



Rotman Commerce UNIVERSITY OF TORONTO

Course Outline

RSM 495 H1F

Management Consulting

Fall 2019

Course Meets: Thursday: 11-1pm, Room: RT 142

Instructor: Jan Klakurka (*Off Campus*)
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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.

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, 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

Readings

Required Texts for Book Summary and Review – Both Available Free from UofT Libraries

Required Text #1: The McKinsey Mind

(<http://web.a.ebscohost.com.myaccess.library.utoronto.ca/ehost/ebookviewer/ebook?sid=2360b4ff-2117-452a-af1c-a6258967a7a4%40sessionmgr4007&vid=0&format=EB>)

Required Text #2: The McKinsey Way

(<http://web.a.ebscohost.com.myaccess.library.utoronto.ca/ehost/ebookviewer/ebook?sid=f2e5988f-228f-479a-92e8-4a21da6fe3b1%40sessionmgr4006&vid=0&format=EB>)

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 nine (9) 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 (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 he or she has command of the course materials.

<u>Work</u>		<u>Due Date</u>
Class Participation	15%	Ongoing
Case or Simulation Assignment Report	15%	Any case or simulation of your choosing*
Required Reading Book Summary	10%	October 10 th , 2019
Real-Life Consulting Project (RLCP)	40%	November 28 th , 2019
Final Exam (Case-Based + Short Answer)	20%	During Final Examination period

A proposal and project work plan are due to the Professor, submitted to the appropriate assignment on Quercus, by the Thursday after Thanksgiving, October 17th, 2019. Each is worth 5% of the overall grade. The remaining 30% of the RLCP grade is awarded based on the final client and professor deliverables described below.

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.**

Grade review: The instructor does not discuss grades without a substantive reason. Substantive reasons include errors made during grading. If you would like me to re-evaluate your grade in any component of the course, you should follow this procedure:

- (a) Write a memo explaining why you need me to re-evaluate your grade. The memo should contain substantive arguments only, and not humanitarian (e.g., “I *really* need an A,” “I worked so hard”), or social justice (e.g. “he got an A for saying the same thing”) appeals. If you do feel that a social justice appeal is justified, you should get the cooperation of the person who you are comparing with, and have them also submit their paper. You may submit this memo to the commerce office.
- (b) You will normally get a response from me within a week.
- (c) The entire exam or paper will be re evaluated, and you should be aware that any grade changes are possible (i.e. decrease, increase or none). The only exception to the “entire paper gets re evaluated” policy is a case where there is a mathematical error in determining a grade.

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.

Final Examination

The final exam will consist of 3-4 short answer/mini scenario questions and one case, which will test your knowledge of the material that is discussed in class sessions and found in the PowerPoints, readings, RLCP/group project and case learnings. The final exam date will not be known until the final exam schedule is released by the Faculty of Arts and Science. The professor reserves the right to make the final exam a take-home exam during period. *Do not book any travel before December 21st, 2019.*

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, your client, and learning the consulting process. A combination of final exam, individual participation, 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>
Final Exam	20%	This exam will be 3-hours in length and contain two parts, as shown below. Aides allowed: Calculator, one, double-sided 8 ½” x 11” paper, text <ol style="list-style-type: none">1. A medium-length comprehensive case testing all course material <i>and</i> application of summary lessons captured at the end of each session (worth 70%)2. Three-to-four (3-4) short answer / mini scenario questions testing material from the text readings (worth 30%)
Participation	15%	Preparation for class case discussion, as demonstrated by; <ul style="list-style-type: none">• willingness to lead and actively participate class discussions in a professional manner• providing valuable insights and analysis• responding to “cold-calls”• Using the blackboard / PowerPoint / Excel spreadsheets to present analyses and findings
Case or Simulation Analysis Write-Ups	15%	Prepare one each of a case and a simulation. Students may select any of the cases on the schedule and either of the two simulations on the schedule. One of these must be handed-in by March 10 th , 2019 (to allow 10% of your course grade back by the drop deadline). Your assignment is simple: Prepare the Case. Use whatever tools and methodologies you

deem appropriate. Hand the case in on the day we do it in class. 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 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 Summary Report

10%

A book summary report of 5 pages maximum that discuss the key features of either of the required readings. Students may provide a 5 minute overview of the report in class in PPT format to enhance their grade.

Real-Life Consulting Project

40%

Taking on the role of external consultants, a limited number of groups of 3 to 5 students (or as determined by the professor in conjunction with the client requirements) will propose (estimated to be 8-10 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 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 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; (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 is approximately 7-8 (min.) hours/week per student.

By taking on this Real-Life Consulting 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 (RLCP) 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.

Students who chose to select their own organization as a RLCP client, must get prior approval of Jan Klakurka.

