Instructor
Raj Rakhra
Mackenzie (MKZ) 207
Office Phone: 206-543-7176
rajr@uw.edu

You will receive communication via Canvas throughout the quarter. Please make sure you monitor emails from Raj Rakhra and Jennifer Bauermeister.

Office Hours: By appointment 12:30 – 1:20pm Tuesdays and Thursdays in MKZ 207 or by pre-arrangement on other days or times.

MBA Strategic Consulting Program
Jennifer Bauermeister, Director
Dempsey 334  jenbauer@uw.edu  206-221-3533
Office Hours: By appointment, 9:00-4:00 pm M-Th.

Jen will offer advice to teams and serve as the advocate for the project sponsors ensuring that they receive appropriate value from their participation. She will attend meetings and presentations and be regular participant in the class providing guidance for the projects. Jen knows many people and organizations in the region and can often assist teams in making project-related contacts for research and other purposes.

Presentation Support
Gregory Heller, Business Communications Advisor
Mackenzie 220  gheller@uw.edu  206-543-2351
Gregory Heller will work with teams and individuals to ensure that final recommendations are clearly and powerfully communicated to clients. Gregory works with MBA students to help them hone their content development and presentation skills to most effectively communicate their messages to the project sponsors.

**Course Information**

**Course Materials:** There are no required textbooks or Course Packs for Applied Strategy. Course materials will be available on Canvas.

**Course Theme:** Under promise and over deliver to exceed expectations of all stakeholders including those of the instructor and project sponsor.

**Course Objectives:** This course offers a practical “learning by doing” experience in which students apply concepts, tools, and theories from the MBA curriculum to the complex, unstructured, real-world challenges and opportunities faced by managers. Management draws evidence-based insights from a variety of disciplines. (e.g., accounting, finance, marketing, strategy, etc.) Insights gleaned from your practical application of toolsets and knowledge to business scenarios can generate significant value for stakeholders.

**Course Overview:** This course is unlike any other in the Foster MBA program in that most of the class sessions should be used to meet with project sponsors, conduct research, or interact with the course instructor. Required sessions are listed on the MBA Core schedule and on the last page of the syllabus.

All students are **required to attend the working dinner** with the project sponsors on Tuesday, January 9 from 6:00-8:00 p.m. in the HUB ballroom.

There will be **two required check-in meetings** with the instructor and program staff. At the first meeting the team will review and discuss the initial project scope with the instructor and/or program staff. The purpose of the second meeting is to discuss the mid-point deck and make sure teams are on track with their projects.

Each team is **required to complete a practice presentation** at least one week prior to the team final presentation. Final presentations will take place at the sponsoring company offices (unless prior arrangements have been made). Please refer to the schedule for further details.

In addition to the limited in-class commitments, we anticipate that each student will invest **10-15 hours** on average per week interfacing with the project sponsor, working within the team, communicating with the instructor or program staff, 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 often
unstructured challenges and an inventiveness in assembling resources 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 sponsoring organization. You
should feel free to approach the instructor, the MBA Consulting program staff, 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 until the last minute. The
advice 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.

You and your team are expected to work professionally, insightfully, and creatively in completing the
project, conducting yourselves 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
deliverables aligns with the sponsoring company goals but also on your investment in the course interim
deliverables, i.e., the scope document, status report, and practice presentation.

Consideration will be given to the perspectives offered by your sponsor, but the instructor will retain
sole responsibility for making the final call on grades.

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 sponsoring organization.

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. 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 clarification.

**To receive credit for the course:**

- Attend all scheduled classes and the January 9 working dinner. (See schedule below.)
- Attend the required team meetings. (Scope review meeting and mid-project review meeting.)
- Participate in the practice presentation.
- Participate in the final presentation.
- Complete the individual interview assignment.
- Complete all deliverables on-time and in accordance with instructions.

