SMALL BUSINESS CONSULTING BA 404

Fall 2016
San Diego State University
College of Business Administration
Department of Management

Instructor: John Francis, Ph.D. Associate Professor of Strategic Management, Director of Aztec Consulting program, john.francis@sdsu.edu, 858-352-8322, http://aztecconsulting.sdsu.edu/

COURSE INFORMATION

Class Days: Friday
Class Times: 10am – 12:40pm
Class Location: EBA 341
Office Hours Times (and by appointment): 12:45 – 1:45 pm
Office Hours Location: SSE 3340
Units: 3

Course Overview

BA 404 is designed to allow you to apply many of the skills you have learned in the SDSU CBA business program. Forming consulting teams of four students, and then assigning a team to a San Diego-area business or organization accomplish this. These are real businesses and not “make work” projects. The CBA uses this as a way to extend and maintain good relationships with these local organizations, increasing the market value of your degree from SDSU. You will find your project to be a rewarding experience as you actually apply what you have previously studied in class.

Student Learning Outcomes

BSBA students will graduate being:
- Effective Communicators
- Critical Thinkers
- Able to Analyze Ethical Problems
- Global in their perspective
- Knowledgeable about the essentials of business

BA 404 contributes to these goals through its student learning outcomes:
- Summarize the organizational managerial context of the business decision.
- Determine the appropriate information needed to arrive at business recommendations.
- Determine the methodologies needed to obtain the required information from both primary and secondary sources.
- Implement the appropriate methodologies in a semester-long research project.
- Analyze the collected information to arrive at sound managerial recommendations.
- Write a sound research report for presentation to management.
- Orally present the research results to management in a well-organized presentation.
- Be a productive member of a team tasked with solving a decision problem.

Enrollment Information

Enrollment in the course is by application only. The majority of the following courses are required to be completed prior to the semester.
BA 300 – Ethical Decision Making in Business
BA 310 – Foundation of Business in a Global Environment
MIS 301 – Statistic Analysis for Business or
BA 360 – Introduction to Operations and Supply Chain Management
BA 323 – Fundamentals of Finance [Formerly FIN 323]
BA 350 – Management & Organizational Behavior [Formerly MGT 350]
BA 370 – Marketing [Formerly MKT 370]
Course Materials

Recommended Texts:


It is also a good idea to have access to textbooks from your core business courses (MKTG 370 Marketing, FIN 323 Finance, ACCT 201 and 202 Accounting and MGT 350 Management core courses).

Course Structure and Conduct

BA 404 is modeled on a real field consulting experience. It is not a “course” in the usual sense of the word. Rather, it is more like a group project or comprehensive examination. And, as in any team project, it is expected that all members of the project team will contribute significantly to all elements of the project’s completion. Thus, while a member with a finance concentration might be expected to lead the effort related to financing alternatives, all members of the project team should be involved in, and understand the implications of the finance decisions.

Professionalism

You are expected to act professionally in all aspects related to this course. This includes, but is not limited to: maintaining confidentiality of the information provided to you by the client, keeping scheduled meetings with clients and giving the expected effort to the project. If asked, each of you will sign a confidentiality agreement and present it to your client. All work that you submit to the client, your teammates, and the instructors should reflect your best possible effort, and be free from typographical, spelling and grammatical errors. A standard similar to that expected in a professional business consulting engagement will be adhered to in this course.

Time Commitment

The operational standard used by the College of Business Administration is roughly three hours of class work (reading, homework, assignments, projects and class) per hour of credit. For this type of course it is roughly 10 hours per week, during a regular 15 week semester. This time will be spent either in class, or working directly with the client or on some other project-related activity. Each student should plan to budget a minimum of 75-100 hours of project time (in addition to class time). Students will maintain time logs, both individually and as a group, and submit these twice over the term.

Contribution

The course requirements are modeled after a consulting firm, and, as such, all members of a team are expected to contribute their fair share to the project. Peer evaluations will be collected twice over the term to assess the work of each team member. Although rare, it is entirely possible for a team, on the vote of a majority of its members, to “fire” or drop a teammate (after appropriate consultation with the instructor). Before a team “fires” a member, written notice of the team’s evaluation of the member’s work must be presented to the individual involved and to one of the instructors so that an attempt can be made to remedy the situation. After one written notice has been provided to a team member and sufficient time for correction has passed, the individual can be “fired” without being given further written notice. Although this is a serious action, it does occur in the “real-world.” This action typically will result in the individual failing the course.

