University of Pennsylvania
The Wharton School

Health Care Management: Field Application Project
HCMG 653
Spring 2016

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Course Description

This course is intended to provide a field application experience as part of your overall Wharton learning experience. As such, the course has several objectives:

- To encourage you to use the mix of functional skills and tools you have learned in the fall semester.
- To take those skills and tools from their abstract presentation or artificial case study settings and use them in a real (and important) management setting in a real organization.
- To show, in ways that cannot be done in the classroom, how knowledge must be adapted to fit real problems.
- To further develop your leadership and team effectiveness skills.

This course will provide a supervised experience in the art and science of a.) shaping client-defined issues in ways that make them tractable and b.) applying new ideas effectively in complex organizational settings. The field application takes the form of a consulting project, but this is not primarily a course in how to do garden-variety consulting. For those who have not had the consulting experience yet, it will, of course, provide the basics. But it will also give you experience with techniques, approaches, and coping mechanisms for problem solving in unstructured, messy, and imperfect situations, especially when you have to influence a situation by expertise and persuasion rather than having direct control over it. You will, in other words, be confronting the reality that most managers face most of the time.

Course Structure

The project is the heart of the course, and you will be involved in helping to shape its direction and content as well as carry it out and effectively engage your clients with your findings. The course is structured to maximize your learning about both the content of the project itself and about how to work effectively in a project-oriented environment. The most important elements of the course structure are:

1) A "tutorial" approach to your team's initial work plan development, problem diagnosis and problem solving, management of client-team and within-team issues, and final presentations.

2) Use of course instructors and mentors. Each team will have access to two faculty members—one a member of the course faculty and the other a mentor, a faculty member with expertise on the specific problem around which the project is built.

3) An introductory class session designed to orient you to the course, the work, and our expectations and to prepare you for the on-campus workshop.

4) An on-campus workshop with the clients to launch the projects.

5) A tutorial with your course instructor and mentor (if scheduling works out) to debrief on the client workshop and to begin to prepare the Client Engagement Memorandum. All team members must attend.

6) Preparation of a Client Engagement Memorandum that will lay out the Scope of Work, Resources Required, Time Frame, and Deliverables. Each team will add a confidential note to the faculty that the client will not see that flags your hunches about possible hidden agendas, difficulties you think you may encounter in executing the project, and what resources you think you will need to successfully complete the project within the time frame.

7) A tutorial with your course instructor and mentor (if scheduling works out) to review progress on the project. All team members must attend.

8) Preparation of a summary of progress and issues encountered, if any, for course instructors. (Upload on ***Canvas*** for your team).

9) A "dry-run" of your project presentation to your client that will be videotaped and will be critiqued on style and content by Ann Fischer and the course faculty.

10) Presentation of the project report to the client.

11) Team memo reflecting on your evaluation of how the engagement should have been managed.

12) Faculty debriefing across the experience of all teams.

Grading

Faculty evaluation of project – analytical quality, management of client, and feasibility.	45%
Faculty evaluation of team memo	20%
Teammate Evaluation of individual performance	10%
Client evaluation of overall team performance	25%

Summary of Written Assignments

- Client engagement memorandum, with addendum for the faculty only.
- Upload team progress reports on ***Canvas***.
- Presentation deck and consultant's report.
- Reflective team memo.

Project Presentation

The presentation to the client is an important step in the FAP (though it is not the culmination of the course). The team will arrange to engage the client in the team's findings and recommendations. The team should consult with the client contact about which members of the client organization should be present to receive the presentation and interact with the team about implementation. The earlier that the team and client can set the date for this working session, the more likely the client can have relevant stakeholders present for the meeting. **All teams should schedule their final presentation to the client between April 11th and April 22nd.** It is advisable that teams discuss this time frame in the initial meeting with the client and develop work plans accordingly. If possible, these presentations should be made at the client site. Try to schedule on a **Friday** so as not to miss other classes.

The **FAP Client Practice Presentations Sessions** will be scheduled for late March to mid-April and are designed as client practice presentations. Ann Fischer, a communications expert who has worked with us in the course will provide immediate feedback and offer direction on communicating your findings and recommendations to your client.

<u>TEAM WRITING ASSIGNMENT</u>

This year we would like to ask you to write a reflective paper (5-7 pages double-spaced) on *how the client managed the consulting engagement*, but to do so from what you think was or should have been the *client's perspective*. In other words, discuss thoughtfully what you would have done if, some years from now, you are in the client's position, having both the goals and the constraints to which, in your understanding, the client was subject. You should not discuss this from the consulting team's perspective—whether this was a "good client" or "good project" or not—but rather try to identify constraints and behaviors from the client's side that influenced the outcome of the project. Ideally the things you identify can be put in the broader context of things clients do or do not do that help to get the most out of the use of consultants. You may conclude that you worked with the best possible and most brilliant client and so should feel free to offer compliments as well as criticisms, but it is likely as usual (and with the benefit of the experience and the hindsight that provides) that there were things that could have been done better or at least differently.