**Required Assignments:**

<table>
<thead>
<tr>
<th>Assignment</th>
<th>Team or Individual</th>
<th>Due Date</th>
<th>Weight</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Team Bio &amp; Email</td>
<td>Team</td>
<td>1/05</td>
<td>5%</td>
</tr>
<tr>
<td>2. Project Scope</td>
<td>Team</td>
<td>1/18</td>
<td>15%</td>
</tr>
<tr>
<td>3. Project Management Plan</td>
<td>Team</td>
<td>1/30</td>
<td>5%</td>
</tr>
<tr>
<td>4. Mid-Point Deck</td>
<td>Team</td>
<td>2/11</td>
<td>15%</td>
</tr>
<tr>
<td>5. Draft Presentation*</td>
<td>Team</td>
<td>2/23-3/2**</td>
<td>20%</td>
</tr>
<tr>
<td>6. Final Presentation*</td>
<td>Team</td>
<td>3/14</td>
<td>35%</td>
</tr>
<tr>
<td>7. Video Interview</td>
<td>Individual</td>
<td>3/14</td>
<td>5%</td>
</tr>
</tbody>
</table>

*Final deliverable format will vary by team. Please discuss with instructor if you have questions.*  
**Draft presentation is due 24-hours prior to your team practice presentation.**

Prior experience suggests that the final presentation is a critical determinant used by the project sponsors in assessing how well teams met project goals; however, the 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 in a way that should impose minimal additional burdens upon your team beyond the completion of the project itself. Guidelines for each deliverable are available on Canvas. Please feel free to contact the instructor if you would like further guidance.

**Project Expectations:** Almost all Foster Applied Strategy project recommendations have been warmly received by the project sponsors, and most have been judged as “good” by past sponsors. Those are likely to be appreciated by the sponsor but not implemented. Others have been judged as “truly exceptional and it is those projects that are much more likely to be implemented and thus make a real difference to the sponsoring organizations.
From past experience, two factors explain most of the variance between “good” and “truly exceptional” projects:

- Those judged “good” relied 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.
- Teams who hit the “truly exceptional” standard crafted presentations and other sponsor-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 compelling logic for addressing an organization’s challenges and opportunities, your ability to persuasively convey that logic to others will be a key determinant of your professional success. That means that your sponsor-facing deliverables should be well-written ---logically structured, visually appealing, free of grammar, and syntax errors, etc.

Two sources of information that will help are: The Power of Logic in Problem Solving & Communication by Linda Long and The Pyramid Principle – Logic in Writing, Thinking and Problem Solving by Barbara Minto (available in Foster Library).

**Honor Code & Professional Conduct:** The course involves substantial interaction with stakeholders outside the Foster School of Business, and the expectation is that you 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 your sponsor and other stakeholders informed, and deliver as promised.

If you conduct any research with third parties in conjunction with the project, you should 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 the general industry the sponsor operates in. *Please note that this may not be sufficient for all research respondents, and some 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 Code to maintain academic integrity in the course and project deliverables. 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 the 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 project sponsor. This extends to all interactions with those outside your team, e.g., do not discuss your project specifics with students on other teams.

Our teams often work with projects or services whose sponsors who are cautious by nature. As a result,
you may be asked to sign a Non-Disclosure Agreement (NDA) before the sponsor will share important information with you. The course instructor and staff can also sign NDAs at the request of the project sponsor.

**Applied Strategy Course Schedule**

Students are expected to reserve the time slot allotted for Applied Strategy class to work on their projects as a team. The instructor reserves the right to meet with teams or individual students during the allotted class time. Each team will sign up for scope meetings, mid-project review meetings, practice presentations, and final presentation time slots.

