

## ADM4317 Group Project: CSL Consulting Project Guidelines

### Overview

In teams of five-six students, you will work together on a sustainability strategy consulting project for a community partner that, in theory, could be implemented by the community partner in the near future. **Your goal is to craft a document that analyzes a particular sustainability or strategy challenge/opportunity that a specific organization is facing right now and to present a well-researched, clear and compelling analysis of the issue as well as recommendations for action.** The consulting projects should be written at a level that you might expect to see from large consulting firms such as McKinsey or BCG and you should think of your community partners as clients. As such, you will be evaluated not only on the content and quality of your work, but also on your ability as a team to deliver a valuable project to the client and your level of professionalism. Instructions for completing each of these projects assignments are included in this guide.

CSL Project Component	Due Date	Grade
<i>Needs analysis/documentation</i>	<i>October 6th</i>	<i>10%</i>
<i>Gap analysis/opportunity matrix</i>	<i>October 20th</i>	<i>10%</i>
<i>Primary research plan</i>	<i>November 3rd</i>	<i>10%</i>
<i>Preliminary evaluation of alternatives</i>	<i>November 17th</i>	<i>10%</i>
Draft Project (to class/community partner)	November 23rd	20%
Project Presentations (in class)	November 24th or Dec 1st	20%
Final Project Submission	December 10th	20%
<b>Total</b>		<b>100%</b>

Your first step is to take a few minutes to familiarize yourself with some examples of research reports produced by leading consulting companies such as McKinsey, BCG or Accenture (such as those assigned as readings for the first session of this course). Look for reports that are specific about the particular issue your community partner is facing (e.g. trends in carbon reduction programs in business). This will allow you to quickly get a sense for the state of the issue in business practice today BEFORE you meet with your client allowing you to ask smarter, better questions.

Because you are serving as consultants to external clients through the MJCGCE, you are representing the Telfer School of Management to the broader community. Your clients are looking for bold new ideas for improving competitiveness and profitability through social and/or environmental stewardship. They expect rigorous analysis, both quantitative and qualitative, that reflects the breadth and depth of an accredited, globally-recognized BComm curriculum. While your client has prepared a preliminary project description, your team must refine and articulate

specific project goals, scope, tasks, timetables and deliverables. I encourage your team to bring curiosity, creativity and enthusiasm to uncovering opportunities.

I will function as a mentor or coach for the community service learning project and client engagement, providing feedback throughout the process. Your assignments are due to me, and I will preview all documents and presentations before you share them with your client to ensure sound reasoning and professionalism. This “no surprises” screening step will limit risk for you and ensure that you are bringing your best effort to the community partners.

### **CSL Assignment #1: Need Analysis/Documentation (10% of grade, due October 6<sup>th</sup>)**

Your first assignment is to describe in detail the issue that your client is facing. You should be able to articulate with sound evidence the current situation, the client needs as well as the urgency and impact of the stated challenge or opportunity. Your needs analysis should also include a documentation of the “as is” model and the particular areas of the strategy or implementation plan that need to be improved with a preliminary understanding of the ‘idealized state’ (that is, before your detailed analysis of operational and organizational constraints).

The questions below are designed as prompts. You shouldn’t feel obligated to answer all of these questions in order, or to answer them all, although they should help guide your analysis:

1. What is the current sustainability challenge facing the client? Describe the client’s situation, including developments in its operating environment (Social, Technological, Environmental, Economic, Political or Legal context).
2. What are the key drivers behind the client’s project?
3. What does the client hope to achieve? What are their goals?
4. What is the background of this specific issue?
5. How might the client define success? How would it be measured?
6. Why is this particular issue important? What benefits would a successful outcome bring?

### **CSL Assignment #2: Gap Analysis/Opportunity Matrix (10% of grade, due October 20<sup>th</sup>)**

Once the issue has been clearly defined and the client needs documented, the second step in the consulting project is to research and analyze the scope of the work to be done between the “as is” situation and the “desired state”, effectively producing a gap analysis as well as an opportunity matrix. You may choose to utilize any of the frameworks discussed during the course (e.g. backcasting, future-fit) or any other gap analysis framework your team deems relevant. The following questions may be helpful in guiding your analysis:

1. What is the client’s key objective? Where are they now? How far are they from their ‘ideal state’?
2. What are other organizations in a similar context doing? What does ‘best practice’ in this field look like (provide some mini-case analysis)?
3. How far is the client from industry best practices? Why?

4. In what specific strategic or operational areas are the most material gaps?
5. Which gaps can be easily filled (short-term/low cost)? Which are more difficult (long-term/high cost)?
6. Which improvement areas align most with the organization's mission, values, objectives, strategy and executional abilities?
7. What is your working hypothesis regarding the way forward?

### **CSL Assignment #3: Primary Research Plan (10% of grade, due November 3rd)**

Having identified the gaps and possible opportunities, it is now time to design your analysis of the alternate courses of action. In this step, you will need identify:

1. Who else at the client's organization might we need to talk to verify our needs assessment, gap analysis and opportunity matrix? When (indicate dates/times)?
2. Are there any other stakeholder's that we should engage (customers, suppliers, creditors etc.)? If so, who? When? How will we reach out to this group?
3. What is the most appropriate way in which to test our working hypothesis? Survey/questionnaire? Structured interviews? Observation? Ethnography?
4. What criteria do we need to evaluate the different alternatives that are emerging? How can these be measured?
5. Have we gathered as enough externally validated data? Are there any other databases or research resources (e.g. journal articles, research reports, industry reports etc.) that we have not yet explored to help build our recommendations?

