



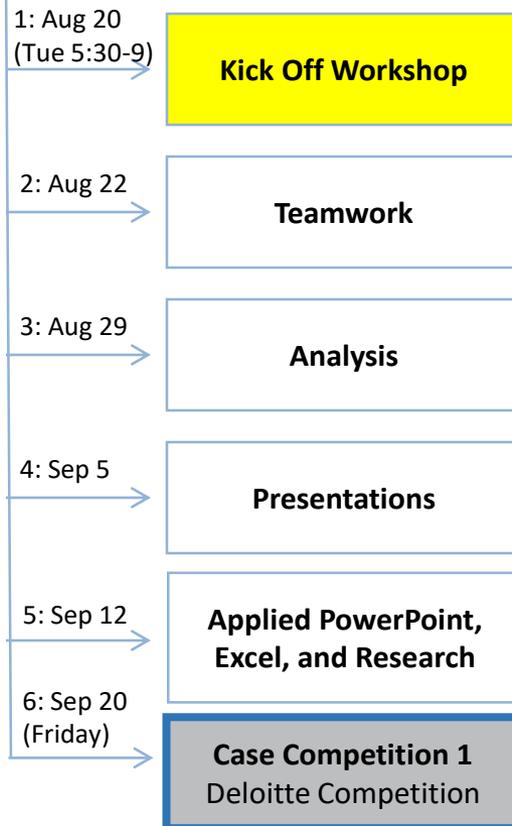
**Consulting Skills & Frameworks**

**Busi 554 – Workshop**

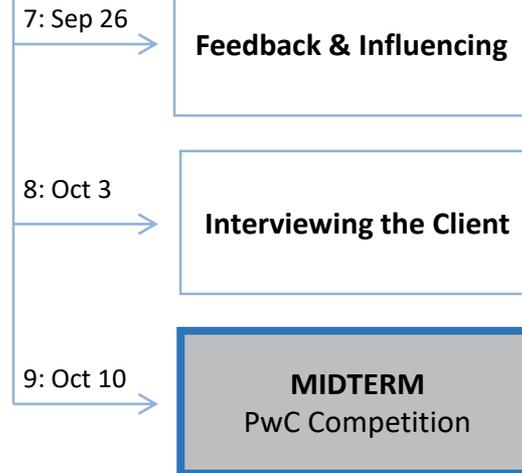
**Fall 2019**

# Consulting Skills & Frameworks Overview

## Consulting Foundations



## Consulting Interactions



## Consulting Frameworks



- = Discussion Days
- = Presentation Days

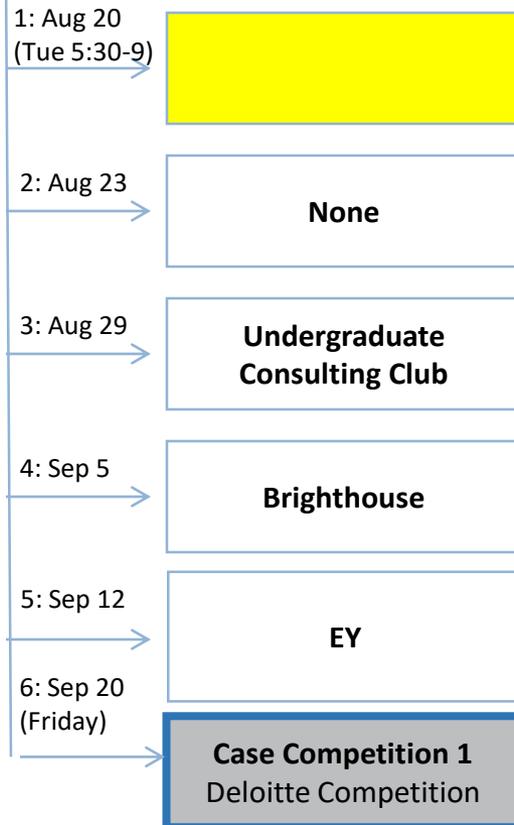
**“It goes by really fast” – Dr. Friga,  
every class of every semester**

