



Instructor Bill Peterson
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(please include section number in the subject of all emails)

Office hours: Tuesday 10-11am, online
Tuesday 1-2pm, online
or by appointment

Grader Kalina Mishev
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Class MW 9:30 – 11:00am, online

Required Materials (none)

**DRAFT – SUBJECT TO
CHANGE**

(from S20 semester)

MKT372, “Strategy Consulting for Marketers”, is a hands-on introduction to the science and art of management consulting with a focus on the application of marketing principles. Through discussion of consulting concepts, several assignments, and especially by executing an actual consulting engagement with a client company, successful students will gain a solid understanding of management consulting principles.

Course Objectives:

- Develop a working knowledge of, and actual experience with, management consulting.
- Refine ability to “frame” complex problems and make them analyzable – a critical skill in consulting and business (and in case-based interviews).
- Understand the various segments of the consulting industry and other business situations where consulting skills are important.
- Gain additional experience in applying marketing concepts.
- Develop additional competencies in the “soft” skills which are critical to consulting and business success: working with a client, working with teams, verbal and written communications, project management, etc.

Course Prerequisite: Marketing 337 or 337H

Course Format:

The majority of this class will consist of student teams executing an actual consulting project. These projects are extremely realistic opportunities for student teams to plan and execute a complete consulting engagement. Via a bid process, students will be assigned to one of five teams, and each team will execute a consulting engagement with a local company (i.e. the “client”). Each team will work with their client to understand their problem, create a work plan and proposal, execute market research, conduct analysis and modeling, and structure their recommendations into a final report and presentation. Generally, teams will meet with their client at least monthly and with their instructor weekly to review progress and receive guidance for their project.

The class will meet in a traditional (but online) classroom format for the first several weeks and occasionally thereafter. Many weeks, however, there will be no class meeting. Instead, teams will work independently and meet individually with the instructor to review progress on their consulting project and receive feedback/guidance.

There will be several interim deliverables during the project. During the last two weeks of class, student teams will present their final recommendations to the client as well as present an executive summary of their project to the class.

While the class will include some time in a traditional classroom setting, much of the work (and much of the learning) will happen outside of the classroom: in team meetings, in meetings with the client, in meetings with the instructor, and in individual work. This is a rigorous class and students are expected to fully apply themselves and be prepared for each activity. Generally, it is expected that students will spend an average of at least 2 hours outside of class for each hour in class (i.e. an average of at least six hours outside of class each week).

Deliverables and Grading:

Component	Percent of Semester Grade			Evaluator			
	Team	Individual	Total	Client	Instructor	Peers	Team
Proposal	20%		20%	✓	✓		
Research Review	20%		20%	✓	✓		
Final Recommendations	40%		40%	✓	✓	✓	
Individual Contribution		20%	20%	✓	✓		✓
	80%	20%	100%				

A brief description of each grading component is as follows:

- **Proposal:** On the front end of the client engagement, consulting teams will prepare a proposal summarizing the objective, scope, work plan and other details of the proposed project. The proposal will be in the form of a MS Word document, no more than 4 pages (plus any appendices), 11-point font, single spaced, submitted via email to the client and instructor no later than the deadline communicated in class. Ideally this proposal will be presented to, and discussed with, the client. Additional details will be provided in class. Grading criteria will include the degree to which the Proposal includes:
 - Effective definition of project scope (balancing client needs/input vs. the realities of the time and resources available during the semester)
 - Effective definition of a SMART objective(s) for the project which reflects accurate use of framing techniques

- Effective and complete use of secondary research
- An effective work plan which defines the appropriate use of primary data collection to support the project objective
- Clear articulation of team commitments (deliverables, schedules, etc.) and client commitments (provision of data, access to employees/customers/partners/etc., budget, etc.)
- Delivery to the client (and instructor) in a professional and effective manner

Note it will be the original submission of the proposal to the client which will be graded (not any subsequent revisions).

