



Experiential Learning: Creating and Growing Project Learning in Business Schools

THE AACSB CURRICULUM DEVELOPMENT SERIES

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Introductions



Dr. Paul Friga

- Clinical Associate Professor of Strategy and Entrepreneurship
- Kenan-Flagler Business School – UNC Chapel Hill
- Special Advisor to the Provost for Online Education
- Faculty Lead – Undergraduate Consulting Area of Emphasis
- Former Director of UNC STAR and STAR Global Programs
- Previously worked at McKinsey & PwC
- Author of articles on strategy, education, decision making and entrepreneurship
- Author of *The McKinsey Engagement: A Powerful Toolkit for More Efficient and Effective Team Problem Solving* and co-author of *The McKinsey Mind*
- ***And let's all get to know each other – name, school, position, and something extra interesting!***
- *For programs – summarize # projects, # students at different levels, fee, and % global projects*



Action Plan for Today

Overview

Design

Deliver

Assess



Action Plan for Today



Overview

Design

Deliver

Assess

- Objectives
- Project Based Learning
- Challenges

Exercise

Key Questions?

The top banner of the slide features a blue gradient background. On the left, there are silhouettes of six business professionals in suits. On the right, there is a stylized globe with white lines representing latitude and longitude. The word "Objectives" is written in a large, white, sans-serif font in the center-right of the banner.

Objectives

- **Issues** - Discuss some of the key issues faced in project based learning
- **Tips** – Offer best practice advice from my research
- **Application** – brainstorm how the material can be used at each of your respective schools



A definition for project based learning

In Project Based Learning (PBL), students go through an extended process of inquiry in response to a complex question, problem, or challenge. While allowing for some degree of student "voice and choice," rigorous projects are carefully planned, managed, and assessed to help students learn key academic content, practice "soft" skills (such as giving and receiving feedback, communication & critical thinking), and create high-quality, authentic products & presentations.

Buck Institute for Education, Project Based Learning



Many schools are active in project-based learning

Schools participating in web conference – 55 in total, 9 outside U.S.


University of Georgia	George Mason University	University of Florida
Indiana University	Walsh University	Salisbury University
University of Wisconsin - Madison	St. Joseph's University	University of Michigan
UCLA	Beckmill Research, LLC	Loyola University Maryland
Purdue University	OP Jindal Global University	Wright State University
Ohio State University	St. John's University	UNC Chapel Hill
University of Pittsburgh	Georgia Institute of Technology	Babson College
Hong Kong Polytechnic University	Bochum University	Stony Brook University
Michigan State University	San Jose State University	Fairmont State University
University of Washington	Ithaca College	NHH, Norwegian School of Economics



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Schools participating in web conference – 55 in total, 9 outside U.S.

George Washington University	University of Catania	Western Illinois University
Virginia Commonwealth University	Catholic University of Portugal	Vanderbilt University
Suffolk University	University of Missouri - Kansas City	Duke University
University of Central Punjab, Lahore, Pakistan	Bowling Green State University	Stevenson University
Jackson State University	University of Richmond	Michigan Technological University
Rowan University	Northern Illinois University	AACSB International
Queen's University (Canada)	Stephen F. Austin State University	Virginia State University
University of San Francisco	Lahore University of Management Sciences	Northwestern University
Keck Graduate Institute	University of Akron	Massachusetts Institute of Technology
Dartmouth	University of Connecticut	New York University
University of Pennsylvania		



Many schools are active in project-based learning (1/2)

Schools participating in web conference – 64 in total, 12 outside U.S.


ADU	Foster (Washington)	John Hancock University
Amrita School of Business (India)	Fuqua (Duke)	Johns Hopkins University
Ashridge Business School (UK)	Haas (Berkeley)	Johnson (Cornell)
Boston University	Harvard Business School	Kelley (Indiana)
Cardiff University	Heinz (Carnegie Mellon)	Kellogg (Northwestern)
Carlson (Minnesota)	Hong Kong Polytechnic University (Hong Kong)	Kenan-Flagler (North Carolina)
Clayton State University	IE Business School	Marshall (S. California)
Darden (Virginia)	IESE Business School	Marshall University
Drucker School of Management, Claremont Graduate University	IMD (Switzerland)	McCombs (Texas)
ESPAE ESPOL (Equador)	Intel Corporation	Mendoza (Notre Dame)
Fisher (Ohio State)	ISM University of Management and Economics (Lithuania)	Monash University (Australia)



Many schools are active in project-based learning (2/2)

Schools participating in web conference – 64 in total, 12 outside U.S.




New Mexico State University	St. Ambrose University	University of Houston – Victoria
Pepperdine University	Texas A&M University Kingsville	University of Lagos, Akoka (Nigeria)
Pontificia Universidad Javeriana (Colombia)	Toulouse Business School (France)	University of Portland
Purdue University Calumet	Tuck (Dartmouth)	University of Potsdam (Germany)
Rockhurst University	Universidad del Desarrollo (Chile)	University of Richmond
Ross (Michigan)	University of Arkansas Little Rock	University of South Dakota
Sacramento State University	University of Central Oklahoma	University of Tampa
Saint Xavier	University of Chicago	University of Texas Austin
Seattle University	University of Denver	Virginia Commonwealth University
Sloan (MIT)	University of Florida	
Southern Illinois Univ. Edwardsville	University of Georgia	



Project based learning can respond to unmet needs

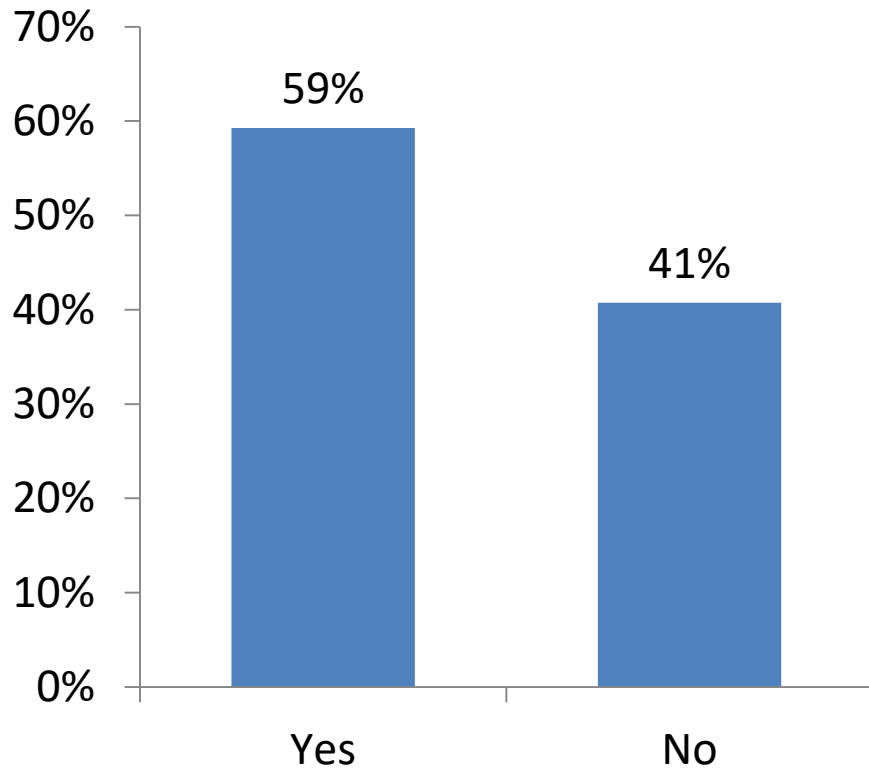
MOST SIGNIFICANT UNMET NEEDS/ OPPORTUNITIES IN BUSINESS SCHOOLS	HOW PROJECT-BASED LEARNING OFFERS A POTENTIAL RESPONSE
Global perspective	Conducts projects in other countries with international students and faculty
Leadership development	Provides people and thought leadership opportunities
Integration	Deals with strategic and cross-functional issues
Organizational realities (power, politics and the challenges of implementation)	Requires teamwork with company executive and implementation buy-in from company sponsors
Creative innovative thinking	Allows students flexibility in addressing ambiguous situations that involve cultural sensitivity
Oral and written communication	Offers pressure-filled meetings with executives – often involving translators

Several business schools have been doing this for a while

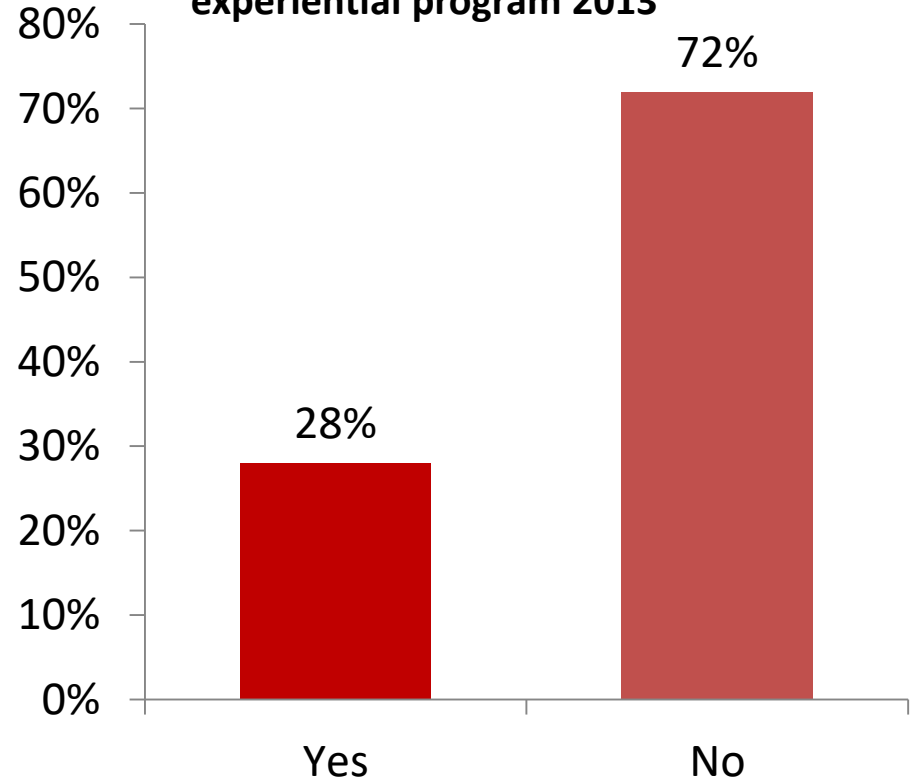
		
University of Michigan	University of North Carolina	Dartmouth College
MAP (Multidisciplinary Action Projects)	STAR – Student Teams Achieving Results and GBP – Global Business Projects	Tuck Global Consultancy
80 Projects/Year	40 projects/Year	8-10 Projects/Year (plus many more for first year students)
7 weeks – no other classes	4 months (one semester + 2 weeks in-country) – part time and mostly virtual for Global	3 months (cross -term) with visit to country
Domestic and Global	Domestic and Global	Global (first year projects are Domestic)

A general shift to elective format

% of schools with a mandatory experiential program 2011

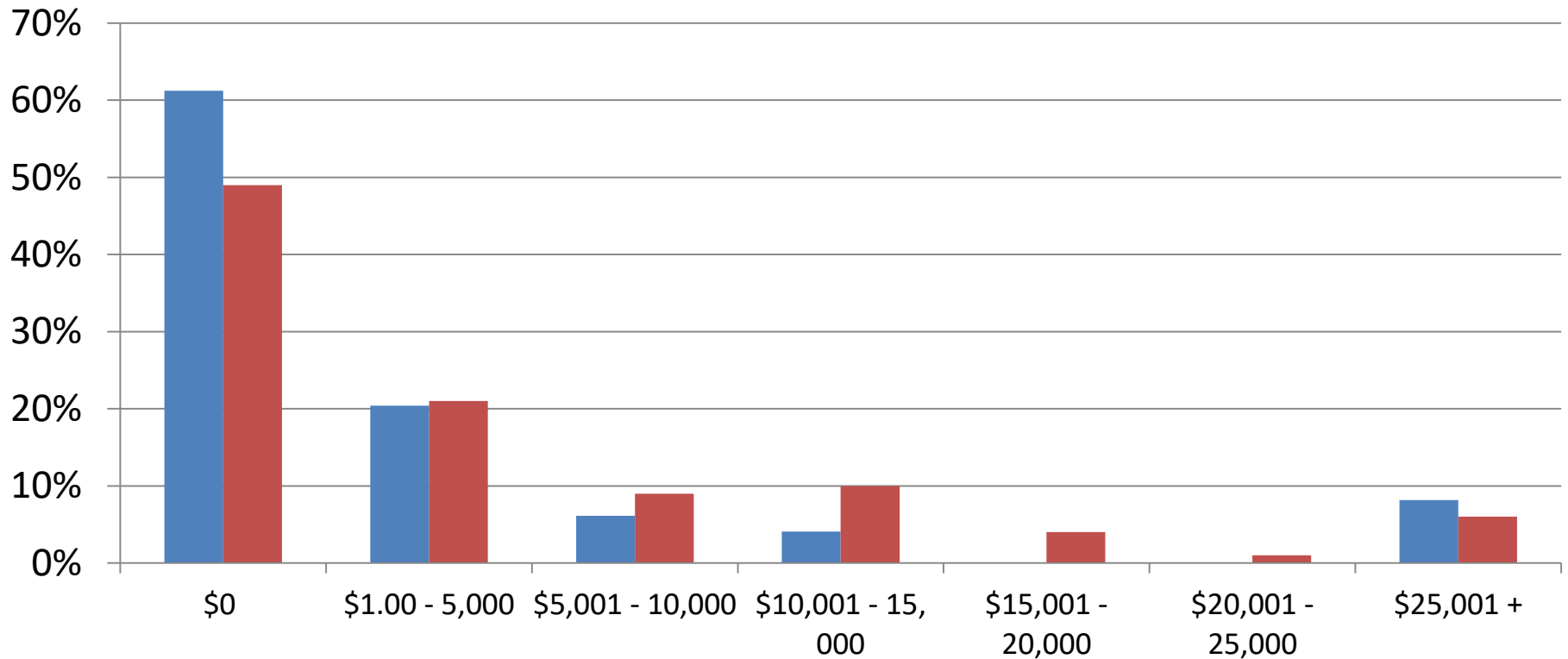


% of schools with a mandatory experiential program 2013



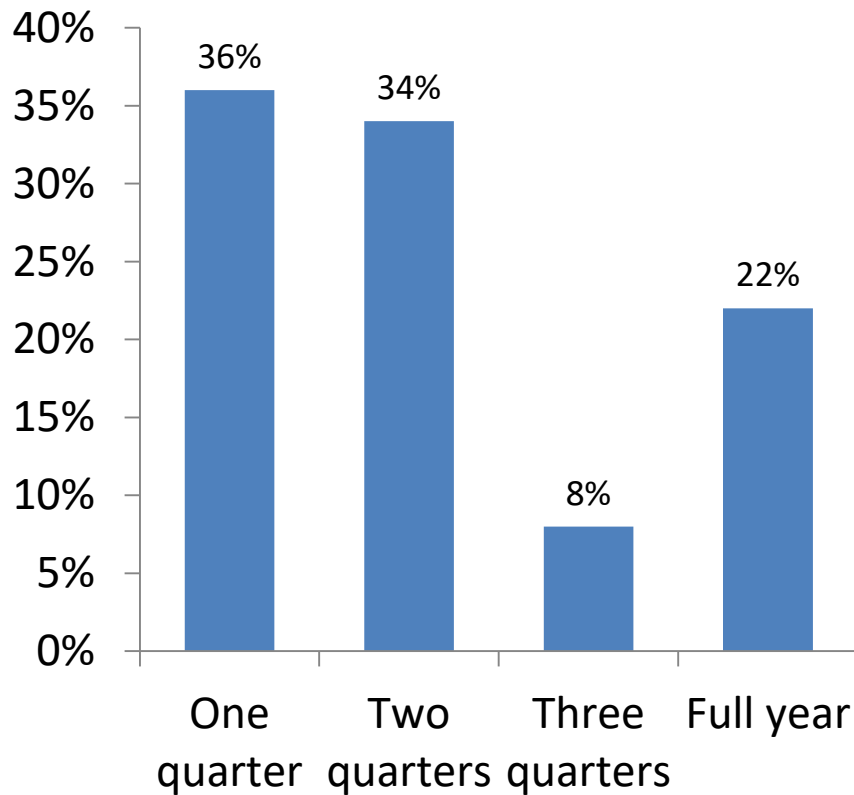
Most projects are provided to clients at no charge

Amount charged to clients per project

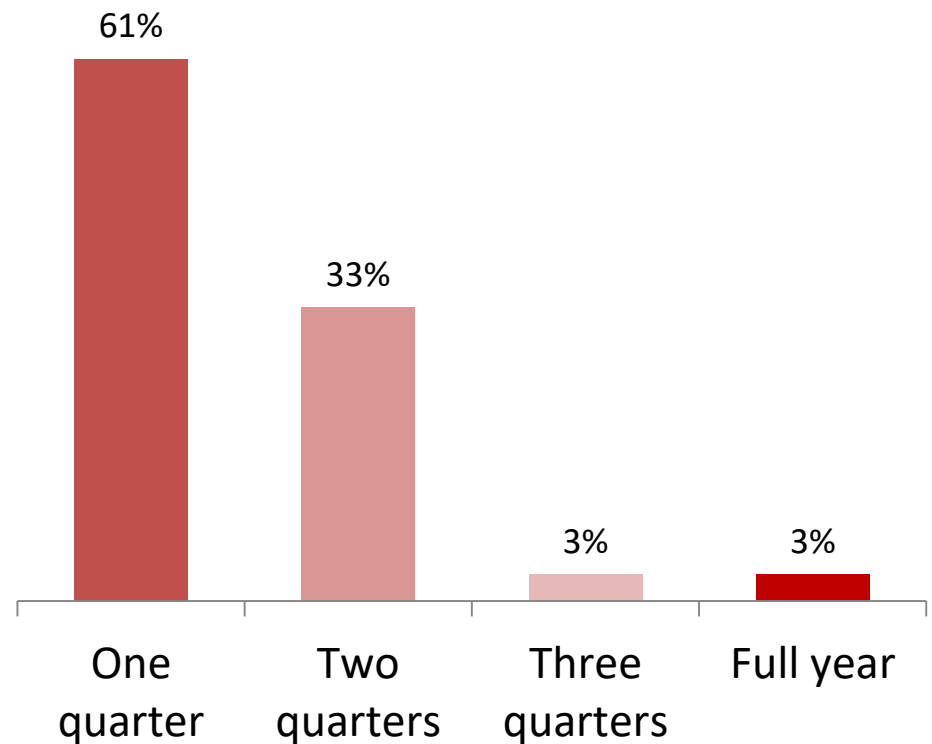


Most E2 programs run 1 to 2 quarters

Length of program 2011



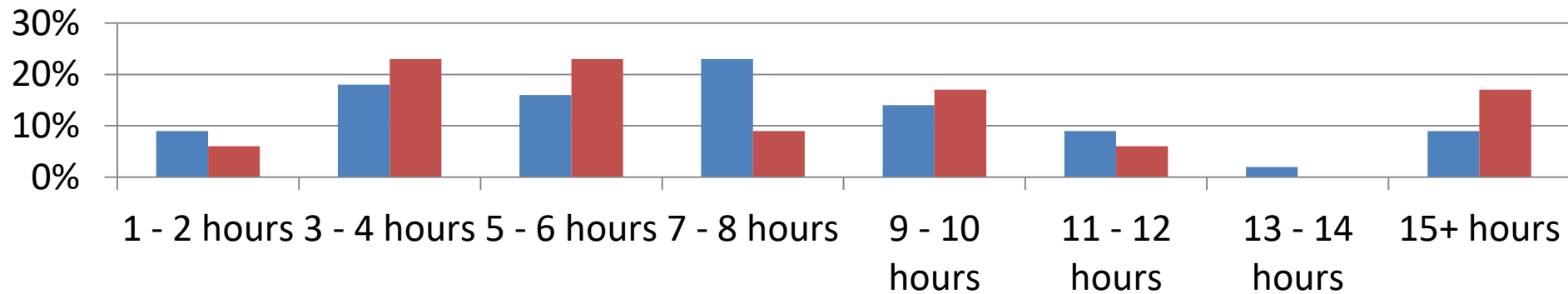
Length of program 2013



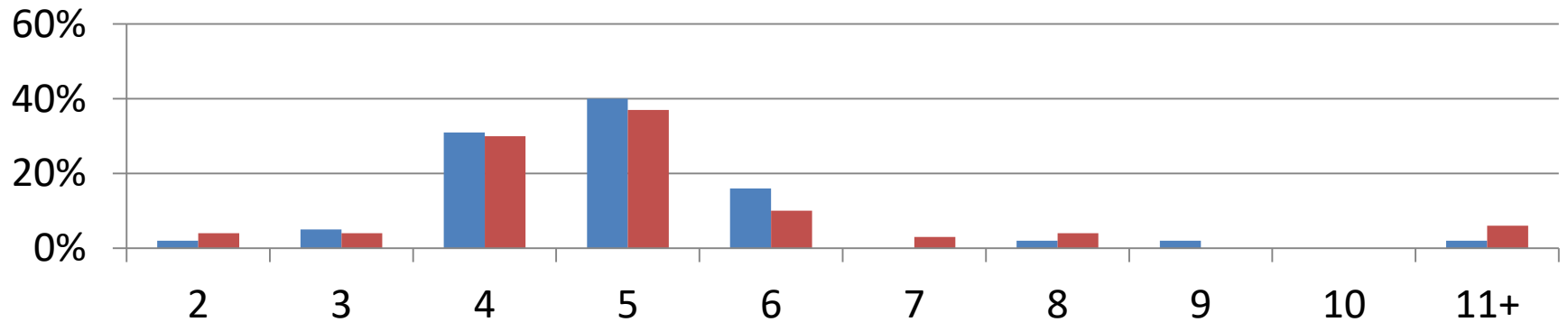


Generally, teams of 5 work 4-10 hours/week

Hours per week students spend on project

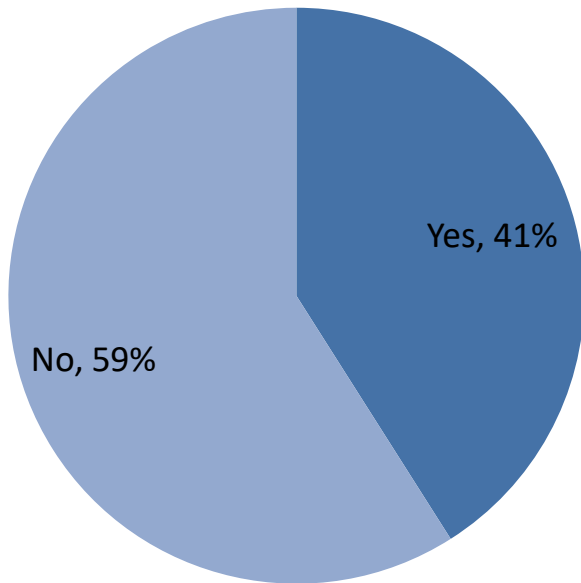


Students per team

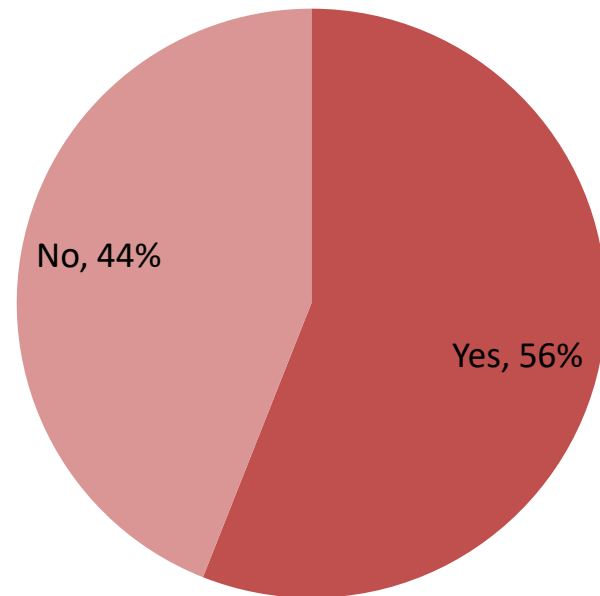


Students have some involvement with design

Do student select their projects? 2011

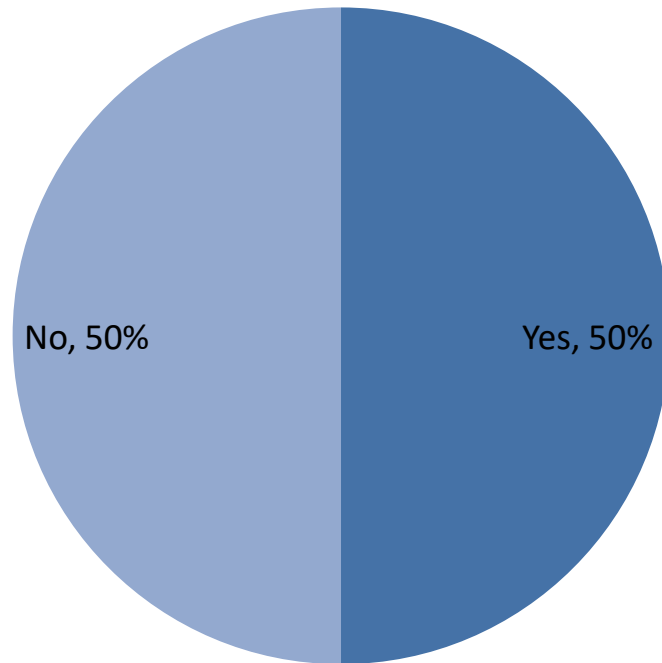


Do student select their projects? 2013

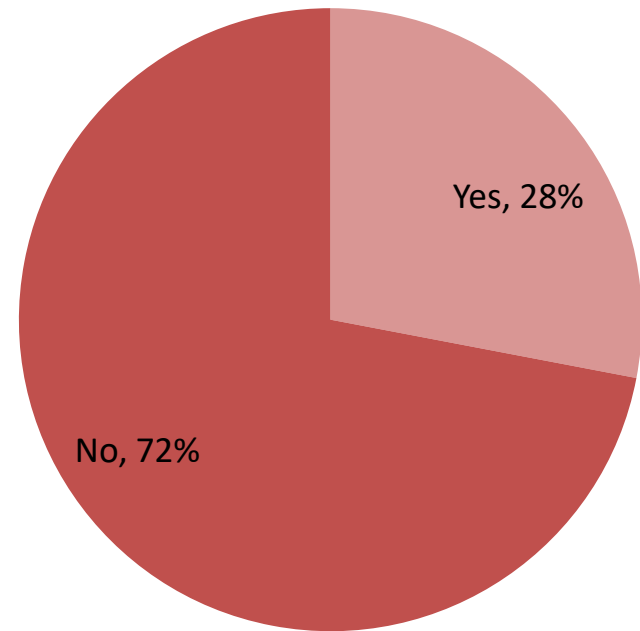


Students are sourcing fewer and fewer projects

Are students responsible for finding their own projects? 2011



Are students responsible for finding their own projects? 2013





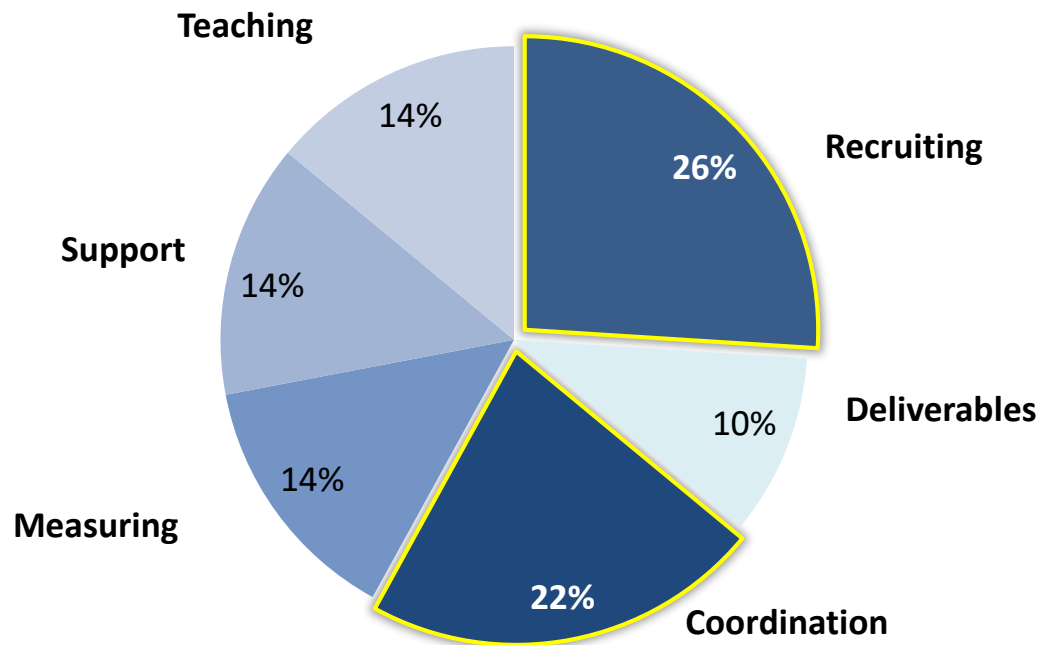
We all face similar challenges

Quoted Challenges Cited by Web Participants

Challenges	Registrant Comments 2011	Registrant Comments 2013
Recruiting (#1 most challenges noted)	<ul style="list-style-type: none"> • <i>"Finding comprehensive projects"</i> • <i>"Getting a diversity of clients"</i> 	<ul style="list-style-type: none"> • <i>"Sourcing quality projects"</i> • <i>"Ensuring projects are all the same difficulty level"</i>
Deliverables (#4 most challenges noted)	<ul style="list-style-type: none"> • <i>"Consistency of quality"</i> • <i>"Managing scale and scope"</i> 	<ul style="list-style-type: none"> • <i>"Scoping projects"</i> • <i>"Deadlines are difficult to meet"</i>
Faculty (#3 most challenges noted)	<ul style="list-style-type: none"> • <i>"Finding proper faculty for projects"</i> • <i>"Scheduling and coordination of multiple priorities"</i> 	<ul style="list-style-type: none"> • <i>"Faculty disinterest"</i> • <i>"Engaging faculty and students together"</i>
Teaching (#2 most challenges noted)	<ul style="list-style-type: none"> • <i>"Extensive coaching is needed"</i> • <i>"Ensuring a great learning experience each and every time."</i> 	<ul style="list-style-type: none"> • <i>"Encourage personal learning"</i> • <i>"Gather extensive resources and support"</i>
Measuring (#5 most challenges noted)	<ul style="list-style-type: none"> • <i>"Follow-up for assessment"</i> • <i>"Scoping projects to fit hours/credit requirements"</i> 	<ul style="list-style-type: none"> • <i>"Scoping projects to fit manageable expectations"</i> • <i>"Team evaluations"</i>

Previous conversations and research on this topic

Percentage of Challenges Cited by Leaders of Project Based Learning Programs



For more information:

2 webinars on the topic of Global Project Based Learning:

<http://www.e2webinar.unc.edu/>

<http://www.kenan-flagler.unc.edu/ciber/programs/webinar-series/webinar-library>

Paul Friga's website with research and tips:

www.paulfriga.com





Action Plan for Today

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- Accreditation

- Learning Objectives
- Curriculum
- Recruiting

Exercise
Key Questions?

Exercise
Shoestring Budget?

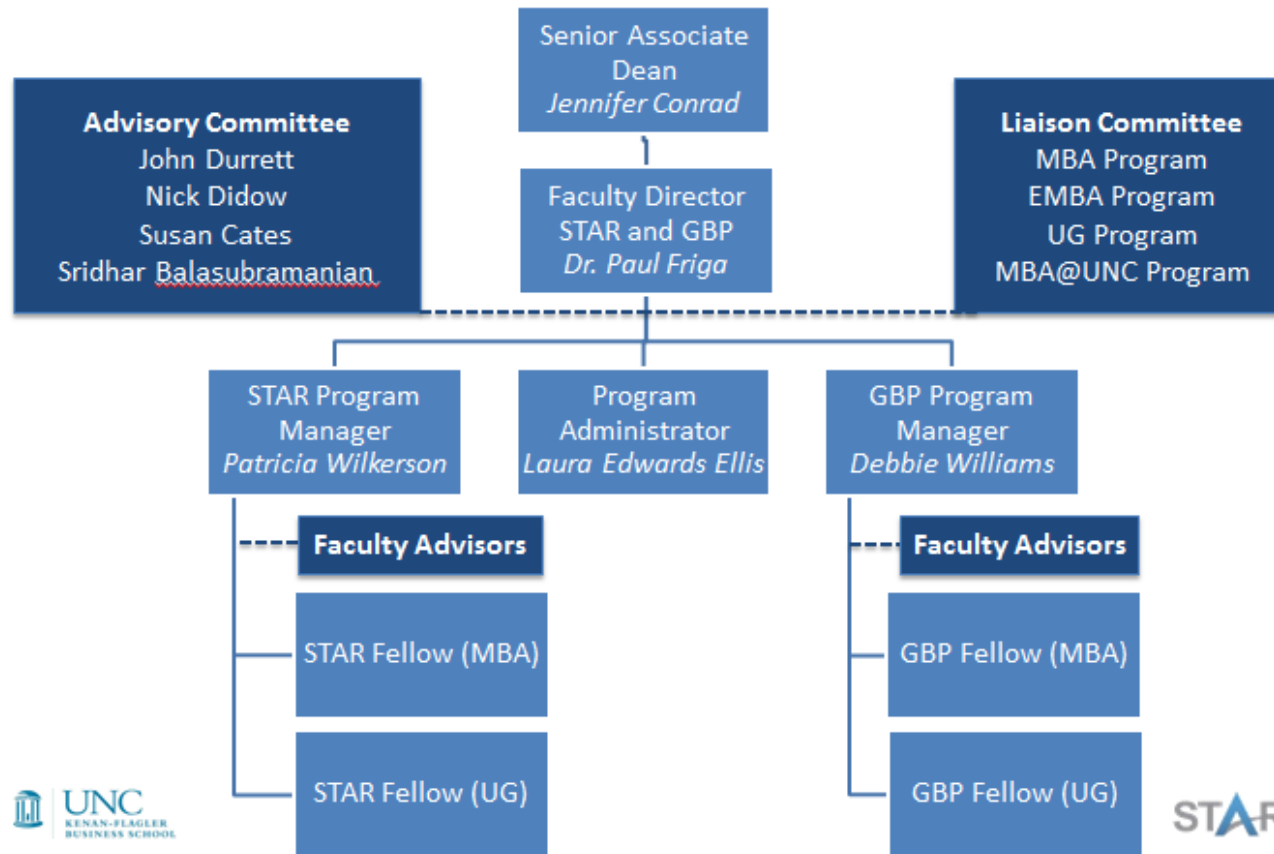


Teaching Students

Complications	Resolutions
Unclear learning objectives	<ul style="list-style-type: none">• Utilize a crystal clear syllabus• Specify learning objectives• Use students in the recruitment and operations
Dealing with ambiguity	<ul style="list-style-type: none">• Provide as much structure as possible• Identify different scenarios that students may face• Provide mentoring and tools and templates
Requires hard work	<ul style="list-style-type: none">• Set expectations up front (e.g. 10-12 hours per week)• Discuss the returns that come from work• Offer “benefits” in terms of meals/receptions

Student Perspective: “Provide structure, but allow mistakes and give feedback to facilitate true learning.”

