

**Business Solutions Teams
MBA 805/806
Professor Michael J. Leiblein
Fisher College of Business
Ohio State University
Fall 2009 & Winter 2010**

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Class: Tues. 6:00 – 10:00 pm.; Gerlach 285.

Office Hours: By Appointment

CLASS OBJECTIVES

Business Solutions Teams (BST) is a two-quarter sequence course designed to provide students with the opportunity to gain experience diagnosing and solving real world business problems. The course mirrors the approach taken by leading consulting firms in stressing an analytical, data driven, problem solving approach. Students in the course work with senior managers at a client firm to systematically analyze a situation, define a focal problem, generate alternative solutions to this problem, recommend a course of action that is supported by evidence from primary and secondary data, and communicate actionable steps that may guide implementation of any recommendations. In so doing BST provides students with the opportunity to gain experience analyzing business situations faced by clients, to apply the theories and models discussed in the classroom, to develop relationships with clients, and to make recommendations to those clients.

CLASS STRUCTURE

BST is organized as a mixture of formal class sessions and informal team meetings. The initial sessions introduce students to behavioral and analytical techniques to support structured problem solving. During subsequent breakout sessions engagement teams work independently with the client under the supervision of Professor Leiblein. Each engagement team should expect to meet with the Professor on a weekly basis. A schedule for these formal meetings as well as other course notices will be distributed to students via e-mail at their "name.osu" accounts by **October 6th**. As good preparation is the *sine qua non* of good consulting, it is expected that all students will attend all meetings fully prepared. In addition to these engagement team meetings, there will be a class session at the end of the fall quarter where each team will provide a presentation summarizing the status of their project and a class session during the 7th or 8th week of the winter quarter where student groups will present their material prior to presenting to their respective clients.

READINGS

There is no required textbook for this course. I have included references to a number of journal readings and textbooks at the end of the syllabus, however. Many readings referenced in the body of the syllabus are available electronically from the OSU library system. An outstanding overview of a variety of standard consulting techniques and tactics that I will refer to in the course is *The Boston Consulting Group on Strategy* by Carl Stern and Michael Deimler. Other, easily accessible overviews of consulting methodologies that I will refer to are available in books such as *The McKinsey Way*, *The McKinsey Mind*, and *The McKinsey Engagement*. A renowned text on presenting and writing is Barbara Minto's *The Pyramid Principle: Logic in Writing and Thinking*. The Project Management Institute provides numerous online project management tips (<http://www.pmi.org/Pages/default.aspx>).

OTHER RESOURCES

In this course, students are required to review literature specific to the business problem underlying their engagement. A wealth of general information is available via financial reports (annual reports or 10k reports), industry analyst reports (e.g., stock market analysts, industry analysts, or even online summaries

such as Hoovers), and trade magazines. I provide links to other data sources on CARMEN and under “strategy research resources” on my personal homepage (see http://fisher.osu.edu/leiblein_1/StrategyResourceLinks.htm). I will guide students in evaluating readings for their specific projects as needed.

MANAGING RELATIONSHIPS

BST projects require students to combine the conceptual and analytical skills developed in their core MBA coursework with skills in management consulting and project management. Management consulting skills are associated with problem definition, problem solving, and the presentation of results. These skills provide students with the ability to apply rigorous methods to business problems and to effectively communicate the findings from these analyses to a client. Project management involves planning, organizing, controlling, and leading. Managing relationships among team members, between teams and their clients, and with your engagement manager represents a critical, often under-appreciated, challenge.

1. The Team Relationship

In this course, students will choose team members with whom to work throughout the two quarters. Students should form teams according to their skills and project interests. Similar to the staffing role played by an engagement manager at a consulting firm, it is often helpful for students to ask themselves the following questions when forming their engagement team: (a) What skills are necessary to rigorously address this project? (b) Do I believe that there will be an equitable distribution of work within this group? Do our schedules, interests, and personalities allow us to work together efficiently? (c) Do the team members understand their role on the project? Will they hold themselves accountable to succeeding in this role? (d) Does the team agree on how decisions will be made and conflicts resolved?

2. The Client Relationship

A good BST team always *leaves the client feeling that his or her time was well spent*. It is important to be timely and flexible in scheduling meetings, to dress and act professionally, and to run meetings in an organized and efficient manner. Above all, each team member must respect the confidentiality of the information obtained when working with a client. Breaches of these standards can lead to a student failing the class. Please note the increased importance of the initial client meeting. *The first meeting with the client should be exceptionally well organized*.

3. The Faculty Relationship

The student – faculty relationship in this course involves classroom interactions, breakout meetings, and other conversations regarding specific issues that arise during the engagement. In the “breakout” meetings, I will treat team members as junior partners and ask questions regarding the team’s progress (e.g. on the project scope and definition, data collection, and analysis). I will provide feedback based on the team’s approach in an effort to help each team prepare for their subsequent client meeting. I expect teams to exhibit the same level of preparation for these status meetings as they do for their client meetings.

ACADEMIC INTEGRITY

Academic integrity is essential to maintaining an environment that fosters excellence in teaching, research, and other educational and scholarly activities. Thus, The Ohio State University and the Committee on Academic Misconduct (COAM) expect that all students have read and understand the University’s Code of Student Conduct, and that all students will complete all academic and scholarly assignments with fairness and honesty. Students must recognize that failure to follow the rules and guidelines established in the University’s Code of Student Conduct and this syllabus may constitute “Academic Misconduct.”

The Ohio State University’s Code of Student Conduct (Section 3335-23-04) defines academic misconduct as: “Any activity that tends to compromise the academic integrity of the University, or subvert the educational process.” Examples of academic misconduct include (but are not limited to) plagiarism, collusion (unauthorized collaboration), copying the work of another student, and possession of unauthorized materials during an examination. Ignorance of the University’s Code of Student Conduct is never considered

an “excuse” for academic misconduct, so I recommend that you review the Code of Student Conduct and, specifically, the sections dealing with academic misconduct.

