Instructor: Raj Rakhra
   Email: rajrakhra@gmail.com
   Office: Mackenzie Hall (MKZ) 217
   Office Phone: 206-543-7176

Office Hours: By appointment via email.

Course Materials: Course-related Readings: There are no required textbooks or Course Packs for Applied Strategy. Course information will be available on Canvas so please check the site for updates.

Recommended Readings: (available at Foster Business Library)
1. The Minto Pyramid Principle – Logic in Writing, Thinking and Problem Solving by Barbara Minto
2. The Power of Logic in Problem Solving and Communication by Linda Long

MBA Strategic Consulting Program Director:
In addition to offering advice to teams, Gordon Neumiller will often act as client advocate. Gordon works to ensure that clients are receiving appropriate value from their participation. He will help to confirm that end-of-project presentations and related deliverables are scheduled in a way that is most likely to offer client value, and he will be a regular, helpful quality control participant in the projects. Gordon knows many people and organizations in the region and can often assist teams in making project-related contacts for research and other purposes.

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Course Theme: Under promise and over deliver and to exceed the expectations of stakeholders including those of the instructor and client.
**Course Objectives:**
The course exists to facilitate successful completion of a mutually-agreed upon project for a client organization. It offers a practical “learning by doing” experience in which students apply concepts, tools, and theories from the MBA curriculum to complex, unstructured, real-world challenges and opportunities faced by managers. Management draws evidence-based insights from a variety of social sciences (e.g., accounting, finance, marketing, strategy, etc.) this is essentially an applied discipline. There is significant value in the practical application of existing tools, and former students can reinforce this proposition.

**Course Overview:**
This course is unlike any other in the Foster MBA program; meetings for Applied Strategy listed on the MBA schedule does not involve meeting in Paccar classrooms. The only required all-section meetings will occur during the first few weeks when we will calibrate the project experience and answer questions you may have about the course. **Session meetings listed on the schedule will be used to meet with clients, research project issues, or to interact with the instructor and other advisors.**

There will be two check-in meetings with the instructor. The instructor will meet with each team to discuss the initial project scope. There will be one or more additional progress status meeting with each team.

The critical practice presentation is scheduled later in the quarter. **The final presentation, at the client’s premises is the last item that has to be completed.** A number of written reports/updates are also required. Please refer to the schedule for further details when meetings are scheduled and reports are due.

In addition to the limited in-class commitments, we anticipate that each student will invest approximately 6-8 hours on average per week interfacing with the client, working within the team, communicating with the project advisor, or otherwise working outside of class on the project.

**Method of Instruction:**
*Applied Strategy* is purposefully designed to differ from other core courses in the Foster MBA Program experience in order to support the unique goals of the course. If you approach this course the way that you have successfully approached others in the Foster MBA Program, you will almost surely be disappointed. There are no assigned readings and few deliverables or other requirements related to the way you invest your time in the course. Instead, responsibility for structuring both work in the project course and the learning experience shifts substantially to the individual and student teams.

To succeed, you will have to demonstrate both a tolerance for ambiguity in the face of ill-structured challenges and an inventiveness in assembling resources to address them that is not common to other courses. The essence of the course lies in using your skills, knowledge, and experience to think critically and creatively to achieve organizational objectives as articulated by your client and others within the client organization. You should feel free to contact Raj Rakhra, Gordon Neumiller, and others in your network to help drive the project to a successful conclusion. **If you are confused or uncertain, we strongly urge you to ask for help as soon as possible rather than waiting for the last minute.**

The advice is free, and it will enable you to both be more successful on the project and potentially learn more that is applicable to your ongoing academic and professional development.

**Required Deliverables:**
Key deliverables for the project include an initial scope document, one interim status report, slide deck for the practice presentation, an end-of-project presentation to the client aimed at communicating your insights and recommendations, and an executive summary. Please note that the client may require
additional written documents (for example a Final Report) or other deliverables, and those must be also be provided to the instructor.

You and your team are expected to perform professional, insightful, and creative work in completing the project, conducting yourself with the integrity and respect consistent with the outstanding culture of the Foster MBA Program.

Course Credit:
Your performance in the course will ultimately be evaluated by your instructor on a “credit/no credit” basis. Your performance will be judged not only on how well the ultimate project deliverable(s) aligns with client goals but also on your interim investment in the course deliverables, i.e., the scope document, status report, and practice presentation. Consideration will be given to the perspectives offered by your client, but the instructor will retain sole responsibility for making the final call on grades. Finally, the Peer Evaluation is a tool that the instructor will use to evaluate members of each team to prohibit free riding.

It is the expectation of the instructor that each participant in the course will demonstrate sufficient competency and mastery of content to earn a “credit” assessment. However, the instructor will exercise the “no credit” option if you choose to pursue consistently a path that does not create sufficient value for yourself, your team, or your client.