Case example – UNC STAR's organization structure





STAR provides many benefits

Students

- Brings business school courses to life
- Teaches integration of key analytical frameworks
- Builds two types of leadership skills: thought and people leadership
- Gives students an appreciation for real-world consequences
- Provides company recruiters with evidence of students' abilities

Clients

- Provides new perspectives from the brightest young minds
- Offers dedicated analytical review on key strategic issues
- Ensures quality advice from faculty advisers with significant consulting/business experience
- Affords direct recruiting access
- Saves significant cost as compared to traditional consulting services



Samples of learning objectives

- -analyze and synthesize information
- -present compelling recommendations to company challenges/problems
- -develop sound recommendations based on data driven analysis
- -ability to give and receive constructive feedback
- -identify and analyze business problems
- -demonstrate deep listening skills
- -have difficult conversations
- -tolerate ambiguity
- -demonstrate ability to deliver client solutions that are on time, on budget and meet client needs
- -identify personal lessons learned and articulate how to translate into professional or personal life
- -apply one or more business frameworks to a project; articulate how you used the frameworks to address the challenge
- -ability to adapt to a new situation
- -compile, list and define analytical tools you used in your project
- -articulate challenges of companies working in emerging economies
- -demonstrate clear written and oral communication skills
- -effectively plan and execute a project
- -use project management software to plan a project
- -draft a scope of services
- -prepare a budget
- -plan, manage and evaluate a client meeting
- -read nonverbal behavior
- -prepare and deliver a persuasive argument
- -prepare graphical representation of data
- -ability to recognize and articulate own talents, strengths and challenges (self-awareness)
- -identify key learning from project and how to apply in personal and professional life going forward
- -ability to identify what you would have done differently if you had the project to do over again
- -describe challenges inherent in third party influencer
- -prepare realistic timeline for project management
- -demonstrate effective time management
- -demonstrate the ability to organize ideas effectively
- -demonstrate the ability to synthesize and summarize data
- -ability to develop a cost benefit analysis
- -ability to use strategic problem solving process (MECE)
- -ability to size a market



One financial overview example – UNC 2016

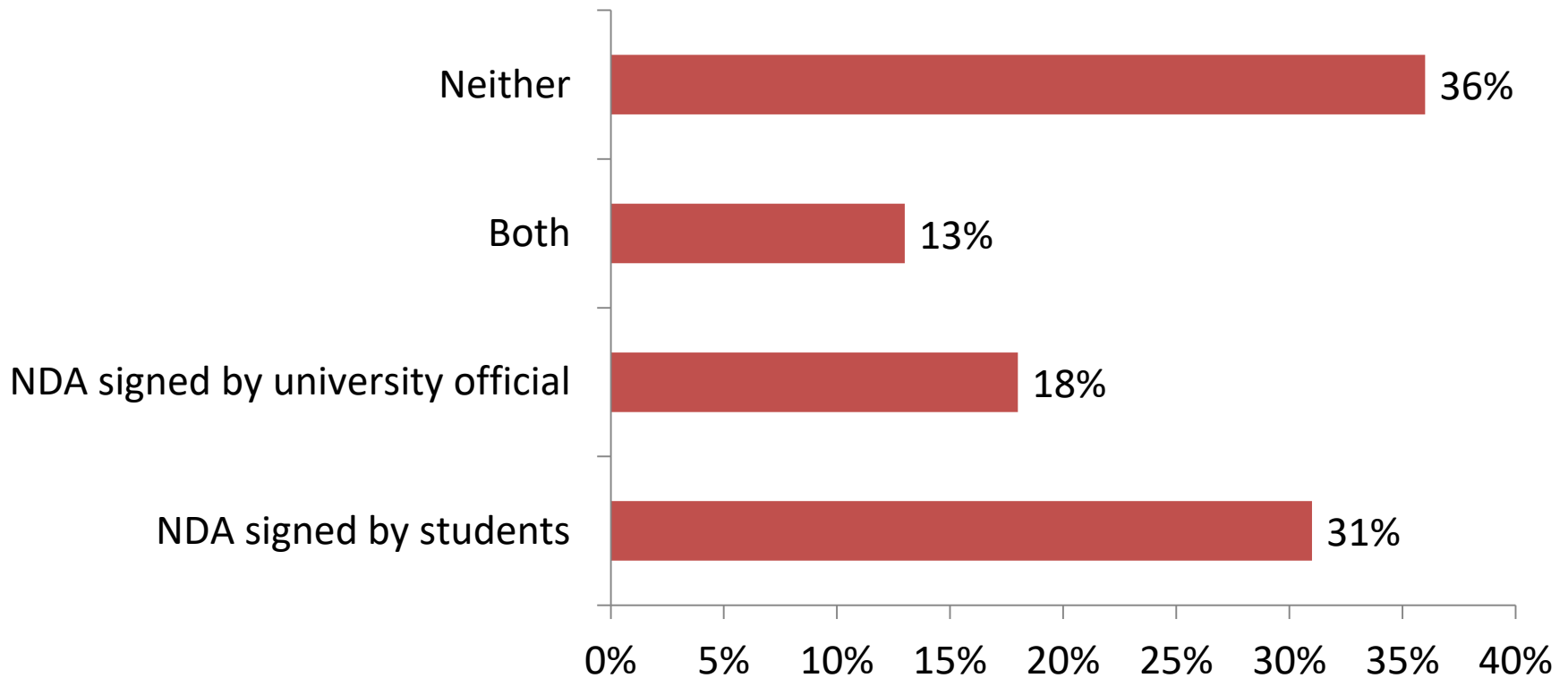
- 33 Projects (19 STAR, 7 STAR Virtual and 7 STAR Global) - 2015
- Approximately 200 UNC Kenan Flagler students
- Estimated total revenue (contributions) of
 - Client fees ~ \$700K
 - Student fees ~ 100K (\$2,500 for global projects)
 - UNC Kenan-Flagler ~ \$100K (PF, + 3 faculty in loads)
 - Total ~ \$900K
- Expenses
 - Faculty ~ \$400K (\$7.5K for STAR and \$10K for GBP)
 - Staff (2) ~ 120K
 - Student Interns (Program) ~ \$10K
 - Projects ~ \$170K
 - General Program, Recruiting and OH ~ \$200K
 - Total ~ 900K

Shoestring:

- Dean's Office
- Donated Faculty Time
 - Development
 - Local Projects

Instant Poll – Question 7 – “NDAs/Confidentiality?”

Do you use NDAs and if so, by university, students or both?



Sample of Course Overview – STAR 2017 – see full syllabus in the appendix

	Phase I FRAME/ ORGANIZE	Phase II COLLECT	Phase III UNDERSTAND	Phase IV SYNTHESIZE
Objectives	<ul style="list-style-type: none"> • Understand the business • Understand the key questions • Prepare initial hypotheses • Plan data collection 	<ul style="list-style-type: none"> • Collect primary and secondary research to prove/disprove hypotheses • Confirm direction for final half of project • Receive team feedback 	<ul style="list-style-type: none"> • Gather additional data as needed • Present initial recommendations • Confirm final presentation needs 	<ul style="list-style-type: none"> • Wrap up project open items • Layout next steps for Corporate Partner • Receive final Corporate Partner feedback
Timing	<p>STAR/SV: Jan 14–Feb 3 STAR Global: Jan 23–Feb 17</p> <p><u>Launch Weekend:</u> STAR/SV – Jan 14-15 STAR Global – Jan 28-29</p> <p>Kick-off Meeting</p>	<p>STAR/SV: Feb 6–Mar 3 STAR Global: Feb 20–Mar 17*</p> <p>Preliminary Findings Meeting</p>	<p>STAR/SV: Mar 6–Apr 7* STAR Global: Mar 27–Apr 28</p> <p>Storyline meeting</p>	<p>STAR/SV: Apr 10–May 5 STAR Global: May 1–May 26 In-Country: May 14–26</p> <p>Final presentation</p>
Deliverables <i>(due by end of phase)</i>	<ul style="list-style-type: none"> • Kickoff Deck • Team Charter (internal) • Scope of work 	<ul style="list-style-type: none"> • Preliminary Findings Meeting & Deck • Midpoint feedback (internal) 	<ul style="list-style-type: none"> • Storyline Document (Microsoft Word) 	<ul style="list-style-type: none"> • Final Presentation Deck • Final Feedback (due within 24 hours of the final Presentation)

Note: we'll use a **hypothesis-driven approach**, in which we will create hypotheses early in the project and then prove/disprove/refine them into findings and recommendations – see overview of model in following slides

* Kenan-Flagler MBA Spring Break is March 11-26 and UG Spring Break is March 11-19

Detailed Support For Course – STAR 2017 (1/2) – see full syllabus in the appendix

Project schedule and overview – Spring 2017 (1 of 2)

	Phase I Frame/Organize	Phase II Collect	Phase III Understand	Phase IV Synthesize
Objectives	<ul style="list-style-type: none"> Receive a company and project overview from Corporate Partner (basic data) Confirm objectives & approach Get to know team and Corporate Partner Establish process for communication between team and Corporate Partner Set dates or tentative dates for remaining Corporate Partner meetings 	<ul style="list-style-type: none"> Test initial hypotheses by gathering preliminary secondary and primary data Engage Corporate Partner in vetting the path being suggested by team Gain interpersonal feedback from team on performance thus far 	<ul style="list-style-type: none"> Present draft recommendations with key support Secure Corporate Partner's buy-in on project direction Gather additional data as needed 	<ul style="list-style-type: none"> Present final recommendations with rationale Discuss implementation and quantify potential impact Gain feedback from Corporate Partner
Deliverables	<ul style="list-style-type: none"> Team Charter Scope of Work Letter Signed Non-disclosure Agreement Process & Content Maps Kick-off meeting Power Point deck <i>Kick-Off meeting with Corporate Partner STAR/SV – Week ending Feb 3 STAR Global – Week ending Feb 17</i> 	<ul style="list-style-type: none"> Data Collection questions and process for both primary and secondary collection Fact pack (findings) Rough draft of Ghost Deck for final presentation; Mid-project team feedback & course evaluation <i>Preliminary findings meeting with Corporate Partner STAR/SV – Week ending Mar 7 STAR Global – Week ending Mar 17</i> 	<ul style="list-style-type: none"> Final Draft of Ghost Deck, with clear story line and evidence of support for recommendations Storyline document (in Word) of preliminary recommendations and support <i>Storyline meeting / conversation with Corporate Partner STAR/SV – Week ending April 7 STAR Global – Week ending Apr 28</i> 	<ul style="list-style-type: none"> Corporate Partner materials on thumbdrive All materials uploaded to Canvas Final Online Assessments completed Corporate Partner Evaluation – link sent by project leader <i>In-Country May 14 - 26</i> <i>Final Presentation STAR/SV – Week of May 5 STAR Global – by May 26</i>
Tasks	<ul style="list-style-type: none"> Review STAR Global syllabus and evaluation material (rubrics) Prepare Team Charter Establish Key Questions embedded in Scope of Work Create Issue Trees and Hypothesis Become familiar with STAR Global Policies and Procedure 	<ul style="list-style-type: none"> Determine what data are needed to answer key questions and how to collect the answers Create primary data collection templates Complete online assessment survey on self and others Establish initial budget 	<ul style="list-style-type: none"> Determine the "So What's" that will head each slide on final deck Be sure that each conclusion (so what) is well founded in data Conduct a Blue Team Review to be sure team is on track (one outsider reviews storyline prior to Corporate Partner meeting) Establish final budget Create team travel workbooks 	<ul style="list-style-type: none"> Prepare final presentation, consisting of high level story and appendices Prepare thumbdrive with all presentations, fact packs, raw data, and models to give to Corp Rep Make copies of final presentation for Corporate Rep (color and bound)

Spring 2017 Syllabus


28



Detailed Support For Course – STAR 2017 (2/2) – see full syllabus in the appendix

Project schedule and overview – Spring 2017 (2 of 2)

	Phase I Frame/Organize	Phase II Collect	Phase III Understand	Phase IV Synthesize
Resources	<p>On Canvas:</p> <ul style="list-style-type: none"> STAR Global Syllabus Policies and Procedures Templates for Scope of Work and NDA Toolkits #1 (Working Effectively in Teams), #2 (Determining Key Questions and Scope), and #3 (Visualizing the Story and Designing the Analysis) <p>Individuals</p> <ul style="list-style-type: none"> Past STAR Virtual students 	<p>On Canvas:</p> <ul style="list-style-type: none"> Toolkits #4 (Collecting Primary and Secondary Data) Free survey tools Examples of ghost decks and story lines <p>Individuals</p> <ul style="list-style-type: none"> A list will be circulated by STAR Virtual Professors as it becomes clear what questions need to be answered (list will include KF and UNC faculty, business people, government agents, former STAR Virtual participants, etc.) 	<p>On Canvas:</p> <ul style="list-style-type: none"> Toolkit #5 (Determining the So Whats) <p>Individuals</p> <ul style="list-style-type: none"> Subject matter experts 	<p>On Canvas:</p> <ul style="list-style-type: none"> Toolkit #6 (Telling the Story) <p>Individuals</p> <ul style="list-style-type: none"> Subject matter experts for Red Team Review
Meetings	<ul style="list-style-type: none"> Kick-Off (Phase I) Launch Weekend January 14-15th (STAR/SV/Global) At least once per week with STAR Virtual professor Additional, as appropriate, among project leader and team members At least one social meeting Kick-off Meeting with Corporate Partner (usually at Corporate Partner site) One 1-hour call with local consultant <p><i>Afternoons preferred for meeting times to allow time for interviewing during the day.</i></p> <p><i>No team meetings: Martin Luther King, Jr Day, Monday, January 16th</i></p>	<ul style="list-style-type: none"> Primary Research (Phase II) At least once per week with STAR Virtual professor Additional, as appropriate, among project leader and team members Celebrate socially Conduct one meeting with Corporate Partner (usually at Kenan-Flagler) 	<ul style="list-style-type: none"> Attend Storyline/Final Deliverables (Phase III & IV) All teams must arrange for at least one hour special meeting to review mid term feedback and develop individual improvement plans Conduct Blue Team Review At least once per week with Faculty Advisor Additional, as appropriate, among project leader and team members One meeting with Corporate Partner (Storyline) – usually virtual <p><i>No full-team meetings during MBA Exams, MBA Break, or BSBA Break*</i></p>	<ul style="list-style-type: none"> At least once per week with STAR Virtual professor Additional, as appropriate, among project leader and team members One meeting with the Corporate Partner (usually at the Corporate Partner site)

The top banner features silhouettes of six business professionals in suits on the left and a stylized globe with latitude and longitude lines on the right, all in shades of blue.

Full example – see the full STAR syllabus

- For a deeper dive, let's review the full syllabus of our UNC STAR Program
- See the appendix slides

Action Plan for Today

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- Learning Objectives
- Curriculum
- Recruiting

- Clients
- Faculty
- Students

Exercise
Key Questions?

Exercise
Shoestring Budget?

Exercise
TEAM FOCUS



Recruiting Clients

Complications	Resolutions
Company Commitment	<ul style="list-style-type: none">• Leverage faculty, students, and alumni• Produce marketing collateral• Invest in long-term relationships
Charging a Fee	<ul style="list-style-type: none">• Start with needs of company• Show examples of past results• Compare to traditional consulting rates
Academic Schedule	<ul style="list-style-type: none">• Publish annual schedule in advance• Begin client recruiting 4 months before start• Expect last minute changes

Student Perspective: “Focus on a wide range of clients and projects, but make sure the client is open-minded and committed.”



Supporting Faculty

Complications	Resolutions
Lack of acceptance	<ul style="list-style-type: none">• Market the program to all business school constituents• Meet one on one with key faculty members• Sell the program benefits to administration
Finding qualified faculty	<ul style="list-style-type: none">• Develop a deep pool of tenure track and adjunct• Look outside the business school faculty• Be explicit about required skills and expectations
Leading faculty	<ul style="list-style-type: none">• Conduct regular “best practice training”• Make their jobs easy – handle all of the administration• Provide feedback and ideas for improvement

Student Perspective: “Students, engage your assigned faculty (and other faculty) as much as possible – they are great.”



Managing Deliverables

Complications	Resolutions
Expectations Vary	<ul style="list-style-type: none">• Conduct info sessions for faculty and students• Mandate scope of work document• Require team charters with expectations
Quality of Work Varies	<ul style="list-style-type: none">• Train students on a common approach and provide templates• Establish regular meetings with team and client• Institutionalize faculty reviews of key deliverables
Formatting Challenges	<ul style="list-style-type: none">• Set standards but include some customization• Emphasize clarity of story and ultimate client impact• Preserve time for iteration and coaching

Student Perspective: “Tell students to expect to work hard, and request clients to be realistic and focused about their particular goals for the project.”



The TEAM FOCUS “Rules of Engagement”

TEAM

Talk

- Communicate constantly
- Listen attentively
- Separate issues from people

Evaluate

- Discuss group dynamics
- Set expectations and monitor results
- Develop and reevaluate a personal plan

Assist

- Leverage expertise
- Keep teammates accountable
- Provide timely feedback

Motivate

- Identify unique motivators
- Positively reinforce teammates
- Celebrate achievements

FOCUS

Frame

- Identify the key question
- Develop the issue tree
- Formulate hypotheses

Organize

- Develop a high-level process map
- Create a content map to test hypotheses
- Design the story line

Collect

- Design “ghost charts” to exhibit necessary data
- Conduct meaningful interviews
- Gather relevant secondary data

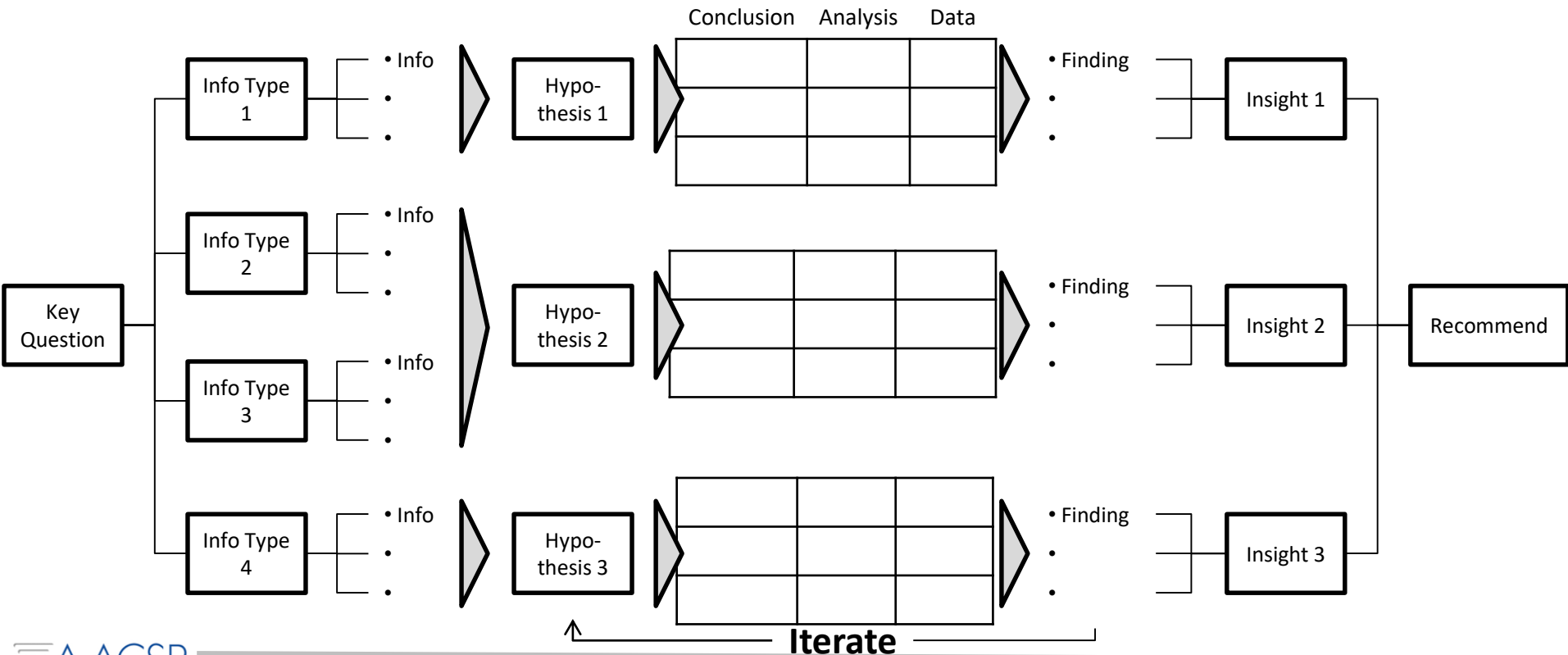
Understand

- Identify the “so what(s)”
- Think through the implications for all constituents
- Document the key insight on all charts

Synthesize

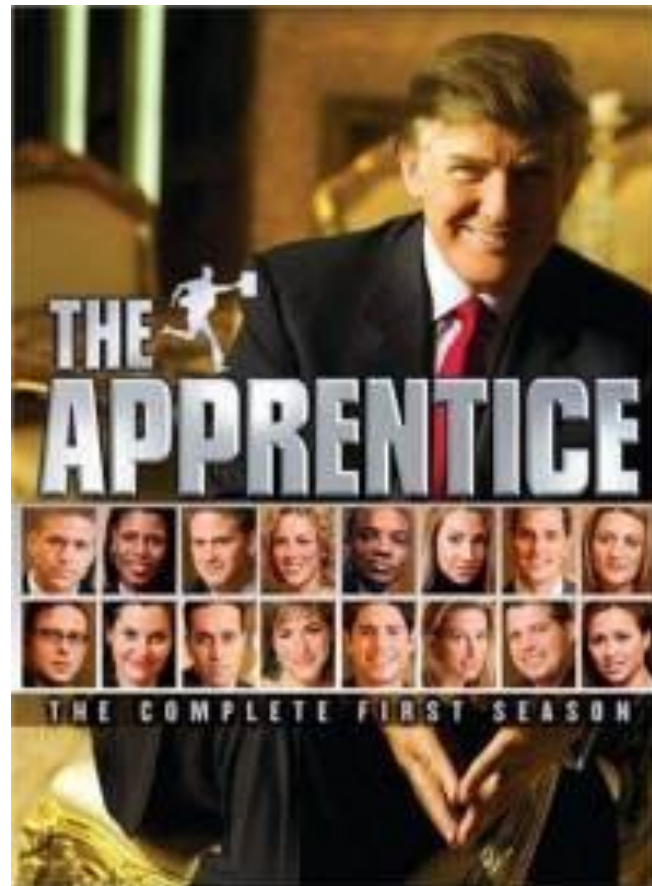
- Obtain input and ensure buy-in from client
- Offer specific recommendations for improvement
- Tell a good story

The FOCUS Analytical Process Map





Now, let's demonstrate a team problem solving methodology



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- Accreditation

Exercise
Key Questions?

Design

- Learning Objectives
- Curriculum
- Recruiting

Exercise
Shoestring Budget?

Deliver

- Clients
- Faculty
- Students

Exercise
TEAM FOCUS

Assess

- Forms
- Feedback
- Grading

Exercise
Action Plans



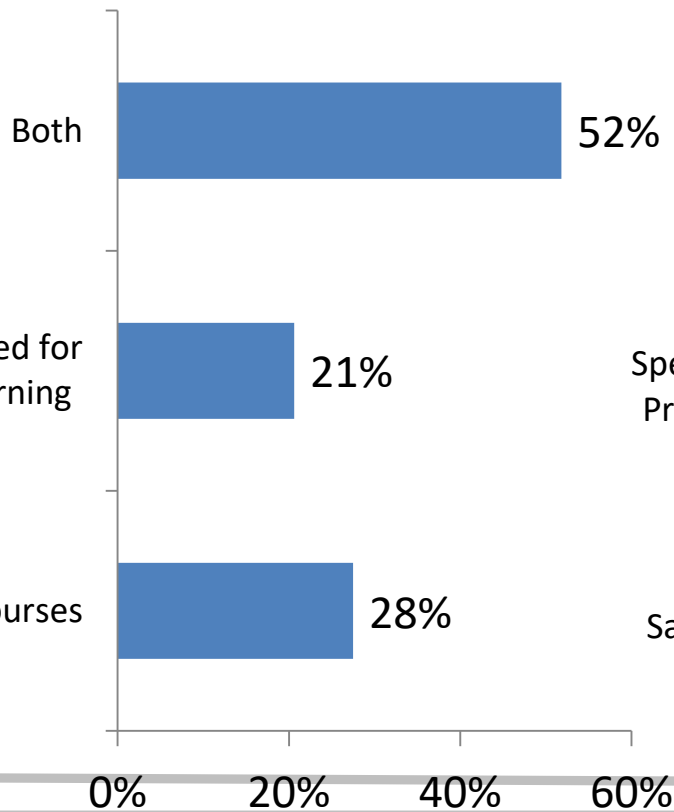
Measuring Outcomes

Complications	Resolutions
Different kind of educational experience	<ul style="list-style-type: none">• Work with Dean's office to explain unique program• Use a modified feedback form• Force formal feedback during the process
Quantification is difficult	<ul style="list-style-type: none">• Offer guidance for numerical assessment• Balance qualitative and quantitative feedback• Avoid over measurement
Variance in client feedback	<ul style="list-style-type: none">• Seek feedback regularly• Explain grading scales• Minimize the effect of client numbers on grades

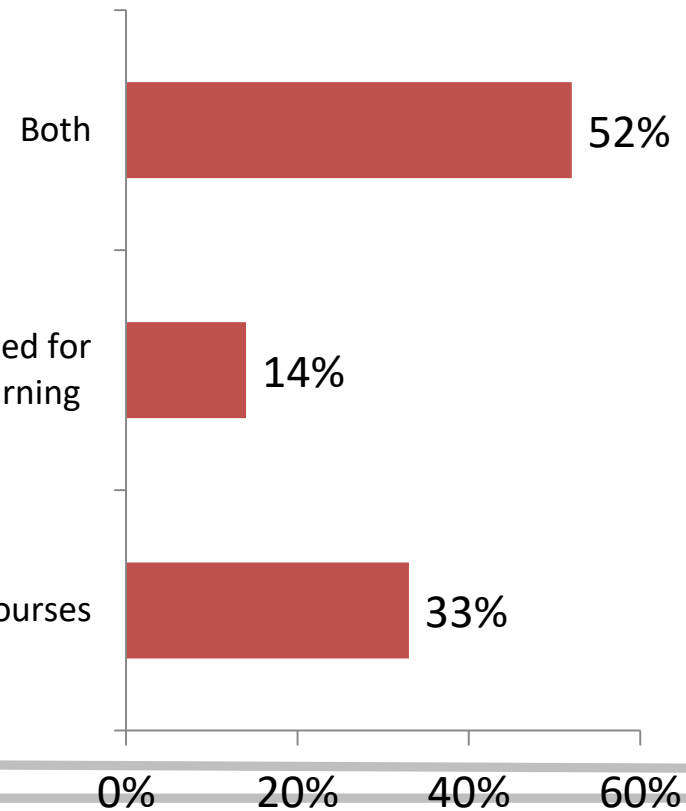
Student Perspective: "The true value from these projects is not the grade but the application of skills learned in other avenues."

Instant Poll – Question 10 – “Course Evaluation Form?”

2011 Results

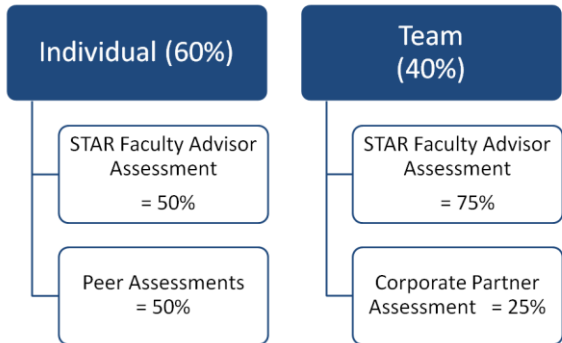


2013 Results



Provide formal feedback at mid-term and the end

Final grading



Assessment – approximate grading scale

Raw Score	Undergraduates	MBA's
1	C-F	L
2	B	P-
3	B+	P
4	A-	P+/H-
5	A	H

Note 1: A mid-term evaluation will be done on everyone using our feedback forms but this will not be counted in the grading assessment – it is purely developmental.

Note 2: At the mid-term and end-term evaluation, each student and faculty member will document qualitative feedback in two categories:

1. What is this person doing well that he/she should continue to leverage?
2. What is this person doing not as well that he/she should change in the future? Provide suggestions for how to make the suggested changes.

Spring 2016 – STAR Syllabus

STAR Program Evaluation

Bayer CropScience

FACULTY FEEDBACK

Submitter	Communication	Completeness	Credibility	Importance	Actionable	Please choose the highest difficulty of the project enabled in the nature of the strategy or action	Overall determination for team/project	Average	Additional comments
Bob Fellows	5	4	4	3	4	3	3	3.71	Team has very good chemistry and work ethic, and has provided the client quality thinking and insights for deliverables to date.

TEAM MEMBERS

Submitter	Role	Member	Participation	Reliability	Responsibility	Quality	Thought Leadership	Teamwork	Presentation	AVG	Summary Statement
Robert Fellows	FA	[Redacted]	3	3	5	5	3	3	5	3.86	Emily is a solid team member who has delivered quality work that has advanced the team's deliverables. Despite the challenge of meeting conflicts due to other responsibilities Emily has exhibited teamwork and has demonstrated that she cares about the team and team's product. // Emily could add even more value to the team by taking the initiative to provide her POV more in team meetings and push herself to help the team generate actionable insights from the preliminary findings.
Justin Trombold	PL	[Redacted]	3	4	5	5	3	5	5	4.25	Emily has done a great job so far, in particular her work on secondary data collection and slide preparation has been timely and well thought out. I would like to see her speak up a little more in the team meetings, but she also has been willing to ask good clarifying questions when she had some questions about what is expected.
[Redacted]	SELF	[Redacted]	3	4	5	5	5	5	5	4.57	I have attended all team and client meetings that haven't interfered with our track schedule. I provide deliverables before deadlines and contribute to group discussions. I covered a teammate's section during a client meeting and have really enjoyed working with my group.
Team Member Average	TM	[Redacted]	3.5	3.75	3.75	4.75	3.75	4.25	3.75	3.93	Emily has done great, really been outspoken and made sure to play an active role. Also done well in working on team morale and helping us socialize.
											Emily did an amazing job during the preliminary presentation. She worked very well with li- jun and worked on understanding his part for the meeting.
											Q
											Emily has always met expectations in her work and as a team member. In fact she once surprised me once with the in-depth work of her research which makes her quality of work above expectations.



Feedback Form – STAR Faculty Advisor Assessment

- STAR Faculty Advisors are evaluated using the same metrics as those contained in the overall course evaluation. Students are also asked to provide qualitative feedback on their Faculty Advisor. All Team Member, Project Leader, and Faculty Advisor Assessments are conducted through Qualtrics online surveys.
- STAR Faculty Advisor Assessment Questions:
(Answers: Strongly Disagree, Disagree, Neutral, Agree, Strongly Agree)
 - My STAR team's Faculty Advisor was well prepared for team meetings.
 - My STAR team's Faculty Advisor explained difficult concepts clearly.
 - My STAR team's Faculty Advisor was open to student questions (during or outside of team meetings).
 - My STAR team's Faculty Advisor was available for help outside of team meetings (e.g. by keeping office hours or making appointments).
 - My STAR team's Faculty Advisor was enthusiastic about teaching.
 - My STAR team's Faculty Advisor required students to be prepared for class.
 - My STAR team's Faculty Advisor provided appropriate feedback on my performance during this course.
 - My STAR team's Faculty Advisor graded my work (e.g., assignments, performance) fairly.
 - Overall, considering both the possibilities and limitations of the subject matter, my STAR team's Faculty Advisor was excellent.
 - Please provide a summary statement on your STAR team's Faculty Advisor to further qualify your responses above, especially for those with which you disagreed or strongly disagreed.
 - What evidence showed that your STAR team's Faculty Advisor made changes that were addressed in the midterm assessments?

Feedback Form – STAR Team Member Assessment

STAR Team Member _____

Assessment by: _____

Criteria	1. Significant Issues	2. Slightly Below Expectation	3. Meets Expectations	4. Exceeds Expectations	5. Significantly Exceeds Expectations
Participation	Missed several team or client meetings without prior notice; did not participate effectively in team discussion of project issues	Missed one meeting without prior notice; or missed several team meetings with prior notice; participated in team discussions when asked	Attended all client meetings, missed no more than one team meeting with prior notice and proactively contributed to the team dialogue in most meetings	Attended all formal client and team meetings and often was a significant contributor to the team discussions . . .	. . . plus was proactive in helping the team solve problems outside of meetings/ assigned tasks, e.g., led informal meetings to resolve team issues
Reliability	Work was usually incomplete and/ or late	Delivered most assigned work products on time and addressed assigned scope adequately in most cases	Delivered all assigned work products on time and consistently addressed assigned scope fully and appropriately	Consistently completed assignments early and/or often addressed additional scope beyond that assigned	. . . and, in so doing, added value beyond assignment
Responsibility	Waited until due date to alert PL of issues with assignment; often not prepared for meetings	Reached out to PL at last minute so there is not enough time to fix before due date; sometimes not prepared for meetings	Verified scope of assigned work; when having difficulty with assigned work, was proactive to reach out to PL with sufficient time to receive help; usually prepared	Sought PL feedback on progress periodically throughout assignment to ensure that he/she was on target and always prepared	Consistently took initiative to resolve issues through consultation with others, keeping PL in the loop
Quality	Work frequently contained simple mistakes, or poorly communicated or without supporting backup evidence	Assigned work was largely error free, but not always well communicated or with weak supporting rationale and backup	Assigned work was largely error free, clearly communicated verbally and graphically with adequate supporting backup material	Work consistently error-free, well communicated verbally and graphically, with strong backup material . . .	. . . plus evidence of significant ingenuity / creativity/ insight for the benefit of the team
Thought Leadership	Difficulties gathering basic data and formulating analyses	Able to gather data but needed help to apply classroom skills and develop analysis that was useful to the client's situation and project	Applied classroom skills, developed insights in assigned tasks, and leveraged those insights to contribute to a practical solution for the client in assigned areas . . . .	. . . and added value by developing insights beyond their own tasks to help synthesize a practical, compelling business solution . . .	. . . and was recognized by client, advisor, PL and/ or team members for pivotal, creative contributions to a practical, compelling business solution.
Team Work	More than one team member and the PL / SP felt that actions were often disruptive of the team	Sometimes was reluctant or unable to share information / insights with team, or concern voiced by team members	Shared material and insights as needed and in a timely manner, contributed constructively to team discussions and conflict resolution	Worked to help other teammates resolve conflicts, actions consistently targeted to help team progress and morale as noted by PL and SP	. . . plus recognized by name by more than one team member along the way for their help and/or contributions to the team`
Client Interaction	Briefed client but had difficulty discussing the work, and/ or did not participate in client interviews	Briefed client and engaged in discussions on work at several meetings, had initial interviews but no follow-up	Briefed client and engaged in discussions on work at several meetings, interviews and follow-up conversations with client managers . . .	. . . plus developed a working relationship with at least one client manager and used to discuss issues and possible solutions . . .	. . . formally recognized by client senior management as making a significant contribution to the success of the project



Feedback Form – STAR Project Leader Assessment

STAR Project Leader _____

Completed by: _____

Criteria	1. Significant Issues	2. Slightly Below Expectation	3. Meets Expectations	4. Exceeds Expectations	5. Significantly Exceeds Expectations
Planning	Did not develop specific client meeting objectives adequately in advance; did not customize presentation template; work plans usually incomplete or inconsistent with objectives	Developed clear objectives for each client meeting but did not begin to customize presentation template sufficiently in advance; work plan for team sometimes incomplete or inconsistent with objectives	Developed clear objectives for each client meeting adequately in advance. Developed customized draft presentation template designed to achieve objectives sufficiently in advance of client meeting. Developed effective week-by-week work plan for team to perform work needed	Customized templates for meetings including (in notes portion of page) directions to team on data needed, analyses expected and integration implications; generally planned several steps ahead . . .	. . . plus work plan included work flow diagrams for team members to see how their contributions tied in to the final product for the client; always anticipated and planned several steps ahead
Guidance	Project leader consistently relied on verbal instructions to team with often inadequate written directions. Significant issues with PL availability to follow up with team members between meetings.	Project leader provided written work assignments to each team member, most of the time. Some issues with PL availability to follow up with team members between meetings.	PL provided written work assignments to each team member each week, discussed with team member and received formal acknowledgment of acceptance of responsibility. Offered to meet with team members one-on-one between team meetings to review progress	Written work assignments consistently clear, logical and within the capabilities of the team member Proactively met with each team member between meetings to check on progress . . .	. . . plus demonstrated flexibility to re-direct team members between meetings to respond to unforeseen circumstances
Coaching	Difficulty balancing the responsibility to deliver a client product with the responsibility to develop the team members	Provided coaching as needed to most team members, a few minor issues	Provided coaching as needed to each team member to help them learn and grow as a professional, adapted assignments to give them development opportunities consistent with project needs	. . . plus met with team members at beginning of project and at mid-term to understand their development needs and objectives. . .	. . . and is recognized by advisor and/or team members for their significant contributions to one or more team members' growth and development
Integration	Issues with quality control of individual work products and/ or lack of self-consistency of team work product, minimal value add to team product	Exercised quality control and review of team member work products, but only cut and pasted the results into the client presentation with little value add	Helped team members understand the project implications of their results and provided value-added integration into the final client deliverables . . .	. . . plus led the identification and development of cross cutting issues with significant client impact . . .	. . . and contributed significantly to the insightful, practical resolution of cross cutting issues
Client Interface	Issues with the PL's execution of the communications process with client that adversely affected the project progress; often incomplete or inadequate communications	Some issues with the PL's execution of the communications process with client that did not adversely affect project progress; sometimes incomplete or inadequate communication	Arranged client meetings, organized interviews and gathered client-provided data well in advance of need Communicated status and issues to senior client on regular basis Pre-briefed senior client on key issues. Communications were never incomplete or inadequate	Developed a business rapport with the senior client(s) that helped the team provide a better product	Client recognized the PL for his/her quality work in leading the team
Growth	PL did not evidence reasonable learning and growth	Demonstrated weak growth as project progressed	Articulated strengths and rooms for improvement after 360 surveys; demonstrated growth in these articulated areas.	. . . plus evidenced growth in other areas of project leader competencies	. . . and made the team/project stronger for this growth as a leader



Feedback Form – STAR Project Evaluation by Client

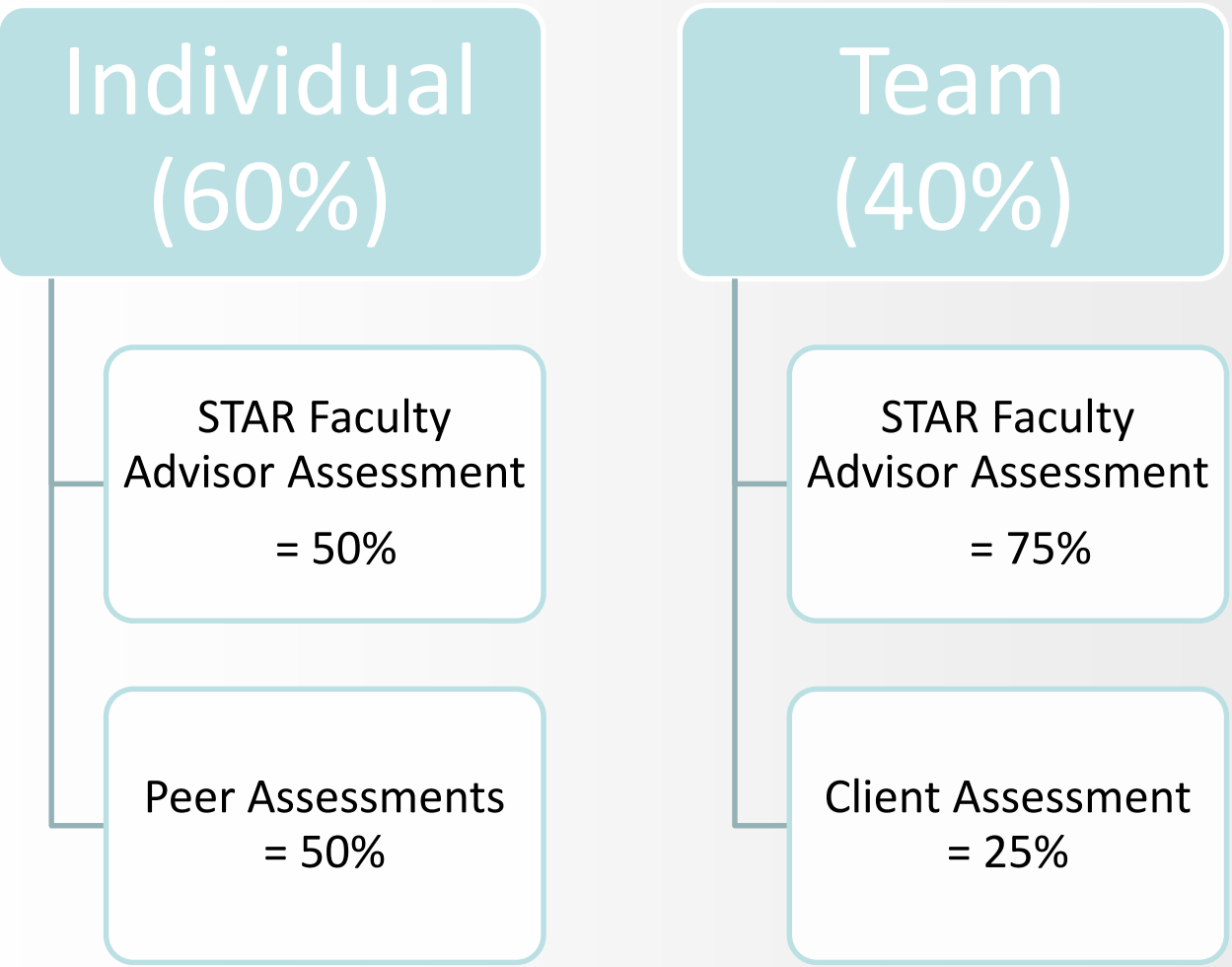
STAR Project: _____ **Completed by:** _____

Completed by client immediately following final presentation by team and turned in to team’s STAR professor

Performance Criteria	1. Significant Issues	2. Slightly Below Expectation	3. Meets Expectations	4. Exceeds Expectations	5. Significantly Exceeds Expectations
Communication	Team communications issues with the client made it difficult for the client organization to effectively participate in the project.	Some issues of mis-communication with client that did not adversely affect progress in any major way. Some significant surprises at formal meetings.	Client kept well informed of project progress. Meeting dates and objectives communicated with adequate notice. Key findings / issues communicated in advance of meetings. Few or no surprises at client meetings	Good communication with both senior client and key client team members, findings and approach well socialized with client management team.	Communications significantly facilitated the working relationship of the student-client team and strengthened the project results.
Completeness	Significant gaps between final deliverables and project proposed work (as formally amended during the project)	Fulfilled most of the project objectives (as formally amended during the project)	Met all requirements of the work proposed (as formally amended during project)	Went beyond initial proposal in a few areas,	Client acknowledges significant value add of the project beyond its initial objectives
Credibility	Significant credibility gaps that impact client’s willingness to take work seriously	Some areas where client feels work lacked credibility, but overall confidence in recommendations	Client felt that the student work was fully credible, well substantiated and with minimal mistakes	Work not only confirmed client’s understanding but developed credible new findings giving client new insights into their business	Credibly identified insights that were new to the client with important business implications
Importance	Client feels the project results are inconsequential to their business – report on the shelf	Client feels that project results not compelling enough to consider near-term action	Client acknowledges fact based, logical arguments to begin execution of the recommended strategic plan in the near term	... case compelling and worth immediate attention; significant, practical business improvements have been identified	... client acknowledges upside potential of major importance to the company
Actionable	Actions steps largely incomplete by team	Client unsure about what to do differently over the next months to achieve the strategy results	Client acknowledges a clear understanding of the steps they must take to execute the strategy	Steps identified are clear well organized and documented, practical and within the capability of the client management team to execute...	... plus team has identified new resources, methods, or actions that client feels will be valuable in execution



Final Grading



Assessment – Approximate Grading Scale

Raw Score	Undergraduates	MBA
1	C-F	L
2	B	P-
3	B+	P
4	A-	P+/H-
5	A	H

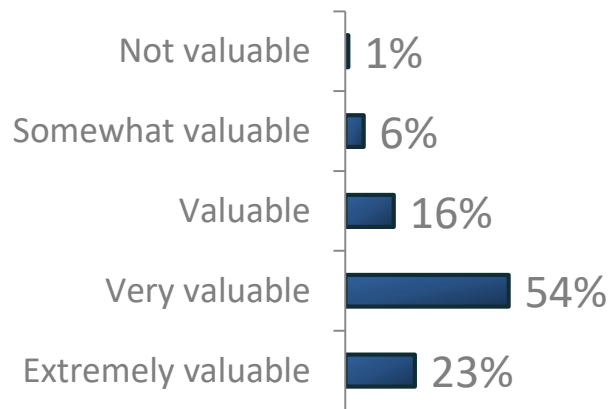
Note 1: A mid-term evaluation will be done on everyone using our feedback forms but this will not be counted in the grading assessment – it is purely developmental.

