MGT 440
Integrated Management Projects
Fall 2013 & Winter 2014
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Overview

Management 440 (MGT 440), *Integrated Management Projects,* is an required course for 2nd year MBA students in which teams of GSM students apply classroom learning to solve complex business challenges for real world clients. Under the guidance of an experienced faculty advisor, student teams learn practical consulting skills while their corporate sponsors—ranging from early-stage startups to nonprofits to global industry leaders—benefit from the experience, insights, and work product of their IMP teams. At the end of the two-quarter engagement, teams present their analyses and recommendations to their sponsors in both a formal presentation and deliver a fully annotated PowerPoint file and all pertinent backup materials created for the project.

Objectives

The Integrated Management Projects (IMP) course embodies the GSM's philosophy of "Preparing Innovative Leaders for Global Impact" and has three main objectives:

- To apply in an integrated way the academic knowledge acquired in the core curriculum
- To identify and address challenges associated with a significant "real world" business problem
- To promote the development of "soft skills," including teamwork, leadership, and accountability

The GSM core curriculum delivers a substantial level of technical and analytical information: this instruction is generally focused on functional areas of expertise, with limited opportunity to probe on opportunities for integration of the disciplines. A successful integrated projects effort requires students to apply the knowledge they have acquired during their first year of classroom work, and demonstrate integrated skills of analytical rigor, critical thinking, and problem solving.

Furthermore, the ability to deliver insightful recommendations on difficult business problems in a short period of time is a vital skill for anyone in business. The faculty advisor will work with IMP teams to help them learn real world management skills such as assessing the opportunity, identifying key questions, outlining work steps, and defining project deliverables. As in the real world, teams will have less time and information than they need, and will be confronted by how to make decisions and deliver results in a dynamic and challenging environment.

Finally, a successful outcome in the Integrated projects course requires considerable use of management skills to ensure cooperation and coordination within the project team, fully leverage the expertise and insights of faculty advisors, and successfully navigate the perspectives, operations, culture, and requirements of an external sponsor organization.

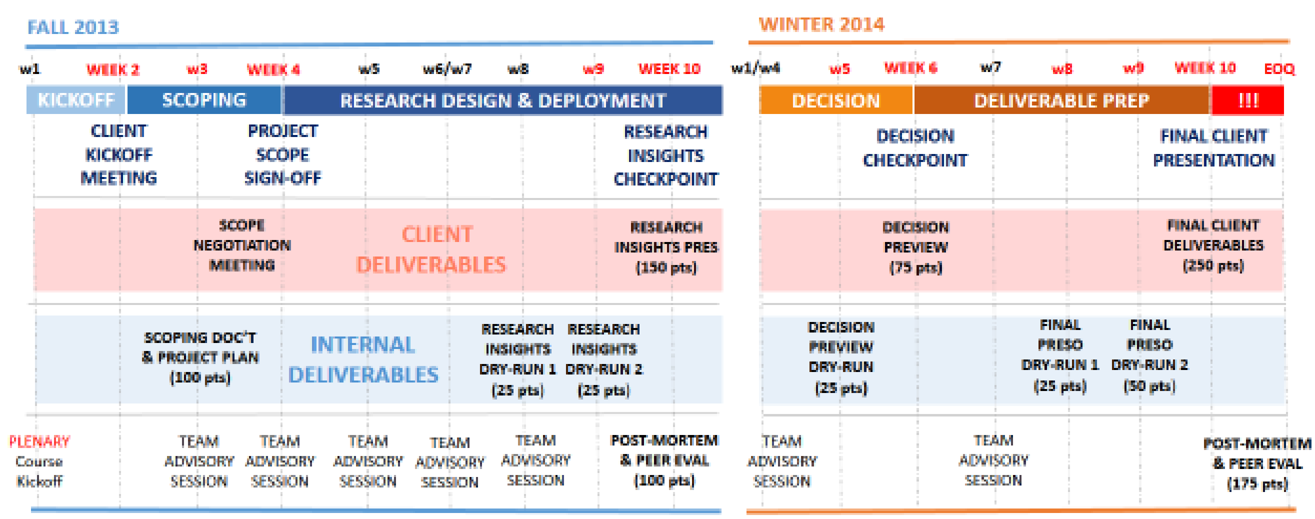
The final product of the team's effort is an oral and written report delivered to the sponsoring organization presented to a panel of faculty and other advisors and to the sponsor.