- Research Review: At approximately the mid-point of the semester, consulting teams will present a summary of their research findings to the client. The deliverable will typically consist of an annotated PowerPoint document of about 20 slides (plus appendices, if any) provided to the client and instructor no later than the deadline communicated in class. Time permitting, this research review will be presented to the class for discussion. Additional details will be provided in class. Grading criteria will include the degree to which the Research Review includes:
 - Effective use of data collection techniques
 - Clear explanation of the linkage of the data collected to the objective of the project
 - An effective hypothesis on the likely final recommendations
 - Delivery to the client (and instructor) in a professional and effective manner
- Final Recommendations: At the conclusion of the project, consulting teams will present their final recommendations to the client. The deliverable will typically consist of an annotated PowerPoint document of about 30 slides (plus appendices, if any) presented to the client and instructor no later than the deadline communicated in class. Each team will also present a summary of their project to the class. Additional details will be provided in class. Grading criteria will include the degree to which the Final Recommendations include:
 - Accomplishment of the objective(s) of the project
 - A credible, data-driven approach for all recommendations
 - Accurate applications of consulting methodologies
 - Accurate applications of marketing concepts
 - Effective financial analyses and implementation plans, as appropriate
 - Delivery to the client (and instructor) in a professional and effective manner
 - Effective presentation of summary of project to class
- Individual Contribution: All students are expected to “carry their weight” and make impactful contributions to their team consulting project. Students who are blatantly unparticipative in team projects will be subject to additional penalties including being “fired” from the team. Additionally, all students are expected to make meaningful contributions in all other aspects of the class (class discussions, presentations, instructor meetings, client meetings, etc.). Individual Contribution grades will be based on the extent to which students meet these expectations:
 - Positive contribution to the results of the team
 - Professional and effective interactions with the client
 - Constructive participation in class discussions, instructor meetings, and other elements of the class
 - Demonstration of a sense of dedication and urgency throughout the semester

50% of the Individual Contribution grade will be based team member input. The other 50% will be based the instructor's assessment of individual contribution in class discussions, presentations, instructor meetings, and client meetings using this rubric:

- Present and contributing especially insightful comments which enhance the learning of other students: 9-10 points
- Present and actively contributing to the discussion: 8 points
- Present and not obviously unprepared: 7 points
- Present but unprepared: 5 points
- Not present: 0 points

Appealing a Grade: If you believe there is a grading error which is cause for review, you may make an appeal. All appeals must be submitted via email (not Canvas) to bill.peterson@mcombs.utexas.edu and must be received no later than 11:59pm on the 7th calendar day after the grade is posted on Canvas or otherwise communicated to you. Your appeal must include a detailed, fact-based explanation of why you think the grade is in error. Note that an appeal is not an opportunity to provide new information or explain a previous submission but instead to correct a legitimate grading error. Your grade may be increased or decreased as a result of the appeal. Appeals for team deliverables must be agreed to by all team members (and the outcome will apply to all team members). Due to tight grading timelines at the end of the semester, no appeals for the final recommendations or individual contribution will be considered.

Final grades will be assigned as follows:

Semester Average	Grade	Grade Points
93-100	A	4.00
90-92	A-	3.67
87-89	B+	3.33
83-86	B	3.00
80-82	B-	2.67
77-79	C+	2.33
73-76	C	2.00
70-72	C-	1.67
67-69	D+	1.33
63-66	D	1.00
60-62	D-	0.67
59 or less	F	0.00

Consistent with the guidelines suggested by the Undergraduate Program Office, the average grade for this elective course will be between 3.4 and 3.6 (or ~90%).

To avoid any misunderstanding regarding rounding methodology, grades will NOT be rounded up - an 89.99 (as close as it is to 90) will still be a B+.

Note that the grade calculations shown on Canvas are occasionally in error. The official grades for this class will be calculated as described in this syllabus and may be different than the grade calculations shown on Canvas.

Out of fairness to all students, I do not arbitrarily change grades or give extra credit opportunities. There will be no exceptions. The way to get the grade that you want is by earning it *during* the semester, and not by asking for a favor at the end of it.

Tentative Class Schedule:

A tentative schedule is provided below. Since this course is by nature "experiential," revisions to this schedule will be made on an as-needed basis. Schedule updates and any assignments will be communicated in class and/or on Canvas.