Note 2: At the mid-term and end-term evaluation, each student and faculty member will document qualitative feedback in two categories:

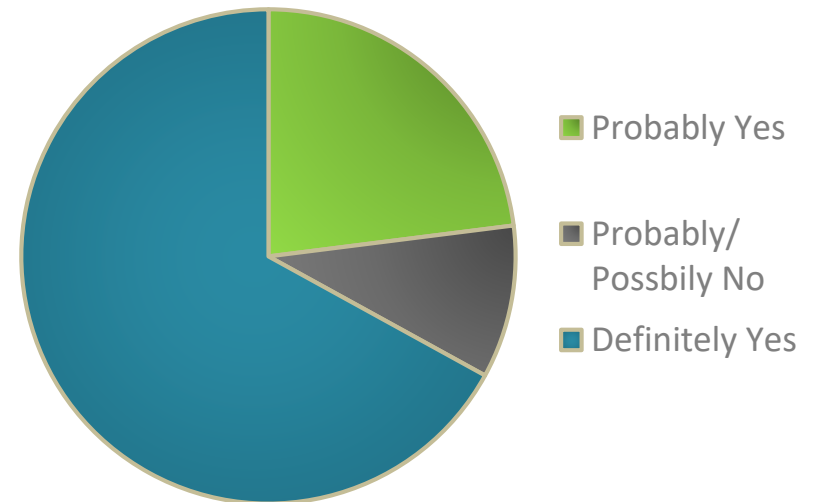
- 1. What is this person doing well that he/she should continue to leverage?*
- 2. What is this person doing not as well that he/she should change in the future?
Provide suggestions for how to make the suggested changes.*

Case Example – UNC STAR

How valuable was the STAR program to your overall education and professional growth?



Would you recommend the STAR program to a current MBA/BSBA Student?



Source: Survey of past participants, 2011 (as of 8/24/22 – n=69)



Standards for Project-Based Experiential Learning Courses in MBA Program

Material presented to LEPE (Leaders in Experiential and Project Based Education, 2017)

By Kerry Laufer (Tuck), Michella Jester (MIT), and Shannon McKeen (UNC)



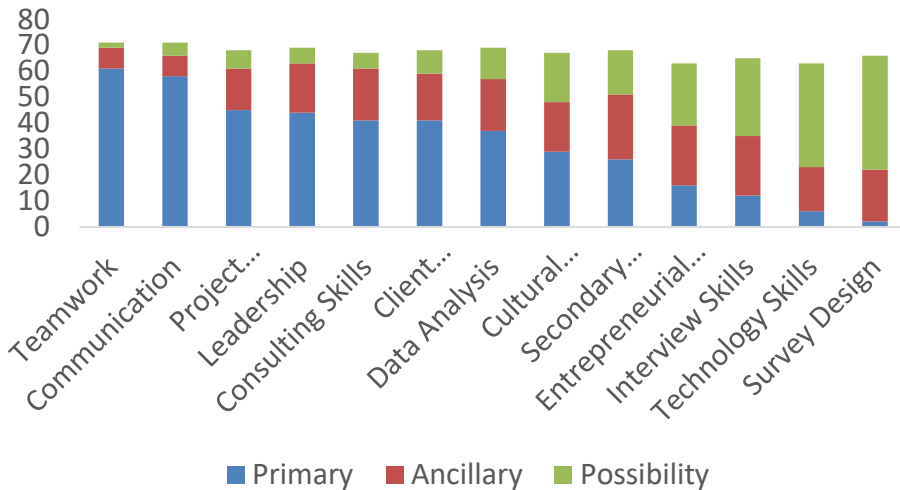
Standards for Project-Based Experiential Learning Courses in MBA Programs

- 1** Tailor learning outcomes to the individual
- 2** Create opportunities for reflection
- 3** Provide feedback early and often to teams AND individuals
- 4** Acknowledge and incorporate the role of emotions
- 5** Evaluate in three domains cognitive, affective and behavioral
- 6** Close the loop

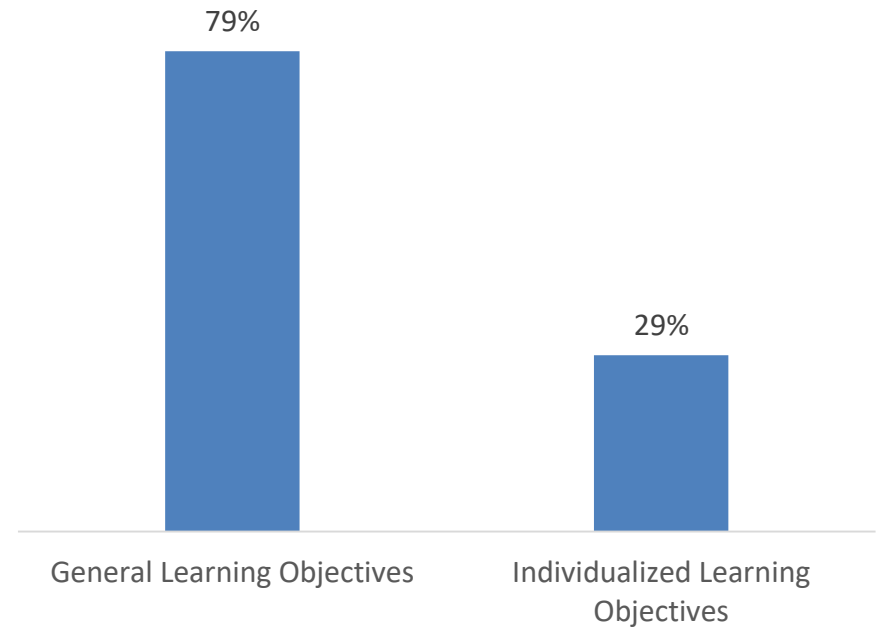


Learning objectives are numerous, paradoxical, and often not individually applied

Learning objectives



Source LEPE+ 2016 survey n = 70

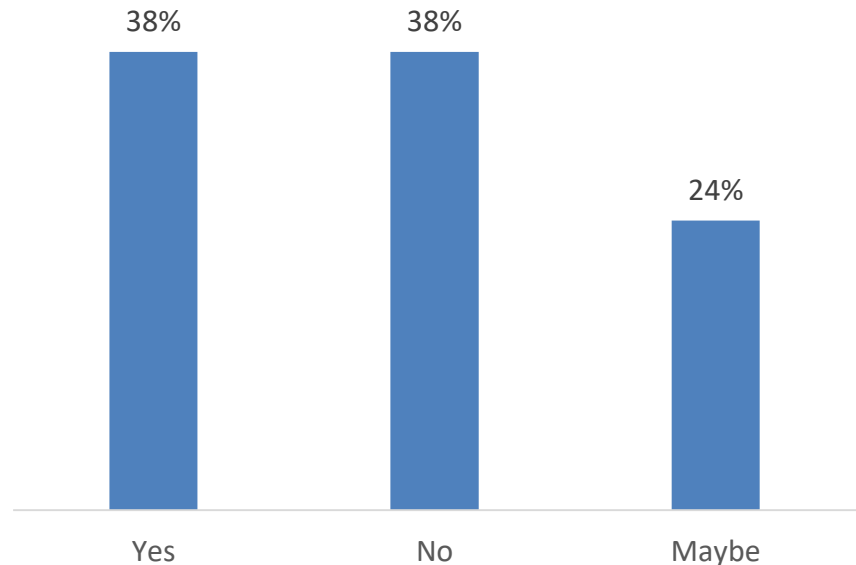


Source LEPE + 2017 survey n=61

Tailor learning objectives to the individual

- Establish four (max) core learning objectives
- Require each student to customize two
- Students share their tailored learning objectives
- *Feedback and assessment should be tailored to match individualized plan.*

Do you have resources to apply individualized learning objectives?



Source: LEPE + 2017 Survey; n = 65



Create opportunities for reflection

- Course learning outcomes should be assessed using 360-degree instruments for all students
- Individual learning outcomes can be assessed through a required reflection assignment
- Course faculty and staff should be trained to design and facilitate reflection

Reflection on and learning from both individual and collective work experience thus forms the very basis for successful action learning, where participating individuals can develop their self-awareness and capacity to manage both themselves and others more effectively.

- Gabrielson et al, 2009

Reflection “enable[s] people to more systematically analyze their developmental experiences, identify behavior changes that would improve performance, and regulate emotions that might interfere with experiential learning.”

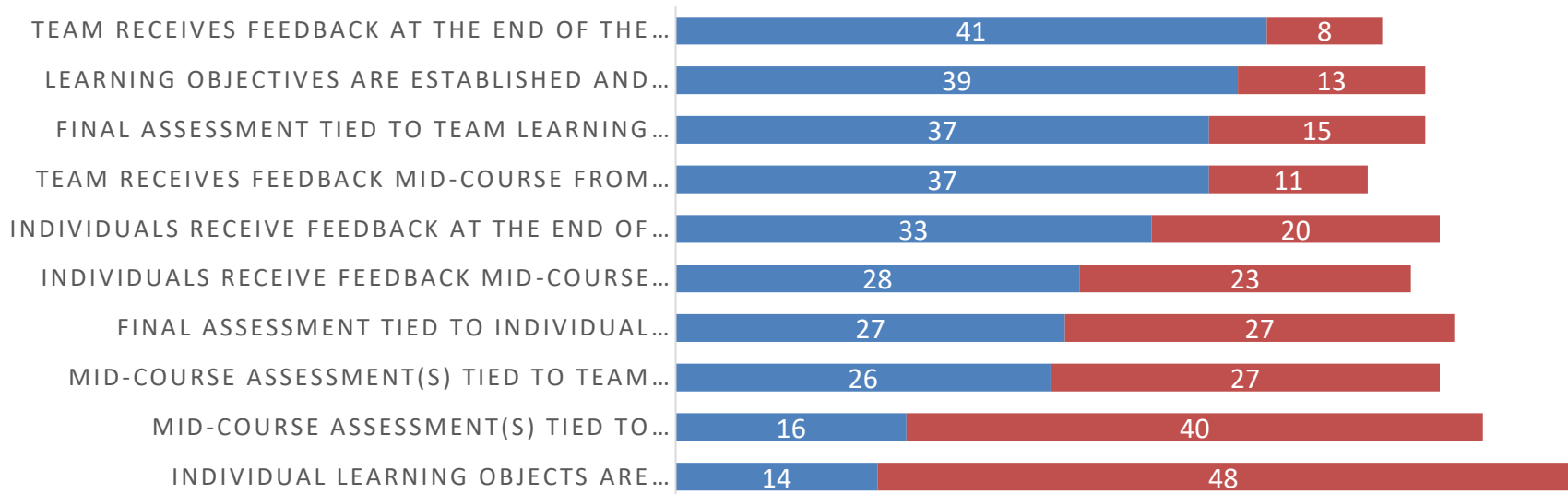
- AACSB AOL guidelines

- The most critical factor for achieving powerful learning outcome from experiential learning program is the inclusion of opportunities for feedback and reflection.


-Eyler, 2009

Feedback from different sources generally collected and shared mid-course and at course conclusion

■ Formal part of program ■ Not formally part of program



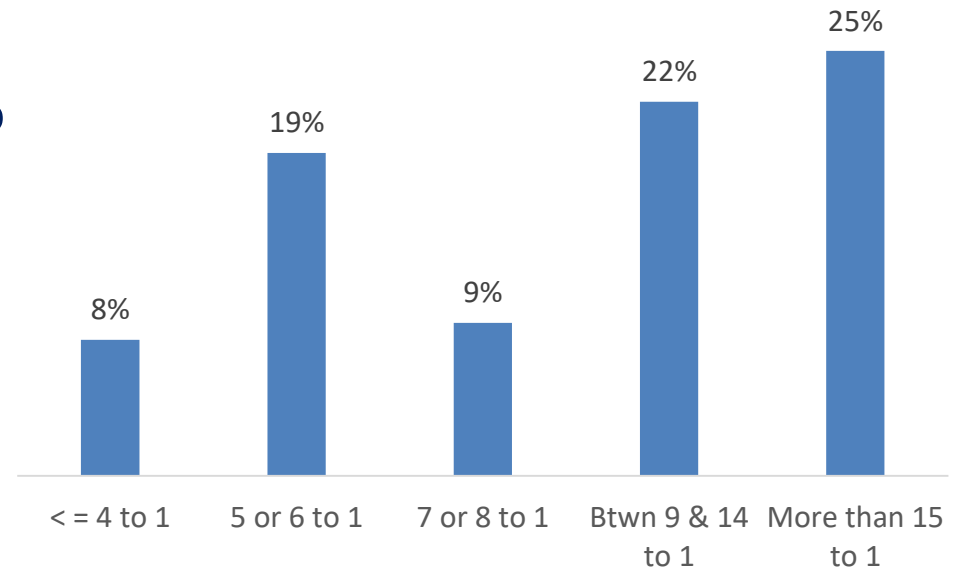
Source: LEPE+ Survey 2017; n=62



Provide feedback early and often to teams and individuals

- Formal feedback should occur at least twice during the project
- Feedback should be directed to the team and to individuals, tied to course-level and individual learning objectives
- Faculty advisors should intentionally focus on providing timely feedback and set an example for teams

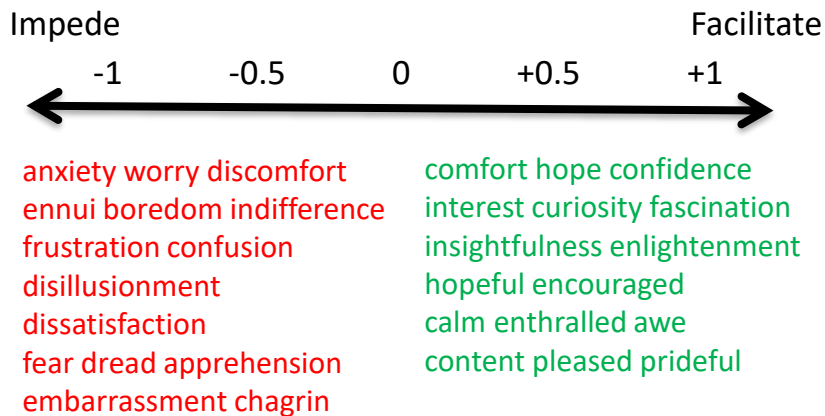
Typical Student/Faculty Ratio



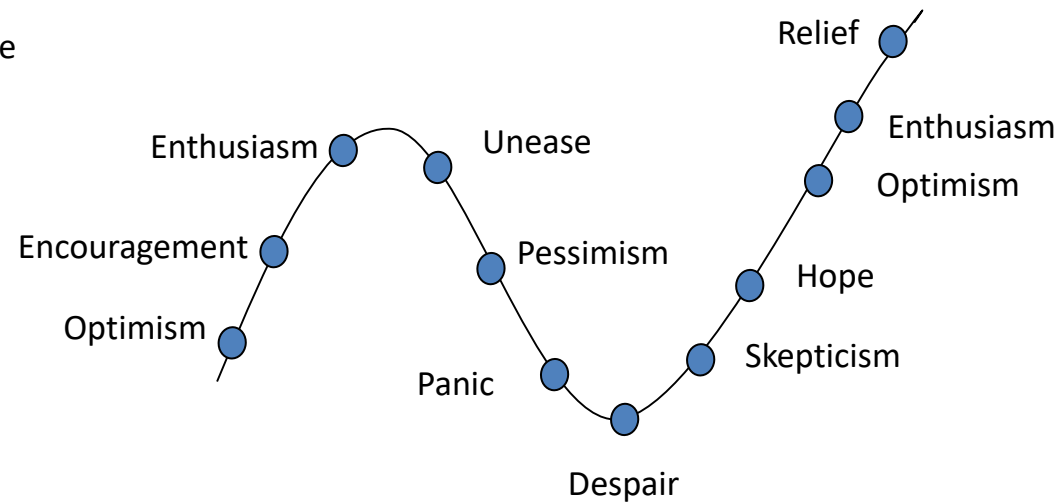
Source: LEPE + 2017 Survey; n = 65

Emotions can facilitate or impede learning

- Emotion Axes



- The Project Cycle



Source: Barry Kort – *Cognition, Affect, and Learning* 2002



Acknowledge and incorporate the role of emotions

- Experiential learning pushes students out of comfort zones and learning can be rooted in emotions
- Frustration, anger, resentment or joy, relief, fulfillment should be mined to catalyze learning
- Faculty and staff should be trained to capitalize on emotions for feedback and coaching

Perhaps the most common expression of strong emotions...occurs around areas of conflict...Differences among students regarding how to proceed with a group project, often lead to feelings of anger or frustration.

-Dirkx, 2008

No two adults perceive the world in the same way. And adults decide what occurs for them in a learning event.

-Vella, 2002

...far more neural fibers project from the brain's emotional center into the logical/rational centers than the reverse, so emotion is often a more powerful determinant of our behavior than our brain's logical/rational process.

-Sylvester, 1994

...the experience gained from action, is, to a large extent, embedded in emotion both positive and negative.

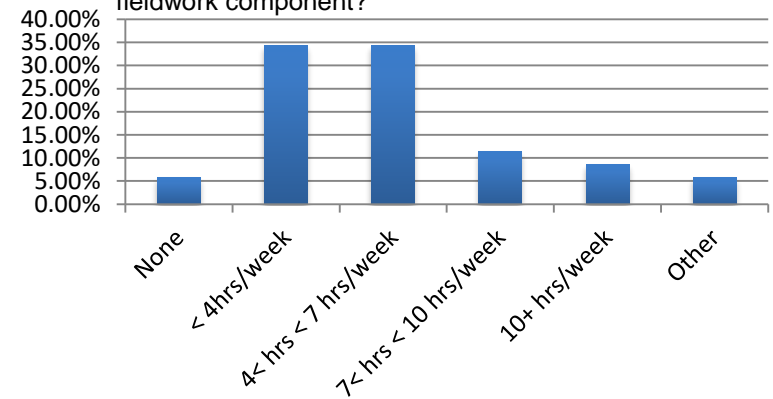
- Gibson, 2006

Evaluate in three domains cognitive, affective and behavioral

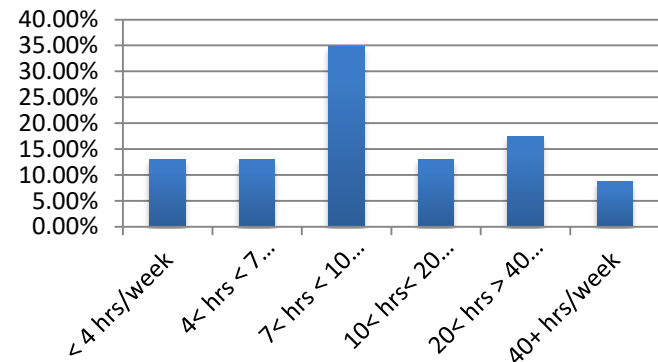
- The advancement and integration of domains can be promoted through experiential learning
- Every learning objective should be directly associated with one of these three domains
- Strongest performers understand and manage emotions and use as input for learning
- Faculty and staff experiential learning instruction should include feedback delivery training in all three domains.

Source: LEPE + 2017 Survey; n = 23

What is the expected weekly student commitment outside any fieldwork component?



What is the expected weekly student commitment during the fieldwork component?

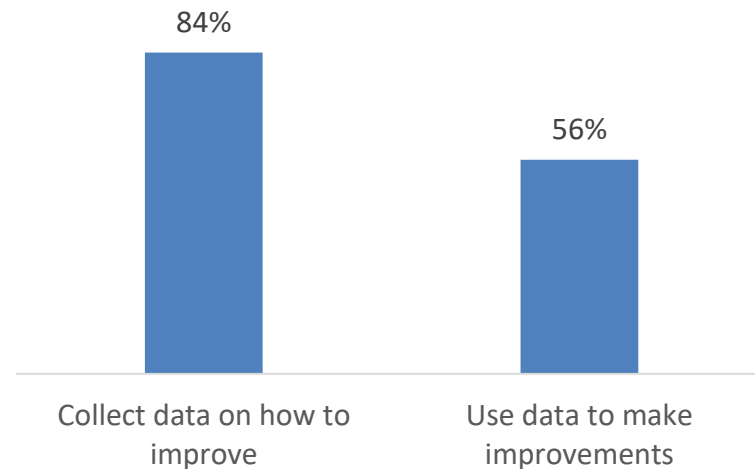


Close the loop

- ‘Closing the loop’ is an opportunity learn with and from our students in service of our programs
- ‘Closing the loop’ can be the hardest step of the AoL process because each project is unique
- Every program should conduct an end of course “post mortem” to identify successes and opportunities for improvement
- Identifying learning outcomes should be a specifically assigned responsibility. Include longitudinal results to document soft skill development and other learning trends

Remember: Perfecting the method is not closing the loop. You need to focus on what the data are telling you.

Gap between intention and execution



Source: LEPE+ 2016 Survey; n = 42

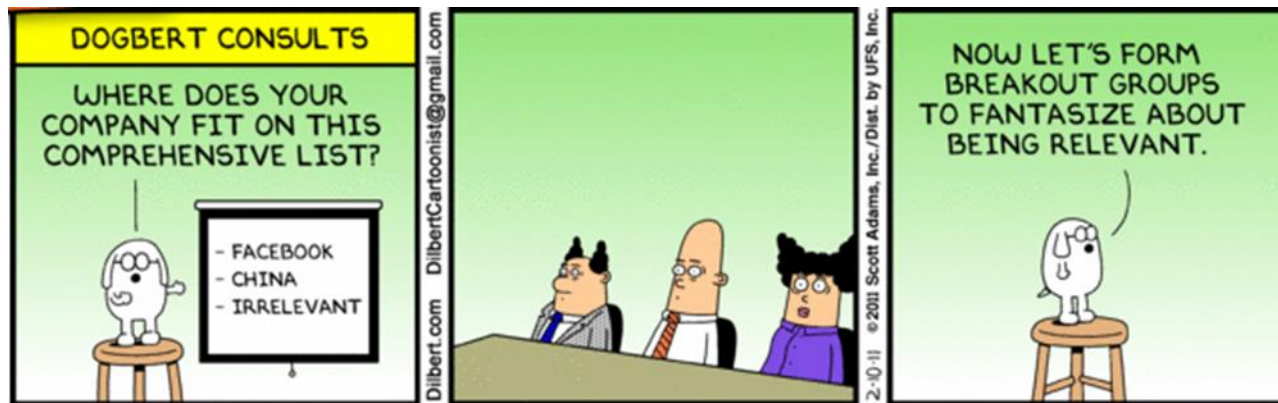
The top banner features silhouettes of six business professionals in suits on the left and a blue-toned globe with white orbital lines on the right. The word "Exercise" is written in white text on the right side of the banner.

Exercise

- Participants document key findings
- Participants brainstorm ideas for their programs
- Final Q&A session

Where do we go from here?

- Build a community
- Share experiences and material
- Educate our students, schools, faculty, clients and world!





Experiential Learning: Creating and Growing Project Learning in Business Schools

THE AACSB CURRICULUM DEVELOPMENT SERIES

Dr. Paul N. Friga

www.paulfriga.com pnf@unc.edu

April 21, 2018

The top banner features silhouettes of six business professionals in suits on the left and a stylized world map with glowing lines on the right, all in shades of blue.

Appendix

- STAR – 2017 Course Overview (Syllabus)
- TEAM FOCUS – Full Model and Web Based Modules

STAR

Student Teams Achieving Results

Overview & Course Syllabus Spring 2017



STAR
VIRTUAL
STUDENT TEAMS ACHIEVING RESULTS

STAR
STUDENT TEAMS ACHIEVING RESULTS

STAR
GLOBAL
STUDENT TEAMS ACHIEVING RESULTS

REAL WORLD **PROJECTS**. REAL WORLD **LEARNING**. REAL WORLD **IMPACT**.

STAR - 2017

Program Overview

Course Overview

Administration

STAR - 2017

Program Overview

Course Overview

Administration

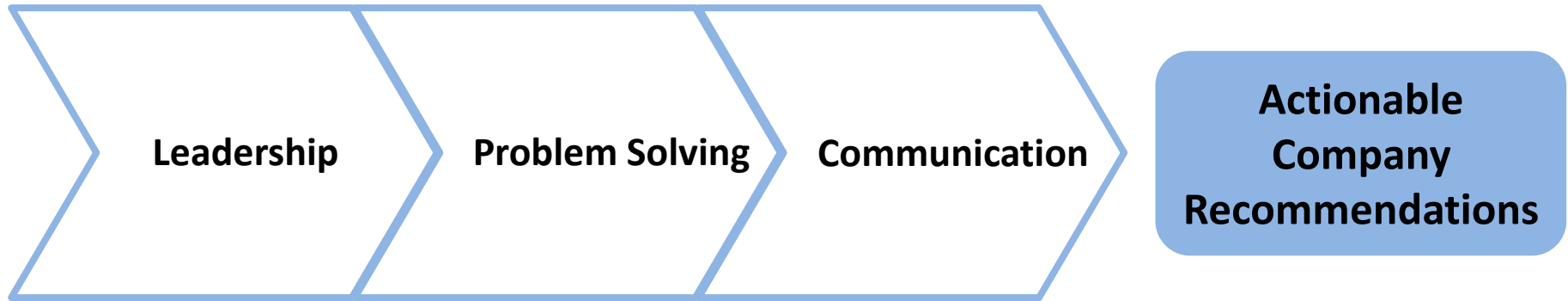
STAR - 2017

The STAR Program Portfolio consists of 3 different options:

- **STAR** - domestic projects with little to no travel
- **STAR Virtual** - domestic projects with all meetings held virtually (for EMBA and MBA@UNC students)
- **STAR Global** – international projects where teams meet in person and virtually and involves 2 weeks travel at the end.

STAR is a different kind of hands-on learning experience

Our Mission



Our Vision

**#1 Action Based Learning Program
in the world**

Attract company who:

- **Recruit at UNC;**
- **Are targeted to recruit at UNC; or**
- **Can provide projects that will be valued by recruits**

STAR is part course, part job

Course

- For credit
- Mandatory attendance and preparation
- Faculty and administrative guidance

Job

- Real company that pays for service
- Deliverables with real consequences
- You represent yourself and your school

Our team of faculty, staff, and students who lead the program and support the teams

Faculty & Staff:



Dr. Paul Friga
*Faculty Director
STAR &
STAR Global*



Meena Dorr
*Director, Business
Partnerships*



Carrie Harbinson
*Associate Director,
Business Partnerships*



Patricia Wilkerson
*STAR Program
Manager*



Debbie Williams
*STAR Global
Program Manager*

STAR Ambassadors:



**Jane
Chaffee**
MBA Ambassador



**Lauren
Montagne**
MBA Ambassador



**Pranav
Pimply**
MBA Ambassador



**Scott
Hockemeyer**
MBA Ambassador



Ted Steinkamp
*Undergraduate
Ambassador*



Lisa Dunleavy
*Undergraduate
Ambassador*

Prepare yourself for a special experience

STAR

STUDENT TEAMS ACHIEVING RESULTS



*Real World Projects.
Real World Learning.
Real World Impact.*



https://youtu.be/OCcOT_VPLME



<https://www.youtube.com/watch?v=uDVkROmNhbI>

We serve a variety of Corporate Partners:

STAR Corporate Partners - 2017

ACKLAND
ART MUSEUM

2 projects: strategic assessment of effective expansion alternatives & plan to increase foot traffic in Franklin store

 **Bayer CropScience**

Mission statement analysis & community connection strategy

Biltmore Estate
HOUSE + GARDENS + WINERY

Strategic approach to get Millennials to buy more wine & home goods


BIMBO BAKERIES USA

Increase consumer awareness and trial of Thomas English Muffins

amazon

Develop business plan to sell in the secondary market


CAESARS
ENTERTAINMENT

Employee turnover and absence reduction strategy

EASTMAN

New Alzheimer's/Parkinson's product positioning and strategic market entry decision

CapTech

New services assessment with a go to market strategy

ESPN

2 projects: how does ESPN improve its relationship with women & how does Gen Z digest video?

lenovo

Marketing investment and organizational structure strategy


LOCK LACES

Marketing & PR strategy to increase brand awareness

CAR WASH CAFE

Assist a new car-wash business model with promoting their new business


NASCAR

Develop Snapchat strategy to increase following in ages 18-34


NATIONAL FARM to SCHOOL NETWORK

Assessment of new revenue and service opportunities

REASON TO BELIEVE

Assessment of the market for a product to help women's' hair loss / hair thinning

North Carolina
Symphony

Strategy to increase audience attendance

Our STAR faculty with backgrounds in academics, business, and consulting

STAR Faculty:



Larry Chavis

- Office: McColl 4418
- Email: Larry_Chavis@unc.edu
- Team: Biltmore



Jessica Christian

- Office: McColl 4727
- Email: Jessica_Christian@kenan-flagler.unc.edu
- Team: Harrah's Cherokee Casino Resort



Gary Clinton

- Office: N/A
- Email: Gary_Clinton@kenan-flagler.unc.edu
- Team: Ackland Art Museum, Biltmore



Alex Dickey

- Office: N/A
- Team: Car Wash Café



Nick Didow

- Office: McColl 4516
- Phone: Nick_Didow@kenan-flagler.unc.edu
- Teams: NASCAR & National Farm to School



Jason Doherty

- Office: Kenan Center
- Email: Jason_Doherty@kenan-flagler.unc.edu
- Team: Reason to Believe



John Fahlberg

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- Team: Lock Laces



Bob Fellows

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- Teams: Bayer Crop Science & Bimbo Bakeries



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- Team: Ackland Art Museum Store



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- Team: ESPN (1) – Women & Sports



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- Team: Caesars – Cherokee Casino & NC Symphony



Mark McNeilly

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- Team: Lenovo



Gary McKenna

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- Team: ESPN (2) Gen Z & Video

Your Project Leaders for STAR

Project	Project Leader
Ackland Art Museum	Gabriel Xavier
Ackland Museum Store	Paula Gomes
Amazon	Dat Nguyen
Bayer Crop Sciences	Bradley Keller
Biltmore Estate	Caitlin Venable
Bimbo Bakeries USA	Bratton DuBose
Harrah's Cherokee Casino Resort	Adeola Adegboye
CapTech	Michael Gabriel
Carwash Café	Eric Insler
Eastman Chemical Company	Mona Xiao
ESPN – Women	Danielle Moita-Robles
ESPN – Gen Z	Tanyi Fuoching
Lenovo	Karan Virani
Lock Laces	Namitha Raviprakash
NC Symphony	Anita Kannan
NASCAR	Cody Hill
National Farm to School Network	Johnathan Aronoff
Reason to Believe	Leslie Wong

Prepare yourself for a special experience



STUDENT TEAMS ACHIEVING RESULTS



*Real World Projects.
Real World Learning.
Real World Impact.*

We serve a variety of Corporate Partners:

STAR Virtual Corporate Partners - 2017



New market segment entry strategy in home healthcare



Create business plan for new offerings to non-traditional and non-residential students



Re-imagine what an optimal millennial healthcare customer experience looks like



Marketing and sales strategy for custom education programs business

Our STAR Virtual faculty offer backgrounds in academics, business, and consulting

STAR VIRTUAL Faculty:



John Ceneviva

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- Team: UNC Chancellor



Pat Garner

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- Email: Pat_Garner@Kenan-flagler.unc.edu
- Team: Fortune – UNC Executive Development & LabCorp



Jill Ridky-Blackburn

- Office: N/A
- Email: Jill_Blackburn@kenan-flagler.unc.edu
- Team: Aramark

Your Project Leaders for STAR Virtual

Project	Project Leader
Aramark	Ryan Kirkendall
UNC Executive Development	Allen Clinger
LabCorp	Brendan Malay
UNC Office of the Chancellor	Amy Manning

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STAR
GLOBAL
STUDENT TEAMS ACHIEVING RESULTS



*Real World Projects.
Real World Learning.
Real World Impact.*



[STAR Global](#)
[EcoWorking](#)
[Campus Brasil](#)

We serve a variety of Corporate Partners:

STAR Global Corporate Partners - 2017



Strategy to efficiently connect global manufacturers to customers worldwide



Market opportunity assessment & go to market strategy for a French cruise line



Strategic assessment of market growth opportunities in Brazil and Latin America



Development of a plan to provide educational resources to local youth and teachers in Ecuador

Our STAR Global faculty offer backgrounds in academics, business, and consulting

STAR Global Faculty:



Gary Clinton

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Shannon McKeen

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Your Project Leaders for STAR Global

Project	Project Leader
Amazon – China	Joshua Boyles Vinod Rajasekaran
Red Ventures	Jachin Nahm
Royal Caribbean	Matt Witko
Schlumberger	Dane Gregerson

STAR - 2017

Program Overview

Course Overview

Administration

Credits and anticipated time commitment

Course Credit

- For Spring 2017 STAR is worth:
 - 4.0 credits for second-year MBAs and other graduate students
 - 4.5 credits for undergraduates

Weekly Commitment

- Project leaders and team members alike should plan to spend at least 10-12 hours per week on their STAR project, including biweekly team meetings
 - STAR Default Time: Wed 7:00-9:00pm EST

Faculty Advisor

- Faculty should plan to spend approximately 6 hours per week on their STAR project, including one meeting with team (80 minutes), one meeting with Project Leader (60 minutes), and one meeting with their Project Cohort Leader (60 minutes).