Academic integrity, including professional behavior, is particularly salient in the BST course. Each BST student is a representative of the Fisher College of Business and the Ohio State University. Breaches of professional standards of conduct are very serious in this setting and can lead to a student failing the class. Professional behavior is also important within engagement teams. In considering issues regarding professional behavior, it may be helpful to consider the Fisher College Honor Statement.

As a member of the Fisher College of Business community, I am personally committed to the highest standards of ethical behavior. Honesty and integrity are the foundation from which I will measure my actions. I will hold myself accountable to adhere to these standards. As a leader in the community and business environment, I will pledge to live by these principles and celebrate those who share these ideals.

If I suspect that a student has committed academic misconduct in this course, I am obligated personally and required by the university to report my suspicions to the Committee on Academic Misconduct. If COAM determines that you have violated the University’s Code of Student Conduct (i.e., committed academic misconduct), the sanctions for the misconduct could include a failing grade in this course and suspension or dismissal from the University.

If you have any questions about the above policy or what constitutes academic misconduct in this course, please contact me.

Evaluation:

The grading plan describes the relative importance attached to each of the individual activities used to assign a course grade. As a two-quarter, eight credit course, you will receive a “P” grade for satisfactory progress upon completion of the first quarter. Your **overall course grade** will be determined upon completion of the course. Upon course completion, the registrar will update the “P” grade obtained in the first quarter to your overall course grade. The overall course grade will reflect your performance in terms of the: **(1) Statement of Work (10%), (2) Weekly Assignments (10%), (3) Status Presentation (20%), (3) Dry Run Presentation (30%), (4) Final Report (20%), and (5) Contribution (10%)**. Each of the grade components are described below.

Statement of Work. After engagement teams are matched with a client organization they will negotiate a Consulting Proposal. The Consulting Proposal is a contract between the student group and the client organization. The first part of this proposal entails a cover letter written by University attorneys sent to client organizations at the onset of the project. Engagement teams are required to collect a signed copy of this letter. The second part of the proposal is the Statement of Work (SOW). The SOW describes the specifications of the project. It should contain (1) a short executive summary, (2) a description of the scope of the project and what you perceive to be its major objectives, (3) a description of the data required to conduct the analysis, (4) a description of the resources and support that the team requires from the client organization, (5) the proposed action plan and work schedule, (6) a list of expected deliverables, and (7) a description of the team organization, including individual resumes. Professor Leiblein will provide an electronic document that may be used as a template for the SOW. Engagement teams are responsible for providing a signed cover letter on Ohio State University letterhead along with the completed SOW by the end of business on **Tuesday, November 3rd**. The SOW will be evaluated on the level of detail in which it articulates the business problem and scope of the project.

Weekly Assignments. Each group is required to complete a series of assignments that are listed later in the syllabus. These assignments will be evaluated along three dimensions: the extent to which they demonstrate

understanding of the assumptions and insights of the underlying conceptual framework, the quality and completeness of the data provided, and the extent to which the student team uses the assignment to develop creative and innovative insights regarding potential solutions to the course project.

Status Presentation (End of 1st Quarter). Each engagement team will complete a 30-minute **Status Presentation on or about the 10th week of the 1st quarter**. The **Status Presentation** summarizes the progress that they have made with their project during the first quarter. This presentation should include a detailed statement of the business problem, an overview of the proposed solution, and a review of the team's data collection efforts. During the presentation, the engagement team will field questions from the class regarding their approach. The presentation will be evaluated on the depth of the engagement teams understanding of the client's problem, the depth and rigor of their proposed solution, the clarity of their presentation, and their response to questions from the audience. Client representatives do not attend the Status Presentation.

Dry Run Presentation (End of 2nd Quarter). The **Dry Run Presentation** summarizes the engagement team's final conclusions. **The Dry Run Presentation is conducted on or about the 7th week of the second quarter**. In contrast to the status presentation, the Dry Run Presentation emphasizes the team's analysis and recommendations regarding how the client should address their business problem. During the presentation, engagement teams will field questions from the class regarding their approach. The quality of the presentation will be judged in terms of the depth and breadth of the engagement teams data collection, the quality of their empirical analyses, the degree to which these analyses support their recommendations, and their response to questions from the audience. Client representatives do not attend the Dry Run Presentation.

Final Report. The **Final Report** is turned in at the time of the client presentation. The final report will be evaluated along the same dimensions as the Dry Run presentation.

Contribution. Professor Leiblein will evaluate the **Contribution** of each individual several times over the two quarters. Students demonstrate their contribution through participation in weekly meetings, by constructively commenting on the work of other teams' during the in-class presentations, and by professionally managing the client relationship (e.g., maintaining weekly update emails). In addition, each group member is asked to complete a peer evaluation at the end of the fall quarter and at the end of the winter quarter (along with the final report). Individual students who have not contributed their fair share to a project's completion or who have engaged in other unprofessional behavior will have their individual grade adjusted down. In extreme cases, students may be asked to leave the class.

Off-site Meetings. Some teams will need to work with clients who are located outside of the Columbus or Ohio region. Conference calls may be managed via skype and/or by reserving a room with a speakerphone through the GPO. These meetings may also be supported by networking software that allows a remote client to view your computer screen presentation in real time. Microsoft Netmeeting is one basic software package that comes standard with Microsoft XP. To access Netmeeting you will have to "run" an installation package in the "Netmeeting" subfolder of the Microsoft "program files" folder. I have developed a short document that summarizes basic instructions regarding the use of Netmeeting and will make this available upon request. Full information is available online.