The Consulting Process

Although there will be variation in project structure based on the individual needs of sponsor organizations, all Integrated Project efforts will require project teams to address the following areas in their initial scope document and subsequent work effort:

- Understanding of the situation
    - Identify key market and operational challenges
    - Assess organizational relationships and interdependencies
- Defining the problem
    - Identify key strategic questions
    - Generate hypotheses on requirements to address these questions
- Developing a project plan
    - Identify key tasks
    - Assign team resources
    - Schedule and tracking of work effort
- Designing a research plan and collecting data
    - Select process and tools to assess and analyze the problem
    - Collect and prioritize insights generated from research results
    - Synthesize data and formulate alternative recommendations
- Developing a decision framework and formulating recommendations
    - Develop a decision framework based on client's business goals
    - Evaluate alternatives and formulate defensible recommendations
- Communicating recommendation and next steps
    - Develop a presentation of the effort's process, analysis, and results
    - Articulate practical recommendations with sufficient specificity to guide implementation
    - Identify the effort and resources required within the organization
    - Identify key challenges, risks going forward for the sponsor
    - Outline the means of measuring results

MGT 440 | 20-week Project Phases, Checkpoints, & Deliverables



FALL 2013 | Timeline, Assignments, & Meeting Schedule

Week	Project Phase / Team Activities	Course Deliverables	Meeting Venue
#1 **9/26**	**COURSE KICKOFF** Course overview, project scoping, project management, and business context modules	Begin research on client – client business & industry context	**PLENARY SESSION** Gallagher Hall
#2 **10/3**	**CLIENT MEETING & KICKOFF** Gather information for project scoping document		**CLIENT KICKOFF MTG** In-person at client site.
#3 **10/10**	**PROJECT SCOPING PHASE** Initial problem definition, research approach & methodology, decision framework, final recommendations Timeline of activities & deliverables, resources assigned & required, and team task assignments	**SCOPING DOCUMENT & PROJECT PLAN** First complete draft submitted in advance of advisory session **All assignments submitted as DOCX, PPTX files via email.**	ADVISORY SESSION Review scoping doc & project plan feedback

Week	Project Phase / Team Activities	Course Deliverables	Meeting Venue
#4 **10/17**	**PROJECT SCOPE SIGNOFF**	**SCOPE NEGOTIATION CALL / MEETING WITH CLIENT** Client sign-off required on negotiated scoping document & project plan	ADVISORY SESSION Review final scoping document. Discuss research topics / methods to be used
#5 **10/24**	Research topics & methods defined Fact finding and research begins		ADVISORY SESSION Review work-in-progress & preliminary findings
#6 **10/31**	Fact finding and research continues		ADVISORY SESSION Review work-in-progress & preliminary findings
#7 **11/7**	Fact finding and research continues		ADVISORY SESSION Begin decision framework development & data synthesis
#8 **11/14**	**RESEARCH INSIGHTS DRY-RUN #1** Fact finding and research continues	**RESEARCH INSIGHTS PRESENTATION** First pass .pptx file, initial walk-thru of presentation	ADVISORY SESSION Run-thru of first pass presentation
#9 **11/28**	**RESEARCH INSIGHTS DRY-RUN # 2** Research phase draws to a close	**RESEARCH INSIGHTS PRESENTATION** Complete, near-final .pptx file, full dress rehearsal	**EXTENDED ADVISORY SESSION** 2-hour meeting, time TBD
#10 **12/5**	**RESEARCH INSIGHTS CHECKPOINT** Options / alternatives identified Decision framework finalized	**RESEARCH INSIGHTS PRESENTATION** FINAL .pptx file, client presentation	**CLIENT IN-PERSON** In-person meeting @ client site

Grading Ranges

grade	low %	low score	high score
A	95.0%	950	1,000
A-	90.0%	900	949
B+	87.5%	875	899
B	85.0%	850	874

grade	low %	low score	high score
B-	82.5%	825	849
C+	80.0%	800	824
C	77.5%	775	799
C-	75.0%	750	774