Your paper may touch on the following issues/questions:

- Where did the idea for the project come from and was the client both convinced of its importance and comfortable having it addressed by a consulting team?
- What constrained the client—in terms of time, resources, and support within the client's firm, views or interests of others in the firm? This list both provides context for what the client would have been able to do but also can be critiqued as limiting or deficient in some ways.
- How did the client manage the interaction with the team? If you had become the client, what would you have done to generate greater value from the interaction?
- Overall, was there imprecision and uncertainty that could have been dealt with differently? Some worthy questions are inherently ambiguous and vague, at least at the start, but the process should move toward limiting and sharpening them.

HCMG 653 Semester Schedule, Spring 2016
Course Outline

January 14 (Thursday) — **Full class session:** 9:00AM to 10:30AM, **JMHH 255**. Overview of course structure and preparation for January 14th on campus workshop with clients. Frankel Group (now part of Huron Consulting) Directors will present a session on effective consulting practices.

January 14 (Thursday) — **Workshop with Clients:** 6:00PM to 8:30PM. Clients will come to campus for a kick-off meeting with their respective teams. All students are expected to attend. Buffet dinner will be served.

LOCATION: Jon M. Huntsman Hall, 8th Floor Conference Center
3720 Walnut Street, Philadelphia, PA 19104

January 20 & 21 (Wednesday or Thursday) — **Tutorial:** Team meeting with course instructor and mentor. Presentation of ideas/brainstorms/designs. (half-hour per team). Upload brief progress report on ***Canvas*** 24 hours before your Tutorial meeting.

Wednesday Jan. 20 — **All sessions will be held 12 Noon to 1:00PM, and 4:30PM to 8:00PM. Meetings will take place in the Faculty Lounge, Colonial Penn Center.**

Thursday Jan. 21 — **All sessions will be held 9:00AM to 10:30AM and 12 Noon to 1:00PM.**

January 21 to January 28: Focused Recruiting Period (FRP).

February 8 (Monday) — **Client Engagement Memorandum and Addendum** to Faculty due. Upload your team's client memo and addendum for faculty on ***Canvas***.

Feb. 10 & 11 (Wednesday or Thursday) — **Tutorial:** Discuss progress and approach to client problem. Each team meets with its faculty advisor and faculty mentor for half-hour. Upload brief progress report on ***Canvas*** 24 hours before your Tutorial meeting.

Wednesday Feb. 10 — **All sessions will be held 12 Noon to 1:00PM, and 4:30PM to 8:00PM. Meetings will take place in the Faculty Lounge, Colonial Penn Center.**

Thursday Feb. 11 — **All sessions will be held 9:00AM to 10:30AM and 12 Noon to 1:00PM.**

Spring Break Week: Saturday, March 5th to Sunday, March 13th.

March 16th & 17th (Wednesday or Thursday) **Tutorial:** Discuss progress and approach to client problem.
Each team meets with its faculty advisor and faculty mentor for half-hour.
Upload brief progress report on ***Canvas*** 24 hours before your Tutorial meeting.

Wednesday March 16 — **All sessions will be held 12 Noon to 1:00PM, and 4:30PM to 8:00PM. Meetings will take place in the Faculty Lounge, Colonial Penn Center.**

Thursday March 17 — **All sessions will be held 9:00AM to 10:30AM and 12 Noon to 1:00PM.**

FAP Client Practice Presentations Sessions with Ann Fischer and Faculty

Each team will schedule a two-hour time slot that includes a 30 minute practice client presentation and 15 minutes of questions/answers, followed by 15 minutes of faculty feedback and 60 minutes of communications instructor feedback. The sign-up schedule will available on **Google Docs** on March 1st -- covering an array of weekday dates between late-March to mid-April, for 4:30-6:30 and 7:00-9:00 time slots. Teams should view their sign-up session date/time as a **firm commitment**.

April 11th – April 22th **TEAM SHOULD SCHEDULE ON-SITE PRESENTATIONS TO CLIENTS DURING THIS PERIOD**.

April 22th (Friday) **Team Reflective Memo Due**
Upload on ***Canvas***

April 26th (Tuesday) We will have a wrap-up class on **Tuesday, April 26th, 4:30PM to 6:00PM, JMHH TBD**. At this class each team will be asked to spend ten minutes discussing its observations about their client's management of the team and project. The team group paper will form the basis for this discussion. **Everyone is expected to attend this final class.**