Professor: Dr. Paul Friga  
CSF Fall 2019

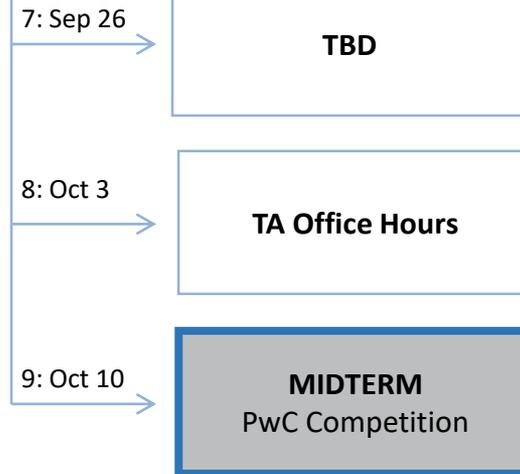
# CSF “Dine and Discover” Sessions

## Optional: Thursday 5-6PM (Food provided)

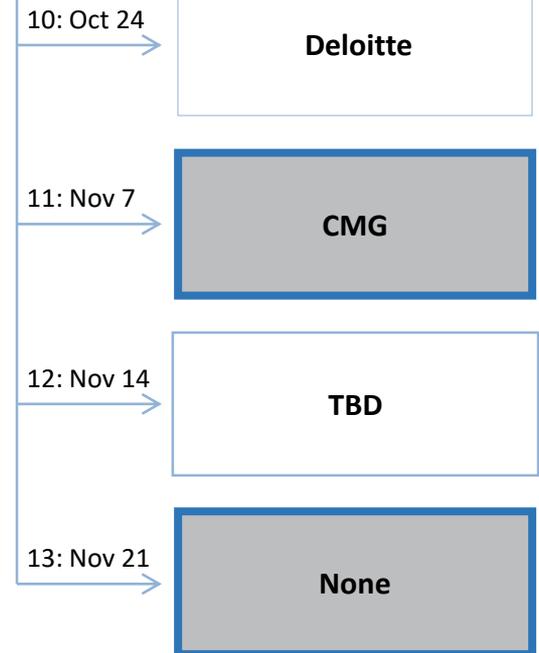
### Consulting Foundations



### Consulting Interactions



### Consulting Frameworks



= Discussion Days  
 = Presentation Days

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CSF Fall 2019

# Action plan for today's workshop

Beg	End	Description	Methodology
5:00	5:30	<b>WELCOME</b> - Introductions, objectives, & agenda (30 min) <i>Koury</i>	Presentation
5:30	6:45	<b>TEAM FOCUS</b> – overview of the entire framework (75 min) <i>Koury</i>	Presentation, discussion, and video exercise – <i>(The Apprentice)</i>
6:45	7:00	<b>BREAK FOR DINNER</b> (15 min) <i>Koury</i>	
7:00	8:15	<b>Pittsburgh Symphony Orchestra – Frame, Organize, and Collect</b> (75 min) <i>Koury for Plenary discussion and then study rooms</i>	Presentation, discussion and interactive case study (Pittsburgh Symphony Orchestra) – as a team create information trees, hypotheses, and content maps based on preliminary facts
8:15	9:00	<b>Pittsburgh Symphony Orchestra – Understand &amp; Synthesize</b> (45 min) <i>Koury</i>	Sample outputs from Framing, Organizing, and Collecting Presentation on “the all important Executive Summary” <i>Koury for Plenary Discussion</i> <i>Homework assignment: Individually, create a high-level storyline based upon final fact packs/insights</i>

# **We have 3 primary goals**

---

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

# What is consulting, in a nutshell?



# **Welcome packages for today**

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1. Schedule
2. TEAM FOCUS – rules of engagement and map
3. Frame and Organize – template
4. Understand and Synthesize – Executive Summary template
5. Pittsburgh Symphony Orchestra case material

