



**Wharton Global Consulting Practicum (GCP)  
MKTG 890/895**

***Syllabus 2016-2017***

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# GCP Overview

The Wharton Global Consulting Practicum (GCP) creates a forum in which students of business can apply the concepts, methods, and paradigms learned in the classroom with the resources of a professional network to develop strategic, innovative, and operational plans for organizations worldwide. By providing students with resources and guidance (as opposed to direction), the GCP endeavors to create an academic, social and ethically-minded atmosphere which cultivates experiential and dynamic learning, and which produces state-of-the-art results for clients. Students' learning correlates with their commitment levels and the efforts put into the projects and team effort. Many, if not all, dimensions of the experience are screened against the "reality experience" one would encounter in consulting (and other professional) environments, with a support team of a project faculty and TA assigned to each team to enhance success and the Wharton brand.

## Snapshot of Course Requirements:

Below is a snapshot of the course requirements that are further delineated in the syllabus:

- **You are required to travel with your team** to visit the client/partner school in December/January unless medical, visa issues, or security concerns prohibit it.
- **You are required to meet with your Wharton team and faculty regularly** (typically once every week, but at least once every other week) from November through May. These meetings do not appear in your syllabus and will be scheduled with your faculty and team. You can reserve rooms through the SPIKE system for these meetings.
  - The program will schedule a few sessions on Wednesdays between 7 and 10 pm EST. These meetings are for all teams to come together in person and virtually.
- **You are required to participate in team calls with your partner school and clients** at times scheduled by your team. These meetings do not appear in your syllabus.
- **You are required to participate in team calls with Len Lodish and Jeffrey Babin** periodically throughout the course. These will be scheduled with your whole team after you have submitted a deliverable but before you present to the client so you have an opportunity to incorporate their feedback.
- **You are required to prepare for and attend all class sessions and webinars** during the course of the year. If you are not able to attend at the time it is held, you are required to watch the webinar within one week of its presentation date.
- **You are required to contribute in a meaningful and valuable way to each deliverable.**
- **You are required to attend Devil's Advocate in person** on the day your team is scheduled in February. Partner school students will participate remotely/via videoconference.  
**Please note: the GCP cannot reimburse students for the cost of lodging or transportation associated with this event.**
- **You are required to attend all days of Colloquium.** **Please note: the GCP cannot reimburse students for the cost of lodging or transportation associated with this event.**
- **You are required to abide by University policies** including particularly those related to financial reimbursements, academic integrity, and travel.

## Grading

Grades take into consideration the final deliverables, value contributed to the client, and the overall quality of the GCP engagement process. Graded assignments are designed to improve the engagement process, and contribute to the individual course grade as follows:

- Graded assignments are worth 10 points each, and in aggregate represent 25% of the final course grade, reflecting the quality of the engagement process
  - Team Guidelines and Preliminary Research Plan
  - Storyboard Exercise
  - Draft Consulting Proposal and Work Plan
  - Market Research Methods and Plan
  - Mid-Term Progress Review
  - Draft Final Presentation and Bring Alive Schedule
- Final client deliverables and value contributed to client represent 75% of the final course grade
  - Final, Client-Approved Proposal and Work Plan
  - Final, Client-Approved Presentation
  - Bring Alive Schedule and Activities
  - Catalogued and Sanitized Research, Reports, and Appendices for the project

Final team grades will be assigned as a letter grade by the PF and TA with input also given from Len and Jeffrey. Individual contributions result in a positive or negative fluctuation from the team grade based on peer feedback, faculty observations, and interim contributions. Each team member will evaluate the performance of their team and their teammates. GCP grading is purely merit-based and does not involve a grading curve. This does not mean students are guaranteed a high grade, but recognizes that the expected work quality and outcomes should not be subjected to a curve.

**Travel, Devil's Advocate, Colloquium, and other engagement requirements are mandatory** as outlined in your Student Letter of Commitment.

## **Peer Reviews**

Peer reviews are designed to provide each GCP student with timely and relevant feedback, and to improve your contributions to the team's efforts. Students will complete peer evaluations twice during the year. The first evaluation does not affect students' grades, and is primarily used to provide feedback so that individuals can build their strengths and develop their improvement areas. You will receive summary feedback soon after the submission deadline, and your TA will provide individually tailored feedback. In addition, you are encouraged to review and debrief team progress/processes collectively at team meetings. Your TA can assist with approaches for this step. *A second peer review, which will be used as a component for determining individual grades, will be sent before Colloquium.* Since grading is driven by interim processes and deliverables, the peer evaluations will help shape the faculty's outlook on how things are going throughout the project.