Data Analysis. BST projects often require students to generate experimental designs (you may recall conversations on the Taguchi method and/or fractional factorial design from your statistics class), to estimate demand for various product or service attributes (e.g., conjoint analysis, hedonic regression), etc. Mini-tab as well as a number of shareware programs (see <http://sunsite.univie.ac.at/statlib/designs/>) provide access to modules that may facilitate these efforts.

2009-2010 BUSINESS SOLUTION TEAMS COURSE OUTLINE (WEEKS 1 THROUGH 4)

Date	Topic	Reading	Assignment
Week 1; 9/29	<p>ENTIRE CLASS: Introduction to the Consulting Process (6:00 to 8:00)</p> <p>ENTIRE CLASS: Introduce Projects & Team Formation (8:00 to 10:00)</p>	<ul style="list-style-type: none"> • CARMEN. Review Syllabus. • CARMEN. Review Project List. • EBOOK. Rasiel, E. 1999. The McKinsey Way; Chapter, 5. • EBOOK. Rasiel & Friga, 2001. The McKinsey Mind, chapters 6 to 8. 	<ul style="list-style-type: none"> • Complete Team Bio & List Project Preferences. Upload to Carmen by 5:00 pm on 10/3. • Upload to Carmen TEAM Exercises (Talk information slide, Evaluation group grid, Assist Plan, Motivation chart)
Week 2; 10/6	<p>ENTIRE CLASS: Introduction Structured Problem Solving (6:00 to 8:00)</p> <p>ENTIRE CLASS: Preparation for the Initial Client Meeting (8:00 to 10:00)</p>	<ul style="list-style-type: none"> • EBOOK. Rasiel, 1999. The McKinsey Way, chapters 1 to 3. • CARMEN. Review Notes on How to Analyze an Industry. • CARMEN. Edit draft email to client. 	<ul style="list-style-type: none"> • Leiblein sends legal cover letter to selected clients. • Upload to Carmen one-page document listing problem statement and questions for client by 5:00 pm on 10/5. • Upload to Carmen powerpoint slides for 15 minute overview of client problem and industry by 5:00 pm on 10/5. • Upload to Carmen two-page Framing Decision Tree and Template by 5:00 pm on 10/26. • Upload to Carmen two-page statement of root problem & alternative solutions by 5:00 pm on 10/26. • Provide 10 to 15 minute presentation to class. • Send initial client email and schedule initial client meeting
Week 3; 10/13	<p>Initial Client Meeting</p> <p>No in-class meeting</p> <p>FOCUS Frame the Problem</p>	<ul style="list-style-type: none"> • EBOOK. Rasiel, 1999. The McKinsey Way, chapters 4 to 6. • EBOOK. Rasiel & Friga, 2001. The McKinsey Mind, Ch. 1. • CARMEN. Review Statement of Work Form. 	<ul style="list-style-type: none"> • Upload to Carmen two page analysis of client industry by 5:00 pm on 10/12. • Conduct Initial Client Meeting. • Upload to Carmen two-page Framing Decision Tree and Template by 5:00 pm on 10/26. •

Week 4; 10/20	Breakout: Defining the Root Problem & Generating Propositions FOCUS Frame the Problem	<ul style="list-style-type: none"> Raisel & Friga, 2001. Chapters 2 & 3. 	<ul style="list-style-type: none"> Upload to Carmen Organize – Hypothesis Testing chart by 5:00 pm on 10/26. Send Revised S.O.W. to client for approval. Submit weekly client email on Friday and copy Leiblein.
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Comment [I1]: Have students generate storyboard presentation at this time or shortly thereafter.

During week 8 add "edit storyboard." Create repeated updates throughout course.

2009-2010 BUSINESS SOLUTION TEAMS COURSE OUTLINE (WEEKS 5 THROUGH 7)

Date	Topic	Reading	Assignment
Week 5; 10/25	<p>ENTIRE CLASS: Why do good managers choose poor strategies (6:00 to 8:00)</p> <p>FOCUS Organize the Solution</p> <p>Breakout: Planning an Engagement & writing the Statement of Work (8:00 to 10:00)</p>	<ul style="list-style-type: none"> • CARMEN. Review Statement of Work Form. • Washburn, Hosmer, Bradley, 2000. (#42). • Bowers, 1999 (#9). • Zabrosky, 1999 (#45). • Washburn, 1989 (#41). • EBOOK. Block, 1999. Flawless Consulting, chapters 2 to 5. 	<ul style="list-style-type: none"> • Upload to Carmen draft SOW (pay particular attention to problem statement, propositions, & work plan) by 5:00 pm on 10/19. • Upload to Carmen Organize – Storyboard chart by 5:00 pm on 10/26. • Upload to Carmen “Ghost Deck.” (SEE ABBOTT SAMPLE)
Week 6 11/3	<p>Breakout: Analyzing your Client’s Competencies</p> <p>FOCUS Organize the Solution</p>	<ul style="list-style-type: none"> • CARMEN. Review Notes on How to Analyze a Firm’s Capabilities. 	<ul style="list-style-type: none"> • Upload to Carmen two-page analysis of client capabilities by 5:00 pm on 11/2. • Submit completed S.O.W. w/ client approval to Leiblein. • Submit weekly client email on Friday and copy Leiblein.
Week 7; 11/10	<p>ENTIRE CLASS: Managing Client Relationships (6:00 to 8:00)</p> <p>Breakout: Interviewing the client (8:00 to 10:00)</p>	<ul style="list-style-type: none"> • EBOOK. Rasiel, 1999. The McKinsey Way, chs. 8, 12 & 13. • Quay, 1985 (#35). • Quay, 1985 (#36). • Cox, C. 1985. (#5). • Navis, 1990 (#33). • Quay, 1994 (#37). • Griffin, 2001 (#14). 	<ul style="list-style-type: none"> • Upload to Carmen “Statement of propositions.” (SEE ABBOTT SAMPLE) • Submit weekly client email on Friday and copy Leiblein.