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# TEAM FOCUS Framework

## “Rules of Engagement”

T E A M

F O C U S

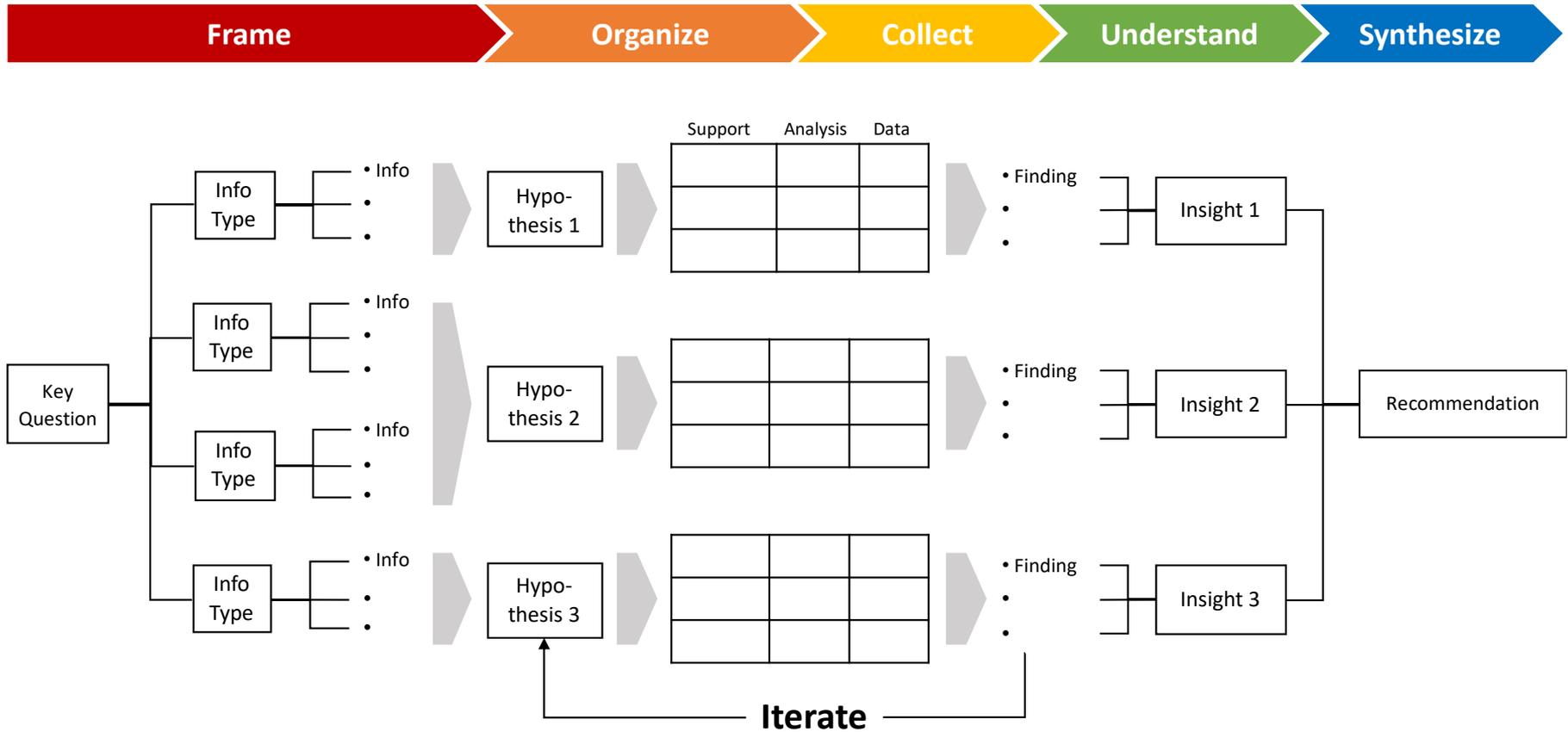
TEAM	<b>Talk</b>	<b>Evaluate</b>	<b>Assist</b>	<b>Motivate</b>
	<ul style="list-style-type: none"> <li>Communicate constantly</li> <li>Listen attentively</li> <li>Separate issues from people</li> </ul>	<ul style="list-style-type: none"> <li>Discuss group dynamics</li> <li>Set expectations and monitor results</li> <li>Develop and reevaluate a personal plan</li> </ul>	<ul style="list-style-type: none"> <li>Leverage expertise</li> <li>Keep teammates accountable</li> <li>Provide timely feedback</li> </ul>	<ul style="list-style-type: none"> <li>Identify unique motivators</li> <li>Positively reinforce teammates</li> <li>Celebrate achievements</li> </ul>

FOCUS	<b>Frame</b>	<b>Organize</b>	<b>Collect</b>	<b>Understand</b>	<b>Synthesize</b>
	<ul style="list-style-type: none"> <li>Identify the key question</li> <li>Develop the information tree</li> <li>Formulate hypotheses</li> </ul>	<ul style="list-style-type: none"> <li>Develop a high-level process map</li> <li>Create a content map/analytical plan to test hypotheses</li> <li>Design the story line</li> </ul>	<ul style="list-style-type: none"> <li>Design “ghost charts” to exhibit necessary data</li> <li>Conduct meaningful interviews</li> <li>Gather relevant secondary data</li> </ul>	<ul style="list-style-type: none"> <li>Identify the “so what(s)”</li> <li>Think through the implications for all constituents</li> <li>Document the key insight on all charts</li> </ul>	<ul style="list-style-type: none"> <li>Obtain input and ensure buy-in from client</li> <li>Offer specific recommendations for improvement</li> <li>Tell a good story</li> </ul>