Date	Day	Class	Class Type	Class Topics
8/26	W	1	Discussion	Course Overview
8/31	M	2	Discussion	The Consulting Process
9/2	W	3	Discussion	The Initial Client Meeting and the Proposal
9/7	M			(Labor Day)
9/9	W	4	Presentations	Secondary Research Presentations
9/14	M	5	Discussion	Framing the Problem
9/16	W	6	Discussion	Data Collection Strategies
9/21	M	7	Instructor Meetings	Instructor Meetings
9/23	W	8	Instructor Meetings	Instructor Meetings
9/28	M	9	Discussion	Best Practices for Data Collection
9/30	W	10	Instructor Meetings	Instructor Meetings
10/5	M	11	Instructor Meetings	Instructor Meetings
10/7	W	12	Discussion	Best Practices for Research Reviews
10/12	M	13	Presentations	Research Review Summary Presentations
10/14	W	14	Presentations	Research Review Summary Presentations
10/19	M	15	(no class meeting)	Research Reviews with Client
10/21	W	16	(no class meeting)	Research Reviews with Client
10/26	M	17	Discussion	Strategy Formulation and Modeling
10/28	W	18	TBD	
11/2	M	19	Instructor Meetings	Instructor Meetings
11/4	W	20	Instructor Meetings	Instructor Meetings
11/9	M	21	Discussion	Implementation Planning and Packaging
11/11	W	22	TBD	
11/16	M	23	Instructor Meetings	Instructor Meetings
11/18	W	24	Instructor Meetings	Instructor Meetings
11/23	M	25	TBD	
11/25	W			(Thanksgiving)
11/30	M	26	Presentations	Project Summary Presentations to Class
12/2	W	27	Presentations	Project Summary Presentations to Class
12/7	M	28	(no class meeting)	Final Presentations to Client

Firing a Team Member:

Occasionally, an unproductive team member can negatively impact the opportunity for a team to have a meaningful learning experience (and negatively impact the quality of the work for the client). In such circumstances, teams can consider “firing” the offending team member. The process for firing a team member is as follows:

- If a team is having an issue with a team member that cannot be resolved internally, the team must first meet with the instructor and present a proposed “Performance Improvement Plan” (PIP) for the offending team member. The PIP must detail the performance issues and the specific improvements which are required. If approved by the instructor, the offending individual has one week to comply with the PIP.
- Seven calendar days after the PIP is delivered, and if the performance improvement plan has not motivated adequate improvements, the team can propose to fire the offending individual. This requires unanimous consent of the remaining team members and approval of the instructor.
- Remaining team members will be held accountable for completing the work of the fired student. In other words, the team will be granted no slack because they are down one team member.
- The fired student will independently complete a project similar to the one assigned to the team (to be defined by the instructor), but which will be evaluated completely separately and will involve no client interaction.

Important Disclosures

(Additions to the standard UT/McCombs disclosures are noted in red font.)

Students with Disabilities

Students with disabilities may request appropriate academic accommodations from the Division of Diversity and Community Engagement, Services for Students with Disabilities, 512-471-6259, <http://diversity.utexas.edu/disability/>.

Diversity and Inclusion

It is my intent that students from all diverse backgrounds and perspectives be well served by this course, that students' learning needs be addressed and that the diversity that students bring to this class can be comfortably expressed and be viewed as a resource, strength and benefit to all students. Please come to me at any time with any concerns.

Religious Holy Days

By UT Austin policy, you must notify me of your pending absence at least fourteen days prior to the date of observance of a religious holy day. If you must miss a class, an examination, a work assignment, or a project in order to observe a religious holy day, you will be given an opportunity to complete the missed work within a reasonable time after the absence.

