:UTORONTO&lang=en&search\\_scope=UTL\\_AND\\_CI&adaptor=Local%20Search%20Engine&tab=Everything&query=any.contains.back%20of%20the%20napkin&offset=0](https://librarysearch.library.utoronto.ca/discovery/fulldisplay?docid=alma991105930347006196&context=L&vid=01UTORONTO_INST:UTORONTO&lang=en&search_scope=UTL_AND_CI&adaptor=Local%20Search%20Engine&tab=Everything&query=any.contains.back%20of%20the%20napkin&offset=0) (inter-school transfer or amazon.ca)
- **Book Review Option #5: Becoming a Changemaker: An Actionable, Inclusive Guide to Leading Positive Change at Any Level, Alex Budak (2022), available from Weldon Library or uwo.ca libraries online**  
[https://ocul-uwo.primo.exlibrisgroup.com/discovery/fulldisplay?docid=alma991045370022505163&context=L&vid=01OCUL\\_UWO:UWO\\_DEFAULT&lang=en&search\\_scope=OCULDiscoveryNetwork&adaptor=Local%20Search%20Engine](https://ocul-uwo.primo.exlibrisgroup.com/discovery/fulldisplay?docid=alma991045370022505163&context=L&vid=01OCUL_UWO:UWO_DEFAULT&lang=en&search_scope=OCULDiscoveryNetwork&adaptor=Local%20Search%20Engine)

**Recommended Text:** Management Consulting: Delivering an Effective Project, 4/E, Louise Wickham & Jeremy Wilcock, Pearson Canada, 2012, ISBN: 9780273768746

**Supplementary Text 1:** Advice Business, The: Essential Tools and Models for Management Consulting, Prentice Hall, 2004, ISBN: 9780130303738

- Available as an e-book (.epub file) from UofT Libraries/Robarts

**Supplementary Text 2:** The Experiential Student Team Consulting Process: A Problem-Based Model for Consulting and Service-Learning, 3rd Edition, Wiley Canada, Dr. Ronald G. Cook | Paul Belliveau | Diane K. Campbell, ISBN-13: 9781285115429

## Case Package

An accompanying package of ten (10) cases is needed for the case analysis portion of the course and cases can be obtained on-line. There are additionally two (2) online simulations that we will work through. Cases and simulations must be ordered directly from the two primary suppliers of business cases, Ivey Business School and Harvard Business School, respectively. Ordering instructions for each institution are found in the appendix to this course outline. A separate course package of three cases will also include the optional cases for the group assignment should students not apply or be successful in attaining a spot on a Real-Life Consulting Project<sup>®</sup> (see below) client team. Make reference to the case list in the Weekly Schedule below to identify the publisher of individual cases. All cases should be order directly from Ivey to receive the best price. The two (2) simulations should be ordered through Harvard. Ordering instructions for both vendors are found in the appendix to this course outline.

## Other Materials

Each week, a PowerPoint presentation will be delivered to students covering material relevant to the theory and practice of consulting. The PPT decks will not simply repeat what is in recommended texts, but will be complementary. Case learning points will be summarized weekly, as key “take-aways” from the class discussion. Other materials the instructor wishes to hand-out will be distributed on an as-needed basis.

A variety of materials and sources of information are presented in this class, reflecting the reality of the practice of consulting.

## Evaluation and Grades

Grades are a measure of the performance of a student in individual courses. Each student shall be judged on the basis of how well they have command of the course materials.

<u>Work</u>		<u>Due Date</u>
Class Participation & Contribution	15%	Ongoing
Case Summaries & Simulation Reflection	15%	Any case or simulation of your choosing*
Required Reading Book Review	10%	October 16 <sup>th</sup> , 2023
Interview of a Consultant	10%	November 20 <sup>th</sup> , 2023
Real-Life Consulting Project <sup>®</sup> (RLCP <sup>®</sup> )	50%	December 7 <sup>th</sup> , 2023

### Additional RLCP<sup>®</sup> Hand-in Deadlines:

The team analysis and reflection, stemming from the in-class team-building exercise, is due October 2<sup>nd</sup>, 2023. A proposal and project work plan are due to the Professor, submitted to the

appropriate assignment on Quercus, by the Monday before Reading Week, November 1<sup>st</sup>, 2023. A status report example and deliverable template are similarly due November 27<sup>th</sup>, 2023. Each is worth 5% of the overall grade. The remaining 50% of the RLCP<sup>®</sup> grade is awarded based on the final client and professor deliverables described below and due at the end of term.

**Participation:** To maximize your participation grades – and overall learning – students should attend all classes to maximize opportunities to speak to their colleagues and concentrate on providing class comments which:

- Move the analysis along and/or take it to a “higher” level
- Provide insight that others may not have seen
- Are relevant to the class discussion
- Leverage prior learnings and other references, of your choice, in the context of the case
- Add clarity to course PowerPoint slides (required reading) in the context of the case
- Challenge colleagues in a professional and logical manner
- Drawn similarities to previous learnings
- Demonstrates their relation to the current case scenario being discussed

Missing class without a valid reason is worth zero participation for that day. Likewise, simply attending class and not speaking or engaging with the discussion is not worth any participation marks. The Professor will utilize various engagement techniques to give students the chance to participate, but this is only helpful when students have **read and analyzed cases and other materials thoroughly in advance of class**. Where students cannot participate due to bandwidth or time zone issues, these should be clearly communicated to the professor at the start of term. Alternative arrangements will then be arranged on an individual basis.