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: 10 pages), worth 5%
- Project Plan, worth 5%
- Weekly Status Report example
- Deliverable Listing
- Data Gathering Approach/Results
- Project Deliverable Report (guideline: 25 pages)
- Presentation (guideline: 10 slides, 10 minutes)
- Non-Disclosure Agreement (professor, students, and client sign) should be an appendix to the Proposal
- Working papers (various models given to client; should be an appendix to Deliverable Write-Up)

COURSE FORMAT AND EXPECTATIONS

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 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.

To Use Turnitin.com:

Normally students will be required to submit their course essays to Turnitin.com 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 Turnitin.com reference database, where they will be used solely for the purpose of detecting plagiarism. The terms that apply to the university's use of the Turnitin.com service are described on the Turnitin.com website.

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) or one of the College Writing Centres (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.

For Group Work:

Learning to work together in teams is an important aspect of your education and preparation for your future careers. That said, project-based teamwork is often new to students; to work well in teams, it helps to follow a set of core expectations to best succeed at your team projects.

1. Read the document entitled, “Working in Teams: Guidelines for Rotman Commerce Students” which is available on the RC portal under the Academic Services tab.

2. When working in a team, Rotman Commerce students are expected to:

- Treat other members with courtesy and respect;
- Honour the ground rules established by the team;
- Contribute substantially and proportionally to the final project;
- Ensure enough familiarity with the entire contents of the group project/assignment so as to be able to sign off on it as original work;
- Meet the project timeline as established by the team.

3. Resolving conflicts:

Conflicts are part of the team’s process of learning how to work together. When handled well, it can generate creativity and bring-multiple perspectives to the solution.

Student teams are expected to work through their misunderstandings as soon as they arise (and prior to submission of the final project). When teams are unable to arrive at a solution that works for all members, the team must meet with the Rotman Commerce Team Coach** as soon as possible. The Coach will listen to the team and help develop options for improving the team process. All members of the project team must commit to, and, utilize their action plans.

**For an appointment with a Rotman Commerce Team Coach, please contact Professor Nouman Ashraf at nouman.ashraf@rotman.utoronto.ca. Nouman is highly skilled at facilitating team dynamics and collaboration. Note that the Team Coach’s role is to provide guidance, support and advice on team matters – not to formally evaluate or assess teamwork for academic purposes.

Active Group Involvement: For the RLCP, 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. 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. Fifteen percent (15%) of your group project mark (equivalent to 4.5% of overall mark) will be based on results of a peer review survey developed, delivered and *interpreted* by the Instructor. So, work well together and actively contribute.

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.

RSM495F Tentative Course Schedule (overleaf) (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	Sept 5, 2019	<ul style="list-style-type: none"> • The Consulting Perspective & Process 	Reading: Consulting at the Cusp, Clayton Christensen, HBS, Available on Quercus and from Roberts Case: McKinsey & Company: Talent Management and Knowledge Creation, (9B15C016), Ivey, Authors: Alison Konrad et al, 2015
2	Sept 12, 2019	<ul style="list-style-type: none"> • Proposal Development • Pitching & Orals Presentations 	Reading: How to Lead Consultants to Exceed Expectations, (9B10TE07), Ivey, Authors: Gordon Perchthold, Jenny Sutton, 2010 Case: IBM's Knowledge Management Proposal for the Ontario Ministry of Education, (9B05E007), Ivey, Author: Ken Mark, 2004
3	Sept 19, 2019	<ul style="list-style-type: none"> • Guest Speaker: Hadiya Roderique, PhD student at Rotman and McKinsey consultant • `Diagnostics & Problem Solving in the Client Context • Conceptual Models • Simulations Overview 	Case: <u>Ford Motor Company and Cruji Management Consulting (A) & (B)</u> , (9A99E013 & 9A99E014), Ivey, Author: Peter C. Bell, 1999 NB: Professor will hand-out Part B in class
4	Sept 26, 2019	<ul style="list-style-type: none"> • Engagement Management & Status Reporting • Simulation Discussion & Results 	Simulation: <u>Project Management: Scope, Resources, Schedule V2</u> , (K4700-HTM-ENG), HBS, Author: Robert D. Austin, 2013
5	Oct 3, 2019	<ul style="list-style-type: none"> • Consulting in a Multi-Stakeholder Environment 	Case: <u>Bon Star Hotel</u> , (9B09M072), Ivey, Author: Jim Kayalar
6	Oct 10, 2019	<ul style="list-style-type: none"> • Drawing Insights from Data • Book Summary Assignment Due 	Case: <u>Deloitte Recommends Client Selection to Regency Bank</u> , (9B11E005), Ivey, Author: Begen et al, 2011 <ul style="list-style-type: none"> • Spreadsheet will be provided by Professor on Quercus.
7	Oct 17, 2019	<ul style="list-style-type: none"> • Executing the Project • RLCP Proposal and Work Plan Due 	Case: <u>Deloitte & Touche Consulting</u> , (9-696-096-PDF-ENG), HBS, Authors: David Upton et al, 1996
8	Oct 24, 2019	<ul style="list-style-type: none"> • Communications: Firm, Team, & Client • Change Leadership 	Simulation: <u>Change Management Simulation: Power and Influence V2</u> (4345-HTM-ENG), HBS, Authors: William Q. Judge, Linda A. Hill, 2013)
9	Oct 31, 2019	<ul style="list-style-type: none"> • Navigating the Client • Dealing with Uncomfortable Situations 	Case: <u>Sherif Mityas at A.T. Kearney (A), (B), (C), & (D)</u> , (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
	Nov 7, 2019	<ul style="list-style-type: none"> • READING WEEK 	NO CLASSES
10	Nov 14, 2019	<ul style="list-style-type: none"> • Project Performance Management • Meeting Firm, Personal & Client Objectives 	Case: <u>Miles Everson at PricewaterhouseCoopers</u> , (410062), HBS, Authors: Robert G. Eccles, David Lane, 2010