Your work within the class will be evaluated on several dimensions. Details about each deliverable, including instructor expectations regarding content, format, length, etc., will be provided prior to due dates. The relative weighting of each of the evaluation dimensions and the submission mode—team or individual—are given below. If submission requirements are unclear after viewing the assignment guide, please contact the instructor for further guidance.

To receive credit for the course:
- For formal team meetings with the instructor, every team member must be present.
- Since we are on a tight schedule please be on time for meetings.
- All submitted reports must be received by the set deadline.
- Class sessions are reserved on Tuesday and Thursday. This means you must be available for meetings during this time frame.
- Attend all scheduled classroom and related events.

Course Evaluation:

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<tr>
<th>Number</th>
<th>Item</th>
<th>Team or Individual</th>
<th>Weight (%)</th>
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<tbody>
<tr>
<td>1.</td>
<td>Project Scope</td>
<td>Team</td>
<td>10</td>
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<td>2.</td>
<td>Project Status Report</td>
<td>Team</td>
<td>10</td>
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<tr>
<td>3.</td>
<td>Practice Presentation</td>
<td>Team</td>
<td>10</td>
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<tr>
<td>4.</td>
<td>Executive Summary and/or Final Report*</td>
<td>Team</td>
<td>25</td>
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<td>5.</td>
<td>Final Presentation</td>
<td>Team</td>
<td>25</td>
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<tr>
<td>6.</td>
<td>Client Feedback</td>
<td>Team</td>
<td>10</td>
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<tr>
<td>7.</td>
<td>Peer Evaluation &amp; Participation</td>
<td>Individual</td>
<td>5</td>
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*An Executive Summary is required for all teams. The client may request a Final Report and if the request is made, please submit a copy of the Final Report to the instructor with the Executive Summary.
Prior experience suggests that the final project presentation is a critical determinant used by clients in assessing how well teams met project goals, and it thus receives the highest weighting in grading. However, experience also suggests that interim deliverables serve two useful purposes:

First, interim deliverables serve to facilitate conversations with the instructor and other stakeholders that will allow you to focus your effort. They give those who have a strong interest in your success a better understanding of your project, and they allow the opportunity to provide critical, constructive feedback.

Second, deadlines imposed by interim deliverables “force the action” in your project. These targets keep project momentum flowing. Guidelines for deliverables are provided to in a way that should impose minimal additional burdens upon your team beyond the completion of the project itself. Please feel free to contact the instructor if you would like further guidance.

**Project Expectations:**
Most all Foster Applied Strategy project recommendations have been warmly received by clients. Most of these have been judged as “good” by past clients. Those are likely to be appreciated by the client but not implemented. Others have been judged as “truly exceptional,” and it’s those projects that are much more likely to be implemented and thus make a real difference in client organizations.

From past experience, two factors explain most of the variance between “good” and “truly exceptional” projects. *First, the latter projects rely upon a solid evidence basis (quantitative data, direct customer feedback, examples drawn from other organizations in the industry or organizations facing related opportunities, etc.) as the basis of their insights and recommendations. Second, teams who hit the “truly exceptional” standard craft presentations and other client-facing deliverables intended to not only inform but also to persuade.* Ultimately, leading others is both an informative and a persuasive process aimed at changing cognitions, attitude, and action. While much of the work on the project is about developing a compelling logic for addressing an organization’s challenges and opportunities, *your ability to convey persuasively that logic to others will be a key determinant of your professional success.* That means that your client-facing deliverables should be logically structured, visually appealing, free of grammar and syntax errors, etc.

**Honor Code & Professional Conduct:**
The course involves substantial interaction with stakeholders outside the Foster School of Business, and the expectation is for you to conduct yourself in the highest professional manner. Previous students have suggested that you will succeed on this dimension to the extent that you treat the project less like a traditional course and more like a job. That is, show up on time and prepared, keep the client and other stakeholders informed, and deliver as promised.

If you conduct any research with third parties in conjunction with the project, you should feel free to represent yourselves as a Foster MBA student team working on a class project on behalf of an organizational client. While it is an accepted practice in the market research industry to not disclose the specific identity of your client if doing so would introduce bias into the data you collect, you should be prepared to disclose the fact that you have a client sponsor and in what general industry the sponsor operates. Please note that this may not be sufficient for all research respondents, and those may choose not to participate in providing research data.

The expectation is to employ the principles and procedures espoused by Foster School of Business MBA Honor System to maintain academic integrity in the course and project deliverables. Please see [http://www.foster.washington.edu/academic/mba/currentstudents/Pages/honorcode.aspx](http://www.foster.washington.edu/academic/mba/currentstudents/Pages/honorcode.aspx) for an outline of this System. While all aspects of the Honor Code apply to the course, the fundamental issue faced in *Applied Strategy* typically involves proper attribution of source material for client deliverables.
Non-Disclosure Agreements:
Because of the special nature of this course, you may be provided access to certain non-public or otherwise confidential information. **You are expected to keep all such information confidential in accord with the goals of your client.** This caveat extends to all interactions with those outside your team, e.g. information sharing sessions and practice presentations. In past experience, this has not been a binding limitation to the course as you can cite the existence of confidential information that produces a specific conclusion without disclosure of the specifics of said information. Our teams often work with projects or services in development, or with clients who are just cautious by nature. As a result, you may be asked to sign a Non-Disclosure Agreement before the client will share important information with you.