Action plan for Launch Weekend

STAR & STAR Virtual - Jan 14-15 Global Jan 28-29

Saturday	
8:00am	Continental Breakfast
9:00am	Welcome & TEAM FOCUS - Phase 1
10:30am	Concurrent Sessions:
	<i>Corporate Partner Session</i>
	<i>TEAM Charter Session</i>
11:30am	LUNCH
1:00pm	Team Time with Corporate Partner
5:00pm	Corporate Partner Reception - <i>Corporate Partners and Faculty Advisor</i>
6:30pm	Team Dinners - on your own (PL and FA make reservations)

simulcast
Breakout sessions

Sunday	
8:00am	Continental Breakfast
9:00am	TEAM FOCUS - Phase 2-4
10:15am	Student Panel
10:45am	Team Session (STAR Global will be Cultural Session)
12:00pm	Lunch

Pre-work:

- Review *The McKinsey Engagement*
- Watch Team Focus Videos at www.paulfriga.com

All STAR participants are required to become masters in TEAM FOCUS

TEAM FOCUS videos and Quizzes are required for participants of STAR (Some participants may have already been exposed through Dr. Friga's Classes/Immersion)

Module	Area	Videos* password= teamfocus	Quizzes (5 interactive questions per module)
1	Overview	http://vimeo.com/36087078	https://kenan-flagler.qualtrics.com/SE/?SID=SV_cZaJdDHXRd1OeBC
2	Talk	http://vimeo.com/36083776	https://kenan-flagler.qualtrics.com/SE/?SID=SV_9n1PH9s8GGJX1be
3	Evaluate	http://vimeo.com/36082060	https://kenan-flagler.qualtrics.com/SE/?SID=SV_6gugCROKaeW7gzi
4	Assist	http://vimeo.com/36079811	https://kenan-flagler.qualtrics.com/SE/?SID=SV_4U6NzpIS2JCpo00
5	Motivate	http://vimeo.com/36066970	https://kenan-flagler.qualtrics.com/SE/?SID=SV_dbwqCGtpMghh97m
6	Frame	http://vimeo.com/36108034	https://kenan-flagler.qualtrics.com/SE/?SID=SV_1CeaYJ7PLtsRggs
7	Organize	http://vimeo.com/36122822	https://kenan-flagler.qualtrics.com/SE/?SID=SV_d7pUVJORr20eGbi
8	Collect	http://vimeo.com/36167577	https://kenan-flagler.qualtrics.com/SE/?SID=SV_2n1mlsZbail4VTK
9	Understand	http://vimeo.com/36310196	https://kenan-flagler.qualtrics.com/SE/?SID=SV_bpyB6RLSbQEajcw
10	Synthesize	http://vimeo.com/36316152	https://kenan-flagler.qualtrics.com/SE/?SID=SV_0puRBwqUiKzMNio

NOTE: The web based apps are designed around the case study "UNC Printing Services"

* Approximately 20 minutes per module

The TEAM FOCUS “Rules of Engagement”

TEAM

Talk

- Communicate constantly
- Listen attentively
- Separate issues from people

Evaluate

- Discuss group dynamics
- Set expectations and monitor results
- Develop and reevaluate a personal plan

Assist

- Leverage expertise
- Keep teammates accountable
- Provide timely feedback

Motivate

- Identify unique motivators
- Positively reinforce teammates
- Celebrate achievements

FOCUS

Frame

- Identify the key question
- Develop the issue tree
- Formulate hypotheses

Organize

- Develop a high-level process map
- Create a content map to test hypotheses
- Design the story line

Collect

- Design “ghost charts” to exhibit necessary data
- Conduct meaningful interviews
- Gather relevant secondary data

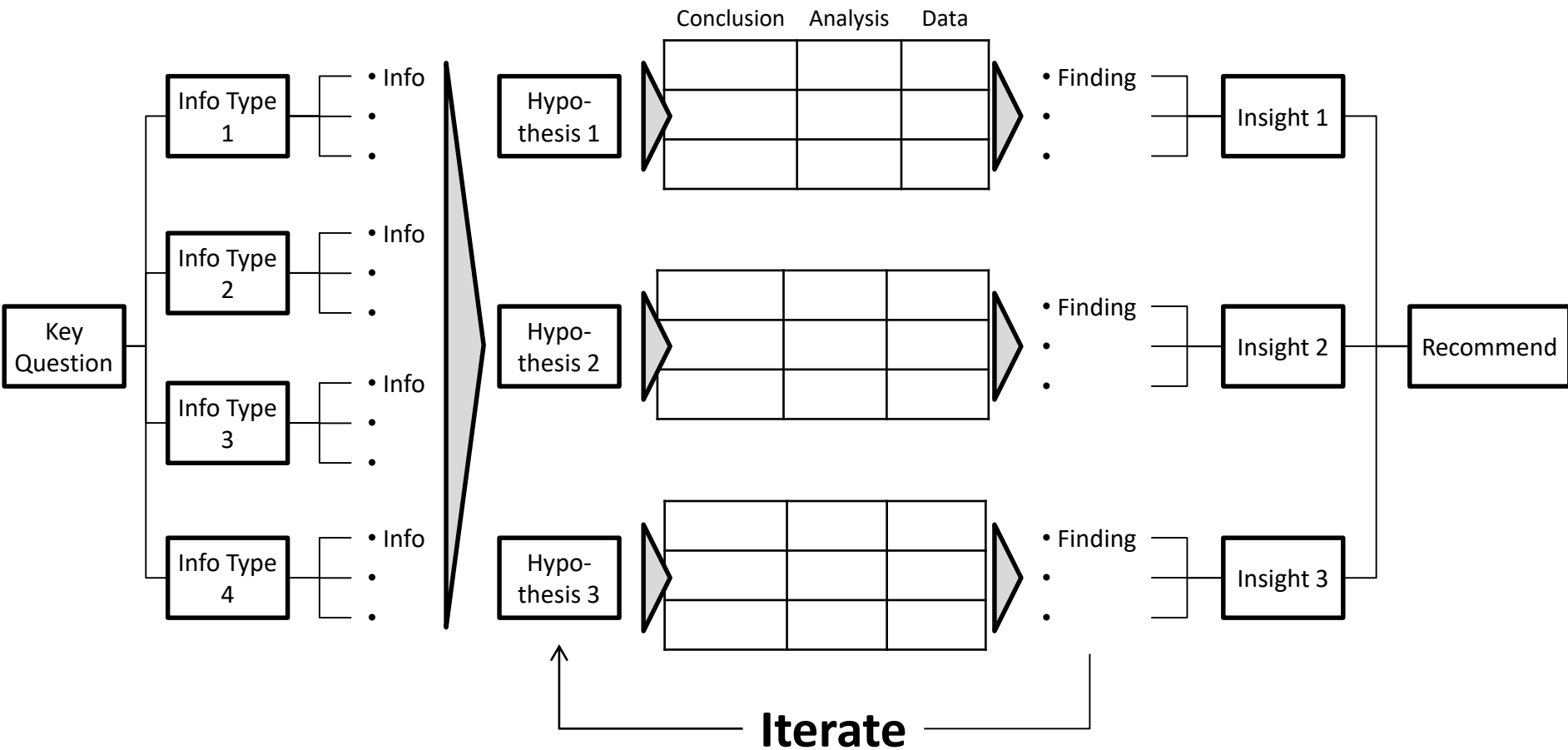
Understand

- Identify the “so what(s)”
- Think through the implications for all constituents
- Document the key insight on all charts

Synthesize

- Obtain input and ensure buy-in from company rep
- Offer specific recommendations for improvement
- Tell a good story

The FOCUS Analytical Process Map



Corporate Partner meetings / deliverables

	Phase I FRAME/ ORGANIZE	Phase II COLLECT	Phase III UNDERSTAND	Phase IV SYNTHESIZE
Objectives	<ul style="list-style-type: none"> • Understand the business • Understand the key questions • Prepare initial hypotheses • Plan data collection 	<ul style="list-style-type: none"> • Collect primary and secondary research to prove/disprove hypotheses • Confirm direction for final half of project • Receive team feedback 	<ul style="list-style-type: none"> • Gather additional data as needed • Present initial recommendations • Confirm final presentation needs 	<ul style="list-style-type: none"> • Wrap up project open items • Layout next steps for Corporate Partner • Receive final Corporate Partner feedback
Timing	<p>STAR/SV: Jan 14–Feb 3 STAR Global: Jan 23–Feb 17</p> <p><u>Launch Weekend:</u> STAR/SV – Jan 14-15 STAR Global – Jan 28-29</p> <p>Kick-off Meeting</p>	<p>STAR/SV: Feb 6-Mar 3 STAR Global: Feb 20-Mar 17*</p> <p>Preliminary Findings Meeting</p>	<p>STAR/SV: Mar 6-Apr 7* STAR Global: Mar 27-Apr 28</p> <p>Storyline meeting</p>	<p>STAR/SV: Apr 10-May 5 STAR Global: May 1-May 26 In-Country: May 14-26</p> <p>Final presentation</p>
Deliverables <i>(due by end of phase)</i>	<ul style="list-style-type: none"> • Kickoff Deck • Team Charter (internal) • Scope of work 	<ul style="list-style-type: none"> • Preliminary Findings Meeting & Deck • Midpoint feedback (internal) 	<ul style="list-style-type: none"> • Storyline Document (Microsoft Word) 	<ul style="list-style-type: none"> • Final Presentation Deck • Final Feedback (due within 24 hours of the final Presentation)

Note: we'll use a **hypothesis-driven approach**, in which we will create hypotheses early in the project and then prove/disprove/refine them into findings and recommendations – see overview of model in following slides

* Kenan-Flagler MBA Spring Break is March 11-26 and UG Spring Break is March 11-19

Corporate Partner meetings / deliverables

	Phase I FRAME/ ORGANIZE	Phase II COLLECT	Phase III UNDERSTAND	Phase IV SYNTHESIZE
Objectives	<ul style="list-style-type: none"> • Understand the business • Understand the key questions • Prepare initial hypotheses • Plan data collection 	<ul style="list-style-type: none"> • Collect primary and secondary research to prove/disprove hypotheses • Confirm direction for final half of project • Receive team feedback 	<ul style="list-style-type: none"> • Gather additional data as needed • Present initial recommendations • Confirm final presentation needs 	<ul style="list-style-type: none"> • Wrap up project open items • Layout next steps for Corporate Partner • Receive final Corporate Partner feedback
Timing	<p>First Month Launch Weekend: STAR – Jan 14-15 STAR Global – Jan 28-29</p> <p><u>Target Completion:</u> STAR/SV – Week ending February 3 STAR Global – Week ending February 17</p> <p>Kick off meeting with Corporate Partner</p>	<p>Second Month STAR Global - Prelim Budget due March 17</p> <p><u>Target Completion:</u> STAR/SV – Week ending March 3 STAR Global – Week ending March 17*</p> <p>Preliminary Findings meeting</p>	<p>Third Month STAR Global - Final Budget Due April 1*</p> <p>Blue Team Review: STAR/SV – Week ending April 7 STAR Global – Week ending April 28</p> <p>Storyline meeting</p>	<p>Fourth Month In-Country – May 14-26</p> <p>Red Team Review: STAR/SV – Week ending April 21 STAR Global – when in-country</p> <p>Final presentation</p>
Deliverables	<ul style="list-style-type: none"> • Kickoff Deck • Team Charter (internal) • Scope of work 	<ul style="list-style-type: none"> • Preliminary Findings Deck • Midpoint feedback (internal) • Initial Budget 	<ul style="list-style-type: none"> • Storyline Document (Microsoft Word) • Final Budget • Team Travel Workbooks 	<ul style="list-style-type: none"> • Final Presentation Deck • Final Feedback (due within 24 hours of the final Presentation)

Note: we'll use a **hypothesis-driven approach**, in which we will create hypotheses early in the project and then prove/disprove/refine them into findings and recommendations – see overview of model in following slides

* Kenan-Flagler MBA Spring Break is March 11-26 and UG Spring Break is March 11-19

Project schedule and overview – Spring 2017 (1 of 2)

	Phase I Frame/Organize	Phase II Collect	Phase III Understand	Phase IV Synthesize
Objectives	<ul style="list-style-type: none"> Receive a company and project overview from Corporate Partner (basic data) Confirm objectives & approach Get to know team and Corporate Partner Establish process for communication between team and Corporate Partner Set dates or tentative dates for remaining Corporate Partner meetings 	<ul style="list-style-type: none"> Test initial hypotheses by gathering preliminary secondary and primary data Engage Corporate Partner in vetting the path being suggested by team Gain interpersonal feedback from team on performance thus far 	<ul style="list-style-type: none"> Present draft recommendations with key support Secure Corporate Partner's buy-in on project direction Gather additional data as needed 	<ul style="list-style-type: none"> Present final recommendations with rationale Discuss implementation and quantify potential impact Gain feedback from Corporate Partner
Deliverables	<ul style="list-style-type: none"> Team Charter Scope of Work Letter Signed Non-disclosure Agreement Process & Content Maps Kick-off meeting Power Point deck Kick-Off meeting with Corporate Partner STAR/SV – Week ending Feb 3 STAR Global – Week ending Feb 17 	<ul style="list-style-type: none"> Data Collection questions and process for both primary and secondary collection Fact pack (findings) Rough draft of Ghost Deck for final presentation; Mid-project team feedback & course evaluation Preliminary findings meeting with Corporate Partner STAR/SV – Week ending Mar 7 STAR Global – Week ending Mar 17 	<ul style="list-style-type: none"> Final Draft of Ghost Deck, with clear story line and evidence of support for recommendations Storyline document (in Word) of preliminary recommendations and support Storyline meeting / conversation with Corporate Partner STAR/SV – Week ending April 7 STAR Global – Week ending Apr 28 	<ul style="list-style-type: none"> Corporate Partner materials on thumbdrive All materials uploaded to Canvas Final Online Assessments completed Corporate Partner Evaluation – link sent by project leader In-Country May 14 - 26 Final Presentation STAR/SV – Week of May 5 STAR Global – by May 26
Tasks	<ul style="list-style-type: none"> Review STAR Global syllabus and evaluation material (rubrics) Prepare Team Charter Establish Key Questions embedded in Scope of Work Create Issue Trees and Hypothesis Become familiar with STAR Global Policies and Procedure 	<ul style="list-style-type: none"> Determine what data are needed to answer key questions and how to collect the answers Create primary data collection templates Complete online assessment survey on self and others Establish initial budget 	<ul style="list-style-type: none"> Determine the "So What's" that will head each slide on final deck Be sure that each conclusion (so what) is well founded in data Conduct a Blue Team Review to be sure team is on track (one outsider reviews storyline prior to Corporate Partner meeting) Establish final budget Create team travel workbooks 	<ul style="list-style-type: none"> Prepare final presentation, consisting of high level story and appendices Prepare thumbdrive with all presentations, fact packs, raw data, and models to give to Corp Rep Make copies of final presentation for Corporate Rep (color and bound)

Project schedule and overview – Spring 2017 (2 of 2)

	Phase I Frame/Organize	Phase II Collect	Phase III Understand	Phase IV Synthesize
Resources	<p>On Canvas:</p> <ul style="list-style-type: none"> STAR Global Syllabus Policies and Procedures Templates for Scope of Work and NDA Toolkits #1 (Working Effectively in Teams), #2 (Determining Key Questions and Scope), and #3 (Visualizing the Story and Designing the Analysis) <p>Individuals</p> <ul style="list-style-type: none"> Past STAR Virtual students 	<p>On Canvas:</p> <ul style="list-style-type: none"> Toolkits #4 (Collecting Primary and Secondary Data) Free survey tools Examples of ghost decks and story lines <p>Individuals</p> <ul style="list-style-type: none"> A list will be circulated by STAR Virtual Professors as it becomes clear what questions need to be answered (list will include KF and UNC faculty, business people, government agents, former STAR Virtual participants, etc.) 	<p>On Canvas:</p> <ul style="list-style-type: none"> Toolkit #5 (Determining the So Whats) <p>Individuals</p> <ul style="list-style-type: none"> Subject matter experts 	<p>On Canvas:</p> <ul style="list-style-type: none"> Toolkit #6 (Telling the Story) <p>Individuals</p> <ul style="list-style-type: none"> Subject matter experts for Red Team Review
Meetings	<ul style="list-style-type: none"> Kick-Off (Phase I) Launch Weekend January 14-15th (STAR/SV/Global) At least once per week with STAR Virtual professor Additional, as appropriate, among project leader and team members At least one social meeting Kick-off Meeting with Corporate Partner (usually at Corporate Partner site) One 1-hour call with local consultant <p><i>Afternoons preferred for meeting times to allow time for interviewing during the day.</i></p> <p><i>No team meetings: Martin Luther King, Jr Day, Monday, January 16th</i></p>	<ul style="list-style-type: none"> Primary Research (Phase II) At least once per week with STAR Virtual professor Additional, as appropriate, among project leader and team members Celebrate socially Conduct one meeting with Corporate Partner (usually at Kenan-Flagler) 	<ul style="list-style-type: none"> Attend Storyline/Final Deliverables (Phase III & IV) All teams must arrange for at least one hour special meeting to review mid term feedback and develop individual improvement plans Conduct Blue Team Review At least once per week with Faculty Advisor Additional, as appropriate, among project leader and team members One meeting with Corporate Partner (Storyline) – usually virtual <p><i>No full-team meetings during MBA Exams, MBA Break, or BSBA Break*</i></p>	<ul style="list-style-type: none"> At least once per week with STAR Virtual professor Additional, as appropriate, among project leader and team members One meeting with the Corporate Partner (usually at the Corporate Partner site)

Background Information for Red Team Review (example, to be sent to the reviewers in advance of the Red Team Review)

Client

- North Carolina State **Temporary Solutions Agency (TSA)**
- Number of Employees working for TSA: 9

Role in State Government

- Assists agencies in filling their workforce needs due to illnesses, vacations, peak production levels, transition periods, and other instances when workloads demand more staff.
- Job assignments range from a few hours to several months,
- Assignments may be full-time or part-time (i.e. *Accountants, Administrative Assistants, Data Entry Operators, Engineers, Graphic Designers, Paralegals, Information Technology professionals, and Public Health professionals*)

Key Question

- Improving efficiency of operations;
- Main Operations (Hiring, tracking time of employees, payroll processing)

Challenges

- Compliance with Executive Order No.4: “**Temporary Solutions**’ assignments are for a period of 11 consecutive months or less. You may be eligible for re-assignment after a lapse in employment of more than thirty-one calendar days.”
- Accounts Receivable Collection

Blue Team Review

<p>Objectives</p>	<ul style="list-style-type: none"> • To provide early and friendly feedback on the overall storyline for the project • The storyline (deliverable #3 of the STAR project) is an outline of the final presentation with key support noted • The purpose is to test the clarity and logic of the story and completeness of the support
<p>Storyline Format</p>	<ul style="list-style-type: none"> • The storyline’s format is a Word document that describes the recommendations and key support in bullet format (see worked examples in Canvas) • Organize the storyline by recommendation, including key numerical support (but don’t go overboard) • The storyline should match the flow of the headlines in the ghost deck, with an introduction that includes the overall situation/complication and overview of the recommendations followed by the more detailed support
<p>Review Procedures</p>	<ul style="list-style-type: none"> • The Blue Team Review is intended to be a 1 to 1.5 hour conversation with a “cold” reviewer (who has not seen the previous project material) • The team should approach the review just as they will the storyline review with the client where they will talk through the material (without reading word-for-word, of course) • During the review, allow time for discussion and reaction from the reviewer after each major section • Although you would send the storyline to the actual client in advance, due to client confidentiality reasons the Blue Team Reviewer should not receive a copy of the storyline before the review • The STAR Program office is coordinating the assignment of Blue Team Reviewers for the each team • The Blue Team Reviews will be conducted ideally one week before your scheduled “Storyline” meeting with the client (coordinate with your assigned Blue Team Reviewer for a suitable time for 1 to 1.5 hours the week of March 21 (this week) or March 28 (next week). • You do not need to get an NDA signature – because you are not sharing client data and keeping it high level – but do take back the printout of the storyline if you provided one

Red Team Review

<p>Objectives</p>	<ul style="list-style-type: none"> To provide a critical and thorough review of the material in the final presentation, including logical flow, slide quality, depth of analysis, and presentation skills It is essentially a dry run of the final presentation
<p>Presentation Format</p>	<ul style="list-style-type: none"> The deliverable for the Red Team Review will be the final slide deck The deck should be as close to perfect as possible—no ghost slides
<p>Review Procedures</p>	<ul style="list-style-type: none"> The Red Team Review is intended to be a 1-2 hour presentation with several “cold” reviewers who have not seen the previous project material The team should rehearse the delivery of their presentation prior to the review so that the reviewer can properly assess the effectiveness of the presentation’s delivery Although you would send the presentation to the actual client in advance, due to client confidentiality reasons the Red Team Reviewers should not receive a copy of the presentation before the review The STAR Program office is coordinating the assignment of approximately 2-3 Red Team Reviewers for the each team including 1-2 external SMEs and 1-2 UNC faculty members (including one Communications Faculty member if possible) We encourage teams to invite additional SMEs as necessary that would be helpful for the review, but recommend limiting the overall number of reviewers to a maximum of 4 While the team’s Faculty Advisor should attend the Red Team Review, we recommend that he/she participate as a largely silent observer during the review (of course, after the Red Team Review has concluded, discussion with the Faculty Advisor is encouraged) The Red Team Reviews will be scheduled by the teams themselves in mid/late April (1-2 weeks before the final presentation) With the exceptions of the reviewers organized by the STAR Program office, the Project Leaders are responsible for organizing all logistics for their respective Red Team Reviews

Prerequisites and ongoing workshops (we will send outlook appointments)

All Participants

- Recommended to have taken Consulting Skills & Frameworks, or to take it in tandem with STAR Virtual
- All students are required to attend the TEAM FOCUS Workshops (MBAs and Undergraduates).

	STAR & STAR Virtual	STAR GLOBAL
Launch Weekend (Workshop #1)	January 14-15	January 28-29
Workshop #2 - Project Leader	January 31 st	February 15th
Workshop #2	February 7th	February 20th
Workshop #3 - Project Leader	February 28 th	March 24th
Workshop #3	March 7th	March 27th
Workshop #4 (Pre-Departure)	NA	TBA

STAR Program Assessment Questions: Administered anonymously via Qualtrics and reported to the Senior Associate Dean
(Answers: Strongly Disagree, Disagree, Neutral, Agree, Strongly Agree)

- I developed knowledge and skills that are relevant to business professionals.
- The specific project I worked on was suitable for providing hands-on experience applying hypothesis-driven problem-solving methodology to a real situation.
- The project was structured in a way that facilitated deep and impactful learning.
- The director provided an overall structure and tools that were helpful in the course.
- The director explained course concepts and ideas clearly.
- Considering the nature and scope of the activities, the director did an excellent job of leading the program.
- On average, how many hours per week would you estimate that you spent on this course?
- Overall, this course provided a valuable learning experience.
- I would recommend STAR/STAR Virtual/STAR Global to other students.

STAR Faculty Advisor Assessment Questions: Administered anonymously via Qualtrics and reported to the Senior Associate Dean
(Answers: Strongly Disagree, Disagree, Neutral, Agree, Strongly Agree)

- My STAR team's Faculty Advisor was well prepared for team meetings.
- My STAR team's Faculty Advisor explained difficult concepts clearly.
- My STAR team's Faculty Advisor was open to student questions (during or outside of team meetings).
- My STAR team's Faculty Advisor was available for help outside of team meetings (e.g. by keeping office hours or making appointments).
- My STAR team's Faculty Advisor was enthusiastic about teaching.
- My STAR team's Faculty Advisor required students to be prepared for class.
- My STAR team's Faculty Advisor provided appropriate feedback on my performance during this course.
- My STAR team's Faculty Advisor graded my work (e.g., assignments, performance) fairly.
- Overall, considering both the possibilities and limitations of the subject matter, my STAR team's Faculty Advisor was excellent.
- Please provide a summary statement on your STAR team's Faculty Advisor to further qualify your responses above, especially for those with which you disagreed or strongly disagreed.
- What evidence showed that your STAR team's Faculty Advisor made changes that were addressed in the midterm assessments?

Feedback Form –Team Member Assessment

Criteria	Significant Issues	Slightly Below Expectation	Meets Expectations	Exceeds Expectations	Significantly Exceeds Expectations
Participation And Reliability	Missed several team or company meetings without prior notice; does not participate effectively in team discussion of project issues ;work is usually incomplete and not shared in a timely way with team mates	Has missed one meeting without prior notice, or several team meetings with prior notice; participates in team discussions when asked; delivers most assigned work products on time and addresses assigned scope adequately in most cases	Has attended all company meetings, missed no more than one team meeting with prior notice and proactively contributed to the team dialogue in most meetings; Delivers all work products on time and consistently addresses assigned scope fully and appropriately	Has attend all formal company and team meetings and has been a significant contributor to the team discussions ... Consistently completes assignments early and/or often addresses additional scope beyond that assigned	... plus has been proactive in helping the team solve problems outside of meetings/ assigned tasks, can be counted on to add value to both process and content
Quality of Work and Thought Leadership	Work frequently contains errors or is not supported with evidence; Has difficulties gathering basic data and formulating analyses;	Work is largely error free, but not also well backed up; Able to gather data but needs help to apply classroom skills and develop analysis that is useful to the company's situation and project	Work is largely error free and well supported by back up evidence; applies classroom skills and prior experience, develops insights from tasks, and leverages those insights to contribute to a practical solution for the company in assigned areas	Work consistently error-free, well communicated verbally and graphically, with strong backup material ; adds value by developing insights beyond their own tasks to help synthesize a practical, compelling business solution . .	...and shows significant ingenuity / creativity/ insight for the benefit of the team; is recognized by members for pivotal, creative contributions to a practical, compelling business solution.
Execution of Support Role	Did little to nothing to define or execute support role in a way that team can understand and take advantage of	Makes some effort to explore ways to articulate support function beyond the "Roles Slide" and made some difference in team's effectiveness in that area	Makes obvious effort to articulate support function beyond the "Roles Slide" and made obvious difference in team's effectiveness in that area	...and adds value to the team's overall effectiveness because of the manner in which he/she executed support role	...and is recognized by the team making the team extremely effective, as a result of his/her execution of the support role
Language & Culture (STAR Global Only)	Makes little effort to utilize or increase cultural knowledge or language ability	Makes some effort to use the language of the destination country and expand knowledge/ use of the language and culture	Shares language and cultural knowledge and works towards greater understanding of both in the context of the project	Actively engages in the language and works towards a deeper understanding and incorporation of prior and new knowledge of language/culture	Plus, assists other team members and company in deeper appreciation of language/cultural issues embedded in project

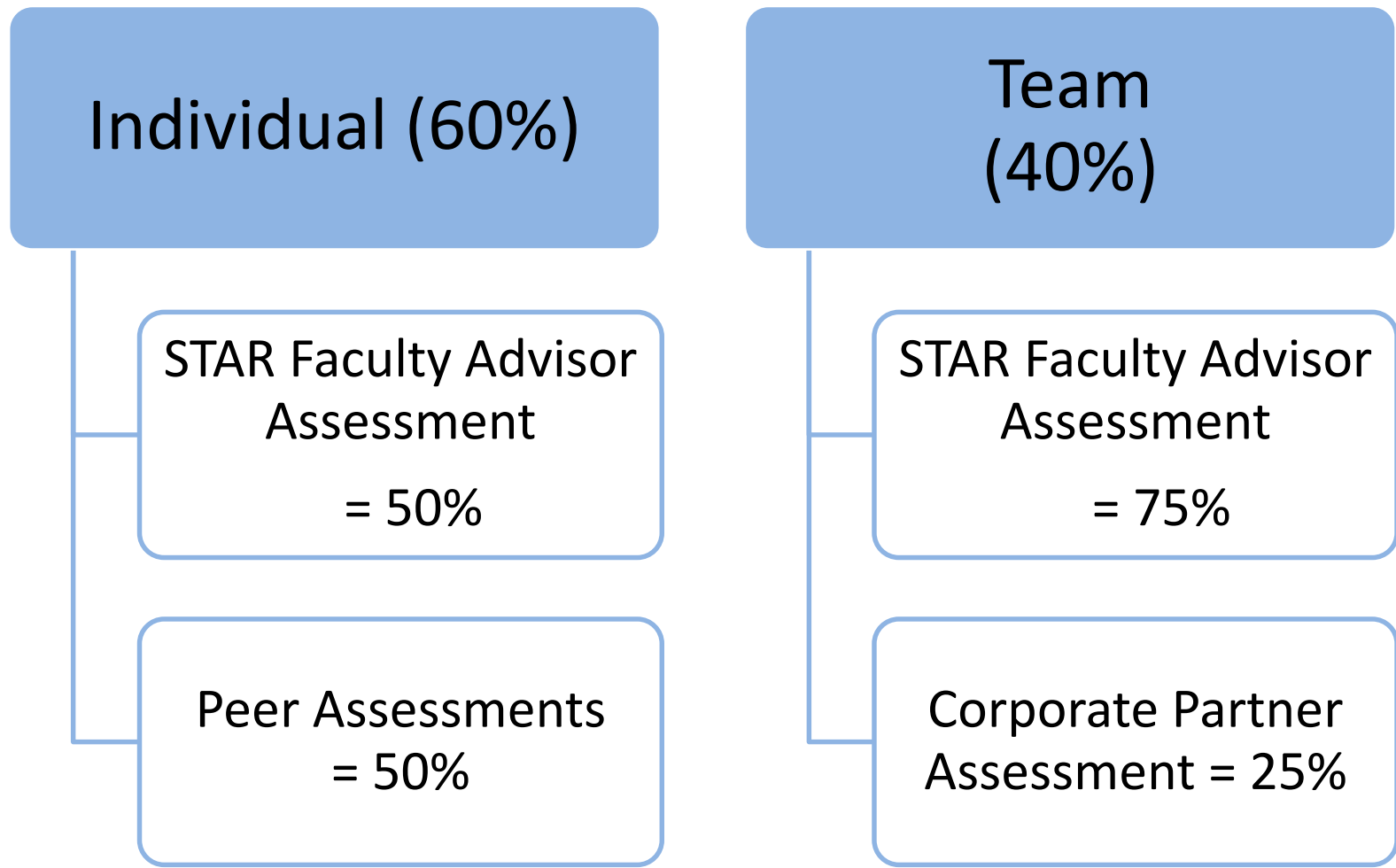
Feedback Form – Project Leader Assessment

Criteria	Significant Issues	Slightly Below Expectation	Meets Expectations	Exceeds Expectations	Significantly Exceeds Expectations
Leadership	Difficulty in planning and guiding team in designated (or emerged) area of project leadership	Provides clear expectations of team members and follows up with team members on assigned tasks	Provides clear assignments and guidance for completion of those assignments; meets consistently with team members who are to complete those tasks	Work assignments and meeting follow up are consistently clear; has developed a good rapport with all team members and company; keeps project on track	Contributes significantly to team's identification of key questions for project as well as to team's progress and project completion
Planning	Has not developed specific team or company meeting objectives adequately in advance; does not adequately help team see big picture; work plans are often incomplete or inconsistent with objectives	Has developed clear objectives for each team or company meeting but has not shaped story sufficiently to inform approach; work plan for team sometimes incomplete or inconsistent with objectives	Has developed clear objectives for team; has shaped story sufficiently to inform approach and work of team members; has developed effective week-by-week work plan for team to perform work needed	Has helped team members understand what data is needed, what analysis is necessary to substantiate hypotheses; has generally planned several steps ahead	... plus work plan includes work flow diagrams for team members to see how their contributions tied in to the final product for the company; always anticipates and plans several steps ahead
Company Interface	PL's method of communication with company has adversely affected the project progress; often incomplete or inadequate communications	PL has managed the relationship/interface with company reasonably well, but sometimes with incomplete or inadequate communication	Has organized interviews and facilitated the gathering of company-provided data well in advance of need Communicates status and issues to senior company on regular basis Pre-briefed senior company reps on key issues. Communications are never incomplete or inadequate	Has developed good rapport with the senior company rep(s) who will help the team provide a better product	Plus team/company rep/faculty advisor(s) recognize the PL for quality work in leading the team
Technological Adaptation	Makes little effort to use meeting and/or project software agreed to by team as method for sharing data; insists on using email as mode of virtual communication	Makes some effort to explore the capabilities of virtual meeting/sharing tools but is often visibly irritated by these modes of communication	Makes obvious effort to explore – or engage the team's technology officer to explore -- the capabilities and possibilities of virtual meeting/sharing tools	...and adds value to the team discussion and team and company rep meetings by effectively utilizing technology	...and is recognized by the team as a leader in helping the team be effective in virtual teaming
Language & Culture (STAR Global only)	Makes little effort to utilize or increase cultural knowledge or language ability	Makes some effort to use the language of the destination country and expand knowledge/ use of the language and culture	Shares language and cultural knowledge and works towards greater understanding of both in the context of the project	Actively engages in the language and works towards a deeper understanding and incorporation of prior and new knowledge of language/culture	Plus, assists other team members and company reps in deeper appreciation of language/cultural issues embedded in project

Feedback Form – STAR Project Evaluation by Corporate Partner

Performance Criteria	Significant Issues	Slightly Below Expectation	Meets Expectation	Exceeds Expectations	Significantly Exceeds Expectations
Communication	Team Communication issues with the company made it difficult for the company rep to effectively participate in the project	Some issues of mis-communication with company that did not adversely affect progress in any major way. Some significant surprises at formal meetings	Company Rep was kept well informed of project progress. Meeting dates and objectives communicated with adequate notice. Key findings / issues communicated in advance of meetings. Few or no surprises at company meetings	Good communication with both senior company reps and key company team members, findings and approach well socialized with company management team	Communications significantly facilitated the working relationship of the student-company rep team and strengthened the project results
Completeness	Significant gaps between final deliverables and project proposed work (as formally amended during the project)	Fulfilled most of the project objectives (as formally amended during the project)	Met all requirements of the work proposed (as formally amended during project)	Went beyond initial proposal in a few areas	Company acknowledges significant value add of the project beyond its initial objectives
Credibility	Significant credibility gaps that impact company's willingness to take work seriously	Some areas where company feels work lacked credibility, but overall confidence in recommendations	Company rep felt that the student work was fully credible, well substantiated and with minimal mistakes	Work not only confirmed company's understanding but developed credible new findings giving company new insights into their business	Credibility identified insights that were new to the company with important business implications
Importance	Company feels the project results are inconsequential to their business – report on the shelf	Company feels that project results not compelling enough to consider near-term action	Company acknowledges fact based, logical arguments to begin execution of the recommended strategy plan in the near term	....case compelling and worth immediate attention; significant, practical business improvements have been identified	...company acknowledges upside potential of major importance to the company
Actionable	Action steps largely incomplete by the team	Company unsure about what to do differently over the next months to achieve the strategy results	Company acknowledges a clear understanding of the steps they must take to execute the strategy	Steps identified are clear, well organized and documented, practical and within the capability of the company management team to execute...	...plus team has identified new resources, methods, or actions that company feels will be valuable in execution

Final grading



Assessment – approximate grading scale

Raw Score	Undergraduates	MBA's
1	C-F	L
2	B	L or P
3	B+	P
4	A-	P or H
5	A	H

Note 1: A mid-term evaluation will be done on everyone using our feedback forms but this will not be counted in the grading assessment – it is purely developmental.

Note 2: At the mid-term and end-term evaluation, each student and faculty member will document qualitative feedback in two categories:

- 1. What is this person doing well that he/she should continue to leverage?*
- 2. What is this person doing not as well that he/she should change in the future?*

Provide suggestions for how to make the suggested changes.

STAR - 2017

Program Overview

Course Overview

Administration

Working with your Subject Matter Experts (SMEs)

Each team will be assigned three Subject Matter Experts

- 1-2 Local Executives
- 1 Consulting Firm Executive

Ways to engage your Local SMEs (you initiate)

- **Phase 1:** One hour phone call or meeting with SME in January to discuss project plan, hypothesis and work plan and to identify other relevant people/ resources
- **Phase 3:** One hour phone call/ meeting in March to discuss storyline/ outline of recommendations
- **Phase 4:** Serve on Red Team Review in April

Tips on engaging your Consulting Firm SMEs

- Phase 1: 60 minute phone call – Advice on hypotheses and resources
- Phase 3-4: 60 minute phone call – Review of logic, flow and support of recommendations

Working with your Subject Matter Experts

General Tips for Dealing with SMEs

Always reach out to your SMEs in a prompt fashion – even if to let them know that you are aware of their willingness to work with the team

Set expectations upfront, outlining how the team plans to leverage the SME

Always be professional in your email and phone conversations – give advance timing, follow up promptly, use polite language, etc.

Be sensitive to the request for time and give adequate lead time for scheduling (e.g. at least 1 week from the date of the request)

Have a formal agenda for the interview and send it in advance

Be structured and have at least 2 people participate in the interview/conversation

See if they can connect the Team with other people (i.e. for interviews)

You don't have SMEs sign NDAs, so you are not permitted to share confidential/client information or documents with them; stay high level

Bottom line: Be a complete professional in every interaction

Technology overview

- **Canvas:** The primary site for STAR course information and documentation
 - All team members will have access to Canvas and will be able to access their group (team) folder where their team-specific deliverables should be uploaded.
 - There will be a general folder that will have templates, worked examples and other general resource materials.
 - Access Canvas through [Kenan-Flagler Intranet](#). For students without an ONYEN, please use the Canvas Guest log-in button.
- **Dropbox:** Each team can create a team Dropbox folder to store working documents.
- **Lync:** Instant Messaging Tool highly recommended for all STAR participants
 - Guide to downloading and using Lync: <https://home.kenan-flagler.unc.edu/Resources/IT/KnowledgeIT/Pages/Messaging%20at%20Kenan-Flagler%20with%20Lync.aspx>

Technology overview - continued

- **Adobe Connect:** Each STAR team will have an Adobe Connect room to facilitate video conference meetings.
 - Adobe Connect homepage: <https://connectpro57802119.adobeconnect.com>
 - VoIP can be used to audio conferencing (headset microphone is highly recommended)
- **Conference Calls:** Available to all teams for Corporate Partner presentations
 - Details on the following slide

Technology: conference calling details

Option 1: Contact Patricia Wilkerson to secure a “UNC Meet Me” Line (at least 24 hours in advance):

- Start the Conference Call (must be reserved ahead of time through Patricia)
 - A few minutes before your reserved time, call 919-966-5995. (You do not need to be at UNC to use this line.)
 - The phone will ring until someone else dials in.
 - The next person who calls the line will automatically activate the conference call. Additional attendees will join automatically as they dial into the meet me line.

Option 2 (if Option 1 is not available): Conference Call COORDINATOR Steps

- Please contact the STAR Program office for Conference Call setup instructions
- Please note:
 - The call cannot start until the coordinator calls in using the host code (participants who have dialed in using the participant code, are put into a “hold queue” until the host enters).
 - **only one person should dial in using the host code – if a person enters the room using a host code that has already been opened, the call will be dropped and everyone will be disconnected.