Policy on Scholastic Dishonesty

The McCombs School of Business has no tolerance for acts of scholastic dishonesty. The responsibilities of both students and faculty with regard to scholastic dishonesty are described in detail in the BBA Program's Statement on Scholastic Dishonesty at <http://my.mcombs.utexas.edu/BBA/Code-of-Ethics>. By teaching this course, I have agreed to observe all faculty responsibilities described there. By enrolling in this class, you have agreed to observe all student responsibilities described there. If the application of the Statement on Scholastic Dishonesty to this class or its assignments is unclear in any way, it is your responsibility to ask me for clarification. Students who violate University rules on scholastic dishonesty are subject to disciplinary penalties, including the possibility of failure in the course and/or dismissal from the University. Since dishonesty harms the individual, all students, the integrity of the University, and the value of our academic brand, policies on scholastic dishonesty will be strictly enforced. You should refer to the Student Conduct and Academic Integrity website at <http://deanofstudents.utexas.edu/conduct/> to access the official University policies and procedures on scholastic dishonesty as well as further elaboration on what constitutes scholastic dishonesty.

Note that, much like an actual consulting engagement, resourcefulness is required and encouraged for MKT372. Given the uniqueness of each project in this class and unless otherwise indicated, you will need to access outside resources. This is acceptable provided that:

- All analysis, recommendations, and deliverables are prepared solely by the students.
- Any information from sources other than class discussion and assigned readings is clearly and completely attributed.

Any other use of outside resources is considered a violation of the academic integrity standards for this class and is subject to the maximum penalties.

Any class recordings are reserved only for students in this class for educational purposes. The recordings should not be shared outside the class in any form. Violation of this restriction could lead to Student Misconduct proceedings.

All class discussion material, exams and quizzes used in this class are copyrighted. Additionally, some class material is covered by non-disclosure agreements with client companies. Reposting or distributing class material is heavily punishable independent of the University of Texas Honor Code.

Campus Safety

Please note the following key recommendations regarding emergency evacuation, provided by the Office of Campus Safety and Security, 512-471-5767, More info at: <https://preparedness.utexas.edu/>.

- Occupants of buildings on The University of Texas at Austin campus are required to evacuate buildings and assemble outside when a fire alarm is activated.
- Familiarize yourself with all exit doors of each classroom and building you may occupy.
- If you need evacuation assistance, inform the instructor in writing asap.
- In the event of an evacuation, follow the instruction of faculty or class instructors.
- Do not re-enter a building unless given instructions by Austin or UT police or fire authorities.
- Behavior Concerns Advice Line (BCAL): 512-232-5050 or [on-line](#).
- In case of emergency, further information will be available at: <http://www.utexas.edu/emergency>.

Safety and Class Participation

We will all need to make some adjustments in order to benefit from in-person classroom interactions in a safe and healthy manner. Our best protections against spreading COVID-19 on campus are masks (defined as cloth face coverings) and staying home if you are showing symptoms. Therefore, for the benefit of everyone, this means that all students are required to follow two important rules.

- **Every student must wear a cloth face covering properly in class and in all campus buildings at all times.**
- **Every student must engage in documented daily symptom screening.** This means that each class day in which on campus activities occur, students must upload certification from the symptom tracking app and confirm that they completed their symptom screening for that day to Canvas. Students should not upload the results of that screening, just the certificate that they completed it. If the symptom tracking app recommends that the student isolate rather than coming to class, then students must not return to class until cleared by a medical professional.

If a student is not wearing a cloth face covering properly in the classroom (or any UT building), that student must leave the classroom (and building). If the student refuses to wear a cloth face covering, class will be dismissed for the remainder of the period, and the student will be subject to disciplinary action as set forth in the university's Institutional Rules/General Conduct 11-404(a)(3). Students who have a condition that precludes the wearing of a cloth face covering must follow the procedures for obtaining an accommodation working with Services for Students with Disabilities.

Other guidelines include:

1. Students in A/B cohort classes should attend their in-person section only on the day and at the time that they are scheduled to attend.
2. Students should not alter the layout of a classroom under any circumstances from its original configuration that is designed to maintain social distancing guidelines.
3. Students should remain outside the building until the passing time prior to their designated class time. Use designated campus study areas as needed.
4. Consumption of food and drink is not allowed in classrooms or public areas of university buildings except for designated break areas.
5. Enter the building at the designated entrances. Use the hand sanitizer as provided or your own personal hand sanitizer after entering the building.
6. Follow the corridor and stairway directional signage where applicable, maintain proper social distancing and noted paths of travel.
7. All physically-able students should use stairs whenever possible. If an elevator is required there should be no more than the number of occupants noted on the elevator signage in the elevator at a time, maintaining social distancing.
8. All classrooms doors should remain propped open before, during, and after class if it is not disruptive. This decision is at the discretion of the instructor using the classroom.
9. Students should enter the classroom at the designated entrance and fill the room by row from the first row to the last row and from the seat furthest from the entrance to the seat closest.
10. Only specific seats in classrooms will be available due to social distancing requirements.
11. Students should carry their own personal sanitizing wipes to ensure that they can clean surface areas including classroom stations as needed. Wipes should be disposed of after class in the nearest trash receptacle.
12. Students should exit the building immediately after the class completes at the designated exit. Each student should exit the room by row from the last row to the first row and from the seat nearest the exit to the seat furthest from the exit. Students who wish to speak with the instructor after class should do so at the location that will be designated by the instructor outside the building so that the next class can get set up and social distancing can be maintained.
13. Dispose of any waste after class in the nearest trash receptacle.
14. Exit the building at the nearest designated exit. Use the hand sanitizer as provided or your own personal hand sanitizer after exiting the building.

Title IX Reporting

Title IX is a federal law that protects against sex and gender-based discrimination, sexual harassment, sexual assault, sexual misconduct, dating/domestic violence and stalking at federally funded educational institutions. UT Austin is committed to fostering a learning and working environment free from discrimination in all its forms. When sexual misconduct occurs in our community, the university can:

1. Intervene to prevent harmful behavior from continuing or escalating.
2. Provide support and remedies to students and employees who have experienced harm or have become involved in a Title IX investigation.
3. Investigate and discipline violations of the university's [relevant policies](#).

Beginning January 1, 2020, Texas Senate Bill 212 requires all employees of Texas universities, including faculty, report any information to the Title IX Office regarding sexual harassment, sexual assault, dating violence and stalking that is disclosed to them. Texas law requires that all employees who witness or receive any information of this type (including, but not limited to, writing assignments, class discussions, or one-on-one conversations) must be reported. **I am a Responsible Employee and must report any Title IX related incidents** that are disclosed in writing, discussion, or one-on-one. Before talking with me, or with any faculty or staff member about a Title IX related incident, be sure to ask whether they are a responsible employee. If you would like to speak with someone who can provide support or remedies without making an official report to the university, please email advocate@austin.utexas.edu. For more information about reporting options and resources, visit <http://www.titleix.utexas.edu/>, contact the Title IX Office via email at titleix@austin.utexas.edu, or call 512-471-0419.

Although graduate teaching and research assistants are not subject to Texas Senate Bill 212, they are still mandatory reporters under Federal Title IX laws and are required to report a wide range of behaviors we refer to as sexual misconduct, including the types of sexual misconduct covered under Texas Senate Bill 212. The Title IX office has developed supportive ways to respond to a survivor and compiled campus resources to support survivors.

McCombs Classroom Professionalism Policy

The highest professional standards are expected of members of the McCombs community. The collective class reputation and the value of the McCombs experience hinges on this. Please let me know right away if this ever is not the case.

Faculty are expected to be professional and prepared to deliver value for each and every class session. Students are expected to be professional in all respects. Classroom expectations of students include:

- Students will arrive on time.
- Students will be fully prepared for each class.
- Students will attend the class section to which they are registered.
- Students will respect the views and opinions of their colleagues. Disagreement and debate are encouraged. Intolerance for the views of others is unacceptable.
- Phones and wireless devices are turned off unless otherwise instructed by the professor.

All students in MKT372 are businesspeople, as is the instructor. Correspondingly, businesslike conduct is expected in class and we are all expected to conduct ourselves professionally. This includes arriving to class on time, silencing and putting away your electronic devices, refraining from personal conversations and texting during class, not making gratuitous comments in an effort to increase individual contribution grades, and being respectful of your classmates, guest speakers, the TAs, and your instructor. Students not conducting themselves in a businesslike manner will receive a decrement to their individual contribution grade, be subjected to additional penalties, and/or be asked to leave the classroom for the remainder of the class period.