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BMIS 479.01: Introduction to Consulting

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Course Information

Dates: August 29th through December 7th
Times: 12:30 – 1:50 pm (MST)
Venue: GBB L11
There are TWO Moodle sections:
1) Consulting Common Area which is for **ME** to provide information to **YOU**
2) Consulting Assignment Area which is for **YOU** to provide assignments to **ME**

Professor Information

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Office Hours: **Mon 3:00 – 4:30 pm**
Wed 2:00 p.m. – 3:30 p.m.
Or by appointment made via e-mail
Or by Zoom with an appointment
umontana.zoom.us/my/davidfirth

Mission of the UM College of Business

The University of Montana's College of Business (COB) is a collegial learning community dedicated to the teaching, exploration, and application of the knowledge and skills necessary to succeed in a competitive marketplace. As part of our assessment process and assurance-of-learning standards, the College of Business has adopted the following learning goals for our students:

- **Learning Goal 1:** COB graduates will possess fundamental business knowledge.
- **Learning Goal 2:** COB graduates will be able to integrate business knowledge.
- **Learning Goal 3:** COB graduates will be effective communicators.
- **Learning Goal 4:** COB graduates will possess problem solving skills.
- **Learning Goal 5:** COB graduates will have an ethical awareness.
- **Learning Goal 6:** COB graduates will be proficient users of technology.

- **Learning Goal 7:** COB graduates will understand the global business environment in which they operate.

Mission of the MIS Department:
To help our students get great MIS careers.

Course Description

This course is aimed at those who wish to be successful consultants or entrepreneurs. The skills needed to be a successful consultant fall into three categories; 1) technical skills, 2) interpersonal skills, and 3) consulting skills. We will not be addressing the technical skills aspect in this course – it is assumed that you will acquire these during your other classes (MIS, Finance, Accounting, Economics, Media Arts, MBA, MSBA, MAcct...).

We will be addressing the interpersonal and consulting skills categories. This means that we will be learning the craft of consulting, from who you are, how to present who you are, how firms make money, how you can be successful with a firm, what goes into a proposal and why, taking meetings with the client, document the work you do, billing for that work, and such. We will have a good number of consultants come talk to us, from an internationally recognized lone wolf, to local consulting firms doing work globally, to global firms doing work locally. If possible, we will also visit a local consulting firm to get an inside look at a firm.

Learning Objectives

The overall course objective is to provide the concepts and skills you need to be a successful consultant. We will concentrate on learning and implementing the tools and skills that you will need on any consulting engagement.

Upon successful completion of the course, you are expected to be able to:

- Understand what goes into a consulting proposal, and how the budget of an engagement is determined.
- Communicate in and effectively run meetings – that means learning how to listen and learn.
- Develop a personal plan for improving yourself to become a better consultant, by understanding your own strengths and weaknesses, and how to position yourself to firms and clients.
- Understand basics of body language as a fundamental source of information from your client, your team members, and those you work for
- Understand your communication style and how to use it to your advantage
- Clear and competent online communication including emails and Zoom/Hangout/Microsoft Team meetings

Instructor's Expectations

In general, the students should assist the instructor in creating a positive, supportive environment for learning. Consulting in the business world depends on a successful "team" approach. Characteristics of successful teams include: diversity in background and skills; tolerance of diversity, uncertainty and ambiguity; clear and complete communication; and mutual respect of others views. Therefore, students are expected to engage with content fully, participate in discussions when appropriate, turn in assignments on their assigned due date, work diligently and appropriately with assigned team members. Most importantly, all participants in the class should be considerate of the other class participants and treat them (and their opinions) with respect. Insensitivity in this area will not be tolerated.

Students with disabilities documented through U of M Office for Disability Equity (ODE) will be accommodated and have the responsibility to contact the instructor to initiate the appropriate actions. Please see me to discuss any concerns on this matter. The University of Montana assures equal access to instruction through collaboration between students with disabilities, instructors, and the Office for Disability Equity (ODE). "Reasonable" means the University permits no fundamental alterations of academic standards or retroactive modifications. For more information, please consult the [ODE website \(http://www.umt.edu/disability\)](http://www.umt.edu/disability).

Course Requirements and Expectations

The course will consist of some or all of the following: lectures, discussions, out-of-class activities, exams, team assignments.