## Faculty and Program Evaluations

The varied nature of GCP projects creates a challenging learning environment. In order to optimize the learning experience, students will be given the opportunity to anonymously evaluate faculty members and the program at the mid-year point.

## Assignment Overview

Assignment	Due Date and Time	Where
Team Guidelines and Preliminary Research Plan	November 2, 2016	Canvas
Storyboard Exercise	November 19, 2016	Canvas
Draft Consulting Proposal and Work Plan	December 5, 2016	Canvas
Final, Client-Approved Proposal and Work Plan	January 11, 2017	Canvas
Market Research Methods and Plan	January 18, 2017	Canvas
Peer Review #1 and Faculty Evaluation	March 1, 2017 <i>(subject to change)</i>	Online (Link will be distributed)
Mid-Term Progress Review	March 15, 2017	Canvas
Draft Final Presentation and Bring Alive Schedule	April 12, 2017	Canvas
Colloquium 2017 Deliverables <ul style="list-style-type: none"><li>Final, Client-Approved Presentation</li><li>Bring Alive Schedule and Activities</li><li>Cataloged and Sanitized Research, Reports, and Appendices for the project</li></ul>	WEMBA SFO – 4/30-5/3, 2017 WEMBA PHL and FT MBA – 5/6-5/11, 2017	In Person/Canvas
Peer Review #2	SFO WEMBA: May 3, 2017 FT & PHL WEMBA: May 10, 2017 <i>(subject to change)</i>	Online (Link will be distributed)

## GCP Calendar

Please view mandatory program dates and other major deadlines on the next page. Please note that phone calls with Len and Jeffrey, as well as team meetings and client meetings, will be scheduled throughout the cycle at the convenience of all parties involved.

**This calendar will also be available in Canvas. Please always refer to the course's Canvas page for the most updated schedule of assignments and program deadlines.**

Date and Time	Class and Location		Session or Deadline
Sat., October 22	PHL 42	SFO 41	Initial Team Meeting with Project Faculty and TAs ( <i>teams schedule time and location</i> )
Sat., October 29	PHL 41, FT MBA	SFO 42	
Wed., Nov. 2, 8-10 pm EST	FT: JMHH F50	WEMBAs via Blue Jeans	GCP Session 1: GCP Orientation and Consulting Process
Wed., Nov. 2, by 8 pm EST	All- Upload to Canvas		Assignment 1: Roles & Responsibilities and Preliminary Research Plan
Sat., Nov. 12, 4:15- 6:15 EST & PST	FT MBA & PHL41 : JMHH 270; SF 41: Blue Jeans OR attend later session in person	SFO 42: Room 612	GCP Session 2: Introduction to Consulting and Storyboarding
Mon., Nov. 14, by 9:00 am EST	All- Email or drop off to GCP Office		Travel Intent Form due
Saturday, Nov. 19th, by 11:59pm EST	All- Upload to Canvas		Assignment 2: Story Board Exercise
Mon., Nov. 21, by 9:00 am EST	All- Email or drop off to GCP Office		Travel Itineraries due
Sat., Dec. 3, 12:15- 1 pm EST & PST	PHL 41: JMHH G65	SFO 42: Room 660	GCP Logistics & Travel Info Sessions
Mon., Dec. 5, by 11:59 pm EST/PST	All- Upload to Canvas		Assignment 3: Draft Consulting Proposal
Wed., Dec. 7, 8-9pm EST	FT MBA : JMHH 355		GCP Logistics & Travel Info Sessions
Sat., Dec. 10, 12:15- 1 pm EST & PST		SFO 41 12:15-1:00pm: Room 615	GCP Logistics & Travel Info Session
<i>Calls with Len &amp; Jeffrey: December 12- 15</i>			
<i>Winter Travel between Dec. 11- January 12</i>			
Wed., Jan. 11, by 7pm EST	All- Upload to Canvas		Assignment 4: Final Consulting Proposal
Wed., Jan. 11, 7- 10 pm EST	FT MBA: Location TBD	WEMBAs via Blue Jeans	GCP Session 3: Research Methods and Post-Travel Debrief
Wed., Jan. 18, by 11:59 pm EST/PST	All- Upload to Canvas		Assignment 5: Market Research Plan (Methodology, Research Objectives, and Preliminary Analysis)
Wed., Feb. 1, by 5:00 pm EST	All- Hard copies of receipts mailed or delivered to GCP Office		Deadline to submit receipts for post-travel reimbursement
Sun., Feb. 12, All Day	PHL 41	SFO 42: Rooms 612 & 615	Devil's Advocate
Sun., Feb. 19, All Day	FT MBA, PHL 42	SFO 41: Rooms 612 & 615	Devil's Advocate
Wed., March 1, by 11:59 EST/PST	All- Link via email		Assignment 6: Peer Review 1 and Mid-Term Faculty Evaluation
Wed., March 15, 8-9 pm EST	All- Assignment on Canvas (FT Location TBD; WEMBAs via Blue Jeans)		Assignment 7: Midterm Progress Reviews; Report to other teams
<i>Calls with Len &amp; Jeffrey: March 22- 25</i>			
Wed., April 12, 11:59 EST/PST	All- Upload to Canvas		Assignment 8: Draft of Final Presentation and Bring Alive activities
<i>Calls with Len &amp; Jeffrey: April 19-22</i>			
24 hours before final pres	All- Upload to Canvas		Assignment 9: Upload final deck
Sun., April 30- Weds., May 3	WEMBA SFO		Colloquium & Bring Alive
Weds., May 3, by 11:59 pm PST	WEMBA SFO		Assignment 10: Peer Review 2
Sat., May 6- Thurs., May 11	FT MBA and WEMBA PHL		Colloquium & Bring Alive
Wed., May 10, by 11:59 pm EST	FT and PHL WEMBA		Assignment 10: Peer Review 2
Last day of Colloquium	All- Upload to Canvas		Final versions of sanitized deliverables