**Grade review:** The instructor does not discuss grades without a substantive reason. Substantive reasons include errors made during grading. If you would like a re-evaluation of your grade in any component of the course, you should follow the proscribed procedures as set out in the document [Student Guidelines for Requesting Grade Reviews](https://portal.rotmancommerce.utoronto.ca/myAccount/academics/information/Guidelines_for_Grade_Reviews.htm) available on the Rotman Commerce portal ([https://portal.rotmancommerce.utoronto.ca/myAccount/academics/information/Guidelines\\_for\\_Grade\\_Reviews.htm](https://portal.rotmancommerce.utoronto.ca/myAccount/academics/information/Guidelines_for_Grade_Reviews.htm))

The instructor is responsible for your grade in RSM495 but not responsible for any administrative decisions that may make use of your grade in RSM495. If you believe that your grade requires review, please follow the procedure above.

**Preparing a Business Case Study:** To prepare students for consulting careers and/or further graduate study in business (e.g. an MBA degree) and/or for the rigour of professional work in strategic consulting or related roles, business cases will be utilized each week to challenge students to link theory with practice. Students will be provided with two source guides (one PPT deck and one DOC file) describing approaches to prepare business cases. These course guides will be available on the course Quercus site prior to the start of classes. Students should refer to these guides prior to the start of term, as they get acquainted with case analysis, and revisit throughout term.

## Final Exam

There is no final exam in this course. The RLCP<sup>®</sup> is the major component of the evaluation and student’s final course grade.

## Requirements and Criteria

Performance in the course will be evaluated using a variety of methods that support the objectives identified above. Success in this course rests on your dedication to the RLCP<sup>®</sup>, your client, and learning the consulting process. This a unique opportunity crafted and delivered by Professor Klakurka. The RLCP<sup>®</sup> is not a field project where you find your own client and self-direct. Nor do I use outsourcers as providers of clients, such as is done with organizations such as Riipen. Neither of these experiences mirror true consulting work at large firms. The RLCP<sup>®</sup> is a true consulting engagement with all the rigour requiring your dedication throughout term. You will meet individuals that you aspire to work for, with, and emulate in your upcoming career. Many students have garnered consulting firm jobs post-graduation as a direct result my course. In addition to the RLCP<sup>®</sup>, a combination of individual participation, critical book review, group presentation(s), and case/simulation assignments will be used to evaluate participants on a number of different levels.

The criteria for success, in no particular order, are:

- Comprehension of the material
- Demonstration of an ability to think cross-functionally
- A willingness to participate for the benefit of oneself and fellow participants
- Strong work ethic to “pull your weight” in group assignments

These criteria will be applied to written and verbal work throughout the term.

Participants will be evaluated on the following activities, as listed in the table below:

<i>Activity</i>	<i>% of Grade</i>	<i>Description</i>
<b>Participation</b>	15%	Preparation for class case discussion, as demonstrated by; <ul style="list-style-type: none"> <li>• willingness to lead and actively participate class discussions in a professional manner</li> <li>• providing valuable insights and analysis</li> <li>• responding to “cold-calls”</li> <li>• Using the blackboard / PowerPoint / Excel spreadsheets to present analyses and findings</li> </ul>
<b>Case Summaries (x2; 2.5% each) and Simulation Analysis &amp; Reflection (x1; 10% each)</b>	15%	Prepare summaries of your analyses and recommendations for two case of your choice, from the class schedule below, discussed during term. Summaries should not be focus on case facts, but rather recommendations for the case proponent and reflections for the RLCP <sup>®</sup> . Students should also prepare a reflection report for one of the two simulations (e-cases) that will be done during the term. Students may select any of the cases on the schedule and either of the two simulations on the schedule. Your assignment is simple: Prepare the Case before class and summaries it for the CXO/partner-level reader. Further, play the simulation (game), view/analyze your person and class results, then reflect on what it means for your RLCP <sup>®</sup> and your future in consulting. Use whatever tools and methodologies you deem appropriate. Hand the case summary in on the

day we do it in class, by end-of-day, so incorporating what you heard during our class session is ok. You may choose to do additional research on the company(ies) in the case, at your discretion, but this is not necessary. Questions to help guide your case analysis will be provided by the professor before each class. These are not a composite set of questions, but rather to assist in framing your analyses.

**Required Reading Book Review Report**

10%

A book review report of 5 pages maximum that discuss the key features of any of the required book readings. These should not be simply summaries, but critical and reflective reviews. For older books, students should consider what would be different in an “updated 2023 edition”. Reflections on how the material is and will be applied the RLCP<sup>®</sup> should be included. Students may provide a 5 minute overview of the report in class in PPT format to enhance their grade. Additional details will be presented on Quercus. Due Date: October 16<sup>th</sup>, 2023.

**Interview of a Consultant**

10%

Students should conduct an interview of no more than one hour with a consultant from practice and reflect on what this means for their own career, what it means for client service, how the information could be used for the RLCP<sup>®</sup>, lessons and tips for future practice and success, nuances for competitive positioning of firms, nature of competencies required, etc. Your instructor will provide contacts from SBR Optimus, a local Ontario consultancy, to interview in one-on-one and focus group format. A sign-up form will be available on Quercus later in term, however interviewees can come from sources of your choice, such as firms, UTCA, RCCA, your RLCP<sup>®</sup> client, etc. A report of 6-7 pages should be handed-in on Quercus, with Interview questions/guide included as an appendix. This assignment is individual, but the data gathering (interview) can be conducted in a group of max. 5 students, in focus group format. Due Date: November 20<sup>th</sup>, 2023.

**Real-Life Consulting Project<sup>®</sup>**

50%

Taking on the role of external consultants, a limited number of groups of ~2 to 4 students (or as determined by the professor in conjunction with the client requirements) will propose (estimated to be 9-10 real-life projects available), project manage, and execute a “real-life”, pro-bono (non-paid) consulting project with a *company of their choosing or who has expressed interest in utilizing the skills of students as a client of a RLCP<sup>®</sup> team*. Students will be responsible for understanding the need, engaging the client representative, scoping the requirements, conducting analyses, providing client status updates, preparing their recommendations and developing an implementation plan.