Course Deliverables & Point Allocation

FALL 2013 | Course Deliverables	**Key Elements / Evaluation Criteria**	**Points**
SCOPING DOCUMENT & PROJECT PLAN Client quality doc file, client sign-off req'd (Week #3/4) **ALL .DOCX, .PPTX files submitted to faculty adviser by email**	• Client situation and industry analysis including key competitors, products, markets served, (public companies) financial data • Clear articulation of problem & project scope • Project plan with key requirements, milestones, & deliverables	100
RESEARCH INSIGHTS DRY-RUN #1 (Week #8)	• Initial walk-thru of Client presentation	25
RESEARCH INSIGHTS DRY-RUN #2 (Week #9)	• Complete dress rehearsal of Client presentation	25
RESEARCH INSIGHTS PRESENTATION FINAL pptx file, client presentation (Week #10)	• Topics / hypotheses researched • Research methodologies employed • Research findings, insights, & takeaways • Alternatives and recommendations to be evaluated in Decision Phase	150
INDIVIDUAL PARTICIPATION SCORE FALL QTR adviser and peer evaluation (End of quarter)	• Personal commitment of student • Constructive behavior with team members • Effectiveness of communication • Dealing with critical factors, uncertainty	100

WINTER 2014 | Course Deliverables	Key Elements / Evaluation Criteria	Points
DECISION PREVIEW DRY-RUN Complete .pptx file, faculty adviser presentation (Week #5)	• Review of alternatives & decision framework • Deep-dive of complete decision analysis • Outline of emerging insights / implications	25
DECISION PREVIEW PRESENTATION FINAL .pptx file, CLIENT presentation (Week #6)	• Review of alternatives & decision framework • Deep-dive of complete decision analysis • Outline of emerging insights / implications	75
DRY-RUN #1 | INITIAL WALK-THRU First pass .pptx file with faculty adviser (Week #8)	• Sit-down, walk-thru of complete presentation • Ability to listen to / incorporate feedback	25
DRY-RUN #2 | DRESS REHEARSAL Near FINAL .pptx file with faculty adviser presentation (Week #9)	• Stand-up, dress rehearsal of final presentation • Complete slide deck (see presentation outline) • Ability to listen to / incorporate feedback	50
FINAL CLIENT PRESENTATION 2-hour FORMAL presentation (Week #10) **FINAL CLIENT DELIVERABLES** Fully annotated pptx file & softcopy back-up docs, research, analytical work, etc. (Finals week)	• Effectiveness and clarity of presentation, credibility in handling questions & discussions • Specificity / practicality of recommendations • Thoroughness, quality, and organization of submitted deliverables	250
INDIVIDUAL LESSONS-LEARNED REPORT Written 5-page doc from EACH STUDENT (End of quarter)	• Personal contribution to project • Lessons learned – industry, business, team dynamics, cross-functional integration	75
INDIVIDUAL ENGAGEMENT / PARTICIPATION SCORE WINTER QTR adviser and peer evaluation (End of quarter)	• Personal commitment of student • Constructive behavior with team members • Effectiveness of communication • Dealing with critical factors, uncertainty	100
TOTAL POINTS POSSIBLE		**1000**

Course Learning Initiatives

In accordance with AACSB requirements, this course has the following learning goals, subgoals and methods of assessment. The performance evaluation above encompasses assessments in student achievement of these goals.

Goal 1: Work well in teams and lead them. Subgoal 1: Study and apply the principles of leadership. Subgoal 2: Communicate effectively in oral form. Subgoal 3: Communicate effectively in written form. Subgoal 4: Use modern technologies to learn and communicate. Subgoal 5: Understand group dynamics and become a contributing team member. Subgoal 6: Understand and appreciate the impact of demographic and cultural diversity. Subgoal 7: Use team building skills to accomplish group tasks.	**Goal 3: Use appropriate models for analysis and planning.** Subgoal 10: Recognize problems and opportunities. Subgoal 11: Identify & critically assess alternatives. Subgoal 12: Demonstrate proficiency in collecting and analyzing data. Subgoal 13: Integrate functional areas of business when analyzing problems.
Goal 2: Apply moral and ethical standards to management decisions. Subgoal 8: Appreciate how ethical judgment enters into business decisions. Subgoal 9: Develop an awareness of ethical issues in an area related to career choice.	**Goal 4: Understand multiple functional areas.** Subgoal 14: Understand the impact of the international dimension on business decisions. Subgoal 15: Understand the political, legal, and social environment in which businesses operate. Subgoal 16: Understand impact of multiple functions on each other in business operations.