2009-2010 BUSINESS SOLUTION TEAMS COURSE OUTLINE (WEEKS 8 THROUGH 10)

Date	Topic	Reading	Assignment
Week 8; 11/17	Breakout: Analyzing Propositions	<ul style="list-style-type: none"> • DOWNLOAD. Christensen & Raynor, 2003. Why Hard-Nosed Executives Should Care About Management Theory," <i>HBR</i>, 81(5): 67-74. • EBOOK: Stern & Deimler, 2002. The Boston Consulting Group on Strategy: Classic concepts and new perspectives. • Leiblein will also direct each team to customized readings based on individual projects. 	<p>AS APPROPRIATE upload 1-page document to Carmen by 5:00 pm on 11/16.</p> <ul style="list-style-type: none"> • REVISE SECTION—might include propositions at this stage. Following will then become exercises to revise propositions. • Upload to Carmen Ghost Deck outlining revised Storyboard. • Upload to Carmen three-page statement of Data Requirements (roughly 1 page each on propositions to be tested, data to be collected, and analyses to be performed) by 5:00 pm on 11/24. • POST CF / PJ sample analysis document. • Identify data collection methodology. LIST data sources (e.g., from CFBank ... CHRR (http://www.chrr.ohio-state.edu/), InfoCision Management Corporation (330-668-1400); Communica (800-800-7890). EAC (?) • Perceptual Map describing demand for product/service attributes in client's existing markets. • One-page analysis of sources of differentiation in client's value chain. • One-page analysis of competitor's primary markets and activities. • Submit weekly client email on Friday and copy Leiblein.

Week 9; 11/24	Breakout: Data Collection (outline of data necessary to test propositions).	<ul style="list-style-type: none"> • EBOOK. Rasiel & Friga, 2001, ch. 3. • LIBRARY. Fuld. LM. 1995. The New Competitor Intelligence. NY: John Wiley and Sons, Inc. Call No. HD 38.7 F863 1995. 	<ul style="list-style-type: none"> • Upload three-page statement of Data Requirements (roughly 1 page each on propositions to be tested, data to be collected, and analyses to be performed) by 5:00 pm on 11/24. • POST CF / PJ sample analysis document. • Identify data collection methodology. LIST data sources (e.g., from CFBank ... CHRR (http://www.chrr.ohio-state.edu/), InfoCision Management Corporation (330-668-1400); Communica (800-800-7890). EAC (?) • Submit weekly client email on Friday and copy Leiblein.
Week 10 12/1	Status Presentations	<ul style="list-style-type: none"> • Minto, 1998-1999 (# 30 -32) • Hattersley, 1998 (#16) • Wyeth, 2002 (#44) 	<ul style="list-style-type: none"> • Upload to Carmen powerpoint slides for presentation. • Bring hardcopy of slides to class. • Provide 30 Minute Status Presentation. • Download and Complete Status Feedback Forms. • Submit weekly client email on Friday and copy Leiblein.

2009-2010 BUSINESS SOLUTION TEAMS COURSE OUTLINE (WEEKS 11 THROUGH 15)

Date	Topic	Reading	Assignment
Week 11	Status Debrief	<ul style="list-style-type: none"> EBOOK: Stern & Deimler, 2002. The Boston Consulting Group on Strategy: Classic concepts and new perspectives. 	<ul style="list-style-type: none"> Upload to Carmen overview of data collection effort (e.g., sample survey questions) by 5:00 pm on day before Breakout. Submit any changes to workplan or approach during meeting. Submit weekly client email (w/ schedule for final client presentation date) on Friday and copy Leiblein.
Week 12	Breakout: Data Collection & Final Presentation	<ul style="list-style-type: none"> Customized reading based on individual projects. See OSU / Fisher sponsored Qualtrics website for free survey s/w & implementation guidelines. http://fisher.osu.edu/kb/qualtrics http://osu.qualtrics.com 	<ul style="list-style-type: none"> Conduct Survey / Collect Data. Upload to Carmen "Understand" charts which help you portray your evidence. Submit weekly client email on Friday and copy Leiblein.
Week 13	Breakout: Data Collection / Analysis	<ul style="list-style-type: none"> Customized reading based on individual projects. EBOOK. Rasiel & Friga, 2001, ch. 4 	<ul style="list-style-type: none"> Conduct Survey / Collect Data. Upload to Carmen 1 page outline of proposed statistical analysis (regression; mean comparison) by 5:00 pm on day before Breakout. Submit weekly client email on Friday and copy Leiblein.
Week 14	Breakout: Data Analysis	<ul style="list-style-type: none"> Customized reading based on individual projects EBOOK. Rasiel & Friga, 2001, ch. 4. 	<ul style="list-style-type: none"> Upload to Carmen "Synthesize" charts that portray how you will portray your argument. Upload to Carmen two-page report outlining key findings by 5:00 pm on day before Breakout. Submit weekly client email on Friday and copy Leiblein.

Comment [I2]: Insert information regarding CHRR on campus survey service

Week 15	Breakout: Recommendations	<ul style="list-style-type: none">• DOWNLOAD. Kotter, P. 1995. Why transformational efforts fail.	<ul style="list-style-type: none">• Upload to Carmen two-page report of primary client recommendations by 5:00 pm on day before Breakout.• Submit weekly client email on Friday and copy Leiblein.
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* Final date and time for Winter quarter meetings to be determined based on registrar's room schedule.