The final student output (deliverable) for the RLCP<sup>®</sup> is the client report. This will include both detailed written report and presentation to client senior management. A summary presentation is also to be made in class on the last day.

As **the client does not mark the student**, students must provide their working papers at the conclusion of the project. Working papers should be securely held in an applicable cloud service (e.g. Asana, Dropbox) and the Professor should be provided access. No Facebook sharing of document is allowed, although students may use it for planning meetings.

**There are two (2) types of deliverables in the RLCP<sup>®</sup>; (1) the Final Report and Presentation to the Client, called “Client Deliverables”, and; (2) the other materials that are required to be submitted to your Professor, listed below under the section “Components of Assignment”, and referred to a “Professor Deliverables”.**

To simulate a real consulting engagement, students must provide several other hand-ins, some signed by the client sponsor, as identified below;

- (1) A Client Proposal, including scope and approach (signed-back by client at project kick-off)
- (2) A Project Work Plan
- (3) A Data Gathering Approach, including Research Plan, and/or Interviewee Listing, Approach & Interview Guide, and/or Template samples, and/or focus group approach
- (4) A Weekly Status Report
- (5) A Deliverable Listing (signed-back by client at project completion)
- (6) A complete Client Deliverable in hard-copy format, complemented with a ten (10) minute group presentation of key findings.

Groups will be selected by the Professor. Students will be encouraged to provide resume & cover letter, plus other relevant materials, in mid-December before the course starts to showcase their skills. Teams will work together on their own time, allocating the work effort evenly to each of the team members. The time commitment for the RLCP<sup>®</sup> is approximately 7-8 (min.) hours/week per student.

***By taking on this Real-Life Consulting Project<sup>®</sup> Assignment, all team members are giving their express implicit agreement to contribute effectively and evenly in the best interest of the client, and to respect each other, the client, and the reputation of the University of Toronto, Rotman, your Instructor, and the broader consulting profession.***

**N.B. The Real-Life Consulting Project<sup>®</sup> (RLCP<sup>®</sup>) is the core of the course. It is not a field project where the scope is purely self-defined by students. Some project scopes will be well-defined by the client, while others will require more validation shortly after the project begins.**

The assignment details are as follows:

*Objective:* To provide the client organization with the most beneficial analyses, recommendations and modes of operationalization, based on the agreed client-organization requirements (could be strategy, operations, IT, etc.)

*Tools:* Groups should utilize learnings from the text, related PowerPoint slides, and any additional books on consulting, project management and/or strategy to structure the written assignment parts and presentation. Students should be prepared to apply a variety of models learned both in this and other classes.

*Components of Assignment:* Each group will be responsible for submitting several components of the overall assignment as follows:

- Proposal (guideline: 5-6 pages), worth 5%
- Project Plan, worth 5%
- Team-building Exercise Participation & Summary Activity Report 5% (week 3 class-based exercise with your new RLCP<sup>®</sup> teammates)
- Weekly Status Report example, worth 2.5%
- Deliverable Listing, worth 2.5%
- Data Gathering Approach/Results, worth 5%
- Project Deliverable Report (guideline: 25 pages), worth 20%
- Presentation (guideline: 10 slides, 10 minutes), worth 5% (at client site and/or in-class – may be duplicated for client staff and class)
- Non-Disclosure Agreement (professor, students, and client sign) should be an appendix to the Proposal
- Working papers (various models, spreadsheets, analyses, research results, transcripts of interviews/meetings, etc. given to client; should be an appendix to Deliverable Write-Up)

## Course Format and Expectations

### Diversity, Inclusion and Equity

The University of Toronto is committed to equity, human rights and respect for diversity. All members of the learning environment in this course should strive to create an atmosphere of mutual respect where all members of our community can express themselves, engage with each other, and respect one another's differences. U of T does not condone discrimination or harassment against any persons or communities.

### Missed Assignments

Students who miss a test or assignment for reasons entirely beyond their control (e.g. illness) may request special consideration **within 2 business days** of the missed midterm/test/assignment due date.

In such cases, students must:

1. Complete the Request for Special Consideration form: <https://uoft.me/RSMConsideration>
2. Provide documentation to support the request, eg. Absence Declaration from [ACORN](#), medical note etc.

**Please note:** As of September 2023, students may use the Absence Declaration on ACORN **\*one time per term\*** to report an absence and request consideration. **Any subsequent absence will require a [Verification of Illness form](#) or other similar relevant documentation.**

Students who do not submit their requests and documentation within 2 days may receive a grade of 0 (zero) on the missed course deliverable.



## Course Objectives

This is a 50:50, lecture:case-based course that will draw upon real-world applied learnings highlighted in the text and PowerPoint slides each week, shared insights from students, instructor-led facilitation, and active individual/group participation (from both in-person and synchronous online students) each week to achieve the following measurable learning objectives:

1. Demonstrate understanding of management consulting concepts, as articulated in the weekly slides, text, through a final exam, two quizzes, and group & individual assignments that mimic those activities performed daily by real-world professionals
2. Provide valuable insights to business case discussions in class, on a regular basis, through active class participation and attendance at each class session
3. Exhibit an ability to plan and execute a long-term, group assignment, including development of a proposal, analyses, spreadsheet modeling, report, and group presentation
4. Highlight personal analytical, deduction, presentation and writing skills through a single, individual case interview guide assignment selected by the student from among those in the course timetable below

Grades will be a function of student's success on the activities noted above (and described below in more detail) to ensure a fair and objective assessment of performance.

