SCM 7397 Supply Chain Corporate Projects
Section 25356 Spring 2018

Professor: Gordon D. Smith, Ph.D.
Class Schedule: 6:00 to 9:00 PM Wednesday **Class Room**: MH 138
Office Hours: MH 260-A Wednesday 4:00 until 6:00pm, or by appointment
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I. Course Description

The Supply Chain Corporate Projects (formerly Supply Chain Management Consulting Lab) is a capstone practicum course offered by the DISC SCM program at Bauer College. The course provides the opportunity for MBA, MS SCM and other professional-program students to gain applied corporate project experience while providing a valuable service to the business community. Students work in teams on significant business projects under the guidance of Bauer faculty who bring considerable professional experience. Student ***project groups*** will dedicate up to 500 person-hours (approximately 150 hours per student) in total to a specific business project.

The course is designed to meet the needs of the majority of students who work in existing organizations, where issues such as changes in strategy, changes in organization, process improvement, feasibility studies, quality certification, and many other kinds of challenges routinely arise and may require internal project/consulting skills. However, the course is also appropriate for new venture development and entrepreneurial projects.

What to Expect

You are enrolled in a course that is probably unlike any you have experienced. Your responsibility for the semester will be to satisfy the business needs of a client—after our initial class sessions your work will be mostly with the client and driven by the client's project schedule and needs. You will be working 'for them', often at their location, on a problem/problems that are very real to them and for which they seek a real and useful solution. You are expected to actually solve their problem, not tell your professor about a possible solution. Students take the lead in these projects - faculty (myself and/or subject matter mentors) are responsible for providing tools for the course and organizing the teams and clients; after that, faculty have minimal interaction with clients, until the final team project presentation. I, as the supervising faculty, will attend all initial introduction meetings, appropriate interim progress meetings and all final team presentations.

Do not be misled by the lack of formal classroom structure. Even though there are only a few formal class sessions, expect to put in many hours of effort. There may well be times when you will wish for a more traditional lecture-type course that has more structure—there are no regular exams; clients may cancel or change meetings with your team and disrupt your schedule; client needs may not be well defined, especially at the beginning of the project; and more. Your clients will contribute significantly to the evaluation of the project for your grade; and, unlike many professors, they feel no obligation to be nice or to reward you for the "old college try." They are expected by their superiors to deliver results, and they will expect no less from you.

II. Course Textbook and Other Requirements

Required: *The Basic Principles of Effective Consulting*. Linda K. Stroh and Homer H. Johnson. Mahwah, NJ: Lawrence Erlbaum Associates, 2006. ISBN 0-8058-5420-7.

Required: *Project Management in Practice, 4th ed.* Jack R. Meredith, Samuel R. Mantel, Jr., Scott M. Shafer, and Margaret M. Sutton. Wiley, 2010.

Both texts can be found as pdf's.

Readings: Many of these are supplemental to the texts and provide additional information helpful for specific purposes.

Class and Online Meetings

Regular 'face to face' class meetings will be the exception rather than the rule—there will be only three regular "classes," and two of those are primarily focused on preparatory activities prior to working with the clients. Most meetings will be "virtual," where teams meet using electronic group communications with professor(s), by e-mail or through ZOOM or other electronic meeting facilitator. Similarly, most assignments in the early part of the course are completed and submitted on line. Meetings between project teams and faculty mentor(s) may also be held at times mutually suitable to team members and faculty mentors, and these may be at times other than regularly scheduled class times; students are encouraged to request such meetings at any time they feel they need them.

Client Meetings

Most meetings with clients will be held on the client's premises, and students should schedule those to be as compatible with both student and client schedules as possible. This usually requires some degree of accommodation on both parts. In the event that a client becomes overly demanding or inflexible, students should feel free to contact the faculty supervisor for assistance; the same is true for clients if the situation is reversed.

Team Formation and Electronic Groups

Teams will be formed prior to the first class meeting. Electronic groups using technology such as ***Google Plus Hangouts, or Yahoo Groups and/or Skype for Conferencing*** will be expected for all teams, with one student in each team taking responsibility for this task. The chosen technology for meeting with the Professor on a weekly or as needed basis is ZOOM (www.zoom.us). These e-groups are a very helpful medium for allowing team members and faculty mentors to work from different physical locations, and for allowing faculty mentors to stay in touch with teams quickly.