Lectures

The majority of the course content will be delivered via lectures. Since it has not been possible to find a textbook that adequately addresses the material we want to cover in this course, we will not be using one. As a result, other material has been selected to expand your exposure to various aspects of consulting. It is your responsibility to access this material from Moodle, print it off and read it. Since there is no book, the costs of doing this compensate.

Activities and Discussions

Students are expected to read, watch and/or listen to the assigned material or perform the assigned activities prior to any assignment due dates (which includes asynchronously). These activities and exercises are designed to reinforce the lecture material. Therefore, failure to do so will severely hamper your understanding of the material.

Exams

There will be one "take-home" exam.

Team Assignment

The team assignment has critical significance. Effort and strength in the team assignments will substantially impact your final grade. Team assignment peer reviews will help me assess your effort and strength. A poor peer review from two or more of your peers will impact your grade significantly.

Client Meeting

The main element of your team assignment will be the meeting with the client (me). The idea behind the client meeting is two-fold: 1) see how you as a team analyze and then present the analysis of your material, 2) record you as a team and give you personal post-class feedback on your presentation style and skills. During the meeting your client will be “potentially hostile”. You should expect the questions you receive to be hard focused, and to press you on your thinking. Thinking nimbly and articulating your thoughts on-the-fly is a critical consulting skill that we’ll test here.

Homework

The TV show Lie To Me, on Fox TV.

I have posted season one of Lie to Me in Moodle. There are 12 episodes. We use this show because it very capably demonstrates and teaches the art of understanding body language. Since professional consultants often cite their ability to read people as being a critical component of their success, learning the fundamentals of body language is important to your success in this field. You can make the very best use of this show and what we cover in our *Body Language* segment of class by watching episodes 1, 2 and 3 before that segment of class.

Required Textbook

None.

A review of the available textbooks and professionally oriented textbooks found none that adequately supported this course, particularly at the price points of the books. **"Consulting for Dummies"** Nelson and Economy, is the best book I've found if you want a book to support what we are doing in class.

Grading

Final grades will be based on the following:

Individual Assignments

- Assignments are laid out in the timeline for class.
- The due dates are laid out in the timeline.
- Typically you will be asked to complete a *Five Things I Learnt (FTIL)* for each consulting firm/individual who attends class. In addition to the FTIL, you will

One Exam

We will have one exam, covering important things that have been addressed in class. This will be a "download and complete within 1 hour" exam.

Client Meeting

Meet in teams. Some sort of handout will be needed to guide the meeting. A two-page "**Here's what you need to do**" report is due after this meeting. There will be a peer evaluation to determine that there was even contribution from all team members. Significant variation in grades amongst team members based on peer evaluated effort can occur.

Portfolio of Key Charts and Insights from class

A self-help document, prepared from materials culled from class, for you to refer to later when you are consulting.

It is important to recognize that grading necessarily reflects the instructor's judgment regarding the quality of your work. Although an objective criterion for grading exists, all grading is somewhat subjective. If you have a question about a grade, please see me. However, requests for re-grading are likely to meet with skepticism unless an obvious grading mistake or unfairness is presented.

Grades will be conferred on a \pm basis and comply with the ranges shown below. Please note that the College of Business requires students to attain a C or better in all core classes.

Overall Percentage	Letter Grade
pct \geq 93%	A
93% > pct \geq 90%	A-
90% > pct \geq 87%	B+
87% > pct \geq 83%	B
83% > pct \geq 80%	B-
80% > pct \geq 77%	C+
77% > pct \geq 73%	C
73% > pct \geq 70%	C-
70% > pct \geq 67%	D+
67% > pct \geq 60%	D
60% < pct	F

Class Attendance

As with any business profession, attendance is extremely important to succeed. Attendance is mandatory, meaning that students are expected to attend to all material posted in Moodle, complete all assignments for this course, and where group work is required to be available (in a reasonable fashion) to meet with your assigned team in a timely fashion as dictated by the class schedule.