It is expected that successful participants will have also achieved the following learning milestones by completion of this course:

- Applied cross-functional skills to make real-world-type decisions as they set and plan for the execution of engagements for several well-known organizations highlighted in cases
- Learned a number of new analytical techniques utilized by professionals in the practice of strategy consulting and business advisory services
- Analyzed and evaluated various aspects of several case organizations, their competition, their business issues, their context, and related tactical options
- Developed client issue responses, decide among alternatives, and created implementation plans to ensure project success, client satisfaction, and firm profitability
- Created innovative "visions for the future" of each industry space in which case organizations play, including how the marketplace might evolve, what products/services will be like, what the consultant can do to assist to prepare for that future, and what can they do to "shape their destiny", drive thoughtware development, and gain market eminence
- Presented the results of their analyses and decision-making to their peers in a executive-style client summary
- Understand the use of these techniques in real-life settings, as demonstrated by consulting guest speaker(s)
- Enhanced communication skills by clearly and concisely sharing of complex information with their peers

Achieving the additional learning milestones will be evaluated as part of the participation grade and the overall quality of case analyses and recommendations made during class cases, quizzes, final exam, and the assignments.

## For Written Assignments:

Please note that spelling and grammar will be considered in the evaluation of all assignments. That is, you may lose points for spelling mistakes and grammatical errors. Students who require additional support and/or tutoring with respect to their writing skills are encouraged to visit the Academic Success Centre ([www.asc.utoronto.ca](http://www.asc.utoronto.ca)) or one of the College Writing Centres ([www.writing.utoronto.ca/writing-centres](http://www.writing.utoronto.ca/writing-centres)). These centres are teaching facilities – not editing services, where trained staff can assist students in developing their academic writing skills. There is no charge for the instruction and support.

### **Use of AI**

Any use of AI must be properly referenced. Students may use artificial intelligence tools, including generative AI, in this course as learning aids or to help produce assignments. However, students are ultimately accountable for the work they submit. Assignments may not be written by AI and detection software will be used. Students must submit, as an appendix with their assignments, any content produced by an artificial intelligence tool, and the prompt used to generate the content. Any content produced by an artificial intelligence tool must be cited appropriately. Many organizations that publish standard citation formats are now providing information on citing generative AI (e.g., MLA: <https://style.mla.org/citing-generative-ai/>). Students may choose to use generative artificial intelligence tools as they work through the assignments in this course; this use must be documented in an appendix for each assignment. The documentation should include what tool(s) were used, how they were used, and how the results from the AI were incorporated into the submitted work. Students must maintain documentation of all versions of their assignments in chronological order and all research materials, to be provided to the instructor upon request.

### **For Group Work:**

Working as a team is challenging; this is true both in the real world and in your academic classes. However, learning to work together in teams is a crucial transferrable skill you will use not only in your coursework, but also in your future careers. Support is available if you encounter common teamwork challenges such as:

- Team members feeling left out of the team.
- Team members not responding in a timely manner to communication.
- Division or quality of work among team members being unequal or unfair.

Consult the [Centre for Professional Skills Teamwork Resources page](#) for tips, strategies, and best practices. You can also [book an appointment with a teamwork mentor](#) through the RC Centre for Professional Skills Writing Centre. Teamwork mentors can help you resolve or mitigate conflict, strategize on planning, or improve team communication.

If you are a student registered with Accessibility Services, and extensions are one of your academic accommodations, consult with your Accessibility Advisor about the teamwork in this course.

**Active Group Involvement:** For the RLCP<sup>®</sup>, groups should allocate the work evenly among each team member. About 7-8 hours/week is expected for each team member to devote to the RLCP<sup>®</sup>. All team members should be familiar with all aspects of the materials developed and presented. A single mark will be awarded to each team. Groups should meet after hours to complete their group assignment, discuss findings, determine applicable textbook and resource guide approaches to use, analyze results, develop the written report and appendices, and rehearse their final group presentation. Groups can determine if each member will speak during the final presentation or if a single spokesperson will present or some derivation thereof. As per Rotman Commerce's new guidelines, students may not mark one another. In this regard, any and all team member issues should be addressed as discovered. Speak with your team

members about performance expectations early. If these cannot be quickly resolved intra-team, escalate the team issue to Professor Klakurka and/or the TA. Up to Twenty percent (20%) of your group project mark (equivalent to 11% of overall mark) may be based on “non-team behavior” identified and *interpreted* by the Instructor. Peer review surveys are no longer allowed by the programme, but information can be submitted directly in e-mail/verbal format when free rider problems/other group dynamic issues exist. So, work well together and actively contribute as these clients are Professor Klakurka’s contacts, given freely for your education purposes. Please treat them, their representatives, and your RLCP® obligations with the upmost respect.

### **Project Management Tools:**

It is recommended that students utilize an online, free project management tool such as Asana.com to manage their projects. Those who are familiar with MS Project can use that tool as well. Alternatively, the Professor will provide many templates on Quercus as “starter materials” for students to consider utilizing to manage / execute their projects. That said, every project is unique and RLCP teams should tailor their project tools and methods to the particular engagement they are undertaking.

## **Policy and Procedure**

### **Course Work & Academic Honesty**

**Attendance in Class** – Physical presence in class and active engagement in daily discussions is expected of all students. Material presented in class may be testable as part of the evaluations noted above.

Each class will follow a three-part agenda focused on increasing understanding of course material, applying course material and analytical tools to the case, and summarizing our key lessons learned, in a list, for later use (on exams, assignments, etc.). The three areas will be addressed according to the following timeline:

- Topical Discussion on the PowerPoint slides (required readings), led by Professor with class participation
- 5 minute break and time to write on-going formal feedback about the class
- Commence Case Discussion & Summary Learning Point List Creation
- Class Ends and Office Hours Commence for 1 hour

A variety of techniques will be used to encourage participation, including “cold-calls”, assigning specific sections of the case analyses at the start of class, and “numbering-off” of all participants to request answers.

**NOTE:** The consistency of your participation comments, knowledge of the previously-delivered material, and quiz/assignment results will be addressed holistically. Students should prepare all weekly cases and assignments individually to maximize their learning and demonstrate the required level of understanding of the material.