We meet as a whole class roughly half of the scheduled class meetings. However, we reserve and utilize that class time for BA 404. This is used for scheduled team meetings with the instructors or advisors as a time that all team members can meet without time conflicts and as a time to conduct research related to your project. Do not schedule other activities (such as work, travel, attending other lectures, conducting work for other classes or attending group meetings for other classes) during the scheduled BA 404 time. This is a mandatory condition for your participation in BA 404 this term. Failure to fully attend all class sessions and meeting will result, at a minimum, in a significant lowering of your course grade.

Project Managers

Each team will have a project manager, who has overall responsibility for keeping the team on track and coordinating the work of the team. Another important task of the project manager is keeping your team’s faculty and graduate advisors apprised of the status of the project through progress reports. For specific periods, project managers will prepare short progress reports.
outlining what has been accomplished during that period and what the team expects to accomplish during the next reporting period.

Support
The Aztec Consulting Center (ACC), houses a number of computers and specialized software packages available for your use. There are copies of prior BA 404 reports in the office (need to check out from GA) and on Blackboard. The ACC will be staffed by course GAs and there is a conference table for your use. You can also use the regular classroom during class time for group meetings. Your client will need to approve any significant budget expenses for your project. Student teams are expected to bear the expense of two making copies of the final report, typically one for the client and one for SBCC.

Faculty and Graduate Student Advisors
Each project team will typically work with one graduate student advisor (GA) or one undergraduate student who has previously taken the course (TA). The role of the advisor is to act as a "sounding board" regarding your plans and proposals for the project, and to provide limited guidance in the project’s execution. Remember that the projects are intended to be designed and implemented by your team and not by your team’s advisors. The faculty instructor must approve your scope of work and your final written report. To avoid confusion, maintain regular communication with your advisors (in person and by e-mail), get approval at agreed to stages, and always submit professional quality work when seeking their input or evaluation. Whenever you are in doubt, ask someone!

Students with Disabilities
If you are a student with a disability and believe you will need accommodations for this class, it is your responsibility to contact Student Disability Services at (619) 594-6473. To avoid any delay in the receipt of your accommodations, you should contact Student Disability Services as soon as possible. Please note that accommodations are not retroactive, and that accommodations based upon disability cannot be provided until you have presented your instructor with an accommodation letter from Student Disability Services. Your cooperation is appreciated.

Academic Honesty
The University adheres to a strict policy regarding cheating and plagiarism. These activities will not be tolerated in this class. Become familiar with the policy (http://www.sa.sdsu.edu/srr/conduct1.html). Any cheating or plagiarism will result in failing this class and a disciplinary review by Student Affairs.

Examples of Plagiarism include but are not limited to:

- Using sources verbatim or paraphrasing without giving proper attribution (this can include phrases, sentences, paragraphs and/or pages of work)
- Copying and pasting work from an online or offline source directly and calling it your own
- Using information you find from an online or offline source without giving the author credit
- Replacing words or phrases from another source and inserting your own words or phrases
- Submitting a piece of work you did for one class to another class

If you have questions on what is plagiarism, please consult the policy and this helpful guide from the Library.

Assessments and Grading
Course grades will be assigned in accordance with San Diego State University policy (see General Catalog, pp. 468-470). Undergraduate grades shall be: A (outstanding achievement, available only for the highest accomplishment), B (praiseworthy performance, definitely above average), C (average, awarded for satisfactory performance, the most common undergraduate grade), D (minimally passing, less than the typical undergraduate achievement), F (failing).

Typically, it is our expectation that each final report will require at least minor modification before being cleared for final presentation to the client. Reports requiring major revision or rewriting may be reduced by one letter grade. Late reports may also be reduced in grade. The more your report reflects sound work and creative thinking on the part of your group, the higher the grade. Your overall team evaluation will be higher the more that your group can plan and act independently and produce good quality results. But, the more that you expect to or need to be told what to do, even if done well, the lower your final grade will be. The following elements will determine the grades for each team:
• 50 percent – client consulting analysis, recommendations, reports and presentation -- content and style and value to client. This is divided into two parts: (1) the business situation analysis and (2) the recommendations and tactical action plan or final report
• 25 percent – assignments, meeting administrative deadlines and maintaining a professional attitude
• 25 percent – peer evaluation

In general, most students in a team may receive the same grade, which is based on a combination of peer review and instructor evaluation on all of the above components. In instances of identifiable differential performance among team members [based on peer review and level of commitment], the grade will be adjusted accordingly, by a full letter grade or more. Elements that may be addressed in the individual student evaluation process include quality and quantity of input, timeliness and work ethic.