2009-2010 BUSINESS SOLUTION TEAMS COURSE OUTLINE (WEEKS 16 THROUGH 20)

Date	Topic	Reading	Assignment
Week 16	Breakout: Implementation	<ul style="list-style-type: none"> • DOWNLOAD. Argyris, C. 2000. Teaching Smart People to Learn • Davis, 1999 (#10) • Long, 1999 (#22) • Bergholz, 1999 (#7) • Anonymous, 1999 (#1) • Lieber, 1996 (#21). • Weiss, 1996 (#43) • Schaffer, 1998 (#38) 	<ul style="list-style-type: none"> • Upload to Carmen two-page analysis of implementation guidelines by 5:00 pm on day before Breakout. • Submit weekly client email on Friday and copy Leiblein.
Week 17	Dry Run Presentations	<ul style="list-style-type: none"> • EBOOK. Rasiel, 1999. The McKinsey Way, chapters 10 & 11. • EBOOK: Rasiel & Friga, 2001. The McKinsey Mind, chapter 5. 	<ul style="list-style-type: none"> • Upload to Carmen powerpoint slides for • Bring hardcopy of powerpoint slides to class. • Provide 30 Minute Dry Run Presentation. • Submit weekly client email on Friday and copy Leiblein.
Week 18	Dry Run Debrief		<ul style="list-style-type: none"> • OPTIONAL. Bring Revised Dry-Run Presentation slides to breakout. • Submit weekly client email on Friday and copy Leiblein.
Week 19	Final Report		<ul style="list-style-type: none"> • Upload to Carmen Final Report. • Submit weekly client email on Friday and copy Leiblein.
FINAL	Final Presentations		<ul style="list-style-type: none"> • Final Client Presentation.

* Final date and time for Winter quarter meetings to be determined based on registrar's room schedule.

Course Outline

Comment [I3]: Insert introductory paragraphs for case discussions ... follow learning objectives notes from introductory PPT.

Provide a 7 word learning objective for each day

For NYPRO Vistakon—often we think about vertical integration decisions in terms of bargaining power or “capability” Here we see a common challenge ... how to develop a capability. We highlight two innovations (1) possibility of improving technical interface (simplifying product) and (2) need to consider both opportunism and problem complexity in designing organization.

Session	Topic	Reading	Assignment
Creating Value: Patterns of Change in Technologies and Markets			
1/ 5	Introduction	<ul style="list-style-type: none"> Gluck, F. & R. Foster, 1975. 	
1/ 7	Industry Transformation: The Evolution of Technologies and Markets	<ul style="list-style-type: none"> Foster, R., 1986. pp. 88-111 (Ch. 4 of <u>Innovation: The Attacker's Advantage</u>). Moore, G. 1999. pp. 9 – 62 (Chapters. 1 & 2 of <u>Crossing the Chasm</u>). 	<ul style="list-style-type: none"> I will provide a link to the Back Bay Battery Simulation that we will run next Thursday during this class. Please verify the link today to avoid any confusion next week.
1/12	Industry Transformation: The Evolution of Technologies and Markets		<ul style="list-style-type: none"> Case: EMI and the CT Scanner (A).
1/14	Industry Transformation: Technological Disruption	<ul style="list-style-type: none"> Bower, J. & C. Christensen, 1995. 	<ul style="list-style-type: none"> Back Bay Battery Simulation.
1/ 19	Industry Transformation: Incumbents & Entrants		<ul style="list-style-type: none"> Synthes.
1/21	Project Portfolios and Technology Platforms	<ul style="list-style-type: none"> Wheelwright, S. & K. Clark, 1992. 	<ul style="list-style-type: none"> Linking Strategy to Innovation: Materials Technology Corporation Assignment 1 due.
1/26	Real Options and Investment Under Uncertainty	<ul style="list-style-type: none"> Luehrman, T., 1998. 	
Capturing Value: Profiting from innovation & the market for ideas			
1/28	The Managerial Challenge of Managing IP	<ul style="list-style-type: none"> Economist, 2005 Winter, S.G., 2000. pp. 242-265. 	<ul style="list-style-type: none"> Galloni, A. Jan. 31, 2006. “As luxury industry goes global, knock-off merchants follow,” <i>Wall Street Journal</i>.
2/2	The Managerial Challenge of Managing IP	<ul style="list-style-type: none"> 	<ul style="list-style-type: none"> Beta Golf Consider moving (Monsanto, Studio, Beta Golf)
2/4	Complementary Assets	<ul style="list-style-type: none"> Teece, D., 1998. 	<ul style="list-style-type: none"> Studio Realty
2/ 9	IP Regime	<ul style="list-style-type: none"> Anand, B & A. Galetovic, 2004. 	<ul style="list-style-type: none"> Monsanto: Realizing Biotech Value in Brazil
2/11	The Influence of Standards	<ul style="list-style-type: none"> Cusamano, Mylonadis & Rosenbloom, 1992. 	
Delivering Value: Organizational Competence			
2/16	Relabel as Developing Organizational Capabilities	<ul style="list-style-type: none"> Senge, P. 1990. 	<ul style="list-style-type: none"> Managing Innovation at NYPRO, Inc. (A) Assignment 2 is due. See synthes notes regarding incumbent / entrant
2/18	Assembling & Organizing Knowledge Sets Balancing basic and applied research	<ul style="list-style-type: none"> Fleming & Sorenson, 2003. 	<ul style="list-style-type: none"> Intel Labs & the crisis in photolithography (A)
2/23	Process Innovation / Learning before Doing Relabel as Choosing a Learning Mode	<ul style="list-style-type: none"> Pisano, G., 1996, Chapter 2 of <u>The Development Factory</u>. 	<ul style="list-style-type: none"> ITT Automotive: Global Manufacturing Strategy
2/25	Outsourcing Relabel as Organization and Capability Development	<ul style="list-style-type: none"> Leiblein, Reuer, & Dalsace, 2002. pp. 817-821. 	<ul style="list-style-type: none"> Molding the impossible: The Nypro /Vistakon Disposable Contact Lens Project
3/ 2	Collaboration Strategies		<ul style="list-style-type: none"> Discovering the Future: R&D Strategy at Merck
3/ 4	Evolution of Value Chains	<ul style="list-style-type: none"> Fine, C., 1998. (Chapter 9 of <u>Clockspeed: Winning Industry Control in the Age of Temporary Advantage</u>). 	<ul style="list-style-type: none"> Abgenix and the Xeno Mouse. Assignment 3 is due.