Note that for this part of the project you do not have to have actually completed the research plan. Rather, you need to present a coherent approach for how you will gather the data that you need in order to make reasonable and informed recommendations to the client. This can be in the form of a Gantt chart or other organizational tool that would allow both your instructor and your client to understand your intended research plan at a glance. You then have until the final project is due to actually go out and gather the data you've set out in your research plan.

### **CSL Assignment #4: Preliminary Evaluation of Alternatives (10% of grade, due November 17th)**

By this point, you should be well versed in your client's sustainability issue and have formulated several different alternative courses of action that you are considering. For assignment #4, you need to come up with some type of method for evaluating between the different courses of action. That is, if you have identified three or four possible strategic options moving forward, how will you objectively evaluate the best way forward? You may want to consider:

1. What decision making criteria are important to the client (e.g. cost, savings, revenue potential, feasibility, reputation, employee engagement etc.)?

2. Are all criteria weighted equally? Or are some factors more important than others? How might you assign each decision making criteria a particular weight?
3. What are the risks/opportunities of each possible course of action? What are the risks of not pursuing each alternative?
4. What stakeholders are effected by each alternative? How might their opinions influence your rating scheme?
5. How does each alternative fit with the client's mission, values, objectives, strategy and executional abilities?
6. Are there any alternatives at this point in time that are beginning to emerge as the most likely candidates for future action?

For this assignment, the analysis itself does not need to be complete. Rather, I am interested in seeing how you are putting together your decision making criteria by which you will make your analysis. You have until the end of the project to finish your research and populate your decision making tool to generate your final recommendation(s).

**Draft Final Report: 20% of your grade, due November 23<sup>rd</sup>.**

In order to make a presentation to the class, you will need to make sure that by the assigned date you have a coherent and complete draft of your consulting project. You should rely on the material you've generated in the previous assignments for the core of the document, but you will also need:

1. A Cover Page
2. An Executive Summary (max 1 page): You should provide a brief statement of the issue, the methods of your analysis, your key findings and conclusions in a succinct fashion. A good executive summary provides a very clear synopsis of the group's recommendation with regards to the strategic alternatives moving forward and includes a very brief statement on methodology used to justify your conclusions. The executive summary condenses the entire report into a mini version for those who will not read the full report. Hint: Write this last.
3. A Table of Contents
4. A Problem Statement (max 2-3 pages): Building on your assignments #1 and #2, you will need to provide a clear statement of the key problem, goals and issues. Here you need to provide enough background so that someone unfamiliar with your CSL project can understand the situation, the industry, the drivers and any other relevant factors that have necessitated this research.
5. Your Analysis (10-15 pages): In this section, you need to present the results of your research plan – the fact based analysis of the 'why' behind your recommendation. What type of primary or secondary research did you conduct? What did you find out? What are the alternative strategic options you have considered? What is your financial analysis of the different courses of action? What are the short term and long term implications of the alternatives (and how do you know)? Apply your decision making criteria checklist from

assignment #4 to all of the research you have done (as outlined in assignment #3). Interpret your results. Note that a good consulting report includes many graphs, charts, visuals, statistics etc. that allow the reader to grasp the key findings quickly. Long, verbose prose is discouraged. Get to the point. Try to find ways to summarize the significant findings from your literature search, primary data analysis (interviews/surveys), decision criteria, alternative evaluation, forecasted impacts on cost/profit/productivity etc. in a compelling manner – details can always be placed in an appendix.

6. Your Recommendation(s) (3-4 pages): Based on your analysis, what course of action does your group recommend that the client take? What are the implications of this course of action for the client? What will need to change? Is this a major change to the current strategy? What is your recommended implementation plan (timing, targets, tactics)? How will this change impact the supporting organizational elements (people, processes, structures, rewards etc.)? What will be the major challenges and opportunities moving forward?
7. Next Steps (1-2pages): What do you foresee as the next steps the client will need to make to move this project forward in the short term? What about the long term?

In essence, the draft strategic plan should present the work that you have done to identify and assess the issue as well as your final recommended course of action in light of this issue, including implementation guidelines, timetables and budgets. Keep in mind that these points represent a general outline. The actual number of sections and the specific headings (and sub-headings) of your draft report will depend on your specific client/issue.

The draft final report should be emailed to me to be posted on BBL 24h before class on November 24<sup>th</sup>.

### **Project Presentations: November 24<sup>th</sup> or December 1<sup>st</sup> (20% of grade)**

During the class of either November 24<sup>th</sup> or December 1<sup>st</sup> you will be required to present your project to the class. You will have a total of 30 minutes to engage the class in a discussion of your client's issue, your analysis and your final recommendation(s). The objective of presenting your CSL project in front of your client and your peers is to 'test' the soundness of your analysis and recommendations and ensure that these are coming across in a logical and compelling manner. While this can be a daunting prospect, especially in front of your client, this step should be taken in the spirit of continual learning and improvement. Think of it as an opportunity to solicit external feedback on the work that you have been doing and identify any information or consistency gaps that still need to be filled.

### **Final Project Submission: 20% of grade, due December 10th**

You will have several weeks after the class presentation to revise your final project. For example, during your presentation, the client or other students might ask a question that you did not anticipate. These should be noted during the presentation, and, if significant and material to the key decisions, the project should be revised to address any concerns (especially client concerns!).

This is your opportunity to reflect on the feedback of the client, instructor and your peers and polish your final report. At this stage, the report should resemble a document that the client could present as is to his/her team to discuss next steps in terms of implementation.

### **Plagiarism**

You are reminded that plagiarism (representing another person's ideas, writings, etc., as one's own) is a serious academic offence; the penalty can be as severe as expulsion. Academic Fraud offenses are taken seriously and students are directed to read the appropriate policy, specifically, the definition of what constitutes Academic Fraud, at the following website: <http://web5.uottawa.ca/mcs-smc/academicintegrity/home.php>