# FOCUS Analytical Process Map

T E A M

F O C U S



# 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**

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**Use your TEAM FOCUS handout to identify what went wrong.**

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# PSO Teams

Team 1 (Study Rm 1105)	Team 2 (Study Rm 1106)	Team 3 (Study Rm 1107)	Team 4 (Study Rm 1108)	Team 5 (Study Rm 1109)	Team 6 (Study Rm 1110)
Harrison Lewis Cole Davies Samuel Kirkman Elizabeth Ritger Sara Fran Greene	Gabriel Oliveira Ben McGuigan Carter Searcy Kirstie Moore Nikita Billman	Lauren Gornto Jake Garner Hidy Akila Charlotte Lutz Justin Smith	James DePolo Lawton Ives William Bower Pryce Martin Lauren Graham	Lillian Curme Gabrielle Kmiec Jacob Spence Gabriel Bouslav Stephanie Thomas	Mason English Eli DeGregorio Anna Concepcion Zachary Washburn

Team 7 (Study Rm 1111)	Team 8 (Study Rm 1112)	Team 9 (Study Rm 1113)	Team 10 (Study Rm 1114)	Team 11 (Study Rm 1115)	Team 12 (Study Rm 1116)
William Gardner Nate Miller Arjun Ghodasara Adam Lewis Lindsey McFarland	Drew Jacobs Louis Allen Ansley Hardison Alec Lanzas Allie Reiter	Jake D'Ambrosio Madeline Creatore Darshan Patel Jacob Randall Megan Lambert	Trey Tanjuatco Jennifer Zhang Courtney Loughran John Spence	Julia Sefler Michael Sheslow Carey Harrell Jenny Suwanmanee Sam Canney	Carson Pledger Austin Dowler Emma Verdi Gokul Dass Nisarg Shah

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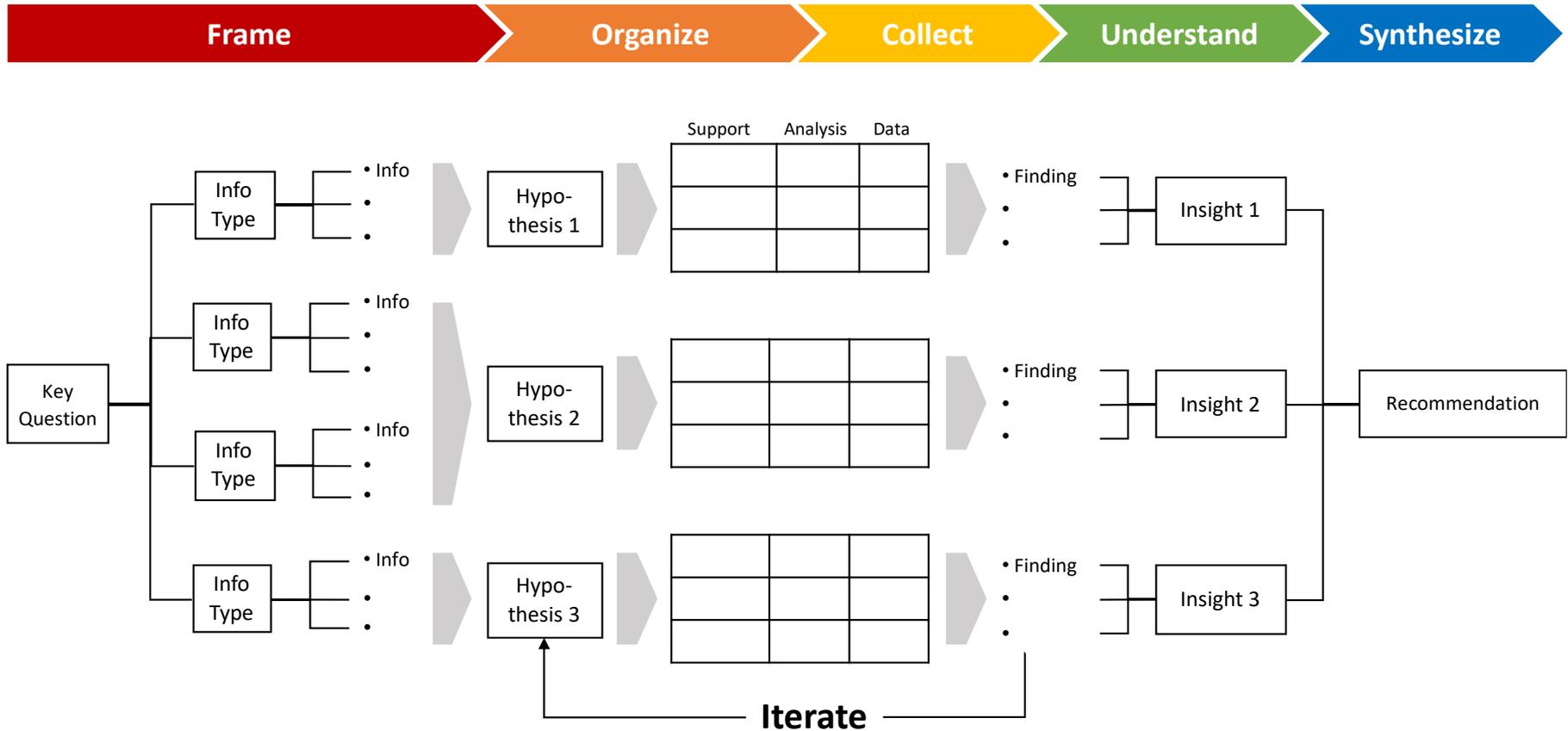
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# FOCUS Analytical Process Map