Course information & documentation

- **For every meeting**, someone should be responsible for preparing the agenda, and someone should take notes which document attendance, key take-aways, and action steps
- **All deliverables** (i.e. Team Charter, Scope of Work letters, Process and Content maps, Corporate Partner Power Points [including Final Presentations]) are to be posted by the team's project leader into Canvas

Team Roles

	Project Leader (PL)	Logistics Officer (LO) – STAR Global only	MarComm Officer (MCO)	Language Culture Officer (LCO) – STAR Global only
Purpose of Role	Student leader of the team	Handle team logistics associated with the in-country portion of the project - working with Travel Coordinators, Corporate Partner and STAR Global Office to make sure that all stays within budget	Build awareness of project and provide materials that can be used to market the program	Provide added language and cultural support including participating in pre-departure workshops
Role Responsibilities	Provide direction and guidance for the team on all aspects of the project and serve as primary contact with Corporate Partner and FA	Assist PL in coordinating in-country accommodations and transportation and communicating arrangements/plans to the STAR Global Office.	Create items that can be used to promote the project and/or STAR Global (i.e. 3 blogs, newsletters, etc.)	Be the “go to” person for language and culture.
	Conduct weekly meetings with team and Corporate Partner, organize all team presentations - practice and actual. Ensure that team members are keeping up with their role responsibilities	Assist PL with in-country budget	Take high-quality pictures and videos of team in action and share with the STAR Global office	Ensure team members are completing language learning plans including encouraging them to use the language during team meetings.
	Work directly with the FA in completing initial Corporate Partner materials (SoW, etc.) and direct completion of all deliverables throughout the project	Guide team in preparing for international travel (visa, flight details, etc.)		Ensure meetings and presentations are done in a culturally sensitive manner
	Work directly with the Corporate Partner to develop team budget	Working with the STAR Global Office, Oversee fund reimbursement processes		Provide supplemental education for team on cultural issues
Deliverables	Coordinate initial meeting with team and Corporate Partner Reps	Meeting Notes	3 Blogs (Feb, Apr, June) as well as collect digital photos and videos - provide all to the STAR Global Office	Pre-departure team sessions – cultural and doing business in the country (PPT to be sent to STAR Global Office as a Deliverable).
	Draw from Syllabus and PL Meetings to ascertain all deliverables and comply with their delivery mode and dates	Team Budget and Team Travel Workbook	Create photo book to present to Corporate Partner at the conclusion of the project.	Assist with In-Country Orientation Weekend.

Team Roles – that can be combined or assigned separately

	Technology Officer (TO)	TEAM FOCUS Officer (TFO)	Research Officer (RO)	Fun Officer (FO)
Purpose of Role	Go-to person in coordinating virtual meetings with team and Corporate Partner.	Assists PL in following Best Practices for Using TEAM FOCUS throughout the project. Is the Go to Person for designing and maintaining the presentation slide deck for final presentation	Leader of research processes and data gathering	Leader in keeping with the Celebration aspect of TEAM FOCUS
Role Responsibilities	Serve (or assign) a tech buddy for the Launch Weekend and any other virtual team meetings	Interpret and adapt templates and toolkits for team and design and manage slide deck	Provide team with accurate material adhering to team deadlines	Ensure team has fun and celebrates successes (i.e.. Planning celebrations or fun activities during meetings)
	Manage Adobe Connect Room including making necessary toll free reservations (done thru the STAR Global office)			
	Provide supplemental education on TEAM FOCUS as needed (i.e. – slide design, interviews, surveys)			
	Report to and update PL throughout the project garnering PL input			
Deliverables	Successful technology during meetings	TEAM FOCUS tutorials for team meetings, as needed and requested by PL, Presentation Template and final presentation slide deck	Ensuring that research and back-up materials are provided in the final deliverables	

Corporate Partner confidentiality

- STAR projects are with real companies for whom we must uphold general consultant's confidentiality standards. Students and Faculty should not discuss the details of the project nor share any data outside the STAR Team (which includes Subject Matter Experts or SMEs).
- The STAR Program office will handle Non-Disclosure Agreements (NDAs) for each team prior to the start of the project (or shortly thereafter). In some cases, students will be asked by their Corporate Partner to acknowledge that they have read the NDA with their signature.

The Final Presentation

- **At the final Corporate Partner meeting, each team's Project Leader should deliver:**
 - Spiral-bound, color copies of the final annotated PowerPoint presentation and supporting thumbdrive (STAR will provide)
 - Thumbdrive should include all PowerPoint presentations made to Corporate Partner over course of the project, along with supporting data and reports that the team collected.
- **Project leader should load the deliverables in your team Canvas page.**

STAR classrooms and study rooms

- Your **team will decide on a meeting time** prior to the start of the semester (typically 8-9:20 a.m. T/Th). Once a time is chosen, Project Leaders are responsible for contacting Patricia Wilkerson to reserve a room.
- The **STAR office has one dedicated study/meeting room** in the lower level of McColl (0022). Use of this room is by reservation only. This room is to remain locked at all times. Keys can be signed out and must be returned at the end of the semester. Please contact Patricia to reserve the room and sign out keys.
- There is also a **printer and phone available in 0022**. Directions on how to set up the printer are posted in the study room. The phone requires a PIN number to use. Please contact Patricia for this number.

STAR Administrative Offices – Kenan Center Suite 404

- Administrative aspects of the projects such as check-out of AV equipment; procurement of virtual and actual rooms for Corporate Partner/team meetings, etc. are handled by STAR Program Manager, Patricia Wilkerson/Debbie Williams.
 - Direct any questions related to reimbursement to Patricia/Debbie in advance of spending
 - Corporate Partner must approve major expense items such as travel to Corporate Partner and major research (e.g. purchase of an email distribution list)
- We are able to use the UNC conference line; requests should be directed to Patricia/Debbie at least 24 hours in advance.
- **STAR Project leaders** – please refer to “STAR Reimbursement Guidelines – 2017” posted in Canvas. This contains the procedures your team must follow for reimbursements, overnight and day-time travel set up, and travel advances.

IMPACT

The world is watching and benefitting.

THE *TEAM FOCUS* FRAMEWORK

FOR TEAM PROBLEM SOLVING

Confidential material from the book: *The McKinsey Engagement: A Powerful Toolkit for More Efficient and Effective Team Problem Solving*

Introduction to TEAM FOCUS

121

What is it?

- A guide for any team problem-solving project
- Based upon the author's experiences at McKinsey and research into best practices at other top consulting firms and business schools
- Note that all of the content you find herein is alive and well at McKinsey, based on my experience and hundreds of interviews, the actual framework presented (TEAM FOCUS) is my new, unique, and hopefully value-adding contribution

What is included?

- A baseline construct of the book published by McGraw Hill entitled "**The McKinsey Engagement,**" including:
 - 9 Primary Areas (TEAM FOCUS) - for team problem-solving
 - 27 Rules of Engagement - for guiding the teams to success
 - 40 Operating Tactics – for executing best practices

How should I use it?

- As a checklist of the most important elements of successful team problem solving – includes templates and examples
- **As a deeper dive for tutorial lessons – utilizing the web based apps shown on slide 3**
- As a source of specific applications, including consulting firm projects, business school field studies/consulting projects, business school case competitions, and executive task forces in corporations – any team problem solving opportunity!

TEAM FOCUS: Links to Web Based Apps

122

Module	Area	Discussion Link*	Quiz (5 interactive questions per module)
1	Overview	http://www.paulfriga.com/index.php?id=3	https://kenan-flagler.qualtrics.com/SE/?SID=SV_cZaJdDhXRd1OeBC
2	Talk	http://www.paulfriga.com/index.php?id=3	https://kenan-flagler.qualtrics.com/SE/?SID=SV_9n1PH9s8GGJX1be
3	Evaluate	http://www.paulfriga.com/index.php?id=3	https://kenan-flagler.qualtrics.com/SE/?SID=SV_6gugCROKaeW7gzi
4	Assist	http://www.paulfriga.com/index.php?id=3	https://kenan-flagler.qualtrics.com/SE/?SID=SV_4U6NzplS2JCpoO0
5	Motivate	http://www.paulfriga.com/index.php?id=3	https://kenan-flagler.qualtrics.com/SE/?SID=SV_dbwqCGtpMghh97m
6	Frame	http://www.paulfriga.com/index.php?id=3	https://kenan-flagler.qualtrics.com/SE/?SID=SV_1CeaYJ7PLtsRggs
7	Organize	http://www.paulfriga.com/index.php?id=3	https://kenan-flagler.qualtrics.com/SE/?SID=SV_d7pUVJORr20eGbi
8	Collect	http://www.paulfriga.com/index.php?id=3	https://kenan-flagler.qualtrics.com/SE/?SID=SV_2n1mlsZbail4VTK
9	Understand	http://www.paulfriga.com/index.php?id=3	https://kenan-flagler.qualtrics.com/SE/?SID=SV_bpyB6RLSbQEajcw
10	Synthesize	http://www.paulfriga.com/index.php?id=3	https://kenan-flagler.qualtrics.com/SE/?SID=SV_0puRBwqUiKzMNlo

NOTE: The web based apps are designed around the case study “UNC Printing Services”

Dr. Paul N. Friga, 2018

* Approximately 20 minutes per module

The TEAM FOCUS “Rules of Engagement”

123

TEAM

Talk

- Communicate constantly
- Listen attentively
- Separate issues from people

Evaluate

- Discuss group dynamics
- Set expectations and monitor results
- Develop and reevaluate a personal plan

Assist

- Leverage expertise
- Keep teammates accountable
- Provide timely feedback

Motivate

- Identify unique motivators
- Positively reinforce teammates
- Celebrate achievements

FOCUS

Frame

- Identify the key question
- Develop the issue tree
- Formulate hypotheses

Organize

- Develop a high-level process map
- Create a content map to test hypotheses
- Design the story line

Collect

- Design “ghost charts” to exhibit necessary data
- Conduct meaningful interviews
- Gather relevant secondary data

Understand

- Identify the “so what(s)”
- Think through the implications for all constituents
- Document the key insight on all charts

Synthesize

- Obtain input and ensure buy-in from client
- Offer specific recommendations for improvement
- Tell a good story

The FOCUS Analytical Process Map

124

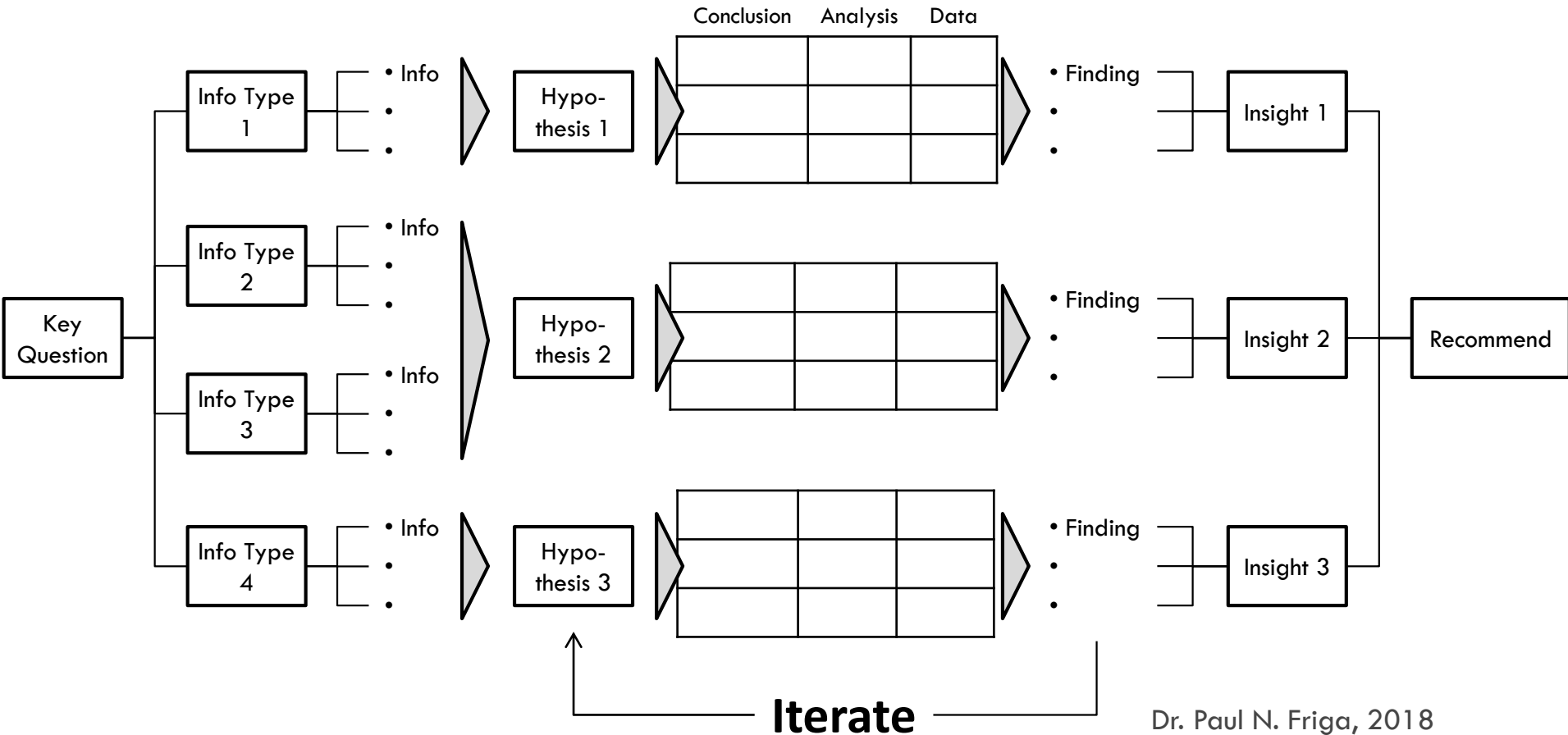
Frame

Organize

Collect

Understand

Synthesize



TALK: Key Questions

125

- ❑ Who is on the team?
- ❑ When should we meet?
- ❑ How should we communicate?

TALK: Rules

126

- ❑ Communicate constantly
- ❑ Listen attentively
- ❑ Separate issues from people

TALK: Tactics

127

- ❑ Tactic 1: Document and share all contact information for the entire internal and external team, identify the key communication point players (who will contact whom), and the overall scope of the project.
- ❑ Tactic 2: Agree upon a meeting schedule that matches the nature of the project, but try to meet in person as a full team at least weekly (include the client in some meetings) or daily for one- to two-week projects.
- ❑ Tactic 3: All meetings should have a clear agenda (or issues to discuss), produce specific deliverables, and result in new action plans.
- ❑ Tactic 4: Use email frequently to keep the team updated on progress and use a brief and consistent format – remember that over-communication is better than under-communication.
- ❑ Tactic 5: When evaluating pros/cons of issues and ideas, remember to separate the issue/idea from the person (once presented, everyone evaluates the merit without any personal attachment).

TALK: Team Charter

128

TEAM NAME :
(Be Creative)

CLIENT NAME :
(If Applicable)

PROJECT DESCRIPTION :
(One Sentence)

POTENTIAL ISSUES :
(By End of Project)

SUCCESS GOALS :
(By End of Project)

GUIDING PRINCIPLES :
(No More Than 3)

CONTACT INFORMATION (Include Client Team Members)

Name	Role	Email	Phone (W)	Phone (M)
Team Member 1				
Team Member 2				
Team Member 3				
Team Member 4				
Team Member 5				

T E A M F O C U S

TALK: Letter of Agreement

129

TEAM X - Letter of Agreement

SALUTATION

INTRODUCTION

- Opportunities for Improvement
- Fit with Capabilities of Consulting Firm
- Contents of Letter

BACKGROUND

- Understanding of the Situation
- Potential Arenas to Explore
- Qualifications of Consultant

APPRAISAL

- Scope (In and Out of Scope)
- Work Streams
- Sources of Data
- Timeline
- Special Deliverables

ADMINISTRATION

- Cost and Payment Schedule
- Confidentiality
- Cancellation

NEXT STEPS

SIGNATURES:

<u>Consultant</u>	<u>Client</u>
Name _____ Date _____ Position _____	Name _____ Date _____ Position _____

EVALUATE: Listening Skill Development

130

1. **Release your agenda** – suspend your communication goals and don't interrupt
2. **Attend to the speaker** – orient your body to the speaker, maintain eye contact, watch for non-verbals, reflect the speakers physical attitude
3. **Amplify the speaker's ideas** – encourage (verbal and nonverbal), clarify, build
4. **Reflect the speaker's ideas** – summarize, paraphrase, contrast and note feelings

EVALUATE: Key Questions

131

- ❑ What are the individual working styles of team members?
- ❑ How shall we get along?
- ❑ Who is responsible for what?
- ❑ How is everyone doing?

EVALUATE: Rules

132

- ❑ Openly discuss group dynamics
- ❑ Set expectations and monitor results
- ❑ Develop and reevaluate a personal plan

EVALUATE: Tactics

133

- ❑ Tactic 6: Identify the personality types of the team members (including the client) – consider using Myers Briggs.
- ❑ Tactic 7: Hold a brief, relaxed session at the outset of the project to discuss personalities and working preferences. Keep the dialogue open over the course of the project.
- ❑ Tactic 8: Be aware of your default tendencies, but incorporate flexibility to deal with different personality types as needed.
- ❑ Tactic 9: Each team member should identify and document his one or two primary objectives in the project.
- ❑ Tactic 10: The team should openly discuss and reconcile individuals' personal objectives.
- ❑ Tactic 11: Establish procedures for handling disagreements and giving/receiving feedback.
- ❑ Tactic 12: Hold regular feedback sessions to allow time for improvement.

EVALUATE: Individual Development Plan

134

Name :

Project :

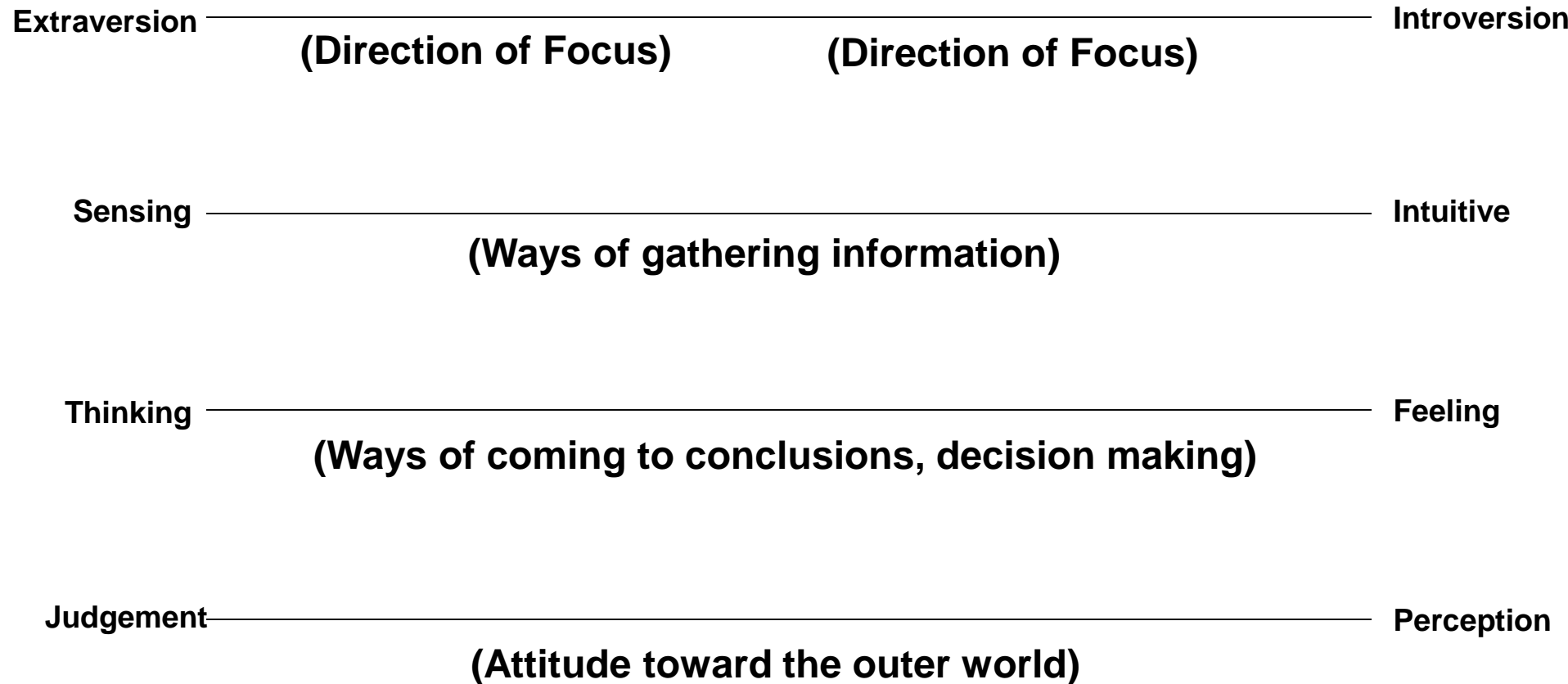
Incoming Strengths &
Weaknesses :

Special Development
Objectives :

Results :

EVALUATE: Myers-Briggs Profile Scales

135



Source: Fleisher & Bensoussan, 2002

EVALUATE: Myers-Briggs Profile Scales

136

EXTRAVERSION (E)	Is comfortable with people and things; expresses emotions easily, and is friendly, talkative, and easy to know.
INTROVERSION (I)	Is comfortable with ideas and thoughts; does not express emotions easily and is reserved, quiet, and hard to know.
SENSING (S)	Uses the five senses to become aware of things, likes precise and routine work, is not comfortable with solving new problems, and takes pleasure in the current moment.
INTUITIVE (N)	Uses unconscious ideas or associations to become aware of things and likes solving problems, planning for the future, and forging ahead in new areas.
THINKING (T)	Uses logic, makes decisions based on facts, likes to analyze and organize, doesn't like to confront or express emotions, and is skeptical when approaching problems.
FEELING (F)	Likes relationships to work well, enjoys people, is sensitive to others, makes decisions based on values and impact upon people, and is trusting when approaching problems.
JUDGING (J)	Is orderly and organized, likes to finish tasks, likes to make quick decisions, and likes to make plans.
PERCEIVING (P)	Is curious, adapts well to change, likes to start many projects but may have trouble finishing them, and may have difficulty making decisions.

Source: Fleisher & Bensoussan, 2002

EVALUATE: Your Team Members

137

Participant		E/I	S/N	T/F	J/P
	Your Guess				
	Actual				
	Your Guess				
	Actual				
	Your Guess				
	Actual				
	Your Guess				
	Actual				

ASSIST: Key Questions

138

- ❑ What are the key tasks that need to be performed?
- ❑ Who is responsible for the completion of specific tasks?
- ❑ What can others do to help in terms of team task completion?

ASSIST: Rules

139

- ❑ Leverage expertise
- ❑ Keep teammates accountable
- ❑ Provide timely feedback

ASSIST: Tactics

140

- ❑ Tactic 13: First spend at least 1 hour in a general brainstorming session to openly discuss the problem and key issues to explore (see the “Organize” section later in this model).
- ❑ Tactic 14: Be sure to balance out the load equitably based upon the estimated number of hours to complete the tasks - revisit the assignments after work has begun to ensure continued equitable work distribution.
- ❑ Tactic 15: Identify and leverage the specific skill set of each team member (and the firm/client, if applicable).
- ❑ Tactic 16: Include at least one or two key status report meetings with the team (and the client) to review findings, data sources, and work streams.
- ❑ Tactic 17: On a daily basis, provide an update of individual and team progress to assess opportunities to adjust workload and assignments.

MOTIVATE: Key Questions

141

- ❑ What are the unique motivators for each team member?
- ❑ How will we reward ourselves once the assigned tasks have been effectively completed?

MOTIVATE: Rules

142

- ❑ Identify unique motivators
- ❑ Positively reinforce teammates
- ❑ Celebrate achievements

MOTIVATE: Tactics

143

- ❑ Tactic 18: Identify and discuss one primary and one secondary motivator for each person (the source of energy for each team member).
- ❑ Tactic 19: Give praise for and celebrate each major team milestone; share compliments with team members on a daily basis.
- ❑ Tactic 20: Have a social gathering after the project is complete.

MOTIVATE: Motivation Chart

144

Motivators

Source

- ___ e.g. Financial
- ___ e.g. Recognition
- ___ e.g. Development
- ___ e.g. Contribution

Person

- _____
- _____
- _____

FRAME: Key Questions

145

- ❑ What are the key questions that we are trying to answer?
- ❑ What are the parameters of our analysis?
- ❑ What is our hypothesis?

FRAME: Rules

146

- ❑ Identify the key question
- ❑ Develop the issue tree (MECE)
- ❑ Formulate hypotheses

FRAME: Tactics

147

- ❑ Tactic 21: Identify the key question to drive the project, which should be based upon specific discussions with the client.
- ❑ Tactic 22: Document this question, the scope, and the high-level plan of attack in an engagement letter.
- ❑ Tactic 23: Specifically identify the temporal (years under study), geographical, and functional areas for the project.
- ❑ Tactic 24: Avoid common “Scope Creep,” when additional work is added that is beyond the original parameters or is only tangentially relevant. Refer back to the base problem, parameters, and engagement letter to mitigate “Scope Creep.”
- ❑ Tactic 25: Develop a general hypothesis that is a potential answer to the problem at hand.
- ❑ Tactic 26: Develop supporting hypotheses that must be true to support the general hypothesis (for testing).
- ❑ Tactic 27: Revisit and revise the hypotheses during the project as data are gathered (prove or disprove them).

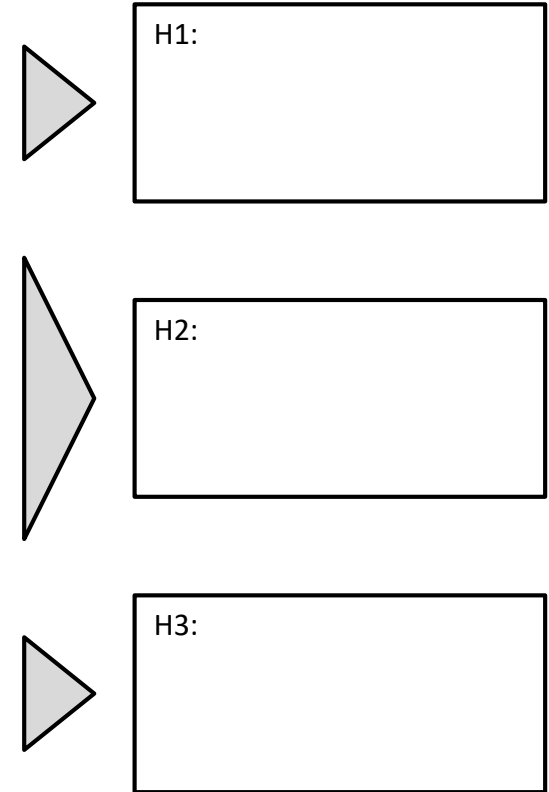
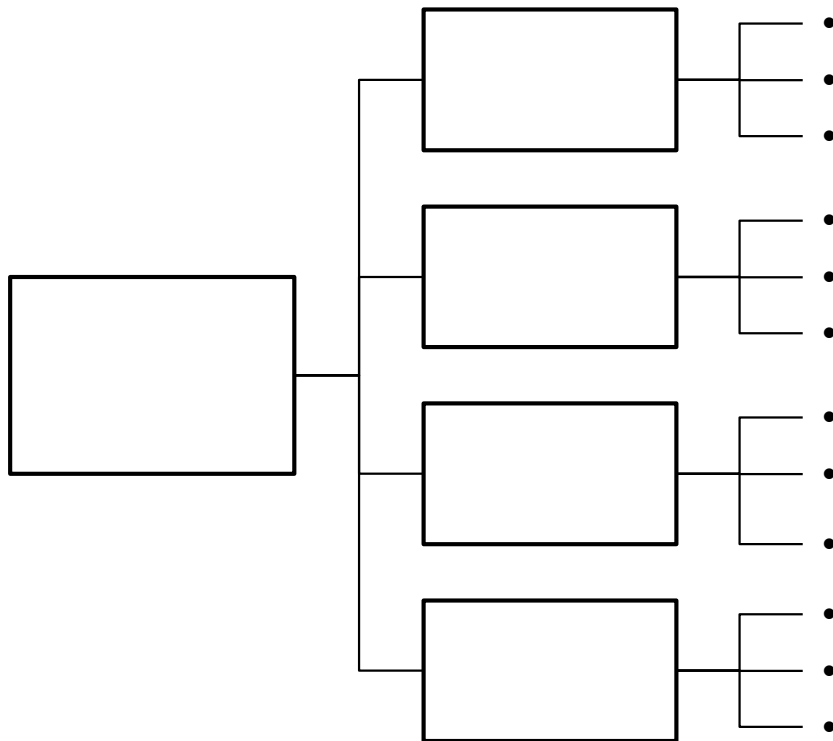
FRAME: Content Map

148

1. Identify key question

2. Develop information tree

3. Formulate hypotheses



T E A M F O C U S

ORGANIZE: Key Questions

149

- ❑ What needs to be true for the hypotheses to be correct/incorrect?
- ❑ What should we not analyze for now?

ORGANIZE: Rules

150

- ❑ Develop a high-level process map
- ❑ Create a content map to test hypotheses
- ❑ Design the story line

ORGANIZE: Tactics

151

- ❑ Tactic 28: Maintain objectivity as the hypotheses are tested during the project.
- ❑ Tactic 29: Use frameworks as a starting point to identify issues for analysis.
- ❑ Tactic 30: Explicitly list the types of analysis and related data that the team will and will not pursue (at least for that stage in the project life-cycle).
- ❑ Tactic 31: Revisit this list if the hypotheses are modified.

ORGANIZE: Process Map

152

Phase	1	2	3
Primary Objective	<ul style="list-style-type: none"> •Frame, Organize, and Collect •Develop a Situational Understanding 	<ul style="list-style-type: none"> •Understand •Create a Preliminary Storyline 	<ul style="list-style-type: none"> •Synthesize •Finalize Report
Deliverables	<ul style="list-style-type: none"> •Work Plan •Preliminary Fact Pack •Interview Summaries •Incorporation example overview (Avon) 	<ul style="list-style-type: none"> •Ghost Deck •Interview Summaries •Revised Fact Pack 	<ul style="list-style-type: none"> •Executive Summary •Final Report •Appendix
Completion Date			

ORGANIZE: Content Map

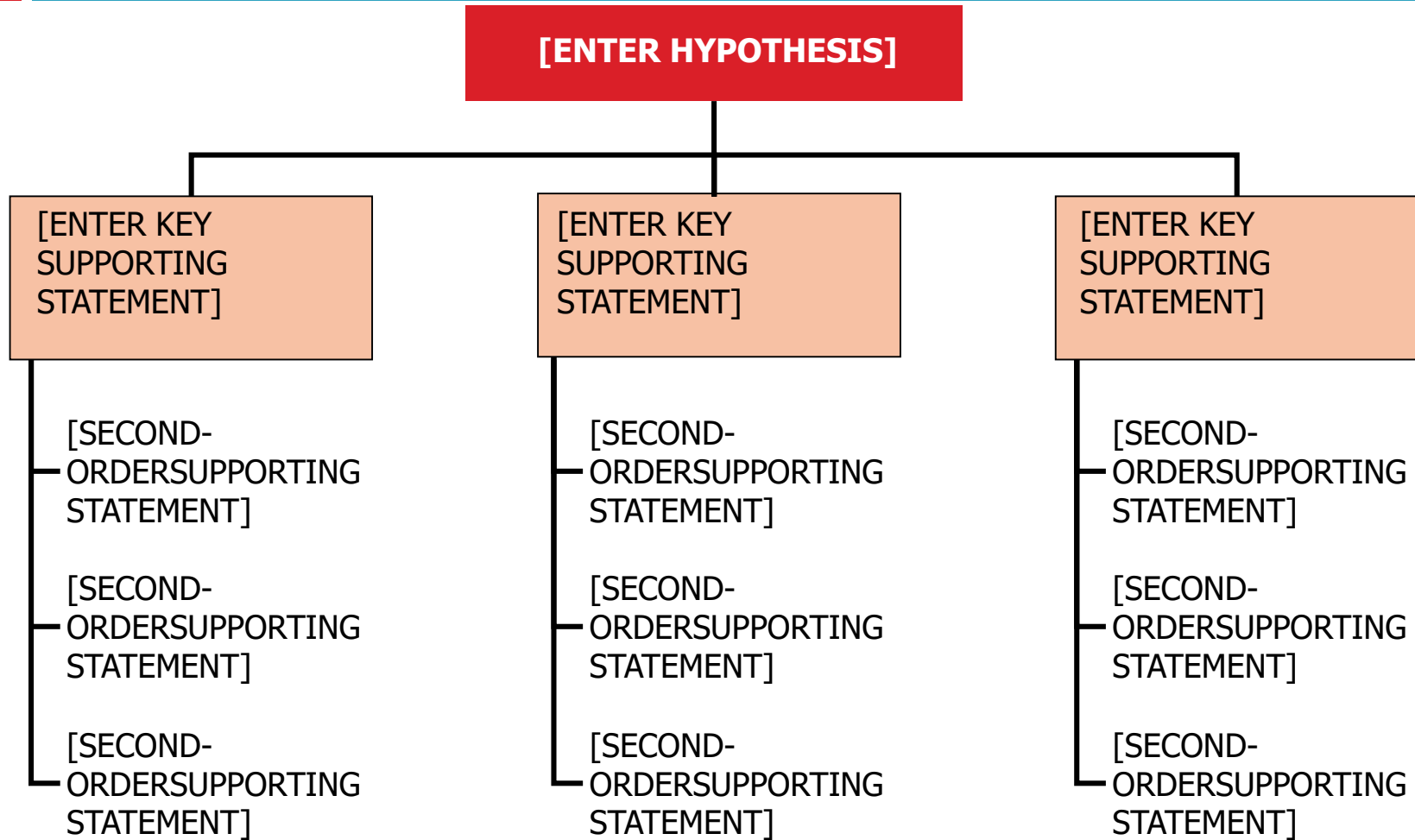
153

Governing thought

Key line	Support	Analysis	Data source	Resp.	Date

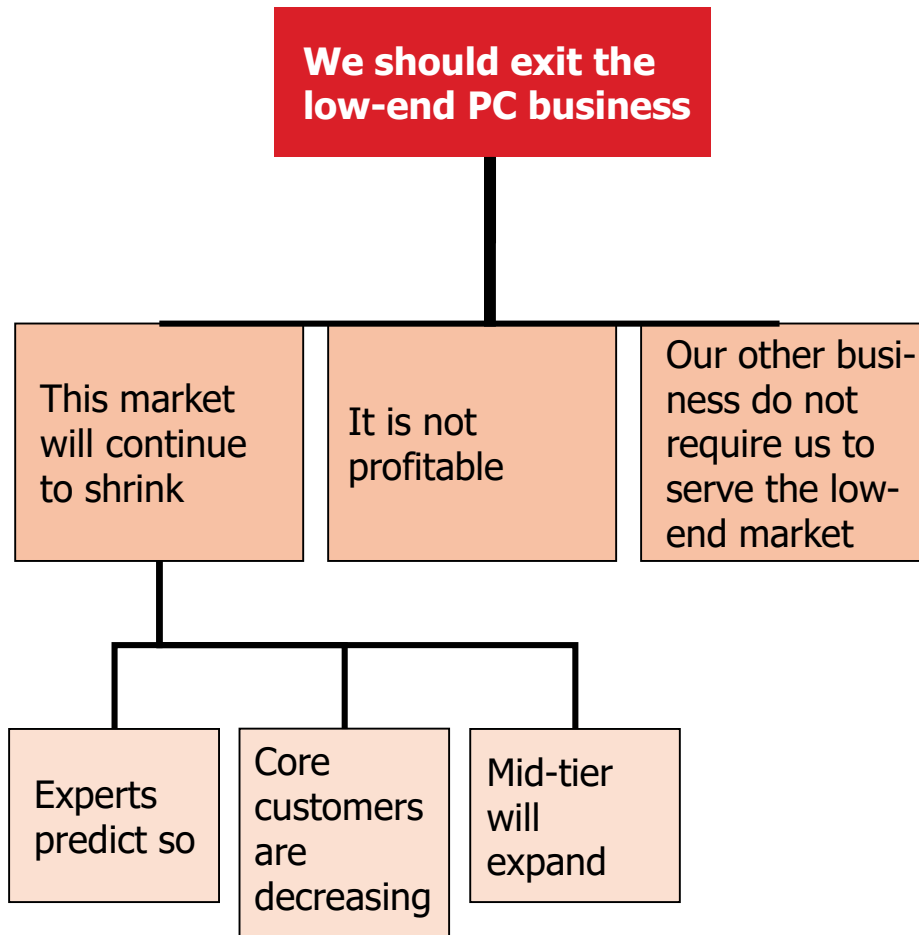
ORGANIZE: Hypothesis Structure

154



ORGANIZE: Hypothesis Testing

155



Work plan

Statement: we should exit from the low-end PC business

Key line	Support	Ana-lysis	Data source	Resp.	Date
This market will continue to shrink	Experts predict so				
	Core customers are decreasing				
	mid-tier will expand				

ORGANIZE: Storyline (Sample)

156

Executive Overview	Main Recommendations / Governing Thoughts	Topics to Cover (Key Supporting Points)	Main Point 1
Supporting Slide(s)	Main Point 2	Supporting Slide(s)	Main Point 3
Supporting Slide(s)	Main Point 4	Supporting Slide(s)	Conclusion

COLLECT: Key Questions

157

- ❑ What data do we need (based upon the questions to answer)?
- ❑ What primary and secondary sources should we utilize?

COLLECT: Rules

158

- ❑ Design “ghost charts” to exhibit necessary data
- ❑ Conduct meaningful interviews
- ❑ Gather relevant secondary data

COLLECT: Tactics

159

- ❑ Tactic 32: Design ghost charts to exhibit the necessary data relevant to the overall story.
- ❑ Tactic 33: Always cite the source of data on each chart created.
- ❑ Tactic 34: Use primary research and especially interview the client personnel – document interview guides ahead of time and share the insights with the team in written form within 24 hours.