The timeline for class is posted in Moodle, and it shows which material is to be covered and when, and which assignments are to be completed and when they are to be completed. It is your responsibility as a student in this class to pay attention to this timeline. There are **many group assignments for this class**. Although this class is asynchronous, you are expected to work with your group to complete assignments when they are due. As such, you are required to be attentive to emails from the instructor, and other members of class. Failure to attend to emails is not an excuse for non-completion of assignments. It is basic business to attend to emails in a timely fashion. If you are going to be missing a submission deadline due to work or other commitments, you should work with your team to **complete this early**.

The instructor appreciates that on occasion there will be an extenuating circumstance that could not be foreseen. In these highly infrequent situations, it is your responsibility as a student in this class to inform your team mates (if applicable) and the instructor of the issue, and how you plan to resolve the issue so as to impact your team mates (if applicable) in the least disruptive manner.

Academic Integrity

Integrity and honesty are hallmarks of the consulting profession. It is your duty to abide by the University's academic policies, and it is the instructor's duty to enforce those policies. Cheating of any sort will not be tolerated. Cheating, failure to follow instructions, and/or failure to follow course policies may result in a reduced grade or a failing grade at the instructor's option. The following message about academic integrity comes from the Provost's office: *All students must practice academic honesty. Academic misconduct is subject to an academic penalty by the course instructor and/or a disciplinary sanction by the University. All students need to be familiar with the [Student Conduct Code](http://www.umt.edu/vpsa/policies/student_conduct.php) (http://www.umt.edu/vpsa/policies/student_conduct.php).*

Email

According to University policy, faculty may only communicate with students regarding academic issues via official UM email accounts. Accordingly, students must use their GrizMail accounts (fname.lname@umontana.edu). Email from non-UM accounts will likely be flagged as spam and deleted without further response. To avoid violating the Family Educational Rights and Privacy Act, confidential information (including grades and course performance) will not be discussed via phone or email.

Guest Speakers and Visitors to Class

- We think it is incredibly valuable for students in Consulting, and our other classes, to see students who have graduated and have a fulfilling career that they love.
- Students will always have plenty of opportunity to ask questions. Getting questions answered is obviously a very important part of a guest speaker or visitor's visit to class. Given this is an asynchronous class, emails can be used to answer student's questions.
- Showing what professionalism looks like in the Consulting class is incredibly useful and important for our students. This hits directly at the College of Business **Learning Goal 1**: COB graduates will possess fundamental business knowledge and **Learning Goal 3**: COB graduates will be effective communicators.
- Class visitors will engage students on topics such as what their own LinkedIn profile looks like, and why it is important, enhancing the topic of global connectedness which is a core underpinning of the consulting field.
- We work very diligently with guest speakers and visitors to send female alums into Consulting and our other classes as we believe that it is critical to highlight the important role of women in business and MIS in particular.

Guest speakers and visitors to class should be treated professionally and accorded a great deal of courtesy. They are taking valuable time away from their own work and professional responsibilities to help you. Some will be coming to class during their visit to UM for recruiting but their attendance at Consulting is not part of a recruiting effort but is to address the bullet points listed above.

Grading

- Almost all the assignments for this class are designed to allow you to improve your skillset as a consultant.
- Another way to put this is that the assignments are not to show me you know what we've covered, but to show yourself that you know what we've covered.
- For almost every assignment, except the final exam, there is **no correct answer**.
- As the aim of the assignments is to help you improve your skillset as a consultant, and because **there is no correct answer** (except for the exam), grading for the most part is on the following scale:
100% if you clearly put in effort to your assignment
60% if you put in what appears to be a moderate amount of effort
20% if you put in what appears to be little effort
0% if you did not hand in the assignment on time

How Class Will Be Run

A large part of my goal with this *Introduction to Consulting* class is to teach you skills that are vital to being a successful consultant, and then have you put those skills into practice. To that end, I plan on running this class like a business meeting. I will formally start class by stating the purpose for the meeting (what the topic is for class that day). Then I will ask the class what they may know about that particular topic to gauge prior knowledge. Then I will proceed to go through the content for the lecture. At the end of class, the meeting will be formally ended by establishing action steps and stating what you have to complete before our next class meeting and what the students are to complete before our next class meeting.

One important take-away from this class is that *consulting* skills are, for the most part, business skills that can be used in any business situation. So, if you're a finance, accounting, management, marketing, or non-business major, the skills we cover in this class will be useful to you in your future career.