Comment [I4]: Re-consider ordering. Merck is a simpler case and may benefit from being 1st.

Technology Strategy in Practice

3/9 Analytical Tools

- We've got Rhythm! Medtronic Corporation's Cardiac Pacemaker Business
-

3/11 Wrap-Up & Summary

Market Survey

A market survey can be conducted in number of ways i.e. mail, telephone, in-person and email/web-based. Each of these approaches provides its own advantages and disadvantages in terms of cost, accuracy and time to complete the survey. It is incumbent upon BST students to develop a logical argument regarding the appropriate survey method after considering the characteristics of the desired information, the composition of target population, as well as accuracy, time and funding constraints.

The **Center of Human Resource Research (CHRR) at Ohio State University** provides software for survey design and data collection, survey instruments (telephony system, skilled onshore and offshore interviewer) and consultation on survey process. The primary cost while using the CHRR service is the payment to interviewer. CHRR provides interviewer either based in onshore at the cost of **\$40/hour** or offshore at the cost of **\$15/hour**. Other estimated fixed cost while using CHRR services is **\$500** one time setup fee. Often, a xxx survey sample list may be obtained for ...

Sample Weekly Update Email

Hello everyone,

I would like to take this time to provide an update on the Abbott Point-Of-Care iSTAT cartridges. Our primary activity right now is the survey. We (Chris Feters, Susan Keane, and the OSU team) had a chance to talk today about the questions on the survey and it is our intent to roll out the survey starting next week. In order to collect a more comprehensive data set for the hCG test, we will also be asking supplementary questions to emergency medicine physicians as part of the survey.

Expanding on the elements of demand within our survey, our team is also researching usage for each test within the existing literature. We are also pricing each test based on data from the Center for Medicare and Medicaid Services and comparable actuarial data from private pay providers. We will integrate this with questions from the survey on pricing and on sources of payment for each of the clinics to provide data on demand.

We feel comfortable with the cost analysis of the offering, given data inputs and recommendations from Abbott's research and development group. Following all of these inputs as well as our literature reviews on each type of test cartridge, we intend to analyze the data, using Abbott's new product documentations as the guiding framework, in February.

Deliverables:

Prepare survey questions specific to emergency room doctors to be included in the survey

- EAC will offer proposed suggestions by Wednesday 1/20
- OSU team will present questions by Thursday 1/21
- We will have another conference call on Thursday 1/21 at 12:00p (Eastern)

Initiate data collection for survey

- EAC will pilot questionnaire by the end of this week (Friday 1/22)
- Both EAC and OSU will roll out survey in full starting next week (Monday 1/25)
- OSU will handle questions with supplemental section specific to emergency room doctors

Thanks,
Justin

CONSULTING ARTICLES

A number of the following articles are referenced in the syllabus. These articles are listed by author(s), year, and the number listed below under assigned readings. A number of additional articles are provided that may prove helpful for those individuals interested in learning more about consulting.

1. Anonymous. 1999. Confessions of an Ex-Consultant, *Fortune*, (October).
2. Canback, Staffan. 1998. The Logic of Management Consulting (part one), *Journal of Management Consulting*, V 10:2 (November).
3. Canback, Staffan. 1999. The Logic of Management Consulting (part two), *Journal of Management Consulting*, V 10:3 (May).
4. Cohen, William A. 1991. The Proposal Process in Kasdan, Ira Engagement Management, *How to Write a Proposal, How to Make it Big as a Consultant*, 2nd Edition.
5. Cox, Connie A. 1985. The Art of Prying Out Information, *Journal of Management Consulting*, V 2:2.
6. Bell, Chip R. 1986. Sample Evaluation Forms Engagement Management Planning Bordelon, Lamar Engagement Management, *Entry Is a Critical Phase in Consulting*, *Journal of Management Consulting*, V 3:1.
7. Bergholz, Harvey. 1999. Do More than Fix My Company, *Journal of Management Consulting*, V 10:4 (November).
8. Borrow, Edwin E. 1998. Poof! You're a Consultant: Characteristics, Best Practices, and Success Factors of Management Consultants, *Journal of Management Consulting*, V 10:2 (November).
9. Bowers, William; Degler, William P., 1999. Engaging Engagements: A Client's Perspective, *Journal of Management Consulting*, V 10:4 (November).
10. Davis, George L. 1999. Your Client Is Unique, *Journal of Management Consulting*, V 10:4 (November).
11. Easley Jr., Charles F.; Harding, Charles F. 1999. Foxhole?, *Journal of Management Consulting*, V 10:4 (November).
12. Fombrun, Charles; Daniel, Oriesek. The Advice Business: The Industry of Consulting, *Handbook for Management Consulting-The Contemporary Consultant*, Chapter 1, pg. 4-16.
13. Gibson, Melissa K. 1998. Avoiding Intervention Pitfalls in International Consulting, *Journal of Management Consulting*, V 10:2 (November).
14. Griffin, Anthony C. 2001. Maintaining Authenticity and Credibility, *Consulting to Management*, V 12:3 (September).
15. Hansen, Morten T.; Nohria, N.; Tierney, Thomas. 1999. What's Your Strategy for Managing Knowledge?, *Harvard Business Review*, (March-April).
16. Hattersley, Michael. 1998. Making Your Argument, *Journal of Management Consulting*, V 10:1 (May).
17. Harding, Charles F. 1995. Finessing the Sale, *Journal of Management Consulting*, V 8:4 (Fall).
18. Harris, Carol. 2001. Consulting and you, *Consulting to Management*, V 12:1 (March).
19. Iandiorio, Joseph. 1994. Confidentiality and Consultant Agreements, *Journal of Management Consulting*, V 8:1 (Fall).
20. Lawrence, Thomas H. The Light Touch: Invisible but Effective, *Journal of Management Consulting*.
21. Lieber, Ronald B. 1996. Controlling your Consultants, *Fortune*, (October).
22. Long, Carl. 1999. To Create Value, First Understand Your Client, *Journal of Management Consulting*, V 10:4 (November).
23. Maister, David H. 1984. Profitability: Beating the Downward Trend, *Journal of Management Consulting*, V 1:4 (Fall).