Key:

Denotes Deliverable or Logistics Deadline

Denotes In-Person or Webinar session

## **University Policies and Resources**

### **Academic Integrity**

As a member of the Penn Wharton academic community, you are expected to adhere to the principles of academic integrity and honesty, as outlined in the University of Pennsylvania's Code of Academic Integrity, available at: <https://provost.upenn.edu/policies/pennbook/2013/02/13/code-of-academic-integrity> Violations ("academic dishonesty") include, but are not limited to, cheating on quizzes or homework, plagiarizing all or part of an assignment (written and oral/presentations), fabricating sources or data, and submitting the same paper to multiple instructors without prior permission.

### **Sexual Harassment, Sexual Violence, Relationship Violence, and Stalking Policies**

All forms of sexual violence, relationship violence and stalking and attempts to commit such acts are considered to be serious misconduct and may result in disciplinary action up to and including expulsion or termination of employment. In addition, such acts may violate federal, state and local laws and perpetrators of such acts may be subject to criminal prosecution.

For more information, please refer to Penn's Sexual Harassment Policy:

<http://provost.upenn.edu/policies/pennbook/2013/02/15/sexual-harassment-policy>

Sexual Violence, Relationship Violence, and Stalking Policy:

<https://provost.upenn.edu/policies/pennbook/2013/02/15/sexual-violence-relationship-violence-and-stalking-policy>

### **Counseling and Psychological Services (CAPS)**

CAPS is the counseling center for the University of Pennsylvania. CAPS offers free and confidential services to all Penn undergraduate, graduate, and professional students.

CAPS is located at: 3624 Market Street, First Floor, West

CAPS Main Number is: 215 -898-7021 (FOR ALL CALLS INCLUDING EMERGENCIES)

Email: [caps@pobox.upenn.edu](mailto:caps@pobox.upenn.edu) for general questions only, NOT for scheduling.

### **Students with Disabilities**

Students with disabilities are encouraged to contact Weingarten Learning Resource Center's Office for Student Disabilities Services for information and assistance with the process of accessing reasonable accommodations.

Student Disabilities Services is located at: Stouffer Commons, Ste. 300, 3702 Spruce Street, Philadelphia PA 19104-6027. Office hours are Monday through Friday, from 9:00am to 5:00pm.

Phone: (215) 573-9235

TDD: (215) 746-6320

FAX: (215) 746-6326

E-mail: [lrcmail@pobox.upenn.edu](mailto:lrcmail@pobox.upenn.edu)

## **Mandatory Class Sessions and Deliverables Details**

### **1. SESSION # 1: GCP Orientation and Consulting Process Wednesday, November 2, 2016, 8-10 pm (EST)**

This session will introduce the GCP program, approach, schedule, and consulting process. This session will be held in person for FT MBAs and will be broadcast as a Webinar for WEMBA and partner school students to attend. Details on how to connect will be updated on Canvas prior to the session.

Look on Canvas for assignments due prior to the session.