COLLECT: Interview Guide Tool

160

- Interviewee:
- Date:
- Interviewer:
- Topic:

Background of Interviewee

Introduction

Key questions to ask

1. **How does the annexation process in IN work?**
2. **The Avon incorporation example**
3. **Lessons learned and tips for White River Township**

COLLECT: Interview Summary Tool

161

Key insights:

1. Avon is a relevant example
2. There are several challenges that can be overcome
3. Annexation is a slow and complex process

1. Avon is relevant

- It's recent – 1995
- Rationale / motivation for incorporation was better services and more control
 - Farmers were selling their land to the highest bidder, and the highest bidder was often an irresponsible developer – the development often wasn't what the town had planned or would like to see. If the town had incorporated earlier, they could have prevented much of the bad development with zoning guidelines.
 - They had crime spilling over from Plainfield.
 - Wanted to annex 1100 acres in Hendricks County
- Citizen and govt. effort led to actual incorporation of a new town
 - They didn't annex enough land, though, and they are still dealing with bad development on the outskirts of town. When Avon tries to annex more land, they are annexing poorly developed land, not free land that can be used for business development.

2. There are several challenges that can be overcome

- Lots of analysis necessary
 - He likened annexation to a business transaction. The problem seems to be that an offer is made, but not accepted by some because it is not explained. The offer needs to be clear, translated into dollars and cents. People respond emotionally to tax issues. Municipalities need to approach them with a benefit-cost analysis.
- Significant communication effort
 - Those annexations that involved good communication went well and those that involved poor or non-existent communication had problems. People should have more power.
 - Notification and communication with citizens and townships are important.
- Funding for mailings and other process requirements

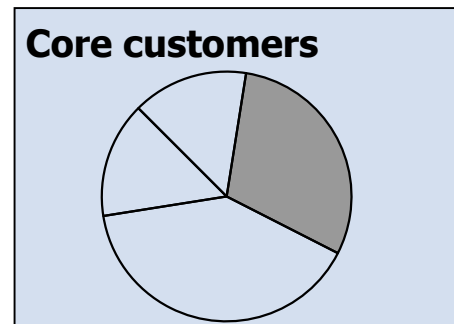
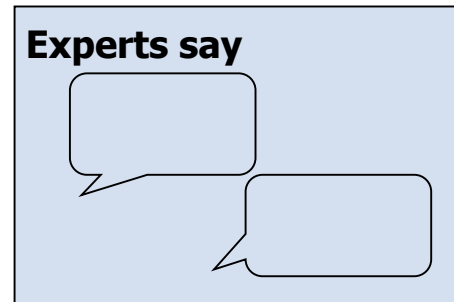
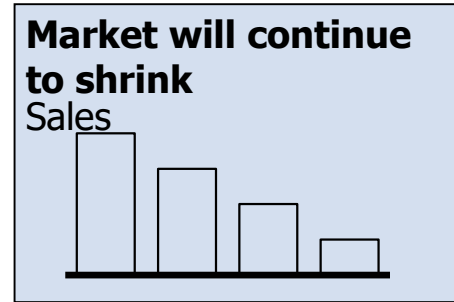
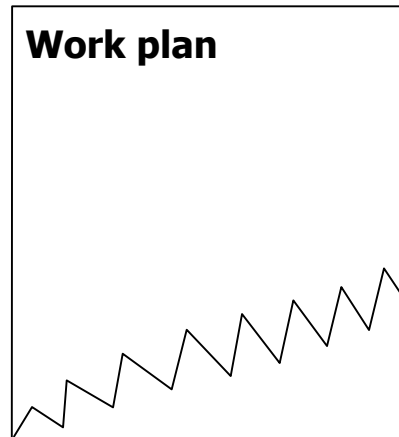
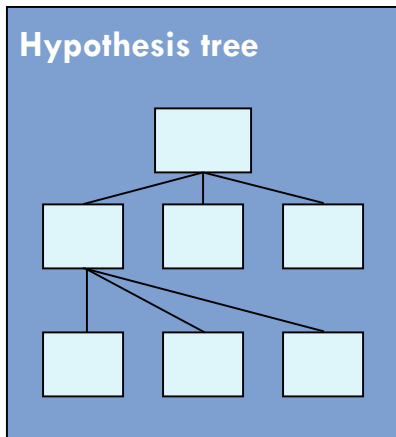
3. Annexation is a slow and complex process

- It took a long time
 - The fight lasted more than a year, during which Westfield launched an aggressive campaign to win over landowners.
- Legal requirements
 - De-annexation is an option if cities fail to provide services- within a three-year time frame.
- It would be even longer and more complex for the size of the WRT annexation Approximately 10 – 30 times as large

COLLECT: “Ghost Decks”

162

Ghost deck



COLLECT: Data Sources

163

Have You Tried These Sources?

Free Sources

Yahoo
 Google
 Company Websites

Electronic Databases

Lexis-Nexis
 Hoovers
 Check all Libraries
 Databases (free to
 students)
 Factiva
 Standard & Poors
 Frost & Sullivan
 Thomson One Banker
 S&P NetAdvantage

UNDERSTAND: Key Questions

164

- ❑ What are the “so whats” of our analysis?

UNDERSTAND: Rules

165

- ❑ Identify the “so what(s)”
- ❑ Think through the implications to all constituents
- ❑ Document the key insight on all charts

UNDERSTAND: Tactics

166

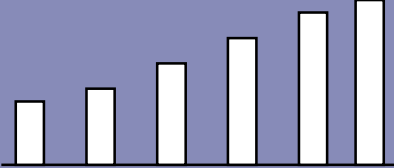
- ❑ Tactic 35: Ask “so what” to sort through the analysis to find out what is ultimately important.
- ❑ Tactic 36: Estimate the impact of the recommendations on the client’s operations.

UNDERSTAND: Chart Examples

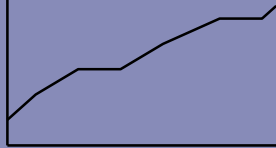
167

Trends

Vertical Bar Chart

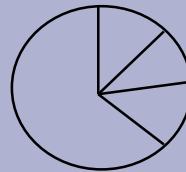


Line

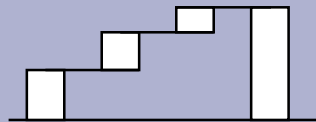


Compositions

Pie Chart

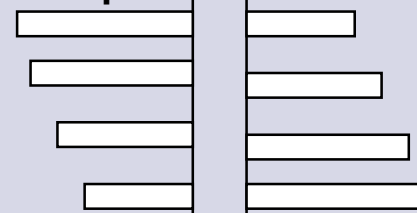


Waterfall Chart

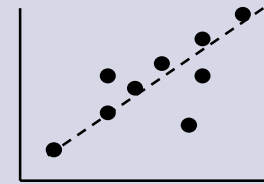


Relationships/ Comparison

Comparison Bar Chart



Scatter Plot



Horizontal Bar Chart

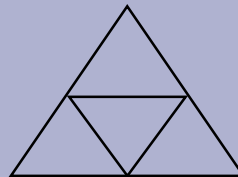


Document structuring

Text

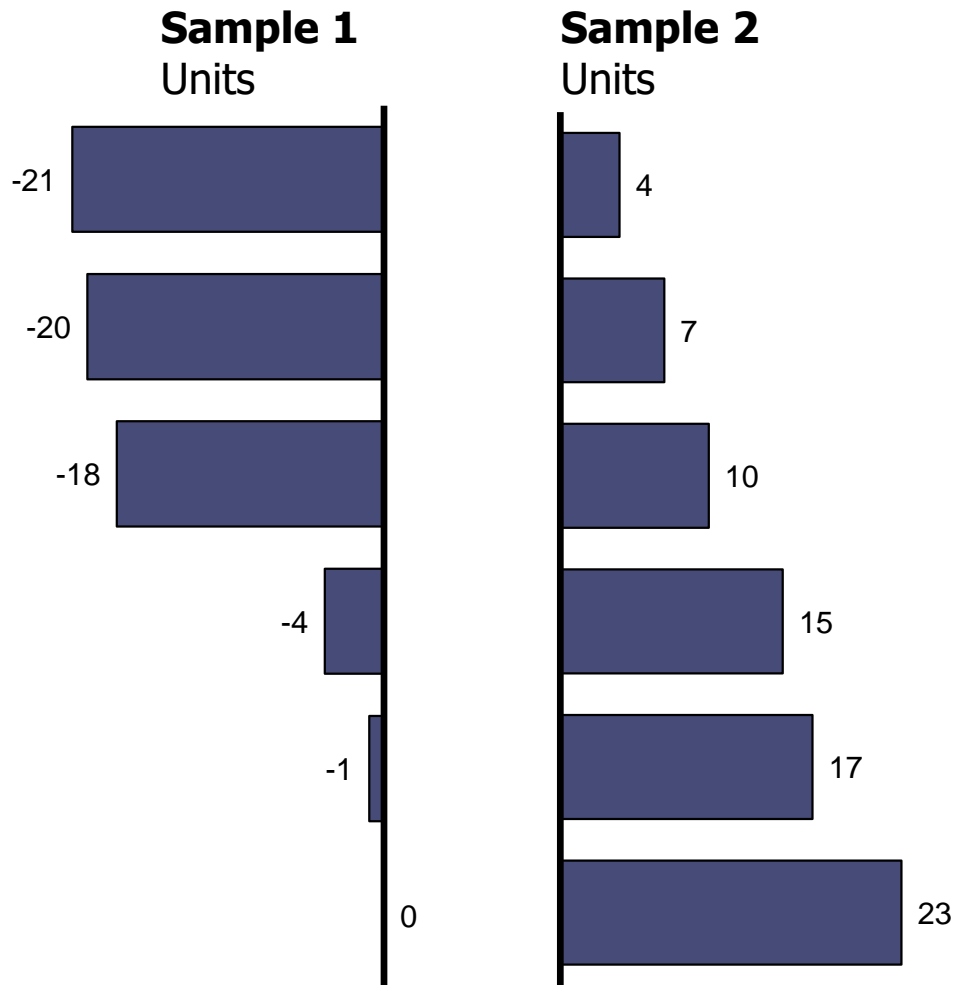
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- askfdkdsklfj lasdkfj asdklfj askdfj asldh gf
- askfdkdsklfj lasdkfj asdklfj asl

Framework



UNDERSTAND: Chart Example

168

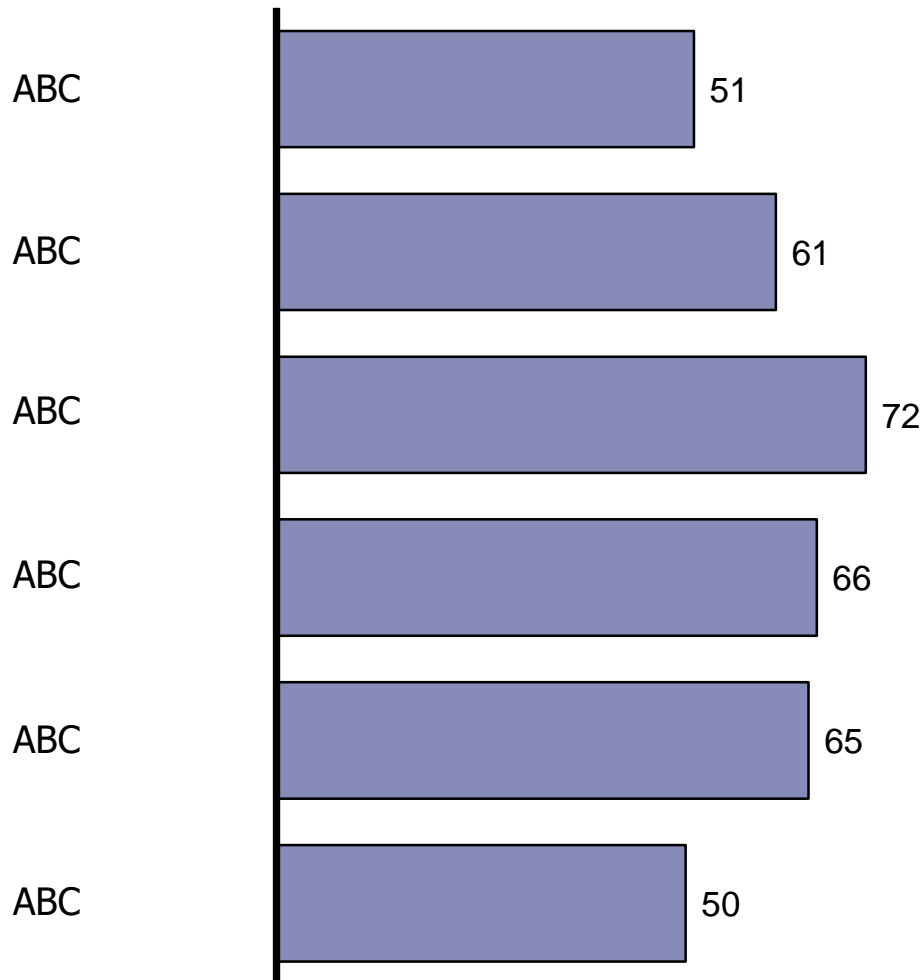


UNDERSTAND: Chart Example

169

Chart name

Units



Source: Insert Source

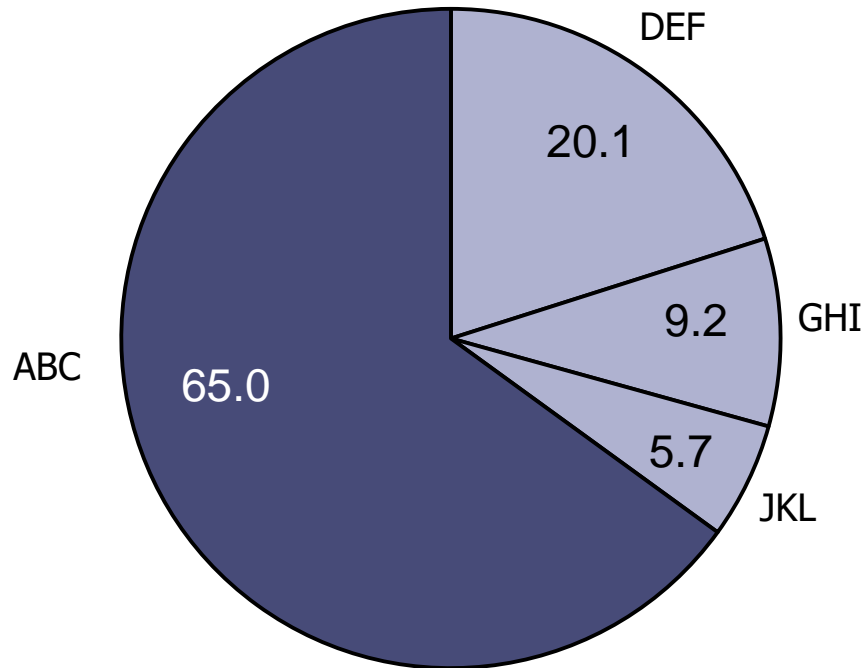
UNDERSTAND: Chart Example

170

Chart name

Units

100% = 84,586



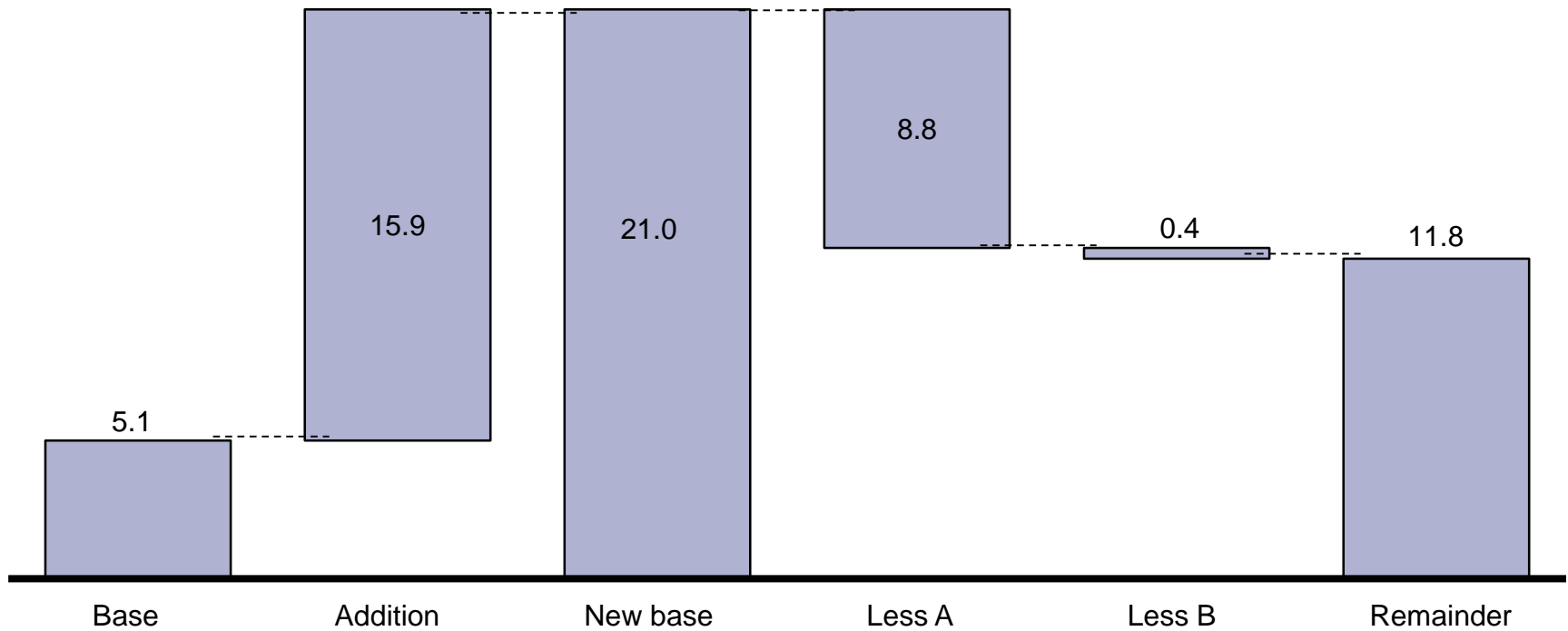
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UNDERSTAND: Chart Example

171

Chart name

Units



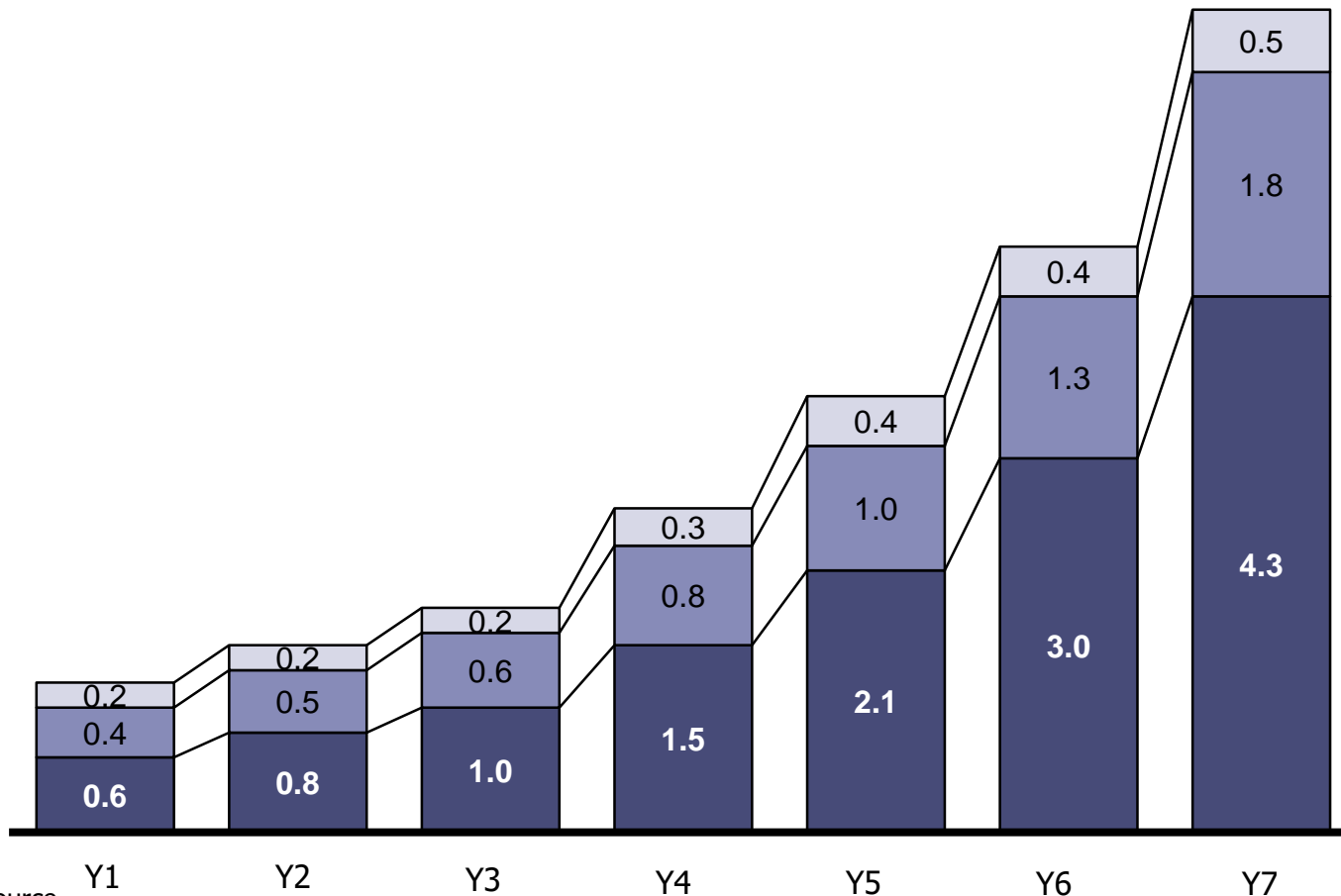
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UNDERSTAND: Chart Example

172

Chart name

Units



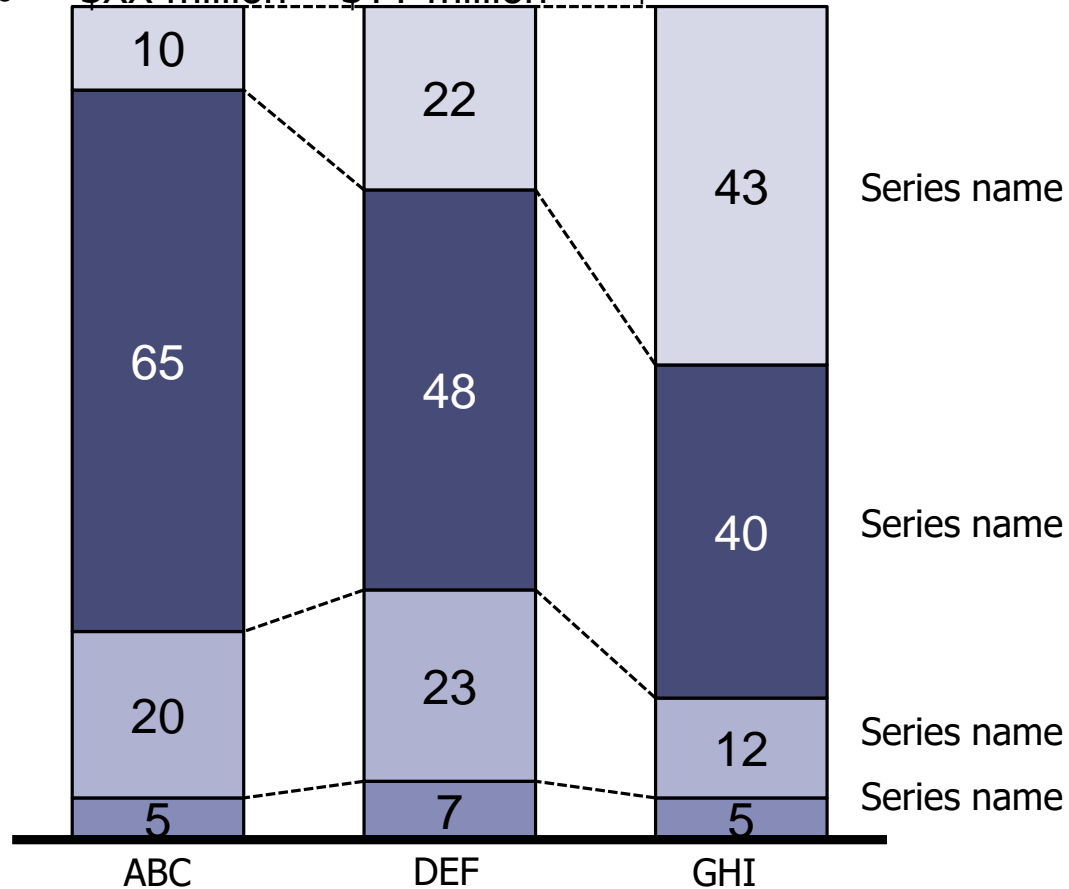
Source: Insert Source

UNDERSTAND: Chart Example

173

Chart name
Percentage

100% = \$XX million \$YY million \$ZZ million



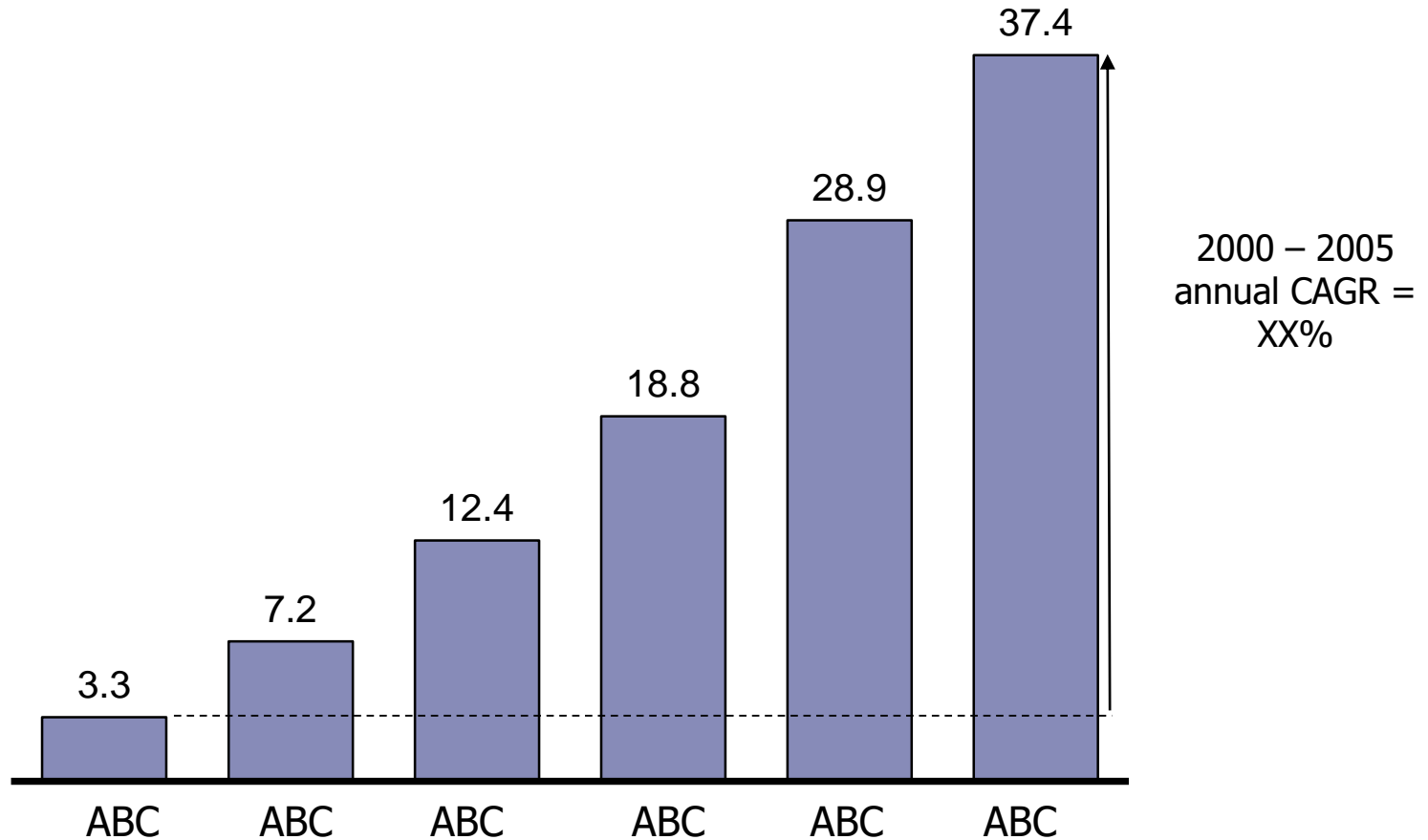
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UNDERSTAND: Chart Example

174

Chart name

Units



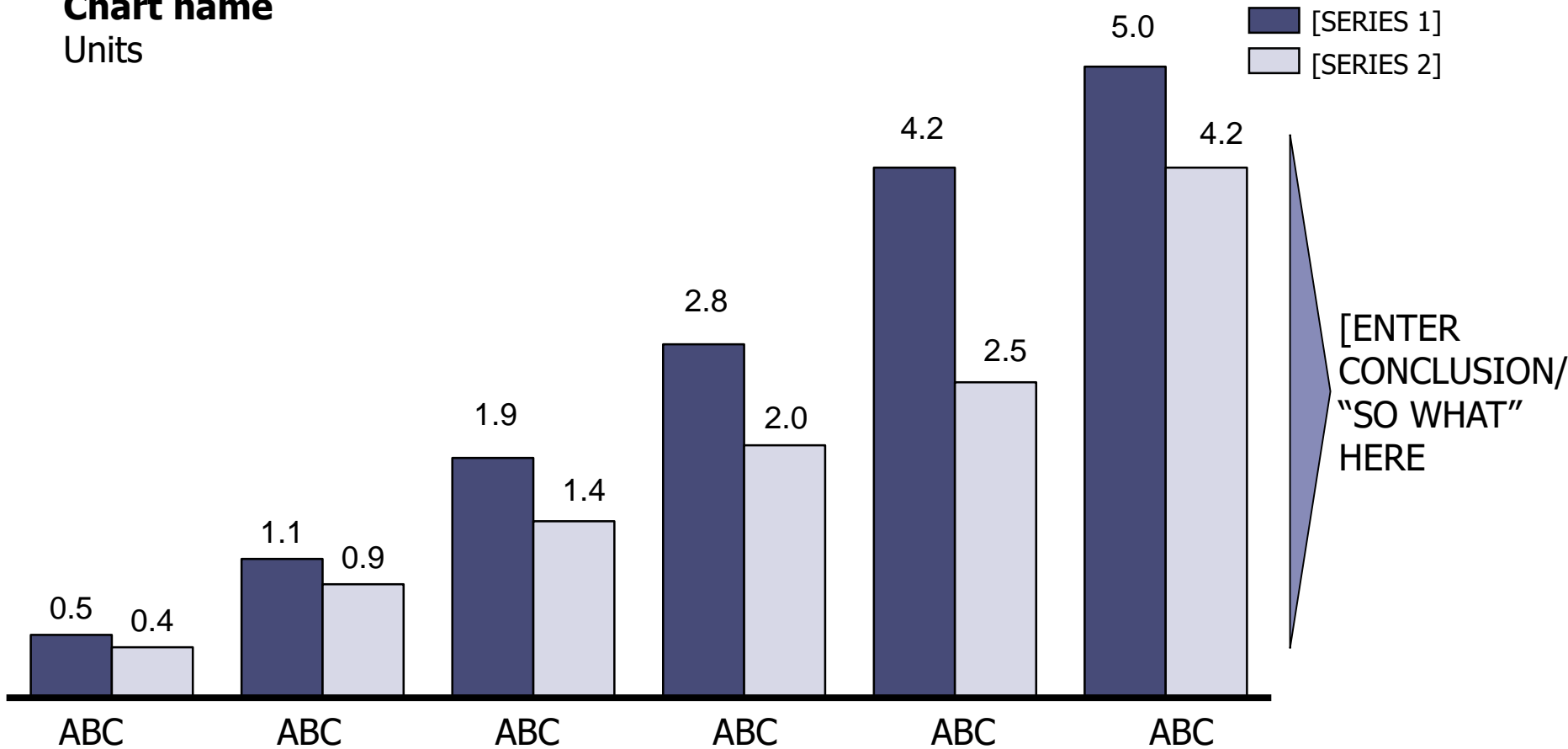
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UNDERSTAND: Chart Example

175

Chart name

Units

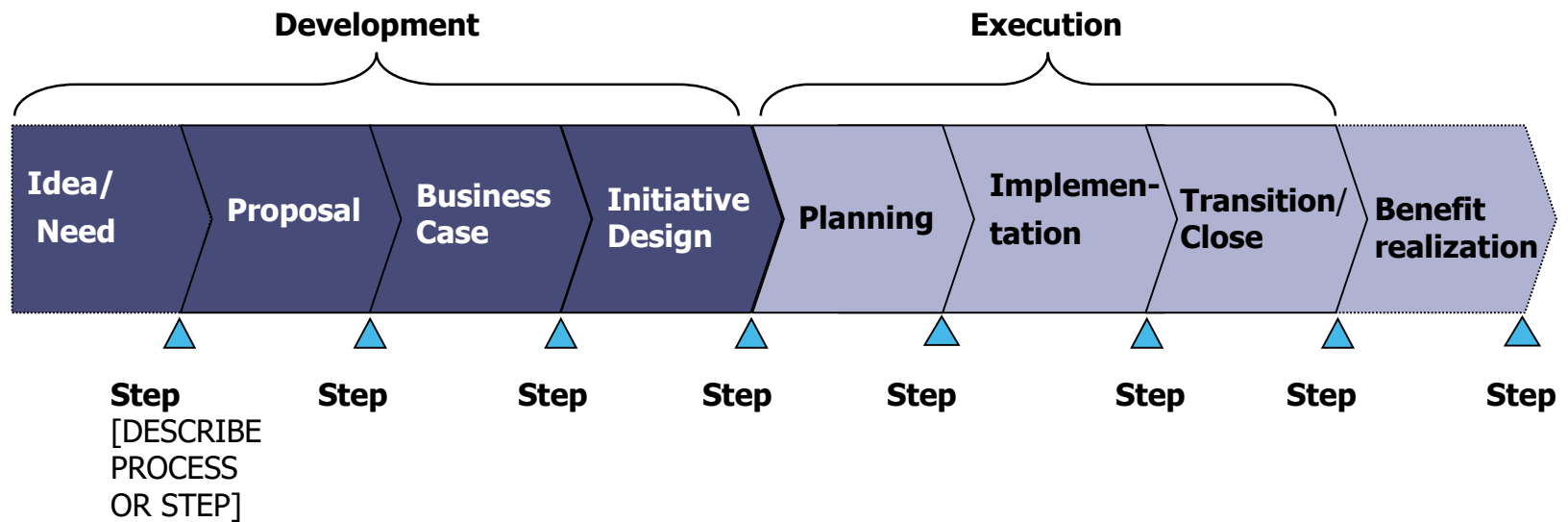


Source: Insert Source

UNDERSTAND: Chart Example

176

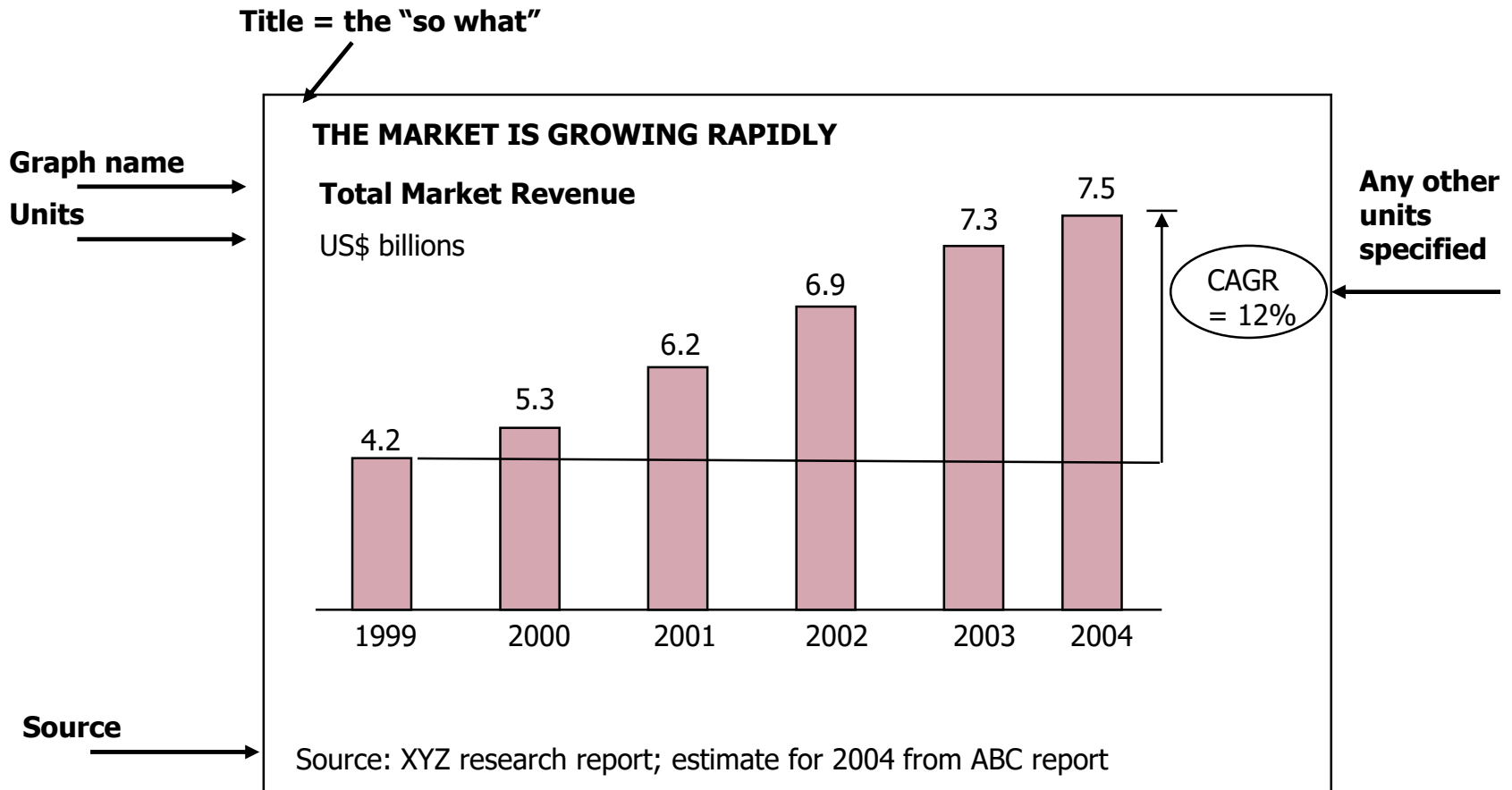
Chart name



Source: Insert Source

UNDERSTAND: Final Slide Example

177



Less is more ... only show essential information

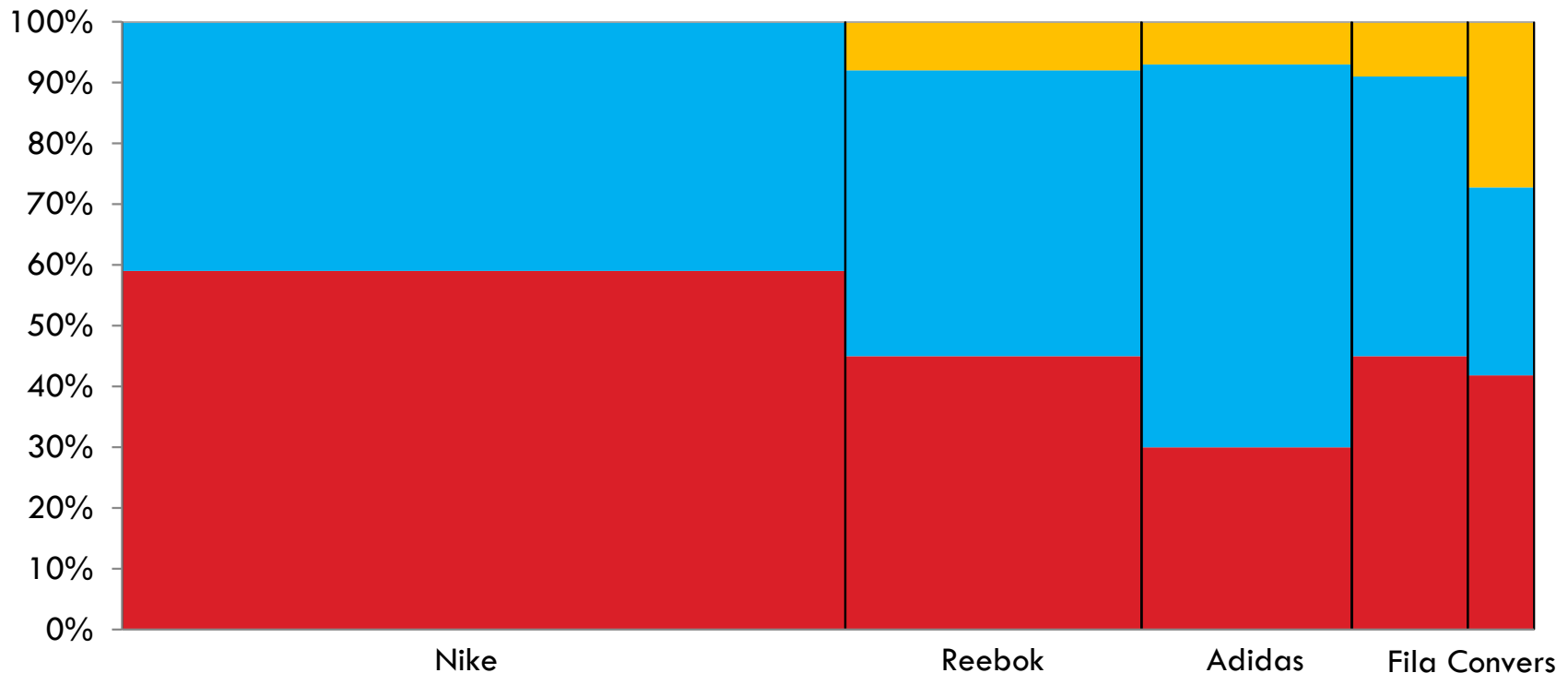
Marimekko Chart Tool

178

Marimekko Chart

Nike dominates its top four competitors with a mix of U.S. and international sales