Project Administration & Expense Reimbursement

Student teams will be responsible for tracking and managing all administrative elements of the project effort, including internal and external meetings, project documents supplied by the sponsors and by the faculty, required projects submissions, and feedback from faculty and sponsors.

We expect sponsors to reimburse students for travel expenses. Lodging and meals are excluded unless the sponsor requires overnight stay at the project location. Student teams are responsible for tracking and reporting their expenses. Standard expense forms will be provided to each team, which should be filled out and returned in a timely manner.

Code of Conduct

We are responsible for our conduct to our university community, to the Graduate School of Management faculty and administration, to our fellow students and to those from whom we seek information and assistance. Any violation of this code of ethics will be reason for automatic failure of the course.

Throughout the class, each student is expected to conduct him/herself in concert with the UC Davis Code of Academic Conduct outlined at: http://sja.ucdavis.edu/files/cac.pdf

In addition, students are expected to comply with the following code of ethics for working with sponsor organizations:

(1) *While we do not receive financial remuneration for this activity, we are taking the time, and therefore exacting a real cost, of many people. We must do everything possible to minimize this cost, especially to sponsor organizations.*

(2) *This program entails responsibility to three parties:*
(a) our team members, who are counting on us to carry our share of the burden and to treat each other in a professional manner;
(b) our sponsor organization, or whoever we contact personally to obtain information, who may incur both a cost and a competitive risk;
(c) the University and School community, which requires that we live up to high academic and personal standards and that we leave an impression of high quality and integrity with all those we contact.

(3) *If there is any real or perceived conflict of interest with our sponsor organization, we should seek another sponsor or another team.*

(4) *We must maintain strict confidentiality of information given to us in confidence.*

(5) *We must make no contacts, outside of information available publicly such as in libraries or on the Internet, without express permission from our sponsors, or without permission by the course instructor.*

(6) *We should research sponsor organizations as much as possible before visiting them. They will respect us more for our advanced understanding of their operations, and we will minimize their time costs.*

(7) *We should meet with as many people as possible to obtain objective information, yet subject ourselves to the discipline of minimizing the sponsor's costs.*

(8) *We should never make ad hoc suggestions. We should learn as much as we can before we come to even preliminary conclusions.*

(9) *We must report our research findings and conclusions honestly, factually and understandably. We must have explicit agreement in advance of the production of our final report of the limits of our study and of the sources that may require protection.*

(10) *We must have a work plan approved by a Faculty Advisor before we start working with the sponsor. All parties to this project must understand their obligations in order to allow completion of the project on time.*

Attendance. Attendance at all sponsor interactions and class presentations is critical and expected. More than one absence will negatively affect the course grade and each subsequent absence will have an increasingly negative effect.

Working relationships. Project teams are self-managed and as such it is incumbent upon the students to develop effective working relationships. To support such efforts, each project team will have access to its faculty advisor and other support as necessary to help facilitate effective teamwork and as required support conflict resolution.

Sponsor communication guidelines. Each sponsor organization will appoint a lead executive, who will be the main point of contact for the MGT 440 team. Each student team should likewise appoint a lead for communication with the sponsor. All initial contact with the sponsor should flow through the student lead to the sponsor lead executive. As the relationship with the sponsor develops, the sponsor lead executive may authorize the student team to have direct communications with other members of the sponsor organization – this will be strictly at the sponsor lead's discretion.

Sponsor meeting preparation and etiquette. Sponsors are critical partners for the MGT 440 teams – and for the GSM overall. Students should act at all times in a professional and courteous manner with clients. This includes being thoughtfully and thoroughly prepared for all client interactions, being prompt and attentive in all meetings (in person or via phone / video conference), and following through on all requests and commitments.

Nondisclosure agreements. To support an open and thorough discussion through the course, and because sponsor companies will be providing proprietary information critical to the operation of their enterprise, students in MGT 440 will be required to sign a non-disclosure agreement. Students are responsible for fully understanding and strictly adhering to the requirements of this nondisclosure agreement, including keeping all client information confidential and secure.