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**Course Schedule**

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<th>Date</th>
<th>Topic</th>
<th>Action</th>
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| 6/23, Mon 6 – 7 PM | Meet the Sponsors | Deloitte Commons, 2nd Floor Paccar Hall  
Attendance is optional but highly recommended |

| 6/24, Tue | Deadline: Project preferences are due by 12:00 noon  
Consulting 101 - Consulting Basics  
Project Scope - Consulting 102  
Required: Send out Team Bios to Client after teams are formed | Review: Helpful Hints for Scope Meetings  
& Project Scope Documents including Confidentiality Agreement and Engagement Letter.  
Deadline: Project Bids are due by 8 am  
Guest Speakers: Cynthia Miller (Lenati LLC Consultant)  
Required attendance & meet in PCAR 394  
Required: Send out Team Bios to Client after teams are formed |

| 6/26, Thu | Communication: Getting Your Message Across | Guest Speaker: Gregory Heller – Getting Your Message Across  
Required attendance & meet in PCAR 394 |

| 7/9, Wed (9 P.M. Deadline) | Project Scope Document due | Deadline: 9 PM for all teams to submit Project Scope.  
Submission details will be provided via |
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<tr>
<th>Date</th>
<th>Event Description</th>
<th>Details</th>
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<tr>
<td>7/10, Tue</td>
<td>Team Project Scope Meeting with Instructor</td>
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<td>Review scope and initial progress with Instructor.</td>
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<td><strong>Team Project Scope Meeting with Instructor</strong> – each team will meet with instructor to discuss the scope and issues relating to scope</td>
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<td>Details of meeting schedule &amp; location to be sent out via email</td>
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<td>Required attendance &amp; meet in PCAR 394</td>
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<td>7/17, Thu</td>
<td><strong>Milestone, Roles &amp; Responsibility Doc due</strong></td>
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<td>(9 P.M Deadline)</td>
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<tr>
<td>7/23, Wed</td>
<td><strong>Project Status Report Due</strong></td>
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<td>(9 P.M. Deadline)</td>
<td>Connect with client; resolve outstanding issues, review insights and tentative recommendations</td>
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<td><strong>Review</strong>: <em>Project Status Report Document</em></td>
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<td>Deadline 9PM for all teams to submit Project Status Reports.</td>
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<td></td>
<td>Submit Project Status Report.</td>
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<td>Submission details provided via email.</td>
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<td><strong>Teams to start scheduling final presentation with clients – email will be sent out with instructions.</strong></td>
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<td>7/24, Thu</td>
<td><strong>Project Update Meetings</strong></td>
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<td>Project Update Meetings – Teams to meet with instructor</td>
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<td><strong>Required attendance &amp; meet in PCAR 394</strong></td>
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<td>8/12, Tue 8/14, Thu</td>
<td><strong>Team Practice Presentations</strong></td>
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<td><strong>Review</strong>: <em>Practice Presentation Guidelines Document</em></td>
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<td><strong>Team Practice Presentations with instructor</strong></td>
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<td>Details of meeting schedule &amp; location to be sent out via email</td>
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<td><strong>3 Strict Requirements:</strong></td>
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<td>1. Completed slide deck must be sent to instructor <strong>24 hours</strong> before the practice presentation is scheduled.</td>
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2. The practice presentations will be videotaped so teams can follow up with Gregory Heller for feedback and improvement.

3. Only after approval is given can teams then proceed with the Final Presentation.

| From 8/14, to 8/22, | Final Presentations at clients’ premises | Confirm final presentation schedule via email.  
|---------------------|-----------------------------------------|-------------------------------------------------------------
|                     |                                         | One of the following persons MUST be in attendance at the Final Presentation – Raj Rakhra or Gordon Neumiller |

| Complete by 8/22, Fri (9 PM. Deadlines for Reports) | Reports due | Review: Executive Summary & Peer Evaluation Report  
|-----------------------------------------------------|-------------|-------------------------------------------------------------
|                                                     |             | All Final Presentations at client’s premises completed by today  
|                                                     |             | 1. Executive Summary  
|                                                     |             | 2. Optional Final Report (if the team is submitting it to the client, a copy of which must be submitted to the instructor)  
|                                                     |             | Deadline 9PM for all teams to submit Executive Summary and optional Final Report  
|                                                     |             | Peer Evaluation Report  (Details provided later via email) |

*Subject to change and a more detailed schedule for team meetings with the instructor will be sent via email as need.

**NOTE:**

*If you or your teams need assistance from Raj at any time during the quarter, please email to set up an appointment. It’s important that he knows about issues and problems earlier rather than later. This means that teams have to anticipate, plan, and execute project activities in advance of any deadlines. An important element of consulting is to exceed expectations set by the instructors and the client.*