**Grade of Incomplete.** A grade of Incomplete (I) indicates that a portion of required coursework has not been completed and evaluated in the prescribed time period due to unforeseen, but fully justified, reasons and that there is still a possibility of earning credit. It is your responsibility to bring pertinent information to the instructor and to reach agreement on the means by which the remaining course requirements will be satisfied. The conditions for removal of the Incomplete shall be reduced to writing by the instructor and given to you with a copy placed on file with the department chair until the Incomplete is removed or the time limit for removal has passed. A final grade is assigned when the work agreed upon has been completed and evaluated. An Incomplete shall not be assigned when the only way you could make up the work would be to attend a major portion of the class when it is next offered. Contract forms for Incomplete grades are available at the [Office of the Registrar website](#).
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<thead>
<tr>
<th>Wk</th>
<th>Date</th>
<th>Topic by Week</th>
<th>To Do/Deliverables</th>
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<tbody>
<tr>
<td>1</td>
<td>9/2</td>
<td>Initial Class meeting – Introduce course</td>
<td>Familiarize yourself with syllabus, Blackboard, and complete bio</td>
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<tr>
<td>2</td>
<td>9/9</td>
<td>Client presentations -- GAs present prospective projects</td>
<td>Read project descriptions. Complete in class ranking of preferences, team formation.</td>
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<td>3</td>
<td>9/16</td>
<td>Initial client meetings (No class meeting)</td>
<td>Team meeting with client to be scheduled by team GA. Prepare meeting agenda.</td>
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<td>4</td>
<td>9/23</td>
<td>Class meeting</td>
<td>Turn in Deliverable 1: Key Issue Report: What are the problems you are trying to solve? What appears to most affect the performance of this business or organization (its ability to increase revenue, increase effectiveness, reduce costs or improve performance)? (Deliverable due on Tues to GA for editing. Final draft due on Friday at 10 am)</td>
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<tr>
<td>5</td>
<td>9/30</td>
<td>Class meeting</td>
<td>Individual teams further discuss key issues, project scope and “need to know” questions/answers for business assessment.</td>
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<tr>
<td>6</td>
<td>10/7</td>
<td>Class meeting</td>
<td>Understanding firm analysis. Discuss Final report format. (Deliverable due on Tues to GA for editing. Final draft due on Friday at 10 am)</td>
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<td>7</td>
<td>10/14</td>
<td>Group meetings with Instructor/GAs</td>
<td>Schedule progress update meeting (30 minutes per group)</td>
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<tr>
<td>8</td>
<td>10/21</td>
<td>Group meetings with GA</td>
<td>Turn in rough draft of Deliverable 3: Final Report First Draft on Tues to GA for editing. Time logs and peer evaluation #1 (by e-mail to GA)</td>
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<tr>
<td>9</td>
<td>10/28</td>
<td>Class meeting</td>
<td>Turn in Deliverable 3: Final Report first draft to instructor.</td>
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<tr>
<td>10</td>
<td>11/4</td>
<td>Group meetings with Instructor/GAs</td>
<td>Schedule progress update meeting (30 minutes per group)</td>
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<tr>
<td>11</td>
<td>11/11</td>
<td>Group meetings with GA during week. No class meeting</td>
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<td>12</td>
<td>11/18</td>
<td>Class meeting – crafting recommendations, final presentations</td>
<td>Turn in Deliverable 4: Final report 2nd draft to GA for review on Tuesday 11/14. This “revised draft” should clearly indicate changes and new content from 1st draft. Schedule final presentations – obtain client approval before scheduling.</td>
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<td>13</td>
<td>11/25</td>
<td>(No class meeting)</td>
<td>Review team’s preliminary PowerPoint presentation with GA</td>
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<tr>
<td>14</td>
<td>12/2</td>
<td>Group meetings with GA -- discuss final report</td>
<td>Tuesday (11/29) – Turn in Deliverable 5: Final Report. Electronic version final report to instructor and GAs by 3:00 PM. Indicate changes to Final Report.</td>
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<td>15</td>
<td>12/9</td>
<td><strong>Final Client presentations</strong> – Location Aztec Center</td>
<td>Bring hardcopy final reports including report and presentation files on CD/thumbdrive to final client presentation. Check with GA as to number of copies. Time logs and peer evaluation #2 by e-mail to GA. <strong>Must be submitted in order to receive credit for the course.</strong></td>
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