T E A M

F O C U S



# Template: Frame

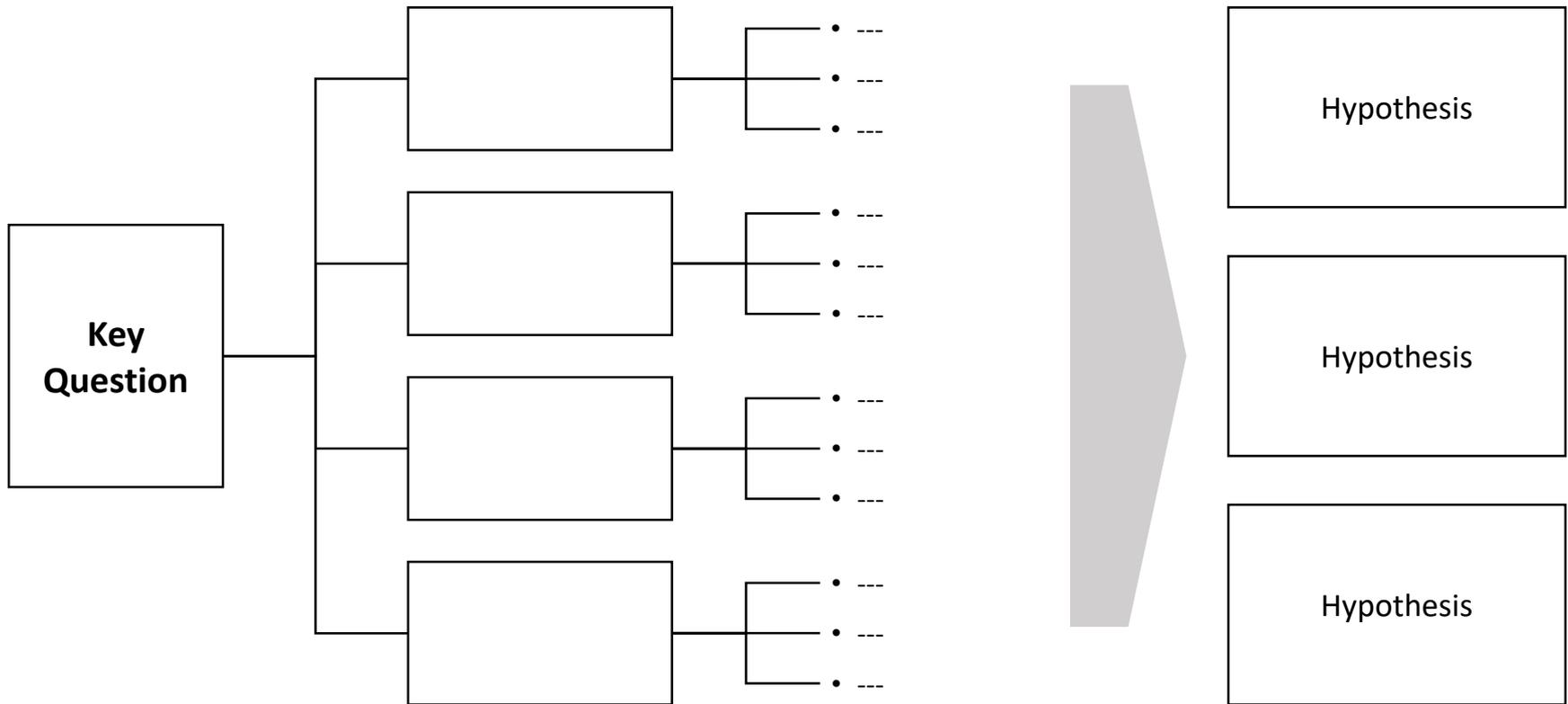
T E A M

F O C U S

1. Identify key question

2. Develop information tree

3. Formulate hypotheses



# Template: Content Map/Analytical Plan

T E A M

F O C U S

Key Question:				
Hypothesis	Support	Analysis	Data Needed	Sources
Hypothesis 1	<ul style="list-style-type: none"><li>• One</li><li>• Two</li><li>• Three</li></ul>			
Hypothesis 2	<ul style="list-style-type: none"><li>• One</li><li>• Two</li><li>• Three</li></ul>			
Hypothesis 3	<ul style="list-style-type: none"><li>• One</li><li>• Two</li><li>• Three</li></ul>			

# Introduction to the Pittsburgh Symphony Orchestra

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# Team Assignments

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- 1) Go to break out rooms
- 2) As a team, fill out the Frame and Organize Templates
- 3) Everyone keep a copy as there will be a homework assignment that utilizes this knowledge

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# Template: Executive Summary

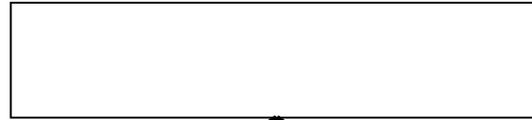
T E A M

F O C U S

Governing Thought	<b>Governing Thought</b>		
Statement	<b>Statement 1</b> <i>Rationale, Conclusions, or Recommendations</i>	<b>Statement 2</b> <i>Rationale, Conclusions, or Recommendations</i>	<b>Statement 3</b> <i>Rationale, Conclusions, or Recommendations</i>
Supporting Evidence	Situation	Situation	Situation
	Complication	Complication	Complication
	Resolution	Resolution	Resolution

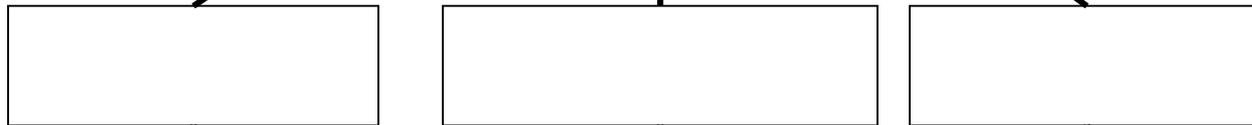
# SYNTHESIZE: Storyline Logic

Governing Thought



- Use structured logic
- Try to stay MECE
- Look from the decision-maker's perspective

Specific Recommendations



What would have to be true?

Support (conclusions/facts)



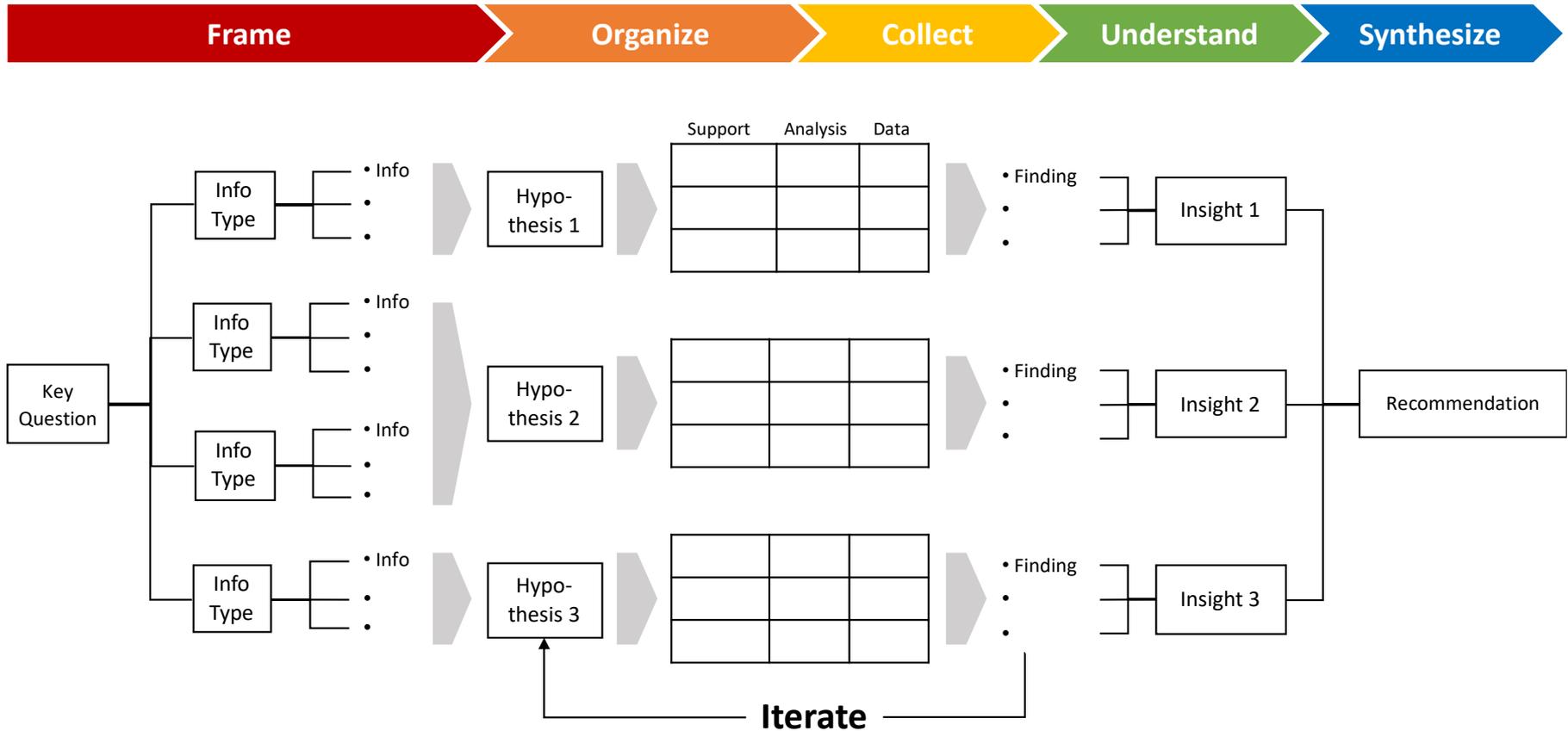
What would have to be true?

TEAM FOCUS

# FOCUS Analytical Process Map

T E A M

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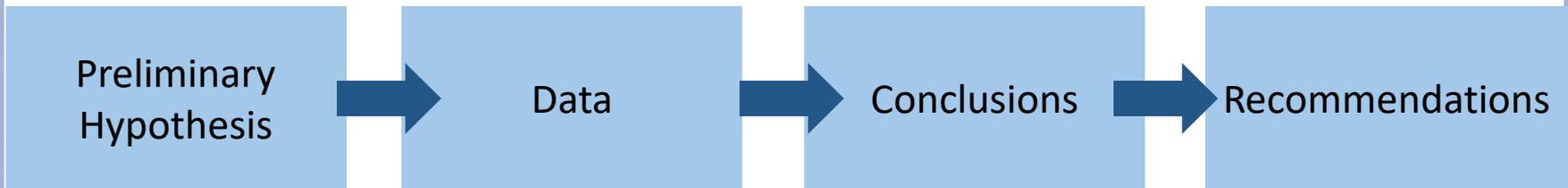
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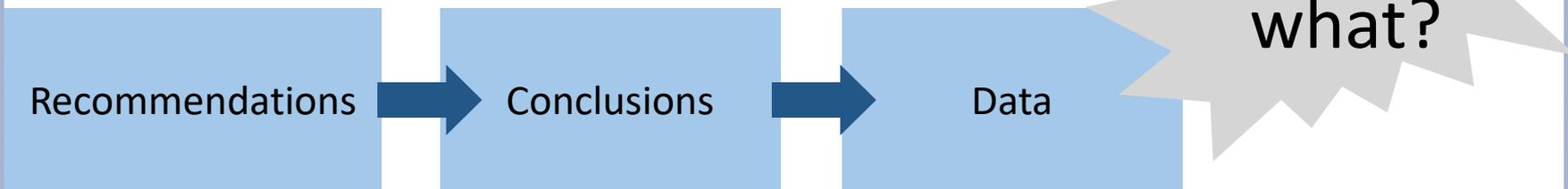