Footwear sales in \$ million



Bar-Mekko Chart Tool

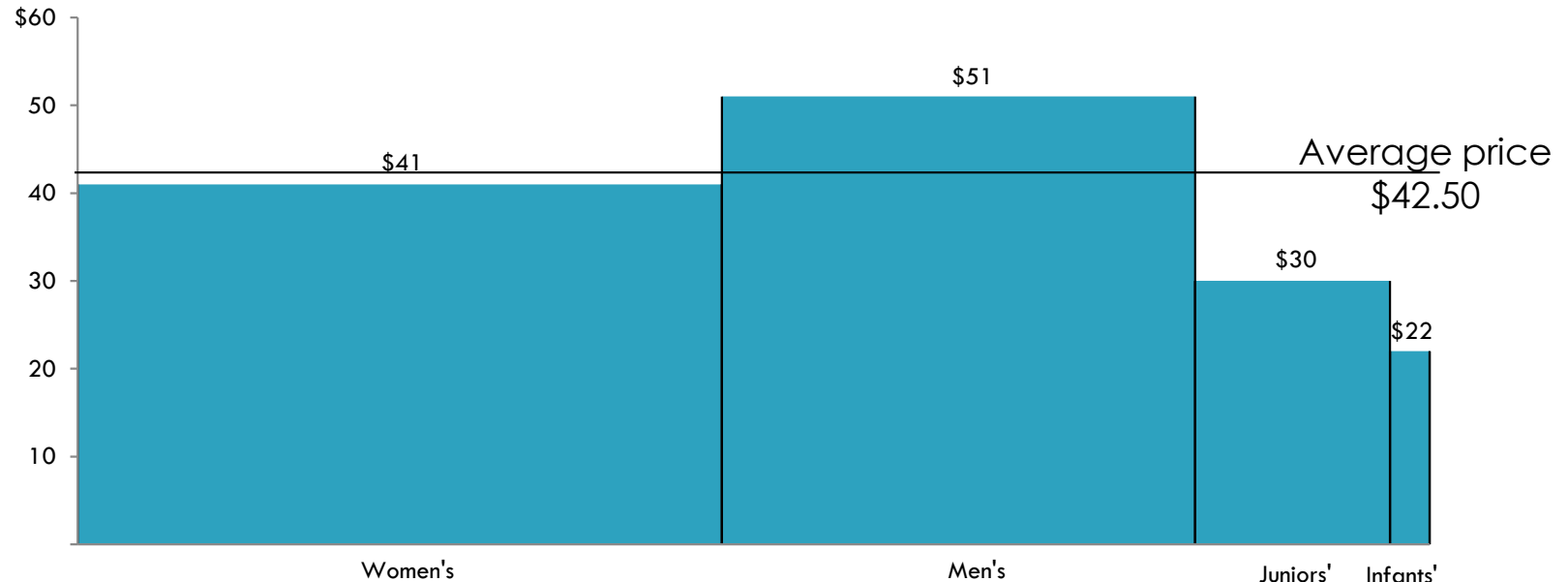
179

Bar-mekko Chart

While more women's footwear is sold, the average sales price is higher for men's footwear.

Average Price per Pair

Total= 340.8
Million Pairs Sold

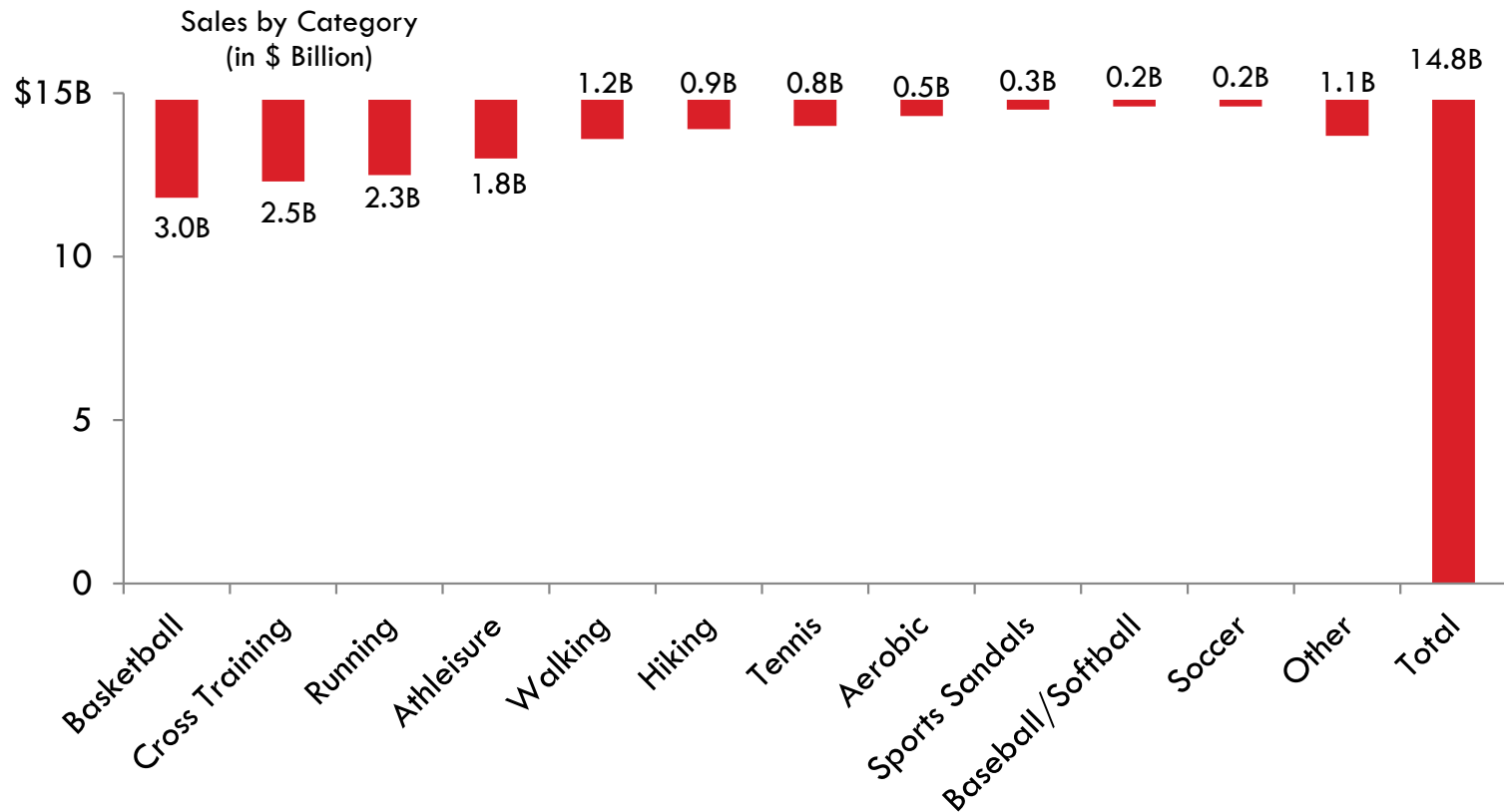


Sales (in \$ billion)	\$6.7	\$6.1	\$1.5	\$0.2
Pairs Sold (in millions)	162.6	119.0	48.7	10.5

Cascade (or Waterfall) Chart Tool

Cascade (or Waterfall)

Basketball, cross-training, and running are the three largest categories of athletic footwear

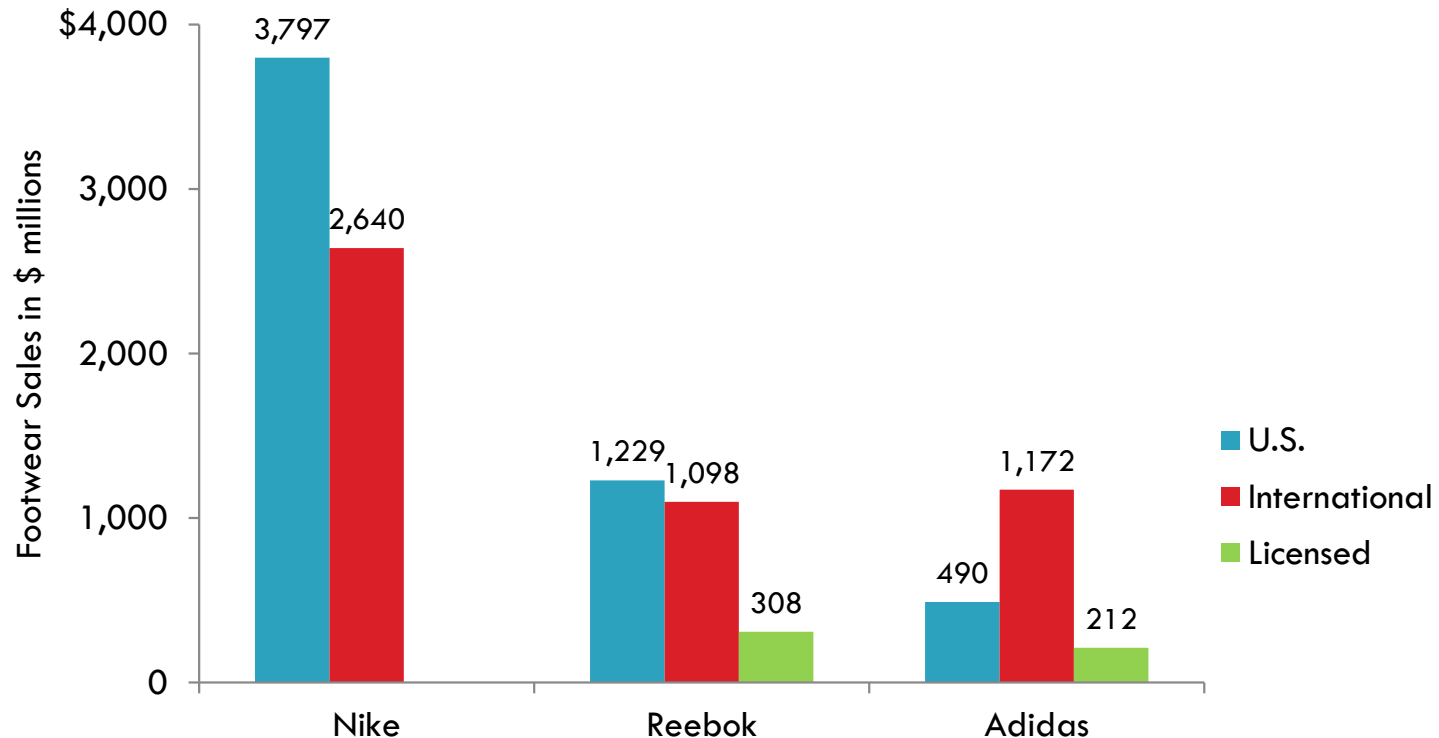


Cluster Bar Chart Tool

181

Cluster Bar Chart

Nike sales were predominately from the U.S., while Adidas sales were predominately international

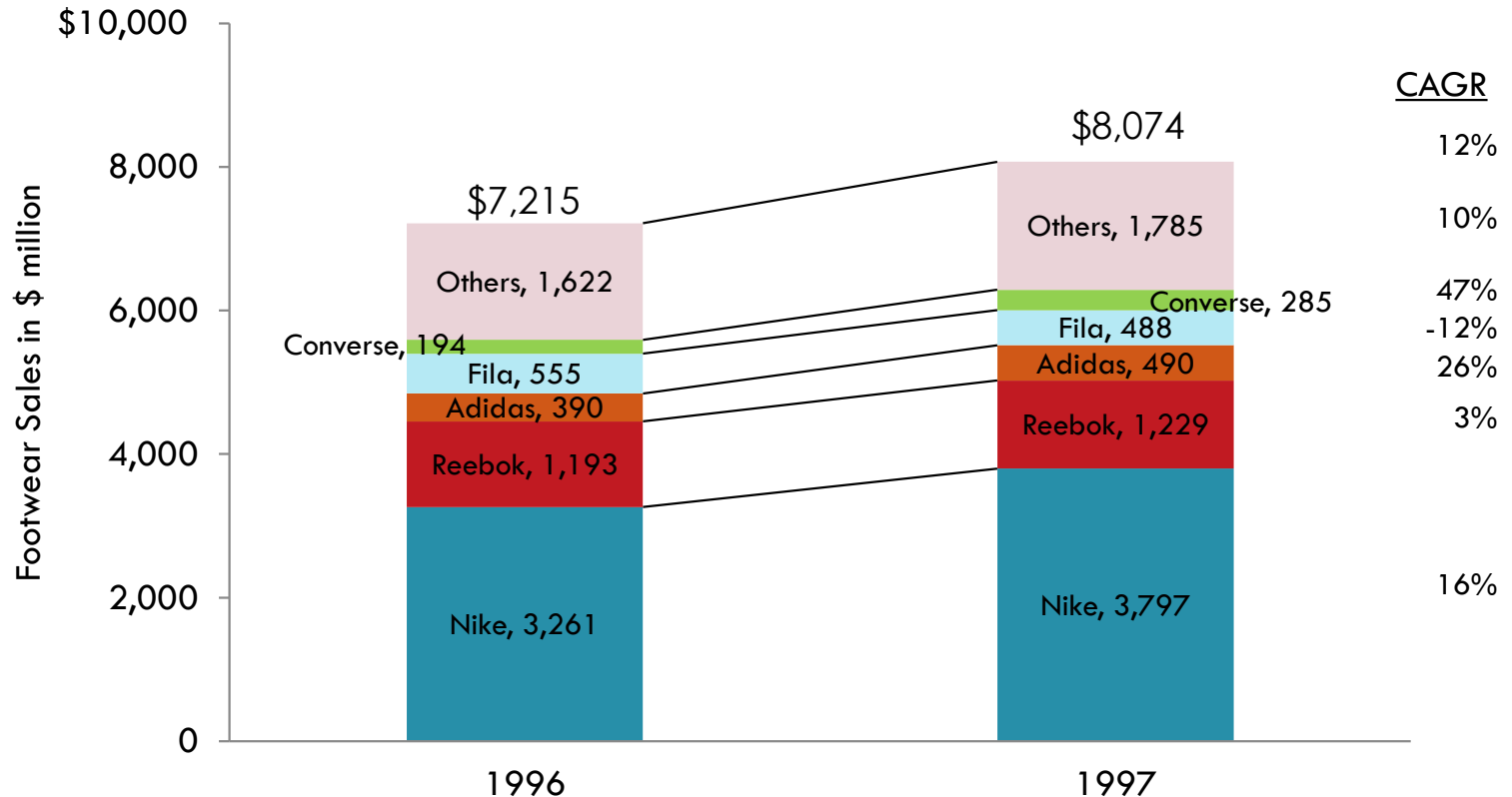


Stacked Bar Chart Tool

182

Stacked Bar Chart

Fila sales decreased significantly, while converse sales increased by almost 50%

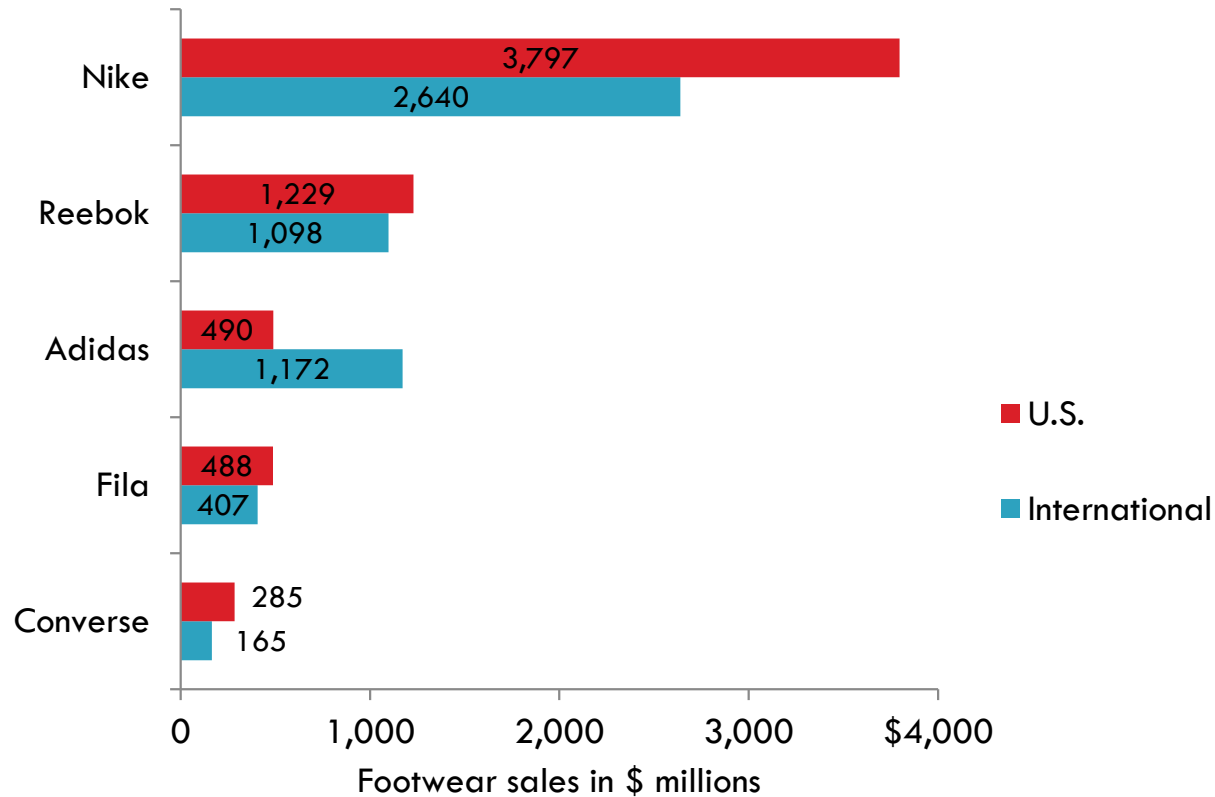


Horizontal Cluster Bar Chart Tool

183

Horizontal Cluster Bar Chart

Fila sales decreased significantly, while converse sales increased by almost 50%

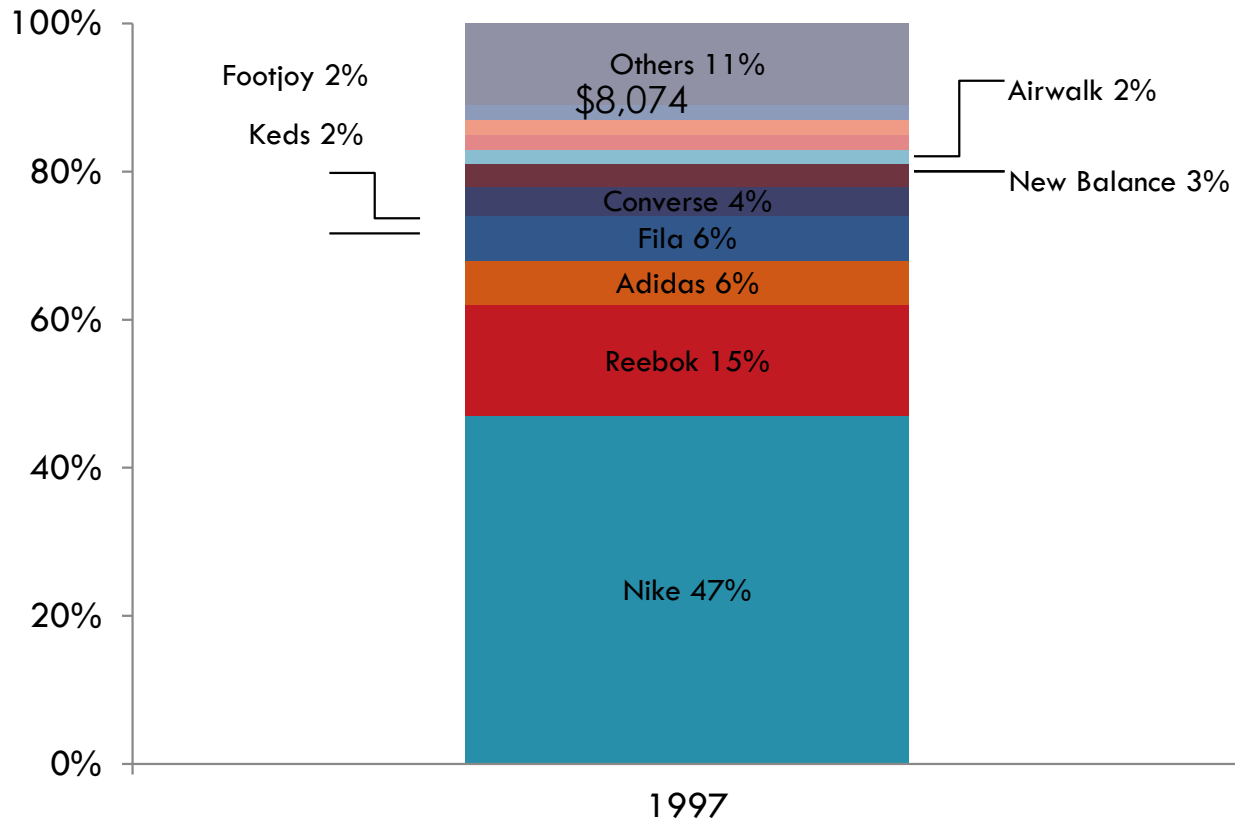


100% Stacked Bar Chart Tool

184

100% Stacked Bar Chart

Nike dominates U.S. branded athletic footwear market

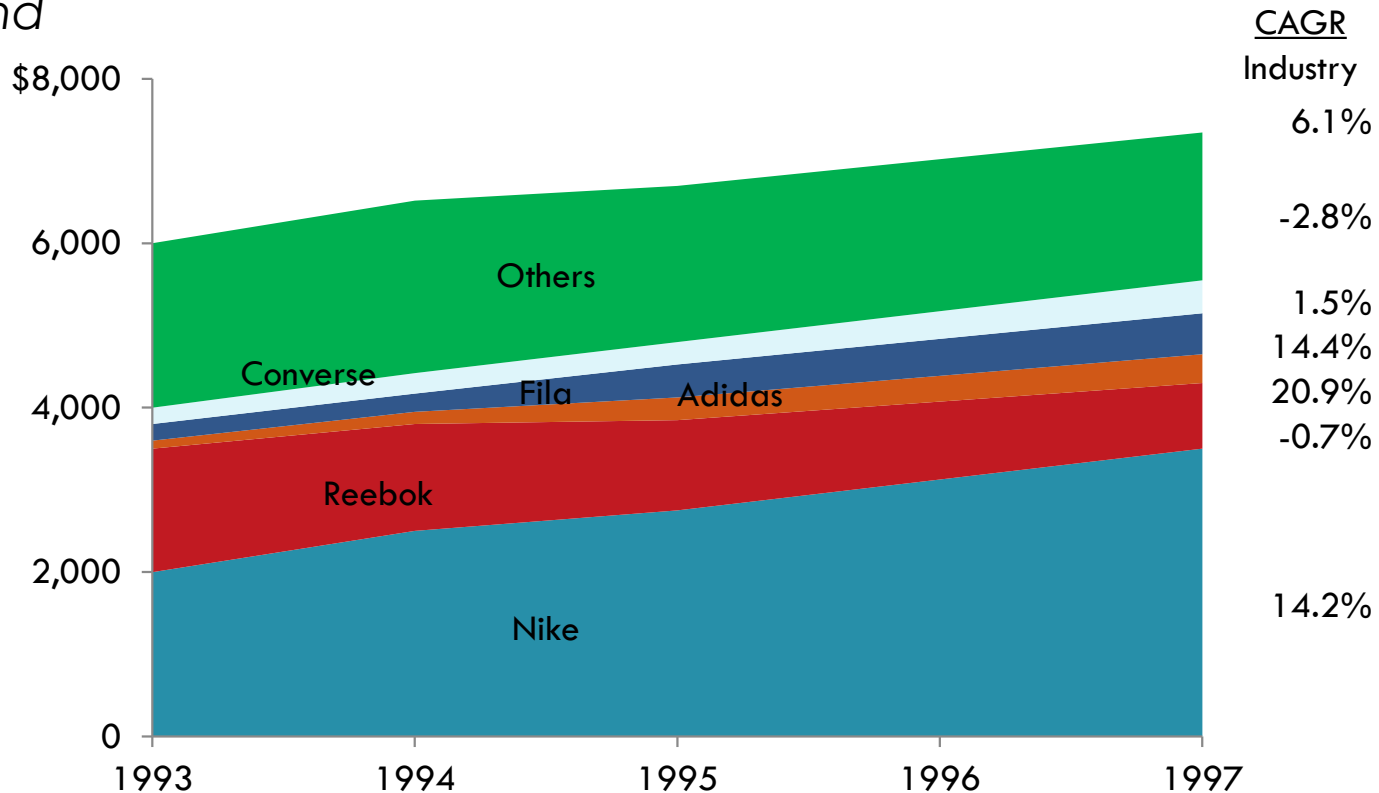


Area Chart Tool

185

Area Chart

Nike, Adidas and Fila sales grew faster than the industry average over the past 5 years, while Reebok, Converse and smaller companies fell behind

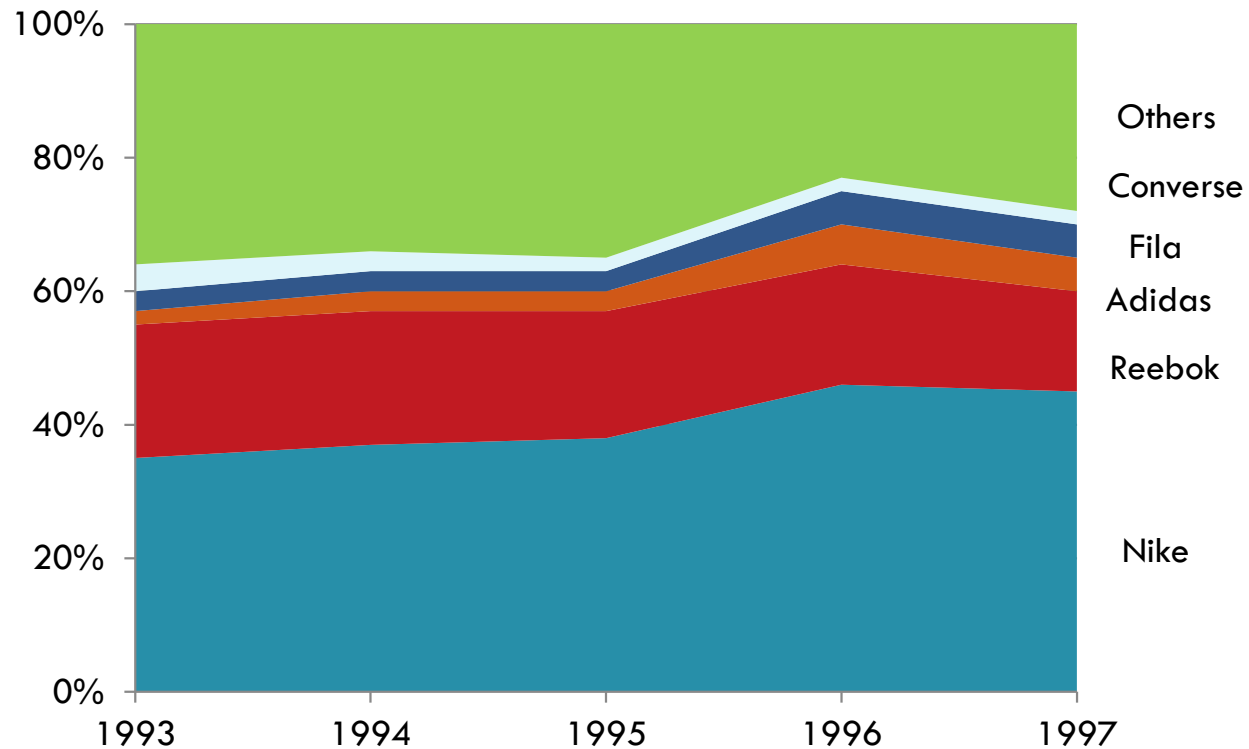


100% Area Chart Tool

186

100% Area Chart

Nike, Adidas and Fila share grew over the past 5 years, while Reebok, Converse and smaller competitors fell behind

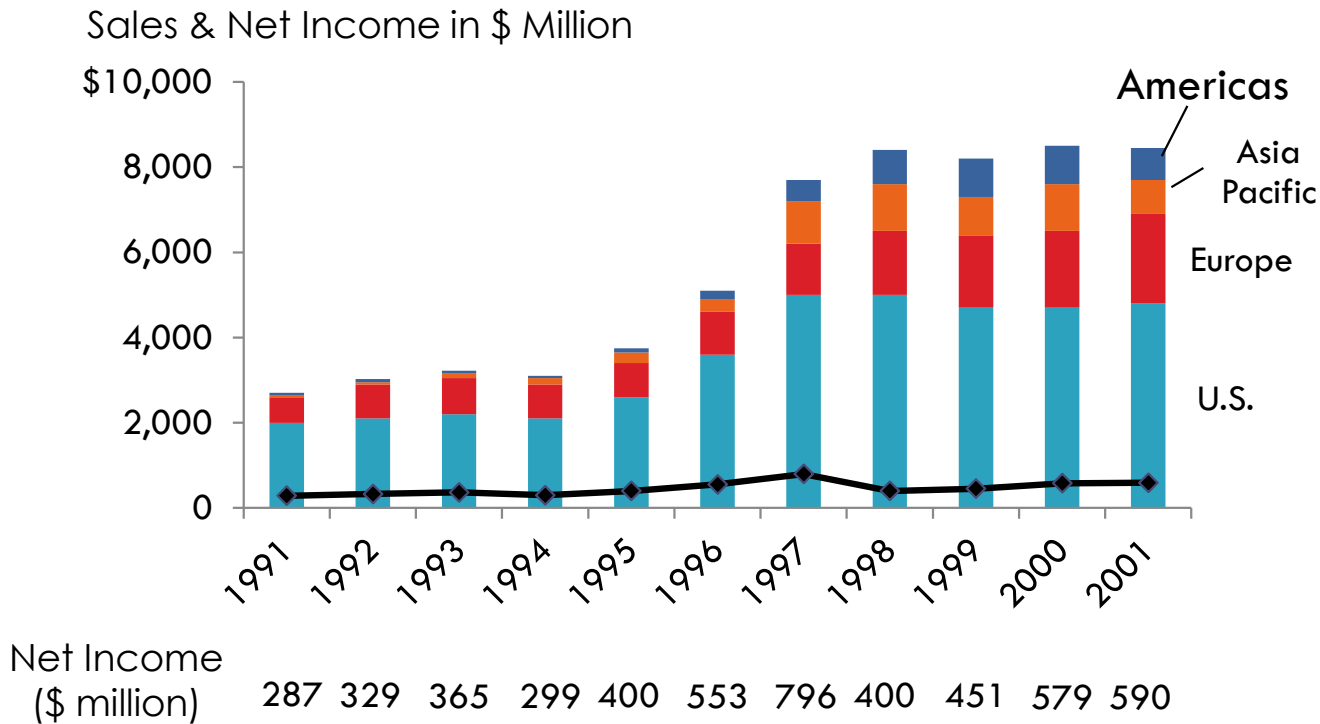


Stacked Bar Line Chart Tool

187

Stacked Bar Line Chart

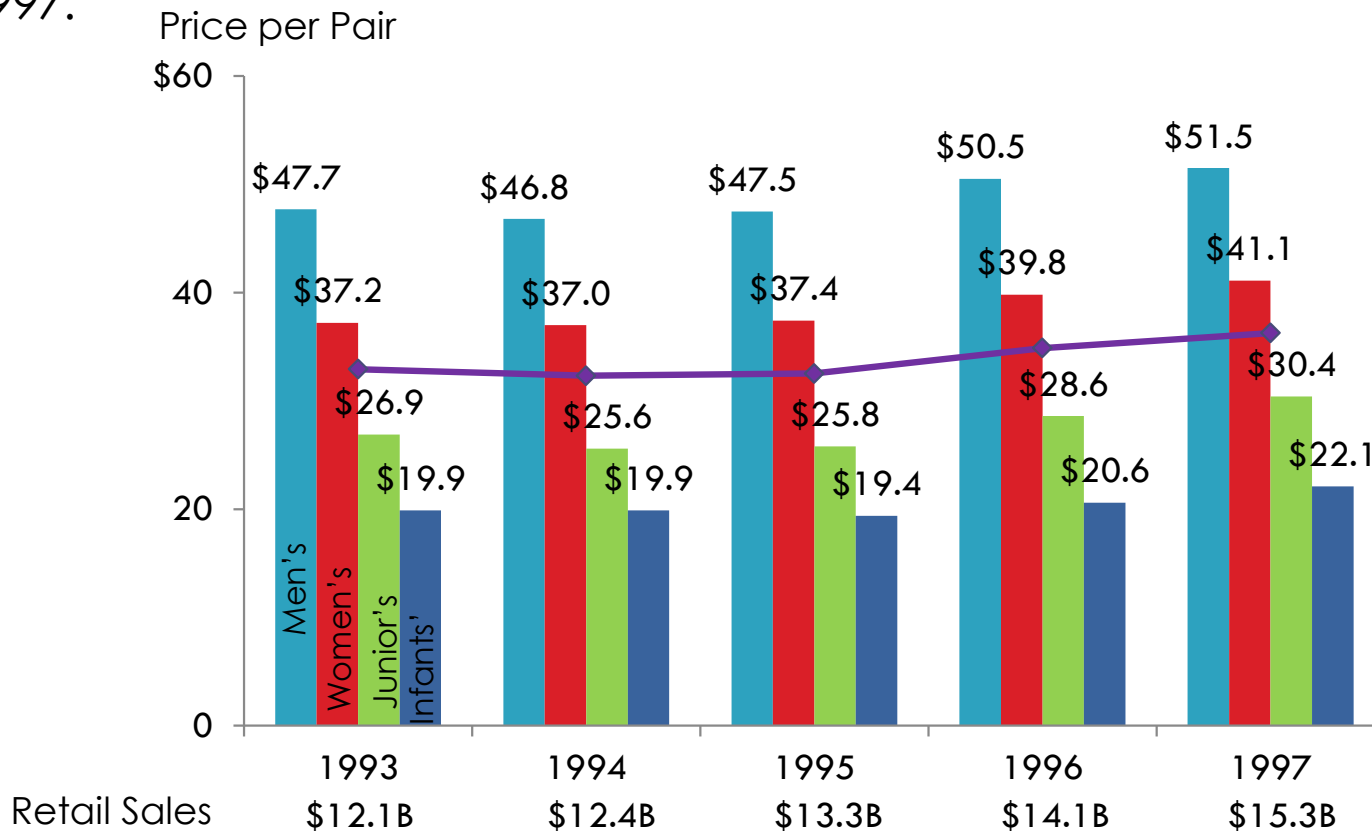
Nike's sales have increased significantly with a greater reliance on non-U.S. markets. Net income growth has not kept pace with sales growth.