Students and lecturer at the end of the class will list summary learning points. These points will be important study notes for future

Respect for fellow students is expected and mandatory (see Standard of Conduct section below) and required to encourage participation by all. Respect will further ensure that all relevant case concepts are raised, therefore increasing the depth of the analysis and discussion. Respect encompasses the following concepts:

- Attend all classes and arrive on time

- Allow and encourage others to participate
- Refrain from “cat-calls” or derogatory comments – if students disagree with an analysis or comment, it is fully expected that counter arguments will be presented in a clear, concise, and professional manner
- Coming to class prepared, including having read the case in detail and having prepared any relevant analysis yourself

Feedback to Instructor: Please send any written or oral feedback to the instructor whenever you feel it is necessary. After session #2, I will ask for your written feedback (just use a blank piece of paper) on any issues you have or things you want to see addressed in the class. This feedback should be confidential, so there is no need to provide your name unless you feel you would like to do so. This type of feedback will then be welcomed at any point during the term. The feedback will be addressed and used to improve the course and your learning experience.

**Submission of Assignments** - Late submissions of any assignment may be considered; however, a resolution may be determined at the instructor’s discretion and may include an academic penalty.

### **Standard of Conduct in this Course**

Since this course is part of a degree designed to give you a broad understanding of the world of business, we aim to run the course in a way which will be consistent with the world of business - where many of you will spend your working lives. We strive to provide accurate information, quality materials and good service, consistent with our obligations to maintain the high academic standards of the Rotman School of Management.

In return we expect that you will conduct yourself in a way that prepares you for the world of work.

- 1 We start on time, so please do not arrive late and disrupt others.
- 2 Leaving class early is also disruptive to your colleagues and will not be permitted unless you have made prior arrangements with the instructor.
- 3 Turn off your cell phone, pager, and watch alarm.
- 4 Keep up to date. Make sure that you know the class schedule. Check on the course web page for updates and posted materials.
- 5 During the class, respect the learning opportunities of others. Don’t distract others by chatting to your neighbour. Our expectation is that you will not only contribute in class to your own learning, but also to that of others.

## **Commitment to Accessibility**

The University is committed to inclusivity and accessibility, and strives to provide support for, and facilitate the accommodation of, individuals with disabilities so that all may share the same level of access to opportunities and activities offered at the University.

If you require accommodations for a temporary or ongoing disability or health concern, or have any accessibility concerns about the course, the classroom or course materials, please [email Accessibility Services](#) or visit the [Accessibility Services website](#) for more information as soon as possible. Obtaining your accommodation letter may take up to several weeks, so get in touch with them as soon as possible. If you have general questions or concerns about the accessibility of this course, you are encouraged to reach out to your instructor, course coordinator, or Accessibility Services.

## Academic Integrity

Academic Integrity is a fundamental value essential to the pursuit of learning and scholarships at the University of Toronto. Participating honestly, respectfully, responsibly, and fairly in this academic community ensures that the UofT degree that you earn will continue to be valued and respected as a true signifier of a student's individual work and academic achievement. As a result, the University treats cases of academic misconduct very seriously.

*The University of Toronto's Code of Behaviour on Academic Matters*

<http://www.governingcouncil.utoronto.ca/policies/behaveac.htm> outlines the behaviours that constitute academic misconduct, the process for addressing academic offences, and the penalties that may be imposed. You are expected to be familiar with the contents of this document. Potential offences include, but are not limited to:

In papers and assignments:

- Using someone else's ideas or words without appropriate acknowledgement.
- Submitting your own work in more than one course without the permission of the instructor.
- Making up sources or facts.
- Obtaining or providing unauthorized assistance on any assignment (this includes collaborating with others on assignments that are supposed to be completed individually).

On test and exams:

- Using or possessing any unauthorized aid, including a cell phone.
- Looking at someone else's answers
- Misrepresenting your identity.
- Submitting an altered test for re-grading.

Misrepresentation:

- Falsifying institutional documents or grades.
- Falsifying or altering any documentation required by the University, including (but not limited to), medical notes.

All suspected cases of academic dishonesty will be investigated by the following procedures outlined in the *Code of Behaviour on Academic Matters*. If you have any question about what is or not is permitted in the course, please do not hesitate to contact the course instructor. If you have any questions about appropriate research and citation methods, you are expected to seek out additional information from the instructor or other UofT resources such as College Writing Centres or the Academic Success Centre.

### **To Use Ouriginal.com:**

Normally, students will be required to submit their course essays to the University's plagiarism detection tool for a review of textual similarity and detection of possible plagiarism. In doing so, students will allow their essays to be included as source documents in the tool's reference database, where they will be used solely for the purpose of detecting plagiarism. The terms that apply to the University's use of this tool are described on the [University's Plagiarism Detection Tool FAQ](#) page from Centre for Teaching Support & Innovation.

### **Electronic Course Materials**

This course will be using the following electronic course materials:

See Ivey & Harvard ordering instructions in appendices to this course outline (below).

These materials will cost approximately \$65. The use of these materials complies with all University of Toronto policies which govern fees for course materials.

## Email

At times, the course instructor may decide to communicate important course information by email. As such, all UofT students are required to have a valid UTmail+ email address. You are responsible for ensuring that your UTmail+ email address is set up AND properly entered on the ROSI system. For more information please visit <http://help.ic.utoronto.ca/category/3/utmail.html>

Forwarding your utoronto.ca email to a Hotmail, Gmail, Yahoo or other type of email account is not advisable. In some cases, messages from utoronto.ca addresses sent to Hotmail, Gmail or Yahoo accounts are filtered as junk mail, which means that important messages from your course instructor may end up in your spam or junk mail folder.