### **2. ASSIGNMENT #1 DUE: Team Guidelines and Preliminary Research Plan Wednesday, November 2, 2016 Due by 8 pm EST**

Prior to the GCP Orientation session, meet with your team members, begin developing a good rapport – so important for effective team function -- and determine your team guidelines. Consider the following in your discussion:

- Personal Objectives: Discuss the goals and objectives that each member has for this class (and semester, education, career) and the team interactions you desire. It is in your best interests to be honest about expectations and objectives in order to develop effective working habits.
- Meetings: Determine the optimal meeting approach for your team. Consider times, locations (including remote via video conferencing), preparation, roles, leadership, and other requirements to make meetings efficient and effective.
- Communications: Identify the tools, techniques, and frequency of your communications for exchanging, discussing, and submitting information and assignments.
- Roles: Consider how the team will manage the project, client, budget, logistics, and all aspects of the GCP engagement.
- Outcomes: Identify the desired results your GCP will achieve and quantify the value your client will receive.

In addition, submit a research plan designed to provide your team with a strong background and insights into your client's industry and competitive environment. Your research plan should be brief and include:

- Questions you seek to answer from your initial research
- List of Subject Matter Experts you will consult
- List of secondary sources you will analyze

Your Team Guidelines and Secondary Research Plan should be 1-2 pages plus the list of subject matter experts and secondary resources.

3. **GCP Logistics and Travel Info Session (Wharton Students only)**

<b>WEMBA SFO 42</b>	<b>Sat. December 3, 12:15-1pm PST (Room 660)</b>
<b>WEMBA PHL 41</b>	<b>Sat. December 3, 12:15-1 pm EST (JMHH G65)</b>
<b>FT MBA</b>	<b>Wed. December 7, 8-9 pm EST (JMHH 350)</b>
<b>WEMBA SFO 41</b>	<b>Sat. December 10, 12:15-1 pm PST (Room 615)</b>
<b>WEMBA PHL 42</b>	<b>Sat. December 10, 4:15-5 pm EST (JMHH G65)</b>

During this session GCP staff will explain the program's logistical and reimbursement procedures, and travel guidelines. Staff will also answer administrative questions.

4. **SESSION #2: Client Management and Storyboarding**  
**Saturday, November 12, 2016; 4:15-6:15 pm EST & PST**

**In-Person Session for FT, WEMBA PHL 41, JMHH 270, 4:15-6:15 pm (EST)**  
**Telepresence Session for WEMBA SFO 42, SFO Rm: 612, 4:15-6:15 pm (PST)**  
**All others via Blue Jeans**

This session will present key strategies and tactics to succeed in managing client engagements and effectively communicating and presenting strategic recommendations. This will be a live presentation. For the Wharton San Francisco class, the session will be a telepresence session held out of the PHL Campus. Session will be recorded and made available electronically for partner school students unable to log in.

5. **ASSIGNMENT #2 DUE: Storyboarding Exercise**  
**Saturday, November 19, 2016 – Canvas Due by 11:59 pm**

To reinforce the principles learned in Session #2 and create good practices for GCP deliverables, each team will submit a storyboard of your GCP engagement. Details for this assignment will be available on Canvas; however, the storyboard will reflect the resources, process, activities, and outcomes you envision that will yield a successful GCP engagement for you and your client.

6. **Mandatory GCP Logistics and Travel Info Session**  
**Saturday, December 3, 7 or 10, 2016 (see specific dates for your class above or on Canvas)**

This session will help you understand the GCP travel arrangements and reimbursement process. We will also have information available from the University office of Risk Management regarding practical ways to keep safe and the resources available to you in case of emergencies while abroad.

7. **ASSIGNMENT #3 DUE: Draft Consulting Proposal and Work Plan**  
**Monday, December 5, 2016 Due by 11:59 pm EST & PST (Len and Jeffrey Team Calls between December 12-15)**

GCP clients have a general area or problem in mind that they would like to solve. You and your team, including your partner school teammates, will create and finalize the project scope and consulting



proposal. You must then work with your client to finalize the proposal and gain approval by all participants when you travel in December/January.

Work with your team to create a framework and plan to get you from the point where you have just accepted your offer for participation in the program, to an excellent client proposal that is approved by your client. Your team should include in the work plan the types of research and analysis your team will need to do in order to both develop a proposal and to be credible when interacting with the client.

GCP client proposals reflect a clear understanding of the engagement, context, and methodology that your team will use to deliver a strategic and actionable recommendation and plan. Objectives and activities will vary depending on the client situation.