11	Nov 21, 2019	<ul style="list-style-type: none"> • Learning and Knowledge Management • Thoughtware & Innovation • Internal Consulting 	Case: Innogy Consulting GmbH: Competing Away From Home , (9B18M159), Ivey, Author: Jonathan Chen et al, 2019
12	Nov 28, 2019	<ul style="list-style-type: none"> • <i>Final Group Project Report (at least draft) Due</i> • Values and culture in consulting 	Consulting Project: Final Presentations Case: Centric Consulting Cleveland: Staying True to Core Values , (9B18C033), Ivey, Authors: Gullett et al, 2018
Final Take-Home Exam	TBA	<ul style="list-style-type: none"> • Due Date / Time will be within the regular exam period specified by Arts & Science 	Final Exam will contain 3-4 mini-scenario questions plus one case.

POLICY AND PROCEDURE

Missed Assignments/Quizzes

Students who miss a test or assignment for reasons entirely beyond their control (e.g. illness) may submit a request for special consideration. The Request for Special Consideration Form and supporting documentation must be submitted in a timely manner in order for the request to be reviewed.

In such cases, students must notify the Rotman Commerce Program Office on the date of the course deliverable such as a missed test, or assignment missed class (in the case of participation marks), or due date. They must then complete a [Request for Special Consideration Form](#) and submit it along with supporting documentation (e.g. [Verification of Student Illness or Injury form](#)) to the Rotman Commerce Office within **2 business days** of the originally scheduled course deliverable. Students who do not provide appropriate or sufficient supporting documentation will be given a grade of 0 (zero) for the missed course deliverable.

Documentation submitted in support of petitions for missing tests and assignments must be original; no faxed or scanned copies will be accepted.

Note that the physician's report must establish that the patient was examined and diagnosed at the time of illness, not after the fact. Rotman Commerce will not accept a statement that merely confirms a later report of illness made by the student to a physician.

If a student is excusably absent from the final exam, a make-up test will be completed at a date and time set by the Faculty of Arts and Sciences.

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. During the mid-point of term, a formal feedback survey will be conducted on Zoomerang seeking your feedback on the course to-date with a view to implementing suggestions for improvement for the second part of term.

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.

Given that there are multiple sections, please understand that with limited seats in the assigned classroom, those students registered in the section always maintain first right to a seat and priority in classroom space. You are allowed to move between sections provided that you are not taking a seat of a peer already registered in the section. Also, slight variations may be expected between the lecture and/or case discussions, depending on the nature of participation, class discussion, and/or lecturer choice.

Accessibility Needs

The University of Toronto is committed to accessibility. If you require accommodations for a disability, or have any accessibility concerns about the course, the classroom or course materials, please contact Accessibility Services as soon as possible:

accessibility.services@utoronto.ca or <http://www.studentlife.utoronto.ca/as>.

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.

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 a total of \$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 q.utoronto.ca and log in using your UTORid and password. Once you have logged in, you will be at the Quercus Dashboard. On this page you will see all of the courses you are presently enrolled in. If you don't see the course listed here but you are properly registered for the course in ROSI, wait 48 hours.

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. Students wishing to record a lecture or other course material in any way 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.

Your Lecturer

Jan Klakurka is Chair and tenure-track Assistant Professor in Management and Organizational Studies 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 six more in academia. 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 as 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: 2012-2018), Huron (2014-2019), and Laurier (2013-2015). Jan's other core teaching courses are *International Business* (2012-2019, including MBA in 2014) and *Management Consulting* at Rotman School of Management (2011-2020). He also regularly teaches *Introduction to Management* at Rotman Commerce (2011-2019). In 2014, he began teaching a Summer Abroad course for Rotman/UofT at Masaryk University In Brno, Czech Republic called *Strategy in the European Context* that is going into its seventh year. 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.

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 twelve and ten 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 serves as Board member and CFO of Corporations for Community Connections, a private foundation of Siemens, and on the finance committee of the Mansfield Ski Club.



Richard Ivey School of Business
The University of Western Ontario

Ivey
Publishing

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.iveycases.com/CoursepackView.aspx?id=24113>
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
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/655022>

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

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