<table>
<thead>
<tr>
<th>Date</th>
<th>Topic</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>December</td>
<td>Research</td>
<td>Begin learning about the company you are working with as well as the industry/project topic. Set-up a news alert to keep you apprised of any major happenings with the company/industry.</td>
</tr>
<tr>
<td>1/5</td>
<td><strong>Assignment #1</strong> Team introduction email &amp; bios</td>
<td>All teams. Send email including team bio on or before 5:00 p.m. on Friday, January 5. See Canvas for details.</td>
</tr>
</tbody>
</table>
| 1/09   | **Class Session #1** Course Overview, Prep for Working Dinner | Raj Rakhra, Jen Bauermeister  
**Prepare:** Read the course *Syllabus & Working Dinner Guide* prior to class. We will provide some class time for working dinner preparation.  
**Attendance is Required.** |
| 1/09   | **Working Dinner** with Sponsors           | Applied Strategy Working Dinner  
HUB Ballroom  
**Prepare:** Research your company and meet as a team to prepare a list of questions for your project sponsor(s). Read *Working Dinner Guide*.  
**Attendance is Required.** |
| 1/11   | **Class Session #2** Scoping with PwC      | Guest Speakers: PwC Consultants  
**Prepare:** Read *Scoping Meeting Guide*  
**Attendance is Required.** |
<table>
<thead>
<tr>
<th>Date</th>
<th>Event Description</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>1/12</td>
<td><strong>Company Visit/Scoping Meeting</strong></td>
<td>Second meeting with project sponsor (should be held at their office). Tour facilities and discuss project scope. (allow at least 2 hours for meeting) Prepare: Read and discuss as a team: <em>Scoping Meeting Guide</em> and <em>Scope Template</em>.</td>
</tr>
<tr>
<td>1/16</td>
<td><strong>Optional- Q&amp;A Sessions</strong></td>
<td>Instructor will be in classroom to answer scoping questions.</td>
</tr>
<tr>
<td></td>
<td>1:30-2:30 &amp; 3:30-4:30</td>
<td></td>
</tr>
<tr>
<td>1/16</td>
<td><strong>Third Meeting with sponsor</strong></td>
<td>Meeting can be held virtually, but recommended as the project scope is due 1/18</td>
</tr>
<tr>
<td>1/18, 11:59 p.m.</td>
<td><strong>Assignment #2: Project Scope</strong></td>
<td>All teams.</td>
</tr>
<tr>
<td></td>
<td>Submit on Canvas</td>
<td></td>
</tr>
<tr>
<td>1/19-1/23</td>
<td><strong>Scope Meetings with Instructor &amp; SCP Staff</strong></td>
<td>Each team will sign-up for a 30-minute time slot (via Google Docs).</td>
</tr>
<tr>
<td>1/30, 11:59 p.m.</td>
<td><strong>Assignment #3: Project Management Plan</strong></td>
<td>All teams. Assignment details on canvas.</td>
</tr>
<tr>
<td></td>
<td>Submit on Canvas</td>
<td></td>
</tr>
<tr>
<td>2/11, 11:59 p.m.</td>
<td><strong>Assignment #4: Mid-Point Slide Deck</strong></td>
<td>All teams. Assignment details on canvas.</td>
</tr>
<tr>
<td></td>
<td>Submit on Canvas</td>
<td></td>
</tr>
<tr>
<td>2/12-2/16</td>
<td><strong>Mid-Project Review Meetings</strong></td>
<td>Each team will sign-up for a 30-minute time slot (via Google Docs).</td>
</tr>
<tr>
<td>2/12-2/16</td>
<td><strong>Mid-Project Update to Company</strong></td>
<td>Required check-in meeting with company. Present your research findings and confirm direction for final weeks of the project.</td>
</tr>
<tr>
<td>2/20</td>
<td><strong>Class Session #3: Communicating Data in the Final Presentation</strong></td>
<td><em>Guest Speaker:</em> Gregory Heller  <strong>Attendance is Required</strong></td>
</tr>
<tr>
<td>2/22-2/28</td>
<td><strong>Assignment #5: Draft Presentation</strong></td>
<td>Submit the draft version of your PowerPoint slides at least 24-hours before your practice session. If you do not submit your draft presentation 48-hours before,</td>
</tr>
<tr>
<td></td>
<td>Submit on Canvas</td>
<td></td>
</tr>
<tr>
<td>Date</td>
<td>Event</td>
<td>Details</td>
</tr>
<tr>
<td>------------</td>
<td>----------------------</td>
<td>-------------------------------------------------------------------------</td>
</tr>
<tr>
<td>2/24-3/1</td>
<td>Practice Presentations</td>
<td>Each team will sign-up for a 45-minute time slot (via Google Docs). Practice session must take place at least one week prior to final presentation. All students must attend and participate in the practice presentation.</td>
</tr>
<tr>
<td>3/2-3/09*</td>
<td>Final Presentations</td>
<td>Schedule your final presentation at a time that works for your project sponsor. A faculty/staff member must be in attendance. Attendance of ALL TEAM MEMBERS at the final presentation is required.</td>
</tr>
<tr>
<td>3/15, 11:59 p.m.</td>
<td>Assignment #6: Final Presentation Submit on Canvas</td>
<td>All teams. Submit your final PPT presentation AND any additional materials you provided to your project sponsor including white papers, reports, financial analysis, surveys, etc.</td>
</tr>
<tr>
<td>3/15, 11:59 p.m.</td>
<td>Assignment #7: Video Interview Submit on Canvas</td>
<td>Individual Deliverable. Review the assignment on Canvas for additional details. Submit prior to leaving the country as Canvas may not allow you to upload your video from outside the US.</td>
</tr>
</tbody>
</table>

*Note that if possible your final presentation should not conflict with other Foster Classes. You are responsible for scheduling a time that works for the company and all team members.*