These e-groups will be the primary hub for project communication. All e-mail will go through the e-groups; all reports and deliverables will be posted to the e-groups. If there should be need for direct contact with faculty mentor(s) outside the e-group this is available, of course, but all normal project business will be reported through the e-group.

Course Grading

Your grade is primarily dependent on your project work (90 percent), and your project work will be evaluated on the basis of three important criteria:

1. "Technical merit." Your work is evaluated on how well you deliver the deliverables required in this course. Key to this is to develop the solution(s) and the quality of the solution(s). As relevant to each client problem or need, the correct and appropriate application of business metrics, process/workflow mapping, project management, and other tools made available through the texts and readings will be evaluated as part of the technical merit of the final product. Quality of writing and clarity of the final report is a significant part of technical merit. Client evaluations of the project final deliverables is also a significant component of this criterion.
2. "Implementation success probability." This is based on an assessment or best estimate of the real impact your effort will have on the client's operations and success. The best assessments are possible with the best quality of analysis, development of solution and final management report.
3. "Professionalism." This takes into consideration how well you deal with your client, your teammates, and your faculty mentor(s). Submission of deliverables during the semester to the faculty mentor will be a significant factor in evaluation of this criterion, as will client evaluation of each student and the teams work.

Several preparatory assignments will be given to familiarize you with two widely useful tools for this course: (1) process/workflow mapping, and (2) project management, the latter using project management software. We will discuss software options during the first class session. The use of project management thinking and tools will be a requirement for this course, and several short required problems will also be assigned, as shown in the syllabus. Each student should prepare and submit these individually.

Finally, a brief take-home test of comprehension will be the final grading criterion. This will be based on the assigned readings from the texts and the readings in this syllabus. Ten (10) percent of the final grade will be determined by this test.

Student Deliverables

During the semester your progress will be monitored through the following required reporting mechanisms; these are to be uploaded to the electronic group page so that all project information is in one location and faculty and group members can gain access to it at all times. Due dates for these are shown in the course schedule (separate document):

- Individual problem assignments; these are very brief and take little time to complete, but are important for familiarity with these tools. *Due:* on date shown.
- A take-home test of comprehension on assigned readings. *Due:* on date shown.
- A project proposal (detailed below), which describes very precisely the consulting project that you plan to do and serves as the basis of the written

contract between you and your client, and an accompanying project plan. *Due:* after meetings with client and definition of scope of project.

- A contract and a non-disclosure agreement (as appropriate) with the client (detailed below). *Due:* after approval of the project proposal.

- Regular progress reports throughout the semester to update your faculty mentor on your progress. These will consist of (1) a brief verbal update of project progress, and (2) an updated **Tracking Gantt Chart**.

  Since these are our primary means of staying in touch, it is very important that these be done regularly and as required in the course schedule.

- A final report and presentation to the client for the project that details the solution that you have developed for the client and provides complete documentation for the implementation of the project. *Due:* end of semester on date to be scheduled with client.
- At the end of the project, clients will provide an evaluation of the project to the faculty mentor(s). Evidence of either superior performance or problems in performing the project will influence the ratings teams receive on these factors. *Due:* end of semester on date to be scheduled with client.

- In addition, students are required to provide an evaluation of their teammates; these evaluations also influence the final determination of individual grades. *Due:* end of semester on date to be scheduled with client.

Progress reports are "graded" as a group during the semester. Every report (see **Progress Report Guideline**) should have information regarding Parts 1 - 3; Parts 4 - 6 may not be relevant to a specific report, and that can be noted. Generally, reports meeting the criteria above will receive "A" grades and contribute as such to the final grade. Missing or poorly done reports may result in a reduction of the final grade. Similarly, contracts, NDAs, and evaluations must be submitted for full credit.

The Project Proposal

Think of the proposal as a formal contract you are tendering to the client, but with additional information to show you understand the client's needs and also to persuade the client that you are the source of competence best suited to meet those needs. Depending on the client, most students will find that the Stroh and Johnson text outline and guidance for the proposal is best.

The specific nature of the proposal will vary depending on the technical requirements, of course, but the majority of proposals are "business proposals," and have some important characteristics. Domain knowledge is an important part of the "situation" of the business, and often the most important part. What are the major variables that define "success" (often discussed as "critical success factors")? What *specific metrics* are used; what is the basis for measuring "success" or performance? Whether getting approval for a project within a company or winning business through competitive bids in a consulting firm, effective business proposals are a key requirement.