**Your team may be able to clarify the client’s problem (for both yourself and your client) by gaining an understanding of the following:**

- Client objectives from the project (try to keep these as general as possible to give your team room for the most value add)
- Client strengths and weaknesses
- Client distinctive competencies
- Market trends and size and share components
- Competition strengths, weaknesses and competencies
- Client constraints
- External environmental trends

**Your team will need to complete your preliminary research plan as part of this deliverable, which may include any of the following:**

- Interviewing market gurus
- Interviewing market participants in all levels of the value chain
- Secondary sources, including trade magazines if they are available
- Other primary research
- Client interviews—it is a good idea to have done some of the other activities before conducting detailed client interviews in order to establish credibility

**Finally, your draft proposal should include a methodology and work plan that you will execute to yield outstanding deliverables and may include the following:**

- Frameworks and concepts that your team will use to communicate and explore the problem
- Processes your team will utilize to evaluate strategic options reach recommendations
- Your team’s activities, milestones, and timetable for completing the engagement

Your grade for this draft is incorporated into the next deliverable which is just a final, client-approved version of this submission. **Please note that failure to submit this deliverable in a timely fashion will result in points off of the final deliverable's grade.**

After you receive feedback from your PF, a call will be scheduled with your team and Len Lodish and Jeffrey Babin to discuss your draft proposal between December 12 and December 15.

8. **ASSIGNMENT #4 DUE: Final, Client-Approved Proposal and Work Plan**  
**Wednesday, January 11, 2017 – Due on Canvas by 7pm EST**

This is the proposal of what the GCP team will do for the client. It should be scoped so that it provides substantial value for the client but also represents a realistic body of work that can be completed by the student team effectively during the course of the spring semester.

Included in this deliverable submission should be your work plan for the spring term which delineates how you will go about delivering on the proposal.

**Grades for the consulting proposal deliverable will be based on a 10-point system and rubric as follows:**

**Proposal Process – 3 points**

Wharton students organize and execute the work to prepare the proposal efficiently and effectively, and they engage their partner school teammates throughout. Process reflects review and understanding of syllabus and course objectives.

**Proposal Content – 4 points**

Proposal reflects significant research and effort and delivers insightful and relevant information about the company, industry, situation, and project objectives. Proposal also includes an appropriate methodology and framework for the engagement.

**Work Plan – 3 points**

The work plan reflects a manageable plan to execute the engagement with detailed work streams, activities, milestones, owners, and dates that coincide with GCP course milestones and timeline.

9. **SESSION #3: Research Methods + All Hands Session Post-Travel Debrief**  
**Wednesday, January 11, 2017, 7-10 pm (EST) – Room TBD**

Full Time teams will participate in person; WEMBA teams will connect virtually. Details on how to connect will be updated on Canvas prior to the session.

10. **ASSIGNMENT #5 DUE: Market Research Methods and Plan**  
**Wednesday, January 18, 2017 by 11:59 pm EST/PST**

This 1-2-page assignment is designed to summarize the work your team has done to date on your primary and secondary research for your project. The summary should focus on the desired outcomes that you hope to gain from your research efforts and how they would impact your project recommendations. For your primary research, please briefly describe your:

- Research objectives
- Business decisions/recommendations you will make based on research output

- Profile of target participants
- Methodology
- Preliminary analysis of results

In addition, please describe the key insights you have gained based on your secondary research.

We will review and select one of these to discuss in the March 15 session that prepares for mid-term reviews and final presentations.

### 11. **Devil's Advocate**

**SFO 42, PHL 41: Sunday, February 12, 2017 – All Day: SFO- 612 & 615 (specific schedule TBD)  
FT, SFO 41, PHL 42: Sunday, February 19, 2017 – All Day: SFO- 612 & 615 (specific schedule TBD)**

The goal of this session is for a professional audience to provide each consulting team constructive feedback on its project work at a time in which responses can be incorporated into the final project.

During its one-hour session, the team makes a 20-minute presentation on their project definition and the methodology it is using to address its problem. The team will also provide its preliminary thoughts on the final deliverables that the team will present to the client. Partner school students will participate via videoconference from their respective countries.

The audience is comprised of a group of interested alumni, friends of the GCP, and Wharton faculty. Each audience member signs a non-disclosure agreement (NDA) and provides constructive feedback during the remainder of the session.

Devil's Advocate will give you the opportunity to present concisely your project and what you have done to date in order to get and effectively process feedback. It is also often an opportunity for your team to make valuable contacts and get ideas from a wide range of individuals.