Cluster Bar Line Chart Tool

Cluster Bar Line Chart

Price per pair has increased across all four market segments from 1993 to 1997.



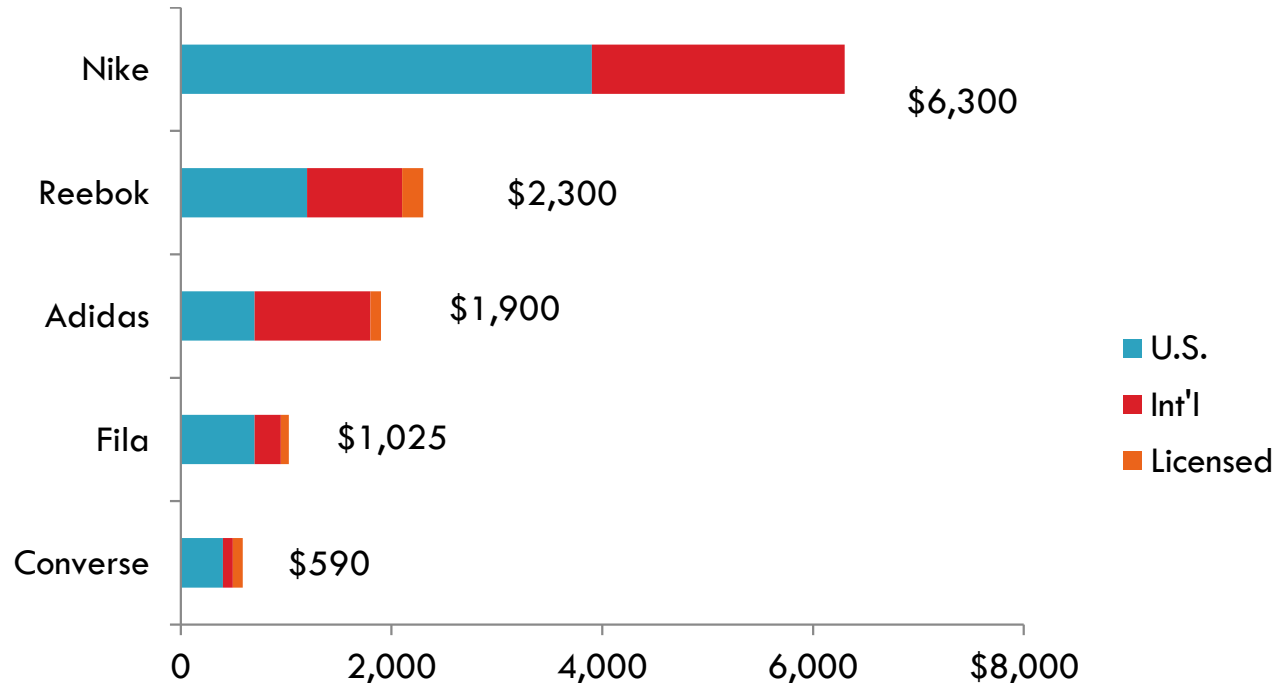
Horizontal Stacked Bar Chart Tool

189

Horizontal Stacked Bar Chart

Nike sales were predominately from the U.S., while Adidas sales were predominately international. Licensing is a small, but significant, revenue source for all companies, except Nike.

Footwear Sales in \$ Million



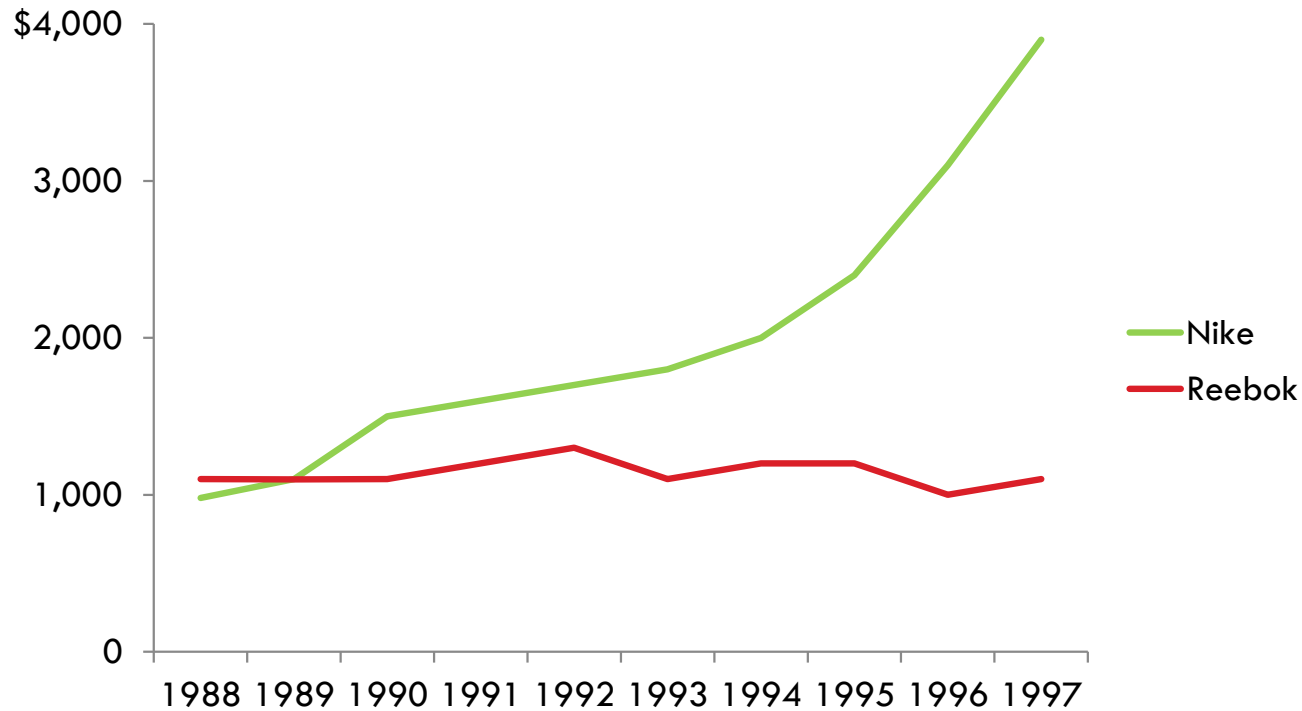
Line Chart Tool

190

Line Chart

Nike overtook Reebok in sales in 1989 and has grown rapidly.

Footwear Sales in \$ Million

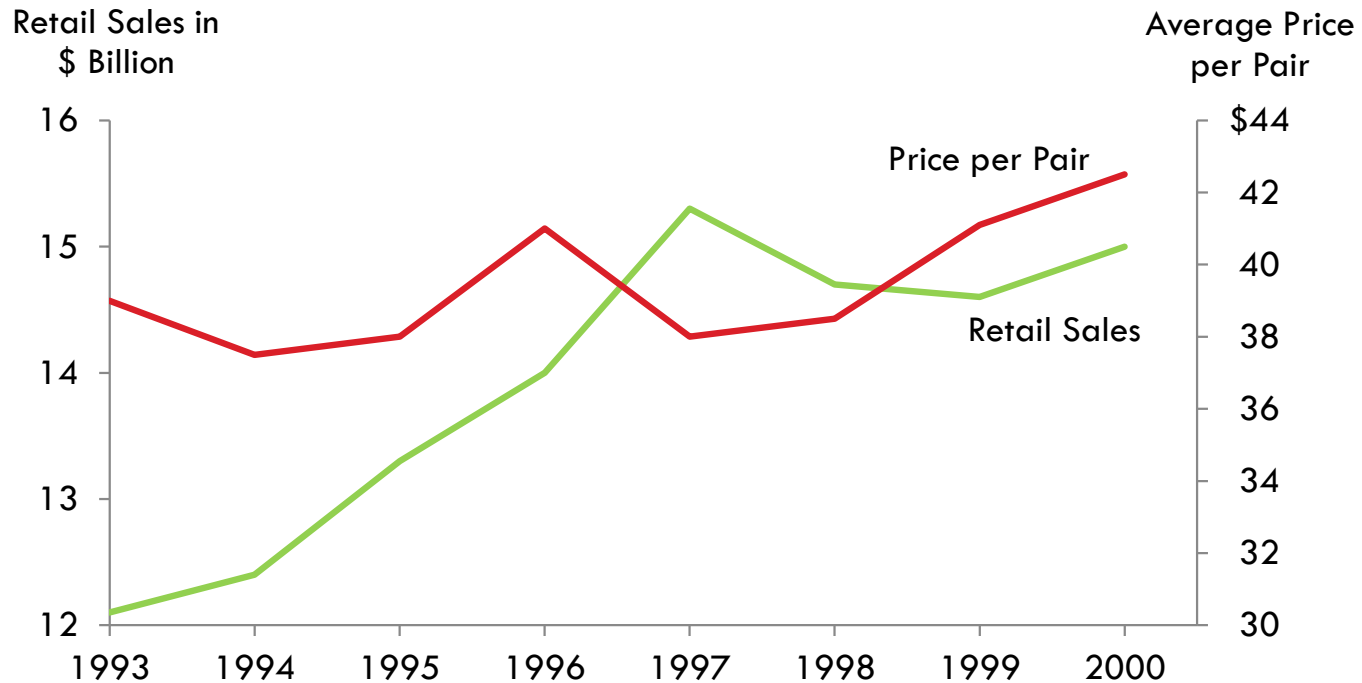


2Y Line Chart Tool

191

2Y Line Chart

Retail sales dipped between 1997 and 1999 as price per pair increased.

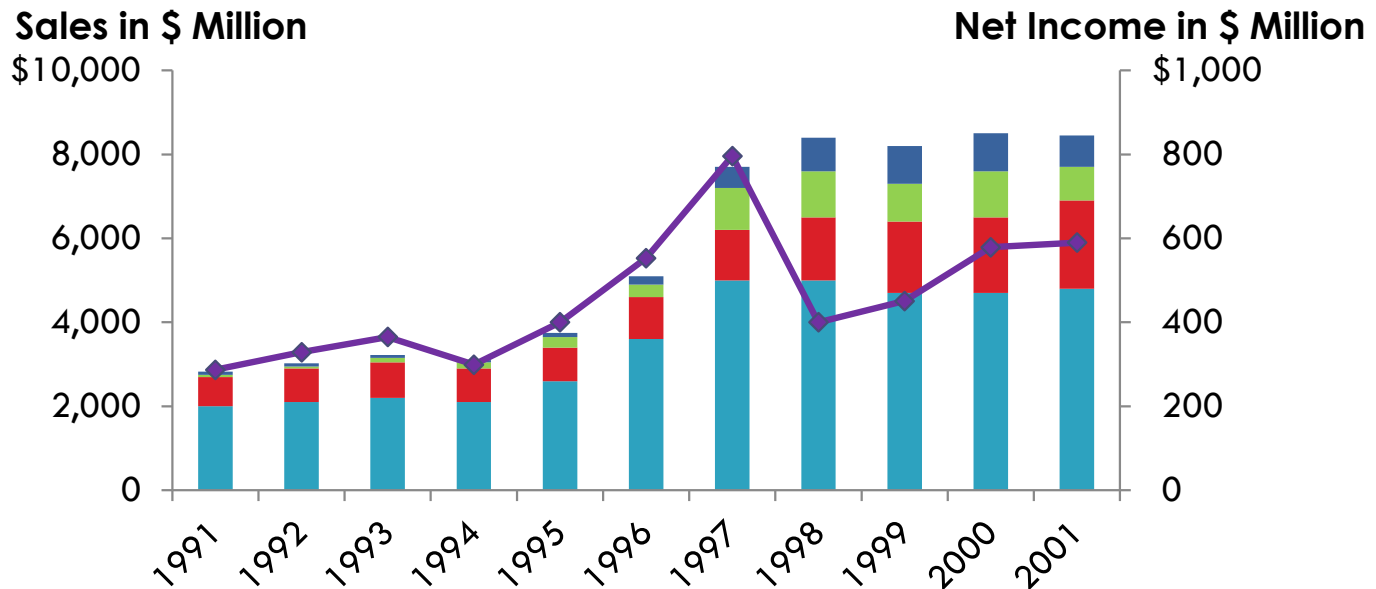


2Y Stacked Bar Line Chart Tool

192

2Y Stacked Bar Line Chart

Nike's sales have increased significantly with a greater reliance on non-U.S. markets. Revenue growth has not kept pace with sales growth.



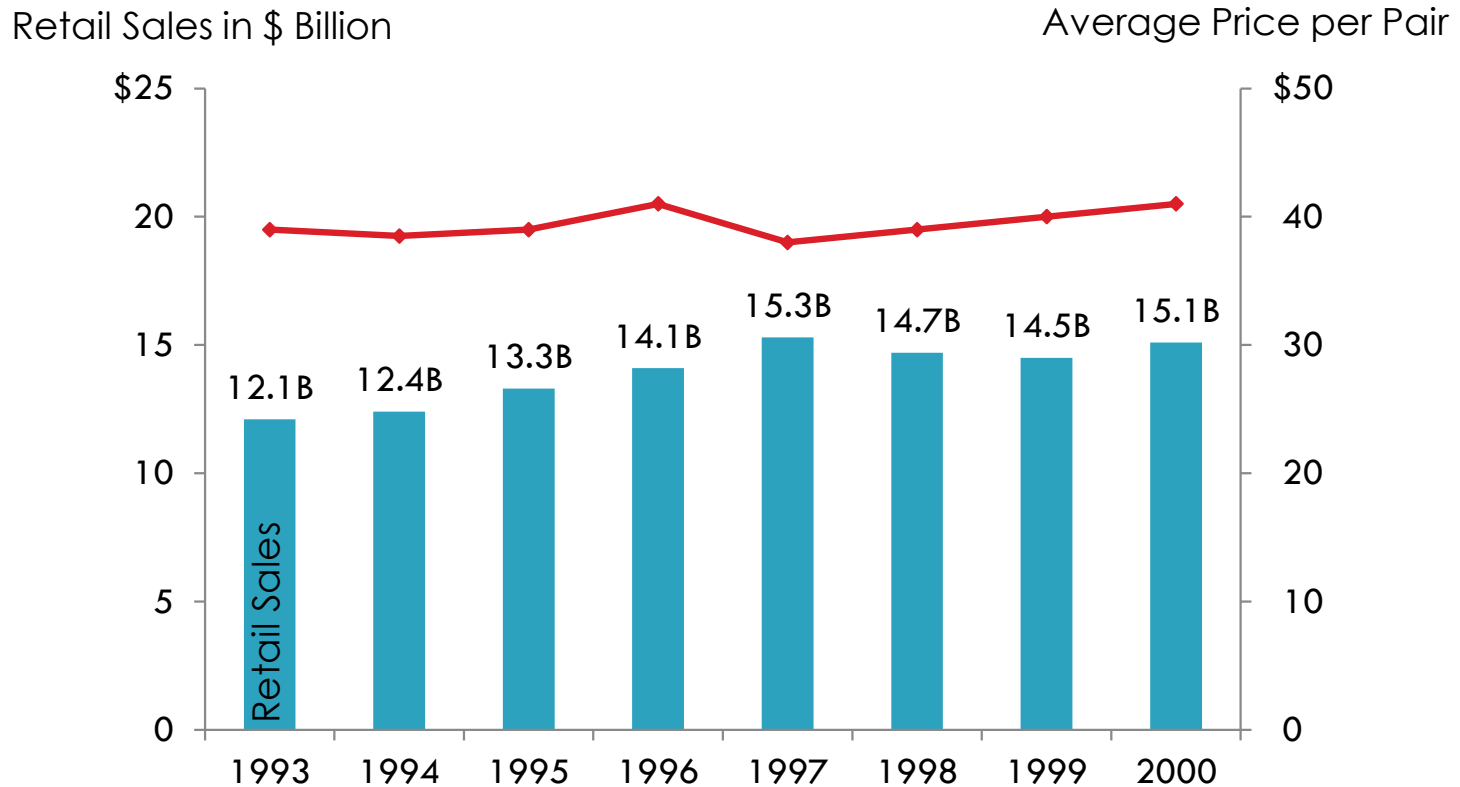
Net Income 287 329 365 299 400 553 796 400 451 579 590

2Y Cluster Bar Line Chart Tool

193

2Y Cluster Bar Line Chart

Retail sales dipped between 1997 and 1999 as price per pair increased

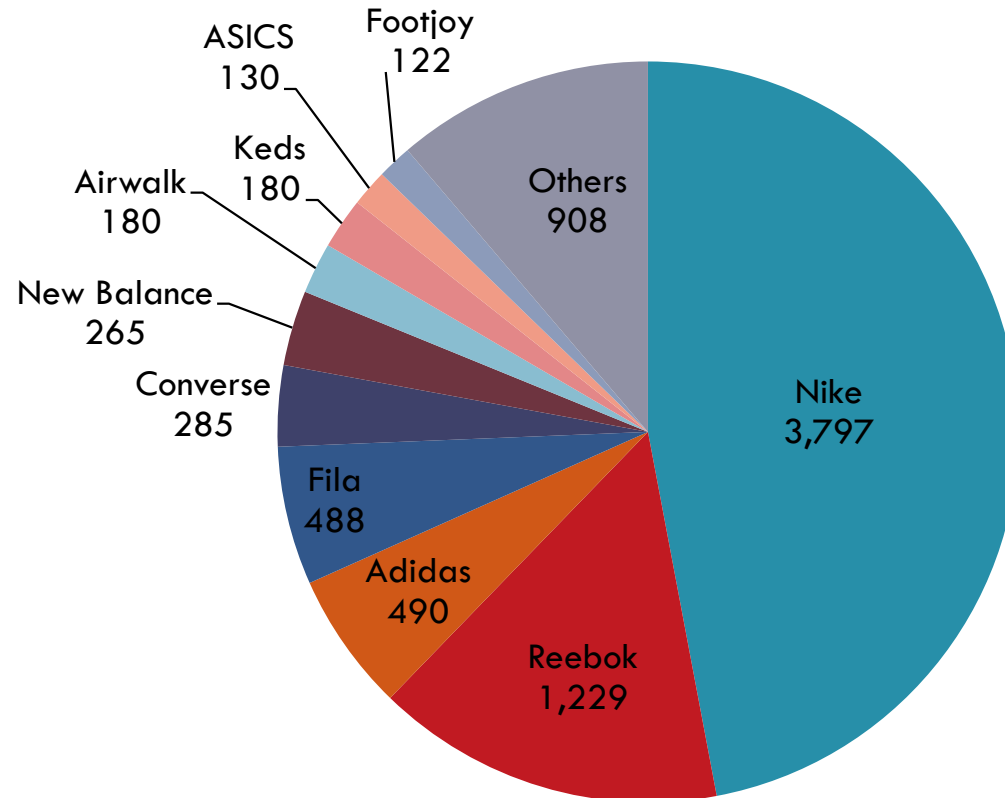


Pie Chart Tool

194

Pie Chart

Nike dominates U.S. branded athletic footwear market.

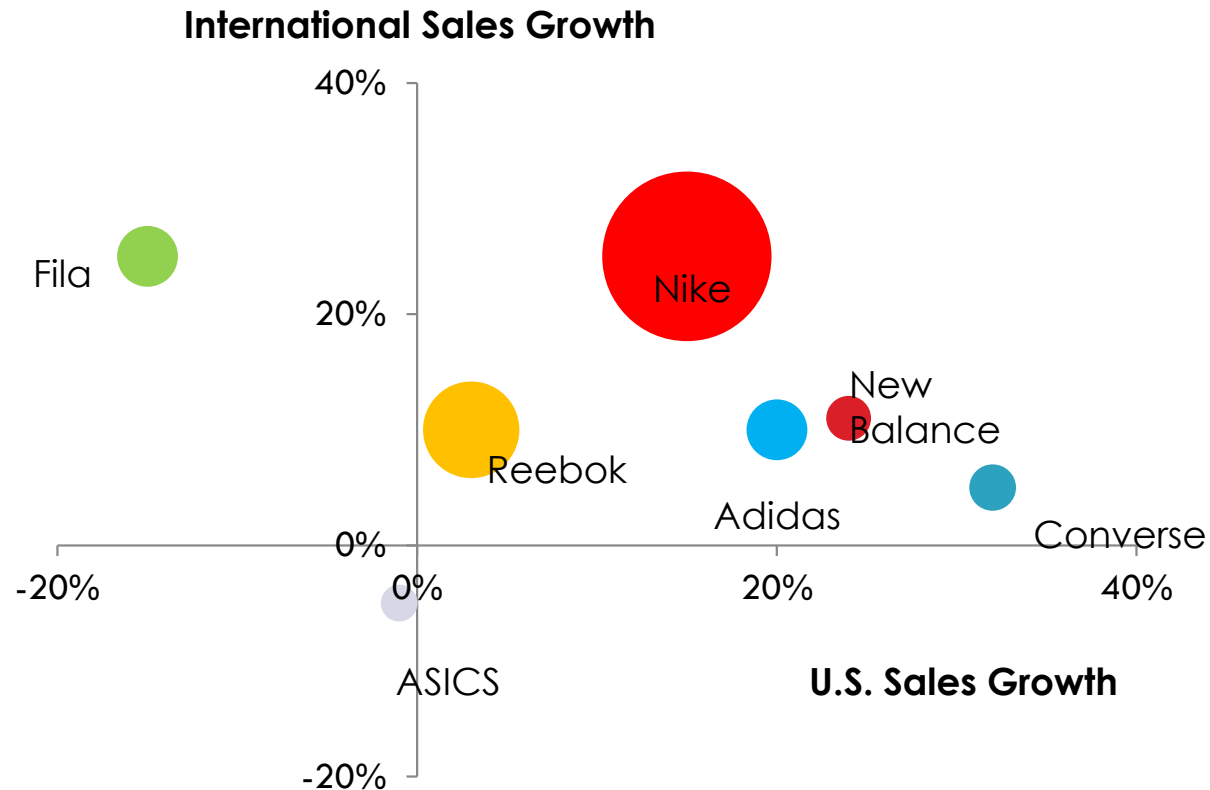


X-Y Linear Bubble Chart

195

X-Y Linear Bubble Chart

Nike experienced strong growth in the U.S. and overseas, while Fila experienced international growth and lower U.S. sales.

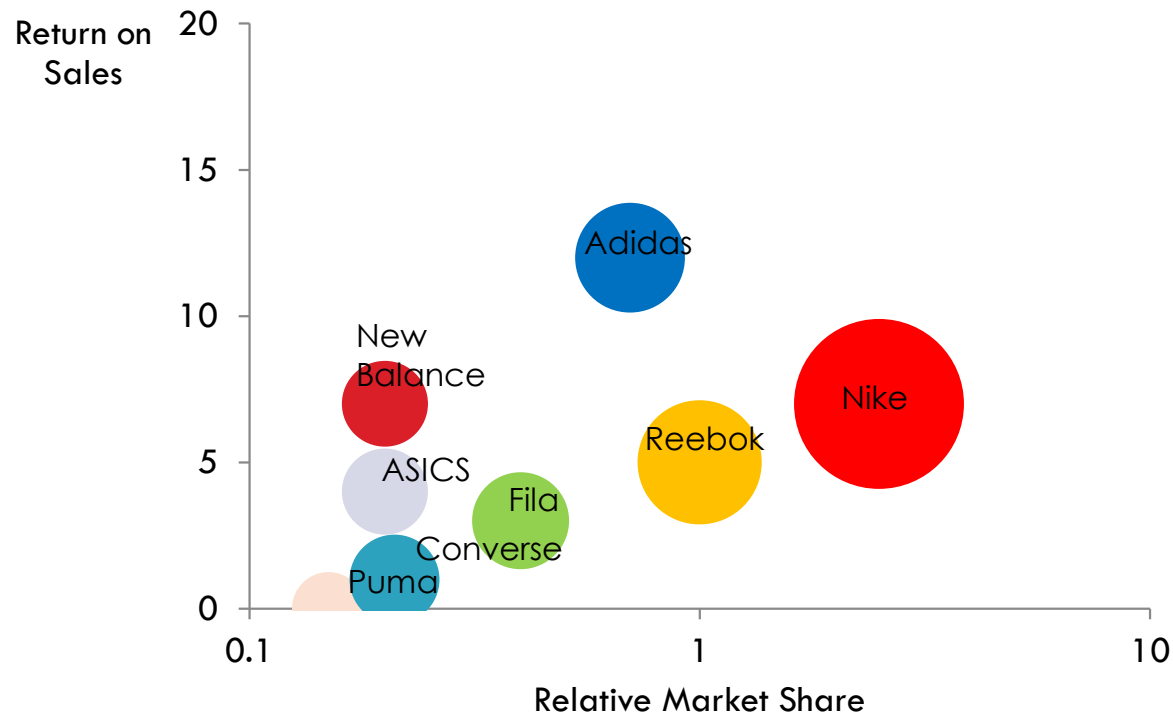


X Log Bubble Chart Tool

196

X Log Bubble Chart

Adidas and New Balance experienced a relatively high return on sales when compared to their market share.

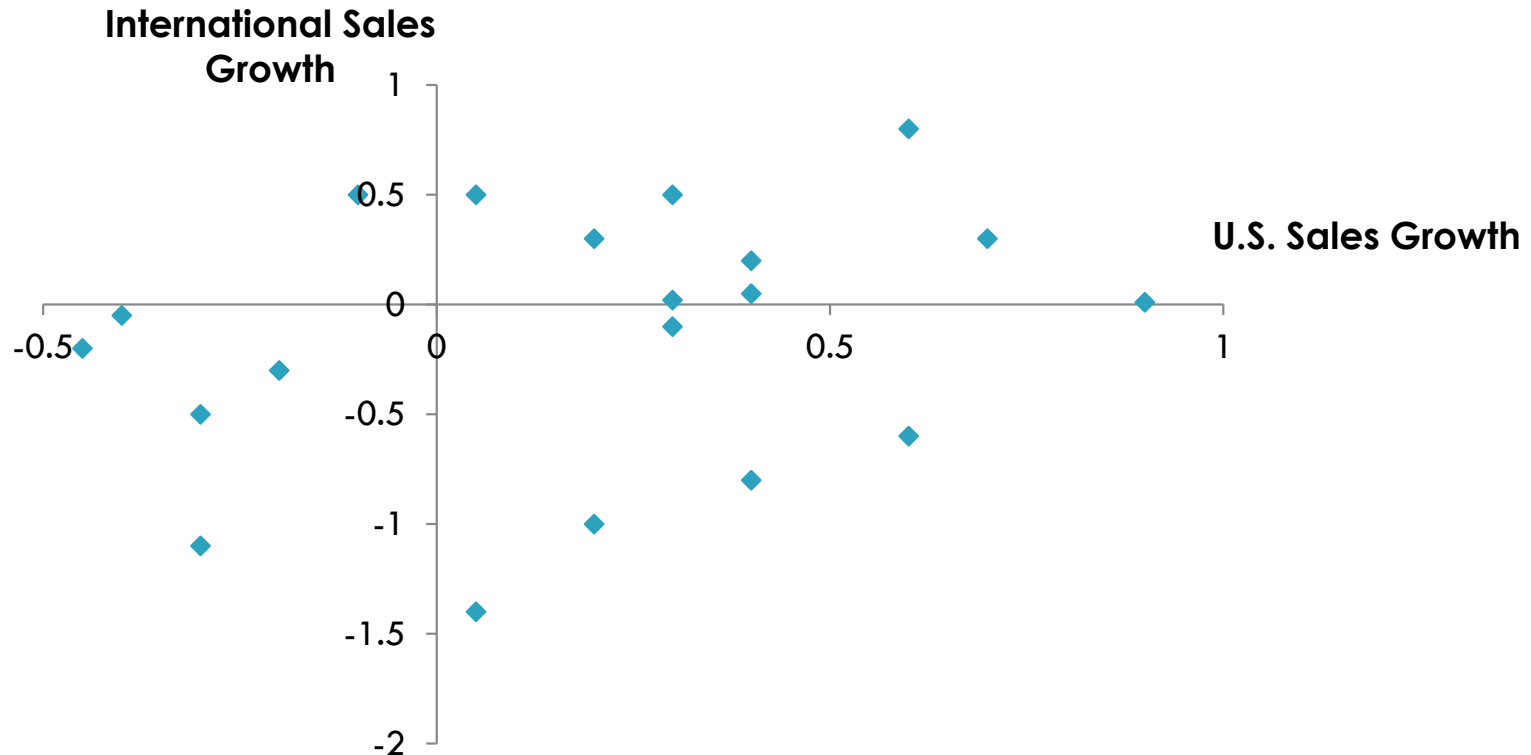


X-Y Linear Scatter Chart Tool

197

X-Y Linear Scatter Chart

Of the top 20 companies, five experienced declines in both U.S. and international sales.

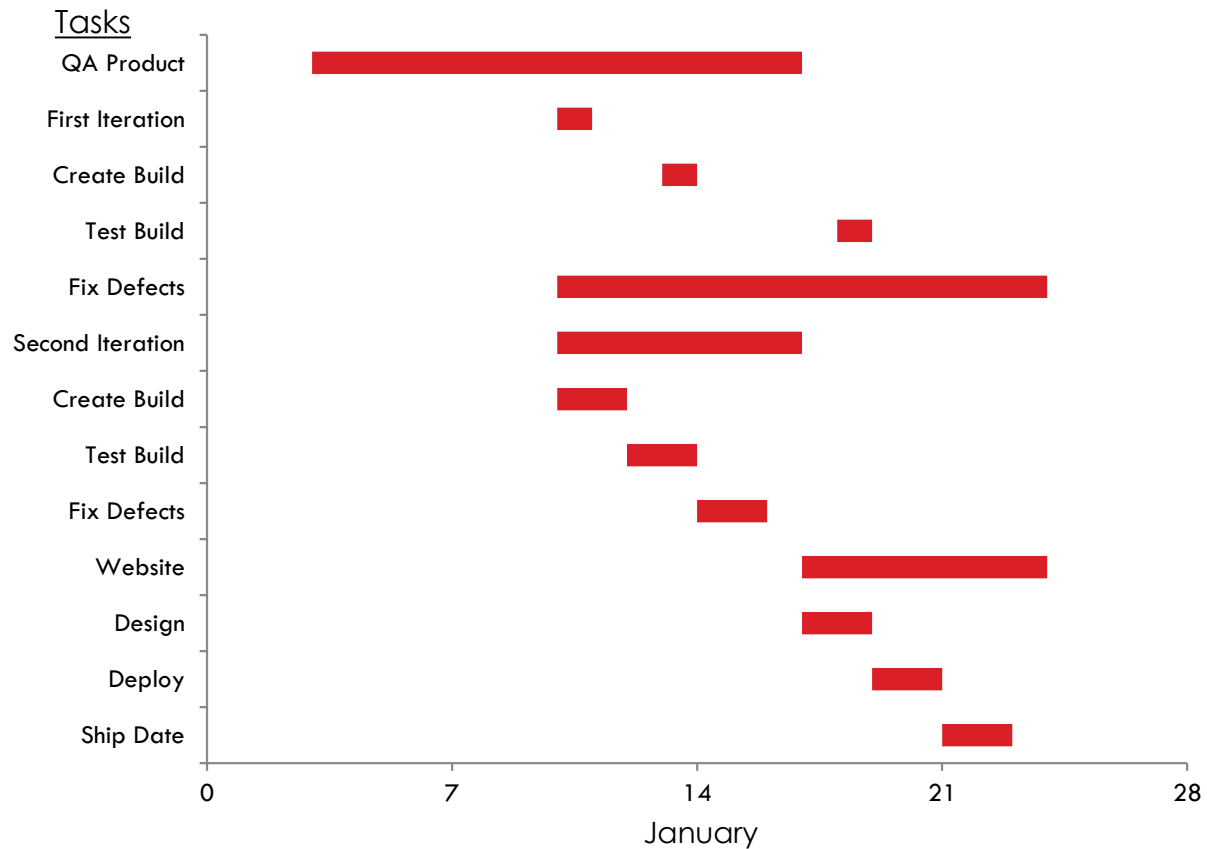


Gantt Chart Tool

198

Gantt Chart

Product release project plan.



SYNTHESIZE: Key Questions

199

- ❑ What is the story (situation, complication, and resolution), and what is the best way to tell it?

SYNTHESIZE: Rules

200

- ❑ Obtain input and ensure buy-in from client
- ❑ Offer specific recommendations for improvement
- ❑ Tell a good story

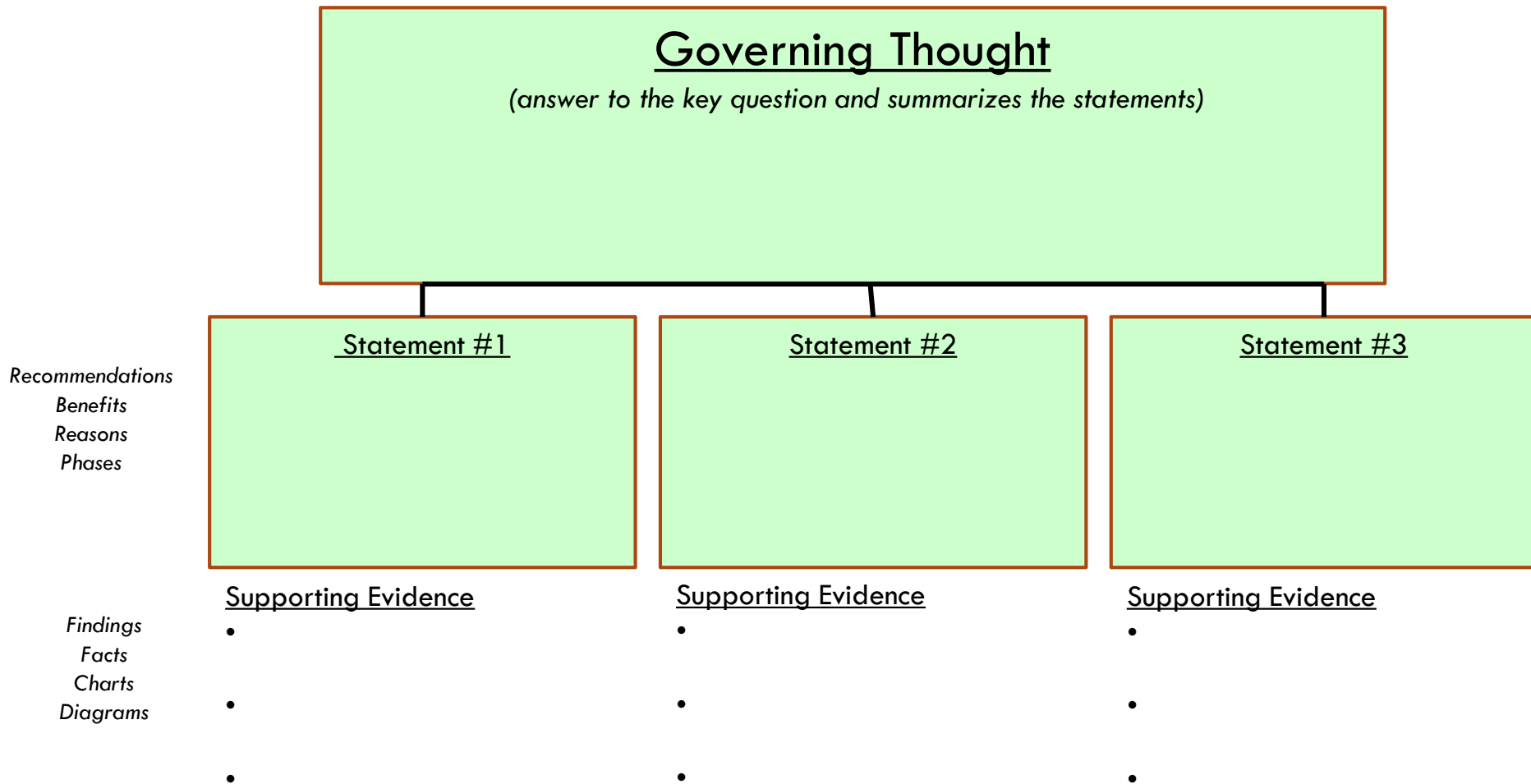
SYNTHESIZE: Tactics

201

- ❑ Tactic 37: Tell a story – using a very brief situation and complication, followed by the resolution which is the most important aspect of the project.
- ❑ Tactic 38: Share the story with the client and the team ahead of time to obtain input and ensure buy-in.
- ❑ Tactic 39: Keep the story simple and focus on the original problem and specific recommendations for improvement – include estimated impact on the organization.
- ❑ Tactic 40: Have fun!

SYNTHESIZE: Executive Summary Slide

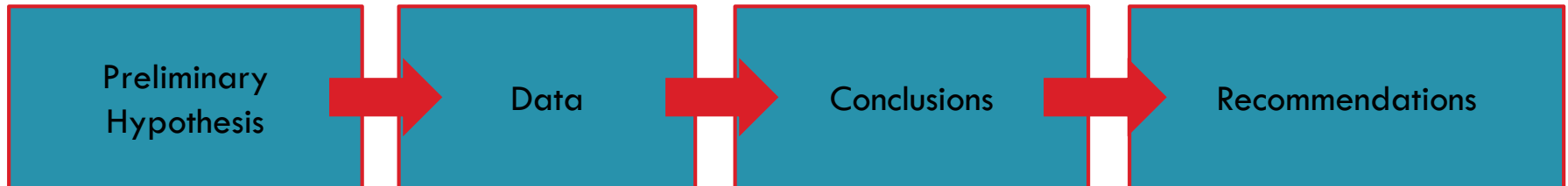
202



The problem-solving and presentation processes each have their own unique steps

203

The problem-solving process:



The presentation process:

