MBA@UNC
Consulting Immersion Track

December 13-15, 2019

UNC KENAN-FLAGLER BUSINESS SCHOOL

Dr. Paul N. Friga & Prof. Steve Beisser

Our action plan for the immersion weekend

Friday

- 9:00 – 11:00 — **Introductions** Program, People, & Resources
- **TEAM FOCUS** Model Overview and Video Case Study
- 1:00-1:30 — **Talk/Evaluate/Assist/Motive** Myers Briggs, Interactions
- 1:30-3:00 — **Team Time** Strengths/Weaknesses, Roles and Team Charter Breakout Rooms
- 3:00-5:00 — **Frame/Organize/Collect** Project Set Up Plenary 3:00-3:30 Teams 3:30-4:45 Plenary 4:45-5:00

Saturday

- 8:00-9:00 — **Understand & Synthesize** Outstanding Slides and Telling a Great Story
- 9:00-12:00 — **Team Time** Analysis and Slide Creation (w/Coaching)
- 12:00- 12:30 — Recap and Plan
- 1:2:30-5:45 — **Tar Heel Activities & Afternoon Team Time**
- 6:00 + — **TEAM APPRECIATION** (enjoy Chapel Hill!)

Sunday

- 8:00 – 9:45 — **Finalize/Coaching Work on slides and practice presentation**
- 10:00-12:30 — **Case Competition**
- 12:30-1:00 — **Recap & Client Debriefing**

= Plenary

= On your own

We have three primary goals

- Learn the TEAM FOCUS methodology and supporting material
- Apply the material in a real world case competition
- Get to know your teammates

We have three overarching "Rules" (3Ps)

- **P**articipate
- **P**ush thinking
- **P**hun

There are multiple resources for you

- Overview/Action Plan Deck (online)
- TEAM FOCUS – Rules of Engagement and Process Map
- TEAM FOCUS slide deck (online)
- Understand and Synthesize – Executive Summary template
- Consulting Toolkits (online)
- Case Research (online)
- The McKinsey Engagement (ebook)

What is consulting, in a nutshell?

Case Competition – Key Question

Develop a PR campaign for 2020 launch of our product with a focus on parents of children with Down syndrome, Autism, Wheelchair, etc.

- Who buys the book: Parents, grandparents, other relatives
- What is the exact target market - Down syndrome? Autism? How many?
- What is the theme: Most of the market/children's books have more normal looking children – "It's time for children who don't like all children to see themselves in stories"
- Partnership with Down Syndrome and Autism – organizations – portions of the proceeds go back to the organization?
- How can we create a PR Campaign with very little investment that gets national attention and drives this segment to our website (e.g. national contest for most unique children, etc.) – done very carefully to build esteem and focus on the personalization

The TEAM FOCUS framework and supporting "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