For this course, the project plan should be developed and presented using project management software. As will be seen, this requires the project team to think the consulting project through in detail, and to schedule tasks in a way that meets both student and client timetables. In addition, it creates an excellent way to portray the project, and to communicate critical parameters about the project to team members, faculty mentors, and client stakeholders.

Client Relationships

All client organizations (as appropriate) sign an agreement to enable students to work with the client and assure mutual protection of client and student interests. All information to and from clients is to be held in confidence—students and faculty mentors (if required) sign a non-disclosure agreement (NDA) with the client for all projects. Students may be required to sign company forms or be required to meet other company related criteria, such as security or drug screening. Clients have the right to not accept students if employment or other affiliations might create a conflict of interest.

The Final Report and Presentation to the Client

The **final report** will be similar in format to the proposal, except you will describe what you actually did rather than what you plan to do; again, the text outline (S&J Chapter 6) provides excellent guidance. It is important that your final report *sell* the project to the client, as did the proposal. “Selling,” of course, means a positive view of the project outcomes, but it also requires honesty and ethical reporting—sometimes what has to be “sold” is information the client would rather not hear. Whatever the situation, you should discuss why the solution is a good one and how the client will benefit from implementation of the solution. Limitations and shortcomings that may have a significant impact on the client should also be acknowledged.

The faculty mentor(s) must approve the final report before it is submitted to the client. The report should have a well-designed cover page; a table of contents; an executive summary; and then the full report. It will cover all the information in the proposal in addition to the outcomes (S&J Chapter 6). Project scope often changes from that in the original proposal, and this should be reported so that a history of the project is given. Technical appendices may be added if necessary, and the final update of the project management plan should be attached.

It is very important that the final report provide complete documentation of the project so that the client may refer to it later, should the need arise. This means that a comprehensive list of all resources used (publications, interviews, government information, etc.) must be provided with full bibliographic information. This may be prepared using any consistent set of guidelines, such as the Turabian (University of Chicago) style manual, American Psychological Association, Modern Language Association, IEEE, etc.

All project reports will submitted to the client along with a **formal presentation** (S&J Chapter 7). In the majority of cases, the final report will be presented to the client on their premises, with the faculty mentor(s) in attendance. If necessary, client organizations may come to campus and receive their presentation and report there.

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SEMESTER SCHEDULE TEMPLATE

Course text pre-reading assignments (complete as early as possible, definitely prior to second class session):

Text: (1) Stroh and Johnson, *The Basic Principles of Effective Consulting*, all chapters. (2, optional) Mantel *et al.*, *Core Concepts of Project Management*, sections 1.1- 1.4; 2.1, 2.2; 3.1 (important), 3.2, 3.4; skim Ch. 4 (budgeting); 5.1, 5.2, 5.4; skim
Ch. 6; 7.1, 7.2; skim Ch. 8.

Downloads: Each class meeting has several downloads available on Black Board for which students are responsible.

1st Class Review of syllabus and texts

Course overview and introduction.

Discussion: e-group process and ZOOM

Discussion: Business Consulting

Using Project Management Software

Review and discussion of critical success factors and business metrics for business outcomes and results

Discussion of Corporate Projects

Week 2 Virtual (IN CLASS IF NECESSARY)

Schedule individual team meeting for discussion of client project, proposals, and scope of work

Client meeting should be held this week.

Week 3 Virtual Meeting Required; Draft Project Plan

Week 4 NO CLASS MEETING: First Project Reports and first project plan update.

Week 5 **CLASS MEETING**: Review posted progress report 2 with updated tracking

Week 6	NO CLASS MEETING: Post progress report 3, project plan update
Week 7	NO CLASS MEETING: Post progress report 4, project plan update
Week 8	March 7th **CLASS MEETING**: Review Progress to Plan; Provide scheduled time for final project presentation proposed (preferred and alternate) dates
Week 9-12	
Week 13	First draft of final report due for faculty mentor review (Stroh and Johnson format required). Have final presentation to client scheduled and confirmed.
Week April 30	Final report presentations to client; submit team peer evaluations, have client complete client evaluation. **DO NOT POST** evaluations to e-group—send these directly to faculty mentor by e-mail.
TBD	Final written report due. *No grades are released without all evaluations and final report.*