## Quercus and the Course Page

The online course page for this course is accessed through Quercus. To access the course page, go to the UofT Portal login at <https://q.utoronto.ca/> and log in using your UTORid and password. Once you have logged in, look for the My Courses module where you'll find the link to all your course websites. If you don't see the course listed here but you are properly registered for the course in ROSI, wait 48 hours. If the course does not appear, go to the Information Commons Help Desk in Robarts Library, 1st floor, for help, or explore the Portal Information and Help at [www.portalinfo.utoronto.ca/students](http://www.portalinfo.utoronto.ca/students) and review the Frequently Asked Questions.

## RSM495H1S (L0101) Course Schedule and Related Items

**(Note: Additional required and/or supplementary readings may be assigned weekly on Quercus to be prepared before class for in-class discussion)**

**POWERPOINT PRESENTATIONS ARE PROVIDED AS A COMPLEMENT TO CASES & CONSULTING PROJECT ACTIVITIES. THEY UTILIZE THE PROFESSOR'S EXPERIENCE, LEVERAGE HIS OWN DELIVERABLE MATERIALS, AND GO "BEYOND" THE RECOMMENDED TEXTS.**

**During Tutorials (TBA), consulting project deliverables and past student presentations will be presented in confidential / "sanitized" form. These materials may not be posted on Quercus however for confidentiality purposes.**

## Weekly Schedule

Session	Date	Topic	Case / Simulation
1	Sep 11, 2023	<ul style="list-style-type: none"> <li>• The Consulting Perspective &amp; Process</li> </ul>	<p><b>Reading:</b> Consulting at the Cusp, Clayton Christensen, HBS, Available on Quercus and from Robarts</p> <p><b>Case:</b> Infosys Consulting 2011-2023 – The Evolution Continues, (SM358), Stanford GSB, Authors: Burgelman &amp; Joshi, 2023</p>
2	Sep 18, 2023	<ul style="list-style-type: none"> <li>• Proposal Development</li> <li>• Pitching &amp; Orals Presentations</li> </ul>	<p><b>Reading:</b> How to Lead Consultants to Exceed Expectations, (9B10TE07), Ivey, Authors: Gordon Perchthold, Jenny Sutton, 2010</p> <p><b>Case:</b> <u>IBM's Knowledge Management Proposal for the Ontario Ministry of Education</u>, (9B05E007), Ivey, Author: Ken Mark, 2004</p>
3	Sep 25, 2023	<ul style="list-style-type: none"> <li>• `Diagnostics &amp; Problem Solving in the Client Context</li> <li>• Conceptual Models</li> <li>• Team Building Exercise with RLCP<sup>®</sup> Team</li> <li>• Simulations Overview</li> </ul>	<p><b>Case:</b> <u>McKinsey and LUNAR: Acquiring a Design Firm</u>, Insead, Authors: Anne-Marie Carrick et al, 2018 (IN1510)</p>
4	Oct 2, 2023	<ul style="list-style-type: none"> <li>• Engagement Management &amp; Status Reporting</li> <li>• Simulation Discussion &amp; Results</li> <li>• <b>RLCP<sup>®</sup> Team Analysis &amp; Reflection Due</b></li> </ul>	<p><b>Simulation:</b> <u>Project Management: Scope, Resources, Schedule V2</u>, (K4700-HTM-ENG), HBS, Author: Robert D. Austin, 2013</p>
	Oct 9, 2023	<ul style="list-style-type: none"> <li>• <b>THANKSGIVING DAY</b></li> </ul>	<b>NO CLASSES</b>
5	Oct 16, 2023	<ul style="list-style-type: none"> <li>• Logical Structuring: The Minto Method</li> <li>• Consulting in a Multi-Stakeholder Environment</li> <li>• <b>Book Summary Assignment Due</b></li> </ul>	<p><b>Case:</b> <u>Bon Star Hotel</u>, (9B09M072), Ivey, Author: Jim Kayalar</p>
6	Oct 23, 2023	<ul style="list-style-type: none"> <li>• Drawing Insights from Data</li> </ul>	<p><b>Reading:</b> What Professional Service Firms Must Do to Thrive, Ashish Nanda and Das Narayandas, HBA, 2021, Available on Quercus and from Robarts</p> <p><b>Case:</b> <u>Deloitte Recommends Client Selection to Regency Bank</u>, (9B11E005), Ivey, Author: Begen et al, 2011</p> <ul style="list-style-type: none"> <li>• Spreadsheet will be provided by Professor on Quercus.</li> </ul>
7	Oct 30, 2023	<ul style="list-style-type: none"> <li>• Executing the Project</li> <li>• People and the Leverage Model</li> <li>• <b>RLCP<sup>®</sup> Proposal and Work Plan Due</b></li> </ul>	<p><b>Case:</b> <u>Deloitte's Pixel (A): Consulting with Open Talent</u>, (420003), HBS, Authors: Tushman, Winsor, Herman, 2020</p>
	Nov 6, 2023	<ul style="list-style-type: none"> <li>• <b>FALL READING WEEK</b></li> </ul>	<b>NO CLASSES</b>

8	Nov 13, 2023	<ul style="list-style-type: none"> <li>• Communications: Firm, Team, &amp; Client</li> <li>• Change Leadership</li> </ul>	<b>Simulation: Change Management Simulation: Power and Influence V2</b> (4345-HTM-ENG), HBS, Authors: William Q. Judge, Linda A. Hill, 2013)
9	Nov 20, 2023	<ul style="list-style-type: none"> <li>• Navigating the Client</li> <li>• Dealing with Uncomfortable Situations</li> <li>• <b>Interview a Consultant Reflection Due</b></li> </ul>	<b>Case: Sherif Mityas at A.T. Kearney (A), (B), (C), &amp; (D)</b> , (9-904-031/035/037/074-PDF-ENG), HBS, Authors: Ashish Nanda & Kelley Morrell, 2004 NB: Professor will hand-out Parts B-D in class
10	Nov 27, 2023	<ul style="list-style-type: none"> <li>• Guest Speaker: Andrew Matheou, MD, BMO Capital Mkts and former Deloitte strategy consultant</li> <li>• Project Performance Management</li> <li>• Meeting Firm, Personal &amp; Client Objectives</li> <li>• <b>RLCP<sup>®</sup> Status Report &amp; Deliverable Template Due</b></li> </ul>	<b>Case: Miles Everson at PricewaterhouseCoopers</b> , (410062), HBS, Authors: Robert G. Eccles, David Lane, 2010
11	Dec 4, 2023	<ul style="list-style-type: none"> <li>• Learning and Knowledge Management</li> <li>• Thoughtware &amp; Innovation</li> <li>• Internal Consulting</li> </ul>	<b>Case: A.T. Kearney, Inc.: The Push to Become a Management Consulting Titan</b> , (8B20M180), Ivey, Author: Christopher Williams et al, 2020
12	Dec 7, 2023 (Make-Up)	<ul style="list-style-type: none"> <li>• <b>Final Group RLCP<sup>®</sup> Project Report (at least draft) Due</b></li> <li>• Values and culture in consulting</li> </ul>	Consulting Project: Final Presentations <b>Case: Centric Consulting Cleveland: Staying True to Core Values</b> , (9B18C033), Ivey, Authors: Gullett et al, 2018

Please note the last day to cancel this course without penalty is November 6, 2023.

## Recording Lectures

Lectures and course materials prepared by the instructor are considered by the University to be an instructor's intellectual property covered by the Canadian Copyright Act. An audio file of the simultaneous in-person and synchronous Zoom session may be provided after class for students to review upon request. Students wishing to record a specific lecture(s) or other course material in any other manner are required to ask the instructor's explicit permission, and may not do so unless permission is granted (note: students who have been previously granted permission to record lectures as an accommodation for a disability are, of course, excepted). This includes tape recording, filming, photographing PowerPoint slides, Quercus materials, etc.

If permission is granted by the instructor (or via Accessibility Services), it is intended for the individual student's own study purposes and does not include permission to "publish" them in anyway. It is absolutely forbidden for a student to publish an instructor's notes to a website or sell them in any other form without formal permission.

## FIPPA Language

### Option 1: Notice of audio recording and sharing (Download and re-use prohibited)

This course, including your participation, will be recorded on audio and will be available to students in the course for viewing listening and after each session.

Course audios and materials belong to your instructor, the University, and/or other sources depending on the specific facts of each situation, and are protected by copyright. Do not download, copy, or share any course or student materials or videos without the explicit permission of the instructor.



For questions about recording and use of videos in which you appear please contact your instructor.

## Your Lecturer

**Prof. Jan Klakurka** is a tenured Associate Professor and past Chair (2014-2021) of the Management and Organizational Studies Department at Huron University College, Western University and long-standing Instructor within the strategy department at the Rotman School of Management, University of Toronto. Jan is a graduate of University of Toronto (B.Comm), the Richard Ivey School of Business (MBA), and Director's College, McMaster University. Jan's professional background spans nineteen years in industry and professional services, and twelve more in full-time academia, while he continues to consult to this day. Prior to the Academy, Jan was Director, Corporate Planning & Business Development, leading and delivering strategy for a mid-tier firm. He has led finance as corporate controller and streamlined operations as Director, Process Improvement, advised C-suite leaders a senior strategy consulting manager, and worked in Canadian treasury operations. With experience across multiple industries, Jan has served organizations across private and public sectors and now teaches senior year courses in strategy, international business, advanced taxation, among others. Jan's research is directed toward the intersection of strategic planning, lucid foresight and governance, with recent keynotes covering consulting academics and conference presentations in global management. As such, Jan is a designated (APF) member of the Association of Professional Futurists.

Jan has taught *Strategic Management* at University of Toronto since 2005 (UTM: 2005-2009, Rotman: 2012-2023), Huron (2014-2023), and Laurier (2013-2015). Jan's other core teaching courses are *International Strategy* (formerly *International Business*) (2012-2021, including MBA in 2014) and *Management Consulting* at Rotman School of Management (2011-2023) where he introduced his proprietary Real-Life Consulting Project<sup>®</sup> that has now delivered over 135 actual consulting projects for RC students with billion-dollar companies, SME's, charities, and even Monitor Deloitte. He also regularly teaches *Introduction to Management* at Rotman Commerce each summer (2011-2019). In 2014, he designed, developed and began teaching a Summer Abroad (SA) course for Rotman/UofT at Masaryk University In Brno, Czech Republic called *Strategy in the European Context* that is going into its seventh year (2014-2019, returning 2024). At Huron @ Western, Jan has introduced *Organizational Governance* (2017-2020, 2023-23) with a Real-Life Board Audit (of not-for-profit Boards in SW Ontario) and *Strategic Foresight & Furturing* (2018-2020, 2023-23), Canada's only undergraduate course in future studies. Jan also teaches in Degroote Business School's Executive Education programs in foresight and systems thinking. He has also taught the general management Ivey LEADER (Leading Education in Emerging Regions) program in Dnepropetrovsk, Ukraine and Minsk, Belarus, has spoken on strategic foresight at University of Toronto, leadership, consulting, and finance at Brock University and the Ivey Business School, taught on the topic of wines at the Independent Wine Education Guild, and has developed and delivered training programs to Deloitte Consulting staff on a range of topics.