24. Maister, David H. 1986. The Three E's of Professional Life, *Journal of Management Consulting*, V 3:2.
25. Maister, David H. 1993. A Question of Balance, *Managing the Professional Service Firm*, New York, Free Press.
26. Maister, David H. 1993. Profitability: Health and Hygiene, *Managing the Professional Service Firm*, Free Press, pg. 31-39.
27. Maister, David H. 1993. The One-Firm Firm, *Managing the Professional Service Firm*, New York, Free Press.
28. Maister, David H. 1997. *Managing Your Client's Projects, True Professionalism*, New York, Free Press.
29. Maister, David H. *Managing Your Firm's Balance Sheet*.
30. Minto, Barbara. 1998. Think Your Way to Clear Writing, *Journal of Management Consulting*, V 10:1 (May).
31. Minto, Barbara. 1998. Think Your Way to Clear Writing (part two), *Journal of Management Consulting*, V 10:2 (November).
32. Minto, Barbara. 1999. Think Your Way to Clear Writing (part three), *Journal of Management Consulting*, V 10:3 (May).
33. Navis, Edward S. 1990. Listen to What They Don't Tell You, *Journal of Management Consulting*, V 6:2.
34. Nees, Danielle B. 1986. Building and International Practice, *Journal of Management Consulting*, V 3:2.
35. Quay, John G. 1985. Gently Steering the Interview, *Journal of Management Consulting*, V 2:3.
36. Quay, John G. 1985. The Art and Science of Effective Interviewing, *Journal of Management Consulting*, V 2:2.
37. Quay, John G. 1994. Training the Interviewee, *Journal of Management Consulting*, V 8:1 (Spring).
38. Schaffer, Robert H. 1998. Overcome the Fatal Flaws of Consulting: Close the Results Gap, *Business Horizons*, (September-October).
39. Schaffer, Robert H.; Ashkenas, Ronald N. Anxiety: The consultant's unwelcome companion, *Journal of Management Consulting*.
40. Sheth, Jagdish; Sobel, Andrew. 2000. The Soul of the Great Professional, *Consulting to Management*, V 11:2 (September).
41. Washburn, Stewart A. 1989. Make the Proposal Fit the Costs, *Journal of Management Consulting*, V 5:2.
42. Washburn, Stewart A.; Hosmer, Bradley E. 2000. Nine Steps to an Effective Proposal, *Consulting to Management*, V 11:3 (December).
43. Weiss, Alan. 1996. The 13 Cardinal Sins, *Journal of Management Consulting*, V 9:2 (November).
44. Wyeth, Sims. 2002. The Three Commandments of Presenting: And How to Obey Them, *Consulting to Management*, V 13:1 (March).
45. Zabrosky, Alex W. 1999. The Art of Writing an Engagement Letter: A Legal Perspective, *Journal of Management Consulting*, V 10:3 (May).
46. 1997. Management Consultancy: The advice business, *The Economist*, (March).

CONSULTING BOOKS

The following books are not required reading, but may prove helpful for those individuals who are interested in learning more about consulting.

47. Ashford, Martin. 1999. *Con Tricks: The Shadowy World of Management Consultancy and How to Make it Work for You*, New York: Simon & Schuster International.
48. Barcus, Sam W., & Wilkinson, Joseph W. 1995. *Handbook of Management Consulting Services*, New York: McGraw-Hill.
49. Bellman, Geoffrey M. 1990. *The Consultant's Calling: Bringing Who You Are to What You Do*, San Francisco: Jossey-Bass Publishers.
50. Biech, Elaine. 1998. *The Business of Consulting: The Basics and Beyond*, Pfeiffer & Company.
51. Biswas, Sugata & Twitchell, Daryl. 1999. *Management Consulting: A Complete Guide to the Industry*, New York: John Wiley & Sons.
52. Block, Peter. 1999. *Flawless Consulting: A Guide to Getting Your Expertise Used* (2nd Edition), San Francisco: Jossey-Bass Publishing.
53. Carucci, Ron A., and Tetenbaum, Toby J. 1999. *The Value-Creating Consultant: how to Build and Sustain Lasting Client Relationships*, New York: AMACOM.
54. Cockman, Peter, Evans, Bill, & Reynolds, Peter. 1996. *Client-Centered Consulting: Getting your Expertise Used When You're Not in Charge*, New York: McGraw Hill Book Co.
55. Cohen, William A. 1991. *How to Make it Big as a Consultant*, American Management Association.
56. Connor, Dick & Davidson, Jeffrey. 1990. *Marketing Your Consulting and Professional Services*, New York: John Wiley & Sons.
57. Corey, Raymond. 1990. *MBA Field Studies: A guide for Students and Faculty* (edited) HBS Publishing Division; Call No. HD 30.4.M42 1990. (Business Reference).
58. Cveljo, Katherine. 1993. *Management Consulting*, New Jersey, Scarecrow Press.
59. Fombrun, Charles J. & Nevins, Mark D. 2004. *The Advice Business – Essential Tools and Models for Management Consulting*, Upper Saddle River, New Jersey: Pearson/Prentice Hall.
60. Fuld, Leonard M. (1995) *The New Competitor Intelligence: The Complete Resource for Finding, Analyzing, and Using Information about Your Competitors*. New York: John Wiley and Sons, Inc. Call No. HD 38.7 F863 1995. (Business Reference).
61. Greenbaum, Thomas L. 1990. *The Consultant's Manual*, New York: John Wiley & Sons.
62. Greenfield, W.M. 1987. *Successful Management Consulting*, Englewood Cliffs, NJ: Prentice-Hall, Inc.
63. Greiner, Larry E., & Metzger, Robert O. 1983. *Consulting to Management*, Englewood Cliffs, NJ: Prentice-Hall.
64. Holtz, Herman. 1989. *Choosing and Using a Consultant*, New York: John Wiley & Sons.
65. Holtz, Herman. 1994. *The Complete Guide to Consulting Contracts*, Enterprise, Dearborn Publishing.
66. Holtz, Herman. 1992. *The Consultant's Guide to Hidden Profits*, New York: John Wiley & Sons.
67. Holtz, Herman. 1993. *How to Succeed as an Independent Consultant*, New York: John Wiley & Sons.
68. Holtz, Herman. 1995. *The Independent Consultant's Brochure and Letter Handbook*, New York: John Wiley & Sons.
69. Kubr, Milan. 2002. *Management Consulting: A guide to the profession*. International labour office; Call No. HD 7802. M26.2002.
70. Lambert, Tom. 1997. *High Income Consulting: How to Build and Market Your Professional Practice*. Nicholas Brealey Publishing.
71. Margerison, Charles J. 1988. *Managerial Consulting Skills: A Practical Guide*. Brookfield, VT: Gower Publishing Company.
72. Maister, David. H. 1993. *Managing the Professional Service Firm*, New York: The Free Press.