**This deliverable is graded as complete/incomplete.**

12. **ASSIGNMENT #6 DUE: Peer Review #1 and Faculty Mid-Term Feedback.**  
**Wednesday, March 1, 2016 – Online links will be distributed ahead of time Due by 11:59 pm EST & PST**

This first evaluation will not affect students' grades, and is primarily used to provide feedback so that individuals can build their strengths and develop their improvement areas. You will receive summary feedback soon after the submission deadline, and your TA will provide individually tailored feedback. In addition, you are encouraged to review and debrief team progress/processes collectively at team meetings.

In addition, you will have an opportunity to provide anonymous feedback about your faculty and TA team that will be relayed to them in a summary format.

13. **ASSIGNMENT #7 DUE: Mid-Term Progress Review; SESSION: 8-9 pm (Location TBD)**  
**Wednesday, March 15, 2017 (Len and Jeffrey Team Call between March 22-25)**

Generally, the progress reviews need to be determined on a client-specific basis. The team should think through the progress review design: their audience, desired outcomes, and messaging (as was introduced early in the project). PFs and TAs usually help to make sure that the teams are addressing these points to prepare the progress review. Storyboards usually have some common elements:

- Refresher about the project purpose, objectives and methodology
- High-level work done to date including listing of sources upfront to build "market voice" credibility (with confidentiality)
- Value-adding insights from work to-date
- Recommendations on how the project should proceed going forward (many cases, best positioned as options to be discussed and considered with the client)
- Honed focus on deliverables and targeted bring alive (to the degree that this is known now, which may not be the case due to WIP strategy formulation)
- Appendix containing supportive data possibly including sample interviews that are pertinent and sanitized

Grades for the Mid-Term Progress Review will be based on a 10-point system and rubric as follows:

**Process – 3 points**

Wharton students demonstrate that they followed and delivered on the workplan, making significant progress on the engagement and modifying the workplan as required. They engaged with their partner school teammates throughout.

**Strategic Content – 4 points**

Presentation content reflects significant progress since the proposal and DA. Team has narrowed down strategic recommendations to client in logical, methodical, and data-driven manner, resulting in client-appropriate recommendations with clear measurable results.

**Tactical Content – 3 points**

Team has begun to frame and investigate tactical or operational plans to achieve strategic recommendations. Work reflects a clear idea of remaining activities to deliver a plan that the client can embrace and yield improved performance.

After you receive feedback from your PF, a call will be scheduled with your team and Len Lodish and Jeffrey Babin to discuss your Mid-Term Progress Review between March 22 and 25 in order to give you feedback for consideration before you present it to your client.

14. **ASSIGNMENT #8 DUE: Draft Final Presentation and Bring Alive Schedule**  
**Wednesday, April 12, 2017 Due by 11:59 pm EST & PST (Len and Jeffrey Team Call between April 18-22)**

***Initial DRAFT of the Final Report***

This is the document that will become your final report to the client and for the class. The objective is to produce the structure and logic of the final report early enough to shape and focus the work. Drafts are anticipated to have some significant content and logic consistent with the expected stage of the project at that point. The elevator pitch should be clear in the report's story headlines.

Previews of this document may be shared with the client once it has been reviewed by the faculty (in order to mitigate client surprises). Tailored to the listening needs and hot buttons of the client, this is usually a PowerPoint presentation characterized by the following:

**Executive summary** (maximum of 10-page prose or PowerPoint, depending on client needs and listening styles), logically explaining the project and findings, including (but not limited to):

- main recommendations and underlying findings
- viable strategic options
- description of methodology
- recommended implementation steps, schedule, and summary financial implications
- program for the "Bring Alive" activities for the client

**50-80+ slides in the main body**, using an appropriate storyboard logic structure, headline format, graphics, illustrations and appropriate text. Usually, this is not a text-intensive, prose document. Slides should have an appropriate amount of text to address the clients' listening styles and to substantiate the key points being made in the storyboard. It is not a Word document transplanted into PowerPoint and should include significant graphics and pictorial content to make the document reader-friendly for most audiences. It should also be operational, and contain the financial implications of the plan-typically optimistic, pessimistic, and most likely scenarios.

An **Appendix** containing the supporting evidence collected and driven by the work executed:

- All the preliminary reports throughout the project (i.e., progress reviews, memos)
- Sanitized primary research including detailed interview write-ups, focus group results, survey responses – all of which should appropriately respect the confidentiality of respondents consistent with the research commitments. This usually includes the removal of names (i.e., interviewees) and distinguishing descriptions that may disclose identities. For example, "Coca Cola's CEO" would not be adequate. "CEO of a Consumer Products Company" would be appropriate. Any data provided in confidence should be deleted. Information that could compromise a company or its employees should not be disclosed unless there is a clear and traceable indication that it is permitted. When in doubt ask or be conservative and don't disclose. Additionally, consider how fragmented/concentrated the industry may be; industries with few players can result in disclosure.
- Contact details for bring-alive participants and any other parties important for implementation
- Copies of key secondary sources including articles, reports, relevant web page addresses, etc.