Jan has recently published in leading journal, *Foresight*, on scenarios for the future of the academy and has conducted a peer-review for a UNESCO chair in anticipatory systems. This past spring, Jan was a successful co-applicant, along with researchers from six different major universities, for an interdisciplinary Social Sciences and Humanities Research Council (SSHRC) grant in the amount of \$500,000 to investigate post-covid lessons and recovery. In 2021, Jan co-authored a chapter called Values-infused Foresight for Governance: A Practical Guide for Director's in the book *Leadership for the Future*. Together with two distinguished colleagues, he hosted the FutureProof conference (2020), is presenting at the International Leadership Association conference (2023, 2021) and was a planning committee member for the upcoming APF global conference to be hosted in Toronto. He presented at academic conferences

globally, most recently at the European Academy of Management (2020 and 2021), British Academy of Management (2021), Institute of Competitiveness (Spring 2020), Scenario 2018 held at Warwick University (2018) on the future of the academy and at Constructing Social Futures hosted by the University of Turku's (Finland) Institute for Future Studies (2019) on leadership values as they inform foresight tendency and strategy. Jan is one of three co-developers for Huron's highly successful new interdisciplinary major in Governance, Leadership & Ethics (GLE).

A graduate of UTM's Commerce program, Jan went on to complete several designations – CPA, CA, C.Dir., APF and CMC, the latter where he was Gold Medalist for the Canadian Association of Management Consultants (2003). His favourite business book is still Competing for the Future, by Hamel and Prahalad, and he enjoys skiing, golf, scuba-diving, white-water kayaking, and strategic investments. His greatest project is having fun with his two daughters who are seventeen and fifteen years-old. In 2006, he was awarded the AIWS designation, joining a worldwide professional group that have completed the Diploma in Wines & Spirits (Dipl.WSET) from the Wine & Spirit Education Trust based in London (U.K.) and is currently on the long road in pursuit of the Master of Wine designation. In 2014, Jan received his Chartered Director's designation offered by the Director's College, Degroote School of Business, McMaster University. Jan served as Board member and CFO of Corporations for Community Connections, a private foundation of Siemens from 2014-2023.

**APPENDIX A: Instructions for Accessing Course Material for Management Consulting  
(RSM495H1F ALL SECTIONS Fall 2023)**



Ivey  
Publishing

Richard Ivey School of Business  
The University of Western Ontario

**RSM 495 – Management Consulting  
How to Order Cases  
Instructor: Jan Klakurka**

1. Please go to the Ivey Publishing website located at:  
<http://www.iveycases.com>
2. Click on “Register”, and choose the “Student User” role. Complete the registration. (Please be sure to remember your username and password.)
3. Click on this link or copy into your browser:  
<https://www.iveypublishing.ca/s/ivey-coursepack/a1R5c0000FvWcdEAF>
4. Select “Digital Download” – then click on Add to Cart.
5. Go to “My Cart” (located at the top of the page), and click “Checkout”.
6. Enter course information and verify your contact information.
7. Enter your credit card information and then click “submit order”
8. Once you have completed your order, go to “My Orders” to download a copy of the case.
9. You will receive an order confirmation and receipt by email immediately after placing your order.

**IMPORTANT - Please Note the Following:**

**To open your cases you will need to enter (within the PDF document)  
the username and password you created upon registering.**

**Access to your case files will expire 30 days from date of purchase.**

**CASE FILES ARE NOT TO BE TRANSMITTED OR REPRODUCED WITHOUT PERMISSION**

If you have any questions or problems, please email [cases@ivey.uwo.ca](mailto:cases@ivey.uwo.ca)  
or telephone 1-800-649-6355 during our regular office hours Monday to Friday  
8am to 4pm EST.

## **Purchasing Simulations through Harvard Business Online for RSM 495 Management Consulting, Instructor, Jan Klakurka.**

Please purchase HBS cases by clicking on: <https://hbsp.harvard.edu/import/1078931>

If you have any technical difficulties please contact HBS directly at: 1-800-810-8858 or [techhelp@hbsp.harvard.edu](mailto:techhelp@hbsp.harvard.edu)

This is copyrighted material. Do not distribute or post. Please keep in mind we are giving you an academic rate for these cases.

### Other Useful Links

- [Become a volunteer note taker](#)
- [Accessibility Services Note Taking Support](#)
- [Credit / No-Credit in RSM courses](#)
- [Rotman Commerce Academic Support](#)

### URL links for print

- Book an appointment with a writing or presentation coach: <http://uoft.me/writingcentres>
- Writing and Presentation Coaching academic support page: <https://rotmancommerce.utoronto.ca/current-students/academic-support/writing-and-presentation-coaching/>
- Centre for Professional Skills Teamwork Resources page: <https://rotmancommerce.utoronto.ca/teamwork-resources>
- Book an appointment with a Teamwork Mentor: <http://uoft.me/writingcentres>
- Request for Special Consideration Form: <https://rotmancommerce.utoronto.ca/current-students/forms-requests-and-appeals/forms/>
- ACORN: <http://www.acorn.utoronto.ca/>
- Email Accessibility Services: [accessibility.services@utoronto.ca](mailto:accessibility.services@utoronto.ca)
- Accessibility Services website: <http://studentlife.utoronto.ca/as>
- University's Plagiarism Detection Tool FAQ: <https://uoft.me/pdt-faq>
- The University of Toronto's Code of Behaviour on Academic Matters: <http://www.governingcouncil.utoronto.ca/policies/behaveac.htm>
- Information Commons Help Desk: <http://help.ic.utoronto.ca/category/3/utmail.html>
- Become a volunteer note taker: <https://studentlife.utoronto.ca/program/volunteer-note-taking/>
- Accessibility Services Note Taking Support: <https://studentlife.utoronto.ca/service/note-taking-support/>
- Credit / No-Credit in RSM courses: <https://rotmancommerce.utoronto.ca/current-students/degree-requirements/credit-no-credit-option/>
- Rotman Commerce Academic Support: <https://rotmancommerce.utoronto.ca/current-students/academic-support/>