73. Maister, David H. 2000. *The Trusted Advisor*, New York: The Free Press.
74. Maister, David H. 1997. *True Professionalism: The Courage to Care About Your People, Your Clients, and Your Career*. New York: Free Press.
75. Meislin, Marcia. 1997. *The Internal Consultant*, Menlo Park, CA: CRISP Publications.
76. O'Shea, James & Madigan, Charles. 1997. *Dangerous Company*. New York: Times Business-Random House, Inc.
77. Phillips, Jack. 1999. *The Consultant's Scorecard: Tracking Results and Bottom-line Impact of Consulting Projects*, New York: McGraw-Hill Publishing.
78. Pinault, Lewis. 2000. *Consulting Demons: Inside the Unscrupulous World of Global Corporate Consulting*, New York: Harper Business.
79. Rasiel, Ethan M. 1999. *The McKinsey Way*. New York: McGraw-Hill Publishing.
80. Rasiel, Ethan M., and Friga, Paul N. 2002. *The McKinsey Mind*, New York: McGraw-Hill Publishing.
81. Schaffer, Robert H. 1997. *High-Impact Consulting: How Clients and Consultants Can Leverage Rapid Results Into Long-Term Gains*. San Francisco: Jossey-Bass Publishers.
82. Scott, Beverly. 1999. *Consulting on the Inside*, ASTD.
83. Shenson, Howard L. 1990. *How to Select and Manage Consultants*, Lexington, MA: Lexington Books.
84. Shenson, Howard L. 1990. *Shenson on Consulting*. New York: John Wiley & Sons.
85. Tepper, Ron. 1993. *The Consultant's Proposal, Fee and Contract Problem Solver*. New York: John Wiley & Sons.
86. Tuller, Lawrence W. 1992. *The Independent Consultant's Q&A Book*. Bob Adams, Inc. Publishers.
87. Weiss, Alan. 2000. *Getting Started in Consulting*, New York: John Wiley & Sons, Inc.
88. Weiss, Alan. 1997. *Million Dollar Consulting (Revised Edition)*, New York: McGraw-Hill.
89. Weinberg, Gerald M. 1985. *The Secrets of Consulting*, New York: Dorset House Publishing.

ABOUT YOUR INSTRUCTOR

Michael J. Leiblein
Associate Professor, Strategic Management area

Michael received his Ph.D. from Purdue University as well as an M.B.A. and a B.S. in Electrical Engineering from Rensselaer Polytechnic Institute. Prior to his doctoral studies, Michael worked as a consultant for Andersen Consulting (now Accenture) and as a systems engineer for Johnson Controls.

Professor Leiblein teaches the Advanced Competitive Analysis, Technology Strategy, and the Business Consulting (BST) elective courses in the MBA Program at the Fisher College. He has previously taught the core MBA business and corporate strategy courses as well as an elective on corporate strategy. In 2000 and 2002 the Ohio State University evening MBA students named him outstanding core course instructor. Michael has consulted in the United States and Europe for a wide variety of organizations and associations and his research has been profiled in popular business outlets such as the *Financial Times* of London.

Michael's academic research focuses on the relationship between organizational form and firm performance in technology-intensive industries. His work has been published in leading academic journals such as the *Strategic Management Journal*, the *Academy of Management Journal*, the *Journal of Industrial Economics*, and the *Journal of Management*. Michael's academic papers have been recognized with several awards including the 1994 Glueck Best Paper Award, an honorable mention for the 1995 Best Paper Award in Technology and Innovation Management, and 2005 and 2007 Distinguished Paper Awards from the Business Policy and Strategy division of the Academy of Management. His dissertation research on the adoption of new technologies in the U.S. semiconductor industry was recognized by the Academy of Management as one of the best dissertations in the field of strategic management (1997 Free Press Award).

Michael currently serves as associate editor for the *Journal of Management* and as an editorial board member for several prestigious editorial boards including the *Strategic Management Journal* and the *Academy of Management Review*. He has also served on the executive committee for leading societies supporting the creation and dissemination of management science including the Business Policy & Strategy division of the *Academy of Management* and the Competitive Strategy division of the *Strategic Management Society*.

In his free time, Michael enjoys attending collegiate sporting events, opera, and hiking through the American Southwest.