# The problem-solving and presentation processes each have their own unique steps

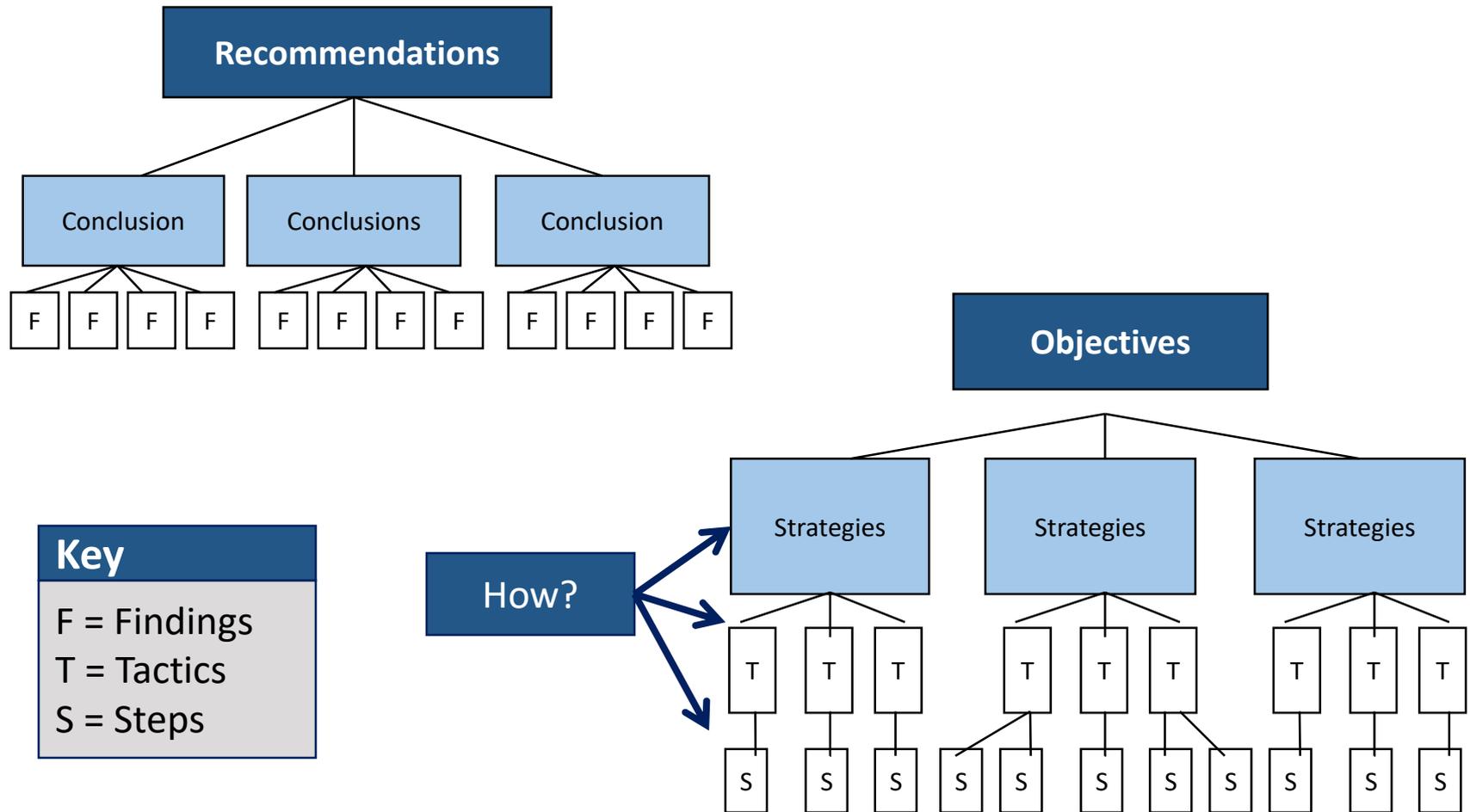
## The problem-solving process:



## The presentation process:



# The Pyramid Principle structures reports to emphasize the logic and support



Source: "Think Your Way to Clear Writing" - Barbara Minto, *Journal of Management Consulting*,

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# Consultants are a different breed

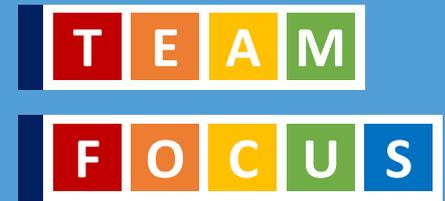
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# Homework by Thursday

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1. Create a high-level storyline for your ideas on the PSO case based on fact packs and insights from this workshop
  - You may use the template provided in this deck or hard copy (handwritten or typed is fine) include your name on what you submit
2. Important: Make sure that you have secured and READ The McKinsey Engagement by next class!
3. Also – watch the first 5 videos – Overview and TEAM sections (links to videos following slide)
4. Review the Myers-Briggs deck on Canvas and take the test using the link provided