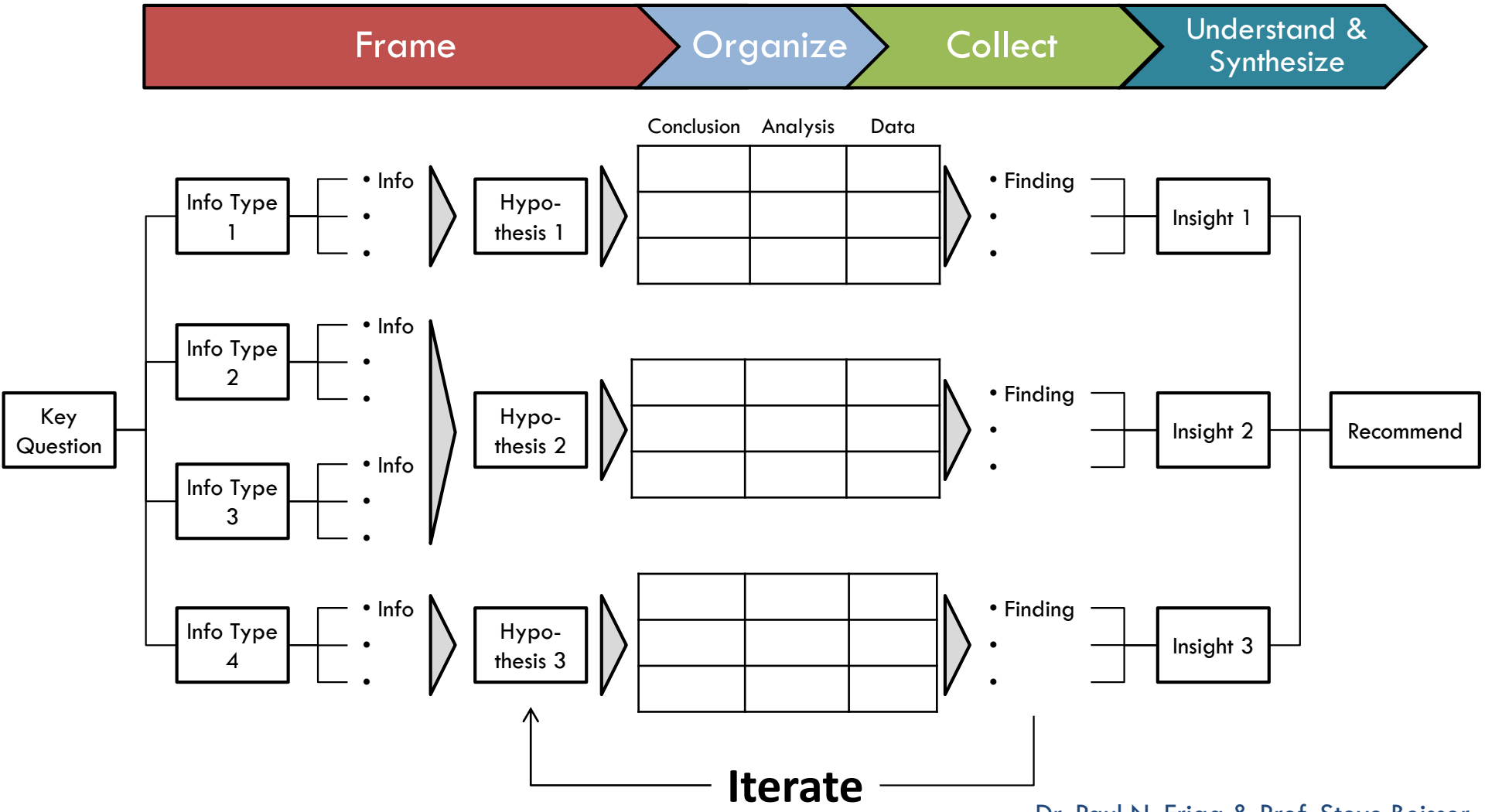
Collect
- Design "ghost charts" to exhibit necessary data
- Conduct meaningful interviews
- Gather relevant secondary data

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

Source: ***The McKinsey Engagement***, Friga, Paul, McGraw-Hill, 2008

The FOCUS Analytical Process Map



TEAM FOCUS Toolkits can be used in implementation

Toolkit 1. - TEAM
Working Effectively in Teams

- Team charter
- Personality profiles
- Development plan
- Influence tools
- Feedback forms

Toolkit 2. - Frame
Determining the Key Questions & Scope

- Key questions
- Process map
- Scope of work letter
- Nondisclosure agreement

Toolkit 3. - Organize
Visualizing the Story & Designing the Analysis

- Issue trees
- Frameworks
- Content map
- Kickoff deck

Toolkit 4. - Collect
Collecting Primary & Secondary Data

- Third-party research
- Benchmarking
- Interviews
- Focus groups
- Surveys

Toolkit 5. – Understand
Determining the "So Whats"

- Storyboarding
- Slide and chart design
- Analysis tools

Toolkit 6. - Synthesize
Telling the Story

- Audience assessment
- Pyramid principle
- Delivery tips

Let's apply these ideas to a (once) popular business reality show

Use your TEAM FOCUS handout to identify what went wrong.

Link to video case study

TEAM FOCUS Toolkits can be used in implementation

Toolkit 1. - TEAM

Working Effectively in Teams

- Team charter
- Personality profiles
- Development plan
- Influence tools
- Feedback forms

Toolkit 2. - Frame

Determining the Key Questions & Scope

- Key questions
- Process map
- Scope of work letter
- Nondisclosure agreement

Toolkit 3. - Organize

Visualizing the Story & Designing the Analysis

- Issue trees
- Frameworks
- Content map
- Kickoff deck

Toolkit 4. - Collect

Collecting Primary & Secondary Data

- Third-party research
- Benchmarking
- Interviews
- Focus groups
- Surveys

Toolkit 5. – Understand

Determining the "So Whats"

- Storyboarding
- Slide and chart design
- Analysis tools

Toolkit 6. - Synthesize

Telling the Story

- Audience assessment
- Pyramid principle
- Delivery tips

Toolkit Time

- See TEAM FOCUS Slide Deck - TEAM

Dec 2018 MBA@UNC Immersion – Consulting Track Cohort

ISTJ	ISFJ	INFJ	INTJ
Inspector 2%	Protector 4%	Counselor 2%	Mastermind 2%
ISTP	**ISFP**	**INFP**	**INTP**
Crafter 0%	Composer 0%	Healer 0%	Architect 0%
ESTP	**ESFP**	**ENFP**	**ENTP**
Promoter 0%	Performer 0%	Champion 10%	Inventor 8%
ESTJ	**ESFJ**	**ENFJ**	**ENTJ**
Supervisor 25%	Provider 4%	Teacher 2%	Field Marshal 29%

Dec 2017 MBA@UNC Immersion – Consulting Track Cohort

ISTJ	ISFJ	INFJ	INTJ
Inspector 0%	Protector 0%	Counselor 0%	Mastermind 0%
ISTP	**ISFP**	**INFP**	**INTP**
Crafter 0%	Composer 0%	Healer 0%	Architect 1%
ESTP	**ESFP**	**ENFP**	**ENTP**
Promoter 1%	Performer 4%	Champion 7%	Inventor 13%
ESTJ	**ESFJ**	**ENFJ**	**ENTJ**
Supervisor 16%	Provider 3%	Teacher 7%	Field Marshal 25%

Dec 2017 MBA@UNC Immersion – Consulting Track Cohort

ISTJ	ISFJ	INFJ	INTJ
Inspector 0%	Protector 0%	Counselor 0%	Mastermind 0%
ISTP	**ISFP**	**INFP**	**INTP**
Crafter 0%	Composer 0%	Healer 0%	Architect 1%
ESTP	**ESFP**	**ENFP**	**ENTP**
Promoter 1%	Performer 4%	Champion 7%	Inventor 13%
ESTJ	**ESFJ**	**ENFJ**	**ENTJ**
Supervisor 16%	Provider 3%	Teacher 7%	Field Marshal 25%

Dec 2016 MBA@UNC Immersion – Consulting Track Cohort

ISTJ	ISFJ	INFJ	INTJ
Inspector 4%	Protector 1%	Counselor 0%	Mastermind 10%
ISTP	**ISFP**	**INFP**	**INTP**
Crafter 3%	Composer 0%	Healer 1%	Architect 1%
ESTP	**ESFP**	**ENFP**	**ENTP**
Promoter 1%	Performer 4%	Champion 7%	Inventor 13%
ESTJ	**ESFJ**	**ENFJ**	**ENTJ**
Supervisor 16%	Provider 3%	Teacher 7%	Field Marshal 25%

June 2016 MBA@UNC Immersion – Consulting Track Cohort

ISTJ	ISFJ	INFJ	INTJ
Inspector 5%	Protector 0%	Counselor 5%	Mastermind 5%
ISTP	**ISFP**	**INFP**	**INTP**
Crafter 0%	Composer 0%	Healer 0%	Architect 11%
ESTP	**ESFP**	**ENFP**	**ENTP**
Promoter 0%	Performer 5%	Champion 19%	Inventor 14%
ESTJ	**ESFJ**	**ENFJ**	**ENTJ**
Supervisor 8%	Provider 3%	Teacher 11%	Field Marshal 14%

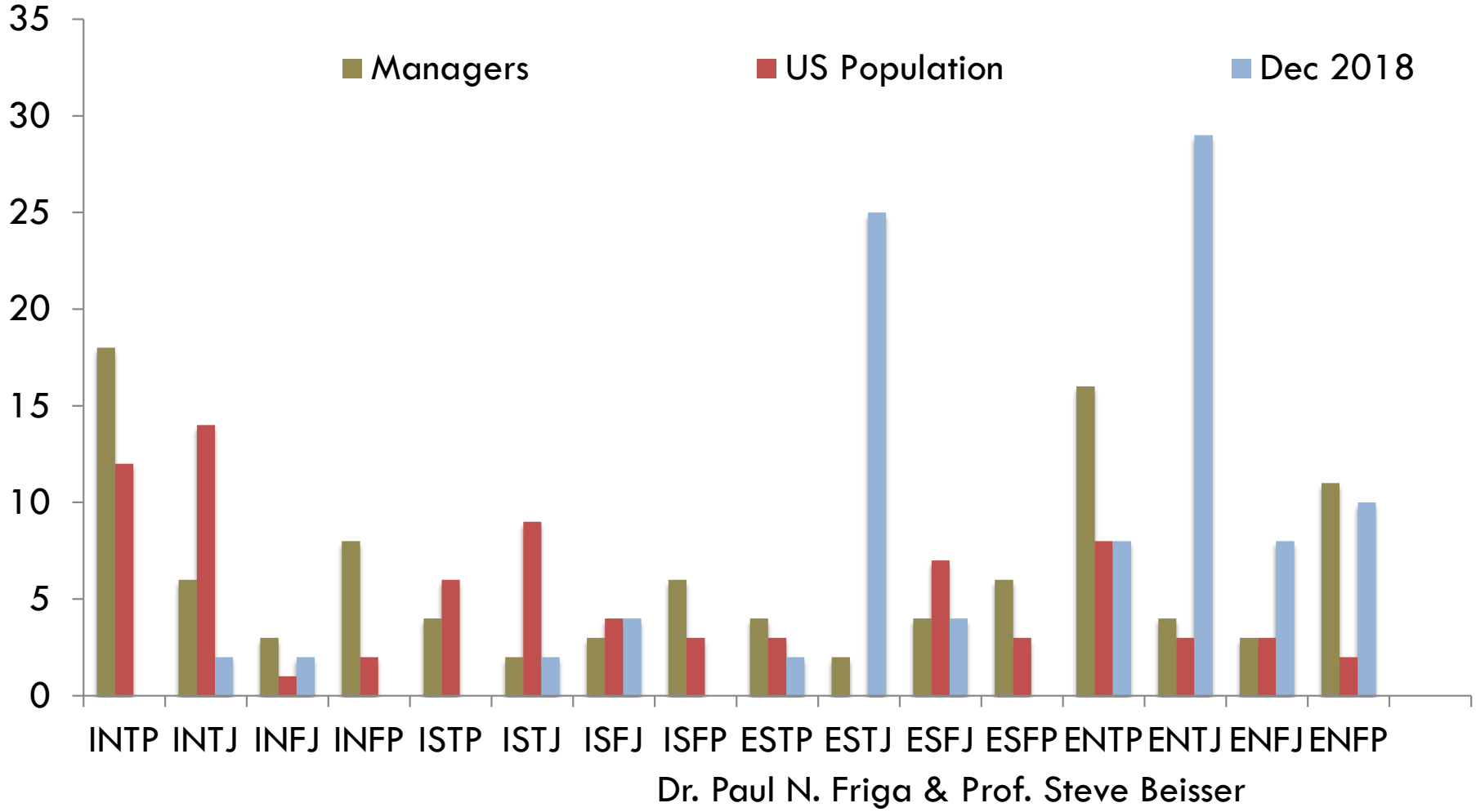
December 2015 MBA@UNC Immersion – Consulting Track Cohort

ISTJ	ISFJ	INFJ	INTJ
Inspector 8%	Protector 0%	Counselor 0%	Mastermind 9%
ISTP	**ISFP**	**INFP**	**INTP**
Crafter 0%	Composer 2%	Healer 0%	Architect 0%
ESTP	**ESFP**	**ENFP**	**ENTP**
Promoter 9%	Performer 6%	Champion 6%	Inventor 15%
ESTJ	**ESFJ**	**ENFJ**	**ENTJ**
Supervisor 9%	Provider 4%	Teacher 6%	Field Marshal 26%

June 2015 MBA@UNC Immersion – Consulting Track Cohort

ISTJ	ISFJ	INFJ	INTJ
Inspector 4%	Protector 0%	Counselor 4%	Mastermind 14%
ISTP	**ISFP**	**INFP**	**INTP**
Crafter 0%	Composer 0%	Healer 0%	Architect 4%
ESTP	**ESFP**	**ENFP**	**ENTP**
Promoter 4%	Performer 0%	Champion 14%	Inventor 14%
ESTJ	**ESFJ**	**ENFJ**	**ENTJ**
Supervisor 11%	Provider 4%	Teacher 4%	Field Marshal 25%

How do we compare to managers and the US population?



Team Assignments

In your teams…

1) Introduce each other and share Myers Briggs results
2) Identify potential issues that might arise
3) Brainstorm ideas for dealing with issues
4) Complete the team charter

TEAM FOCUS Toolkits can be used in implementation

Toolkit 1. - TEAM

Working Effectively in Teams

- Team charter
- Personality profiles
- Development plan
- Influence tools
- Feedback forms

Toolkit 2. - Frame

Determining the Key Questions & Scope

- Key questions
- Process map
- Scope of work letter
- Nondisclosure agreement

Toolkit 3. - Organize

Visualizing the Story & Designing the Analysis

- Issue trees
- Frameworks
- Content map
- Kickoff deck

Toolkit 4. - Collect

Collecting Primary & Secondary Data

- Third-party research
- Benchmarking
- Interviews
- Focus groups
- Surveys

Toolkit 5. – Understand

Determining the "So Whats"

- Storyboarding
- Slide and chart design
- Analysis tools

Toolkit 6. - Synthesize

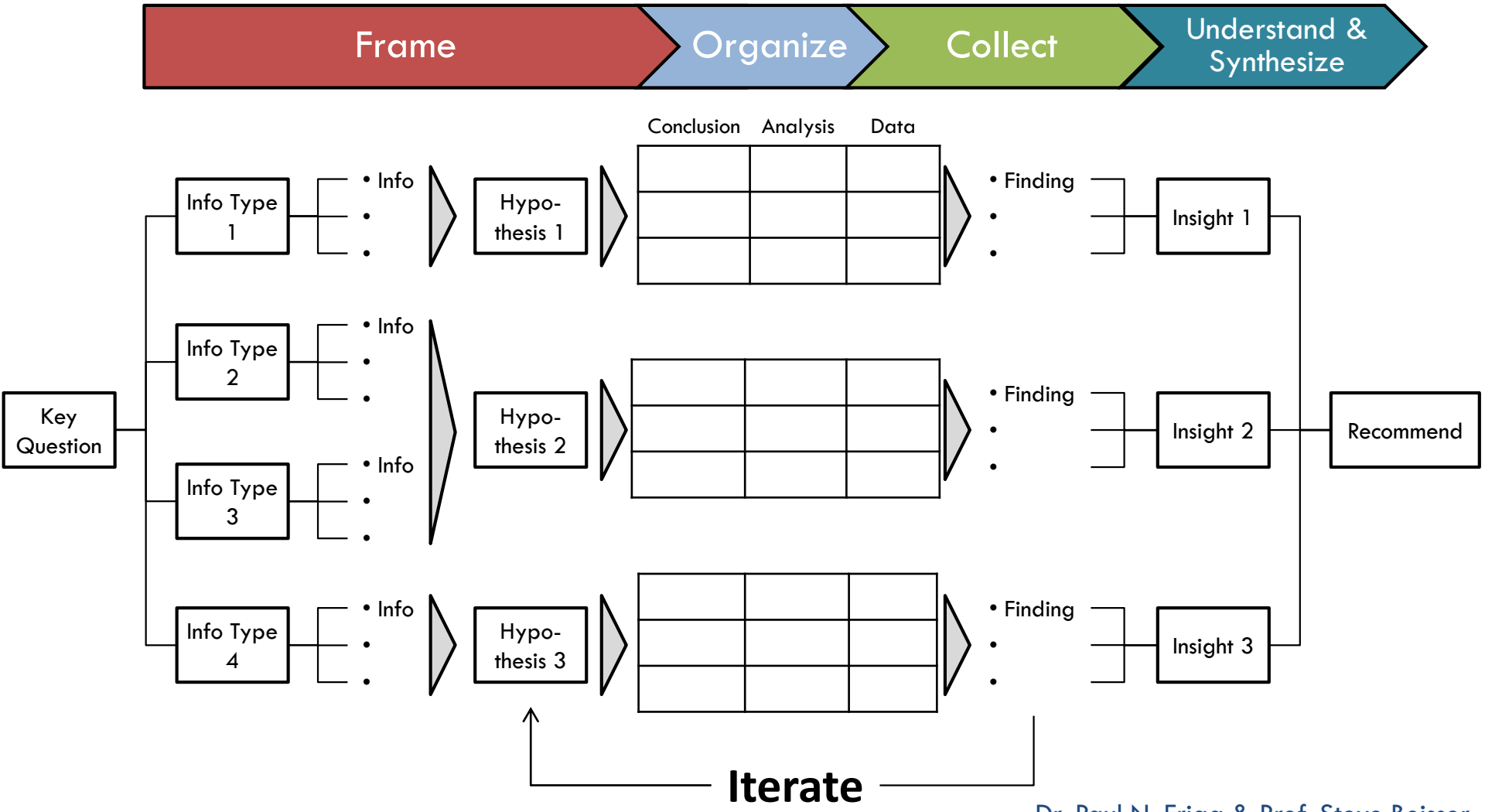
Telling the Story

- Audience assessment
- Pyramid principle
- Delivery tips

Toolkit Time

- See TEAM FOCUS Slide Deck – “FOC”

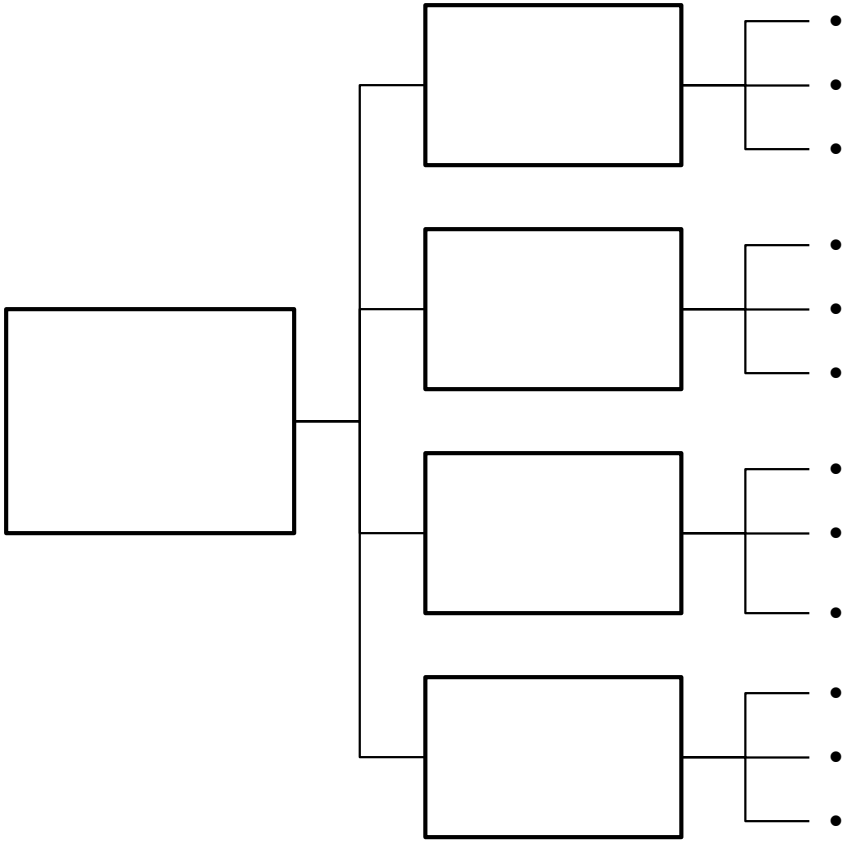
The FOCUS Analytical Process Map



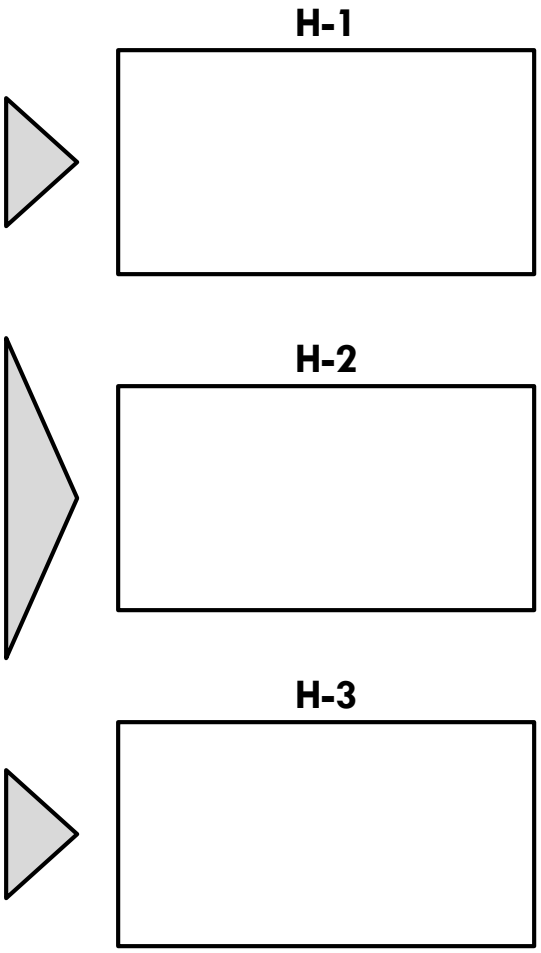
Frame

1. Identify key question

2. Develop information tree



3. Formulate hypotheses



Organize

4. Create a content map

Hypotheses	Support (Conclusion)	Analyses	Data needed
H1:	•	•	•
	•	•	•
	•	•	•
H2:	•	•	•
	•	•	•
	•	•	•
H3:	•	•	•
	•	•	•
	•	•	•

Next steps (process map hints)

- Process map discussion (plan for the day) – 5 minutes
- Divide and conquer – split up issue tree and skim material for bullet point findings (25 minutes)
- Group analysis – report out and summarize overall insights (30 minutes)
- Hypothesis creation – identify up to 8 and prioritize top one to test (impact, data availability, etc.) (30 minutes)
- Content map – how are you going to test it and split up streams (linked to storyline) – high level – one major recommendation with 3 sections (essentially Situation-Complication-Resolution)

TEAM FOCUS Toolkits can be used in implementation

Toolkit 1. - TEAM
Working Effectively in Teams

- Team charter
- Personality profiles
- Development plan
- Influence tools
- Feedback forms

Toolkit 2. - Frame
Determining the Key Questions & Scope

- Key questions
- Process map
- Scope of work letter
- Nondisclosure agreement

Toolkit 3. - Organize
Visualizing the Story & Designing the Analysis

- Issue trees
- Frameworks
- Content map
- Kickoff deck

Toolkit 4. - Collect
Collecting Primary & Secondary Data

- Third-party research
- Benchmarking
- Interviews
- Focus groups
- Surveys

Toolkit 5. – Understand
Determining the "So Whats"

- Storyboarding
- Slide and chart design
- Analysis tools

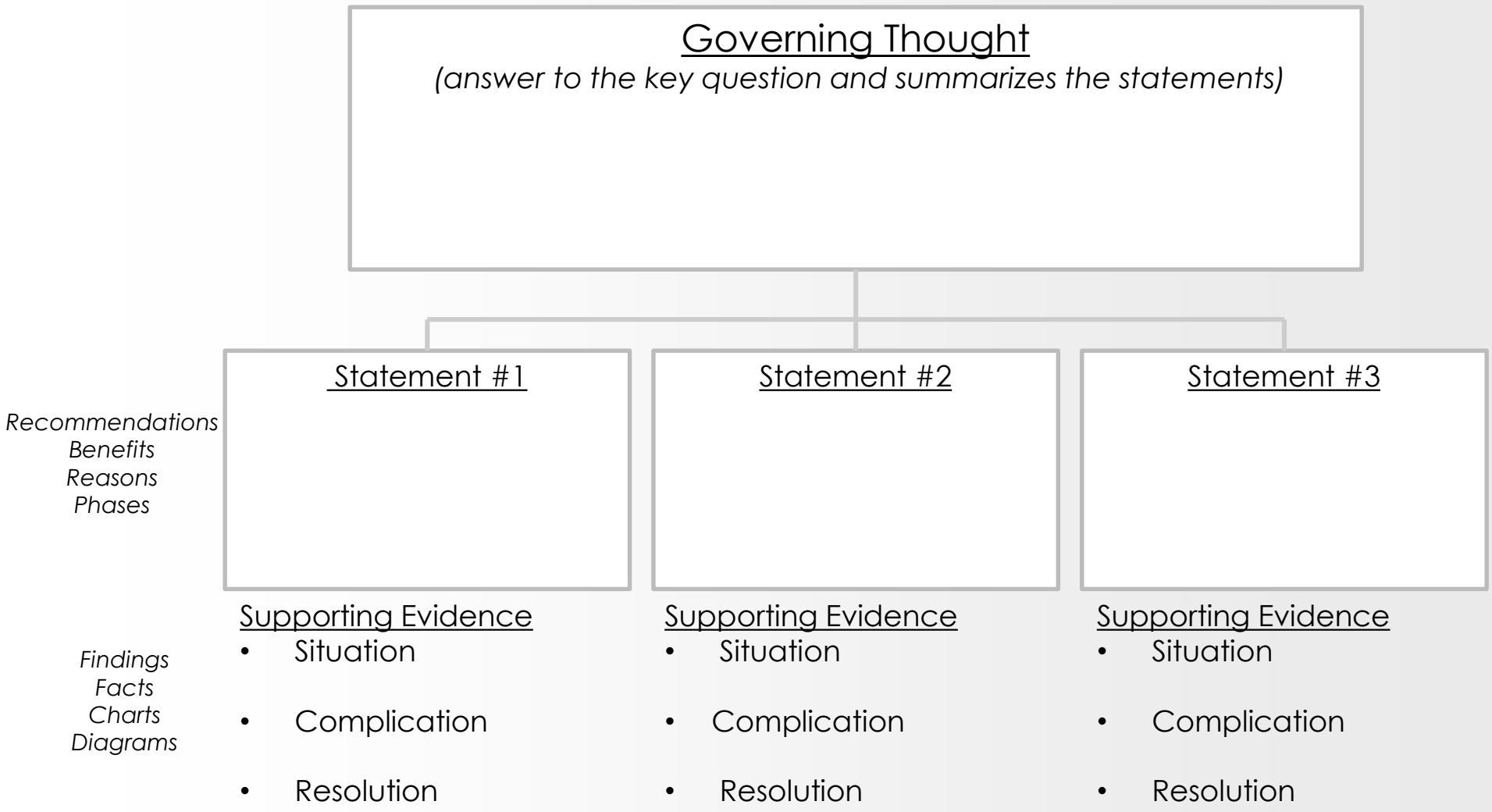
Toolkit 6. - Synthesize
Telling the Story

- Audience assessment
- Pyramid principle
- Delivery tips

Toolkit Time

- See TEAM FOCUS Slide Deck – “US”

Executive Summary/Storyline Template



Next steps (process map hints)

- Update the overall storyline – SCR (30 minutes)
- Divide and conquer – brainstorm the SCR for each recommendation and split up recommendations and create slides and run numbers; PPT Guro creates template for deck (60 minutes)
- Group analysis – report out and summarize overall status and suggest changes (30 minutes)
- Revisions – after lunch, revise story based upon available data and insights as a team (30 minutes)
- Crank slides – work individually on sections and feed draft slides to PPT Guru and assumptions to Financial Guru (120 minutes)
- Group analysis – look at overall story and flow and make modifications as well as creating appendix (30 minutes)
- Final slide deck – review final deck as a team and fill in gaps of research/data with PPT Guru driving the process

We have three primary goals

- Learn the TEAM FOCUS methodology
- Understand that support material exists
- Apply the material in a mini case and get to know your teammates

Consultants are a different breed

MBA@UNC
Consulting Immersion Track

December 13-15, 2019

UNC KENAN-FLAGLER BUSINESS SCHOOL

Dr. Paul N. Friga & Prof. Steve Beisser