- Spreadsheets including financial projections of revenues, operating and implementation costs
- Excel Macro's for any models developed

### ***DRAFT of Bring Alive Activities***

#### **What are “Bring Alive” Activities?**

Bring Alive activities are arranged in conjunction with a team's final presentations, and are designed to expand upon and emphasize the team's recommendations. Some examples of past teams' Bring Alive activities are:

- Meetings with consultants who serve the industry the client wishes to enter. Consultants in these meetings advise the client about industry practices; one example is how to develop and run a sales force in the U.S.
- Meeting potential business partners.
- Discussions with managers who might eventually become potential business partners, but who presently are prepared to advise the client about U.S. business practices. Some discussions like this have been with “friendly” venture capitalists. In a meeting of this nature, the VC would hear the client's pitch, offer suggestions on ways to improve, and provide guidance concerning what kinds of questions other venture capitalists would have and how to address those questions effectively. The team prepares both the client and the venture capitalist for such a meeting.
- A law firm who discusses liability issues for offshore firms importing to the US.
- Discussions with non-competing businesses, whose leadership agrees to explain their own successes and to be benchmarked against the client. In these cases, the team prepares the client and the benchmarked firm, so both know about the experience of the other's experience prior to the meeting. At the meeting, the clients can ask questions about the particular results were accomplished.
- Putting the team on a minibus or train with all or part of the consulting team in order to meet valuable contacts.

Think of these meetings as a potential learning experience for your client. Your client will probably not be able to arrange such teaching/learning meetings on its own.

Grades for the Draft of the Final Report and Draft Bring Alive will be based on a 10-point system and rubric as follows:

**Engagement Process – 2 points**

Team demonstrates that they followed and delivered on the work plan, making significant progress on the engagement and modifying the work plan as required.

**Strategic Content – 2 points**

Presentation content reflects significant progress since the midterm progress review. Team has selected and developed strategic recommendations to client in logical, methodical, and data-driven manner, resulting in client-appropriate recommendations with clear measurable results.

**Tactical Content – 2 points**

Team has developed a clear action plan to achieve strategic recommendations. Work reflects requirements and resources and expected outcomes that the client can embrace to yield improved performance.

**Value to the Client – 2 points**

NOTE: This will become the single most important grading criteria for the final engagement deliverables. Team has modeled and quantified the measurable impact they can have on the client's business.

**Bring Alive Activities – 2 points**

Team has developed a pipeline of individuals, activities, and objectives that may serve as candidates for Bring Alive activities. Bring Alive activities support and reinforce strategic recommendations and tactical plans.

*After you receive feedback from your PF, a call will be scheduled with your team and Len Lodish and Jeffrey Babin to discuss the draft of your final presentation between April 19<sup>th</sup> and April 22<sup>nd</sup> in order to give you feedback for consideration before May Colloquium begins.*

**15. ASSIGNMENT #9 DUE: Peer Review #2**

**Wednesday, May 3, 11:59 pm PST (SFO WEMBA)**

**Wednesday, May 10, 11:59 pm EST (FT & PHL WEMBA)**

This second peer review form, which will be used as a component for determining individual grades, will be sent at the end of the program. This evaluation will provide faculty additional information that may flex individual grades up or down from the team grade.

**16. Colloquium 2017: Final Presentation; Bring Alive Schedule and Activities; Catalogued and Sanitized Research, Reports, and Appendices for the Project**

**WEMBA SFO**

**Sunday, April 30 – Wednesday, May 3, 2017**

**WEMBA PHL and Full Time MBA**

**Saturday, May 6 – Thursday, May 11, 2017**

The client's management team, teammates from partner schools, and faculty from all our partner schools come to Wharton. Colloquium includes the formal presentation of the team's final report to the client at an all-day session that allows the client to ensure that they understand the team's recommendations and their reasoning for it. The team also arranges Bring Alive activities for the client's management team. These activities "bring alive" the recommendations and often include

meetings for the client with potential business partners that make sense in the context of your project and recommendations. Colloquium's main objective is to prepare the client to take over the implementation of the plan. The week also includes some social activities. This week is often the most satisfying week of the GCP. The Wharton team as a whole has the responsibility to provide hospitality as well as results to their partner teammates and to their clients.

This assignment reflects the final deliverables for the engagement. See the previous assignment, "Draft of Final Presentation & Bring Alive Activities," for details about submission requirements.

The letter grade assigned reflects the team's overall grade for the project, which may be modified for each team member based on peer evaluations. The team grade is based on a single criterion:

**The team has modeled and quantified the measurable impact that the recommendations and plan, which were communicated in the final presentation and deliverables, may have on the client's business.**

Individual grades for the course will be based on the culmination of all earlier deliverables, the final deliverable, and aggregate results of the second peer evaluation.

**As a final deliverable, you must provide the following information to BOTH the client *and* the GCP office by the last day of Colloquium. Please note that you will not be able to receive your final grade if this is not received by the GCP office.**

The contents should be organized in folders in a logical manner. Items to be included:

1. Table of Contents
2. Clean copies of all your interim and final deliverable decks:
  - a. Final, Signed Version of Consulting Proposal
  - b. Mid Term Progress Review
  - c. Final Presentation Report
  - d. Any other significant deliverables from client meetings throughout the project (i.e., progress reviews, memos)
3. **Sanitized** primary research including detailed interview write-ups, focus group results, survey responses – all of which should appropriately respect the confidentiality of respondents consistent with the research commitments. This usually includes the removal of names (i.e., interviewees) and distinguishing descriptions that may disclose identities. For example, "Coca Cola's CEO" would not be adequate. "CEO of a Consumer Products Company" would be appropriate. **Any data provided in confidence should be deleted.** Information that could compromise a company or its employees should not be disclosed unless there is a clear and traceable indication that it is permitted. When in doubt ask or be conservative and don't disclose. Additionally, consider how fragmented/concentrated the industry may be; industries with few players can result in disclosure.
4. Contact details for bring-alive participants and any other parties important for implementation (as long as the Bring Alive participants have given permission to share their contact information.)



5. Copies of key secondary sources including articles, reports\*, relevant web page addresses, etc. All sources should be appropriately cited. Please make sure to footnote sources as much as possible in the work, so that information is traceable.
6. Spreadsheets including financial projections of revenues, operating and implementation costs
7. Excel Macro's for any models developed

\*NOTE REGARDING REPORTS AND ARTICLES: Please **include** any reports paid for by the client (i.e. using your research budget) or that are publicly available. Please **exclude** anything that you accessed through the library system because of your student status.

### Recommended Readings:

Section Title	Topics	Study.Net Readings
GCP Orientation and Consulting Process	<ul style="list-style-type: none"> <li>• Overview of consulting and the consulting process</li> <li>• What it means to be a consultant</li> <li>• Strategies for success in GCP</li> </ul>	"Consulting is More than Giving Advice", Turner, Harvard Business Review "Thinking Like a Consultant", The Advice Business, Chapter 7 [p 98-101]
Defining the Scope of Work	<ul style="list-style-type: none"> <li>• Managing the initial client meeting</li> <li>• Project scoping, methodology and commitments</li> </ul>	"The Contracting Meeting", Flawless Consulting, Chapter 5 [p 69-88]
Client Management	<ul style="list-style-type: none"> <li>• Client communications and the client/consultant relationship</li> <li>• Defining client's involvement in the process</li> <li>• Expectations management</li> <li>• Avoiding intimidation</li> </ul>	"Techniques Are Not Enough", Flawless Consulting, Chapter 2 [p 13-16, 27-35] "5-step Client Education Checklist", Process Consulting, Chapter 1 [p 3-6]
Project Management and the Consulting Process	<ul style="list-style-type: none"> <li>• Developing the project work plan</li> <li>• Task, schedule management</li> <li>• Client communications and updates</li> </ul>	"Managing Projects", The Advice Business, Chapter 10 [p 153,156-164] "Ten Steps to Launch", Process Consulting, Chapter 1 [p 14-18]
Storyboarding	<ul style="list-style-type: none"> <li>• Presentation best practices</li> <li>• Storyboarding</li> </ul>	Higgins, "Storyboarding Your Way to Success", Training & Development June 1995, pages 13-17
Research Methods	<ul style="list-style-type: none"> <li>• Approaches to data collection and research</li> <li>• Conducting expert interviews</li> <li>• Sourcing, using secondary information</li> <li>• Surveys and other market research techniques</li> </ul>	"Backward Market Research", Andreasen, Harvard Business Review "Market Research," Dolan, Harvard Business Review "Gathering Data and Diagnosing Situations", The Advice Business, Chapter 11 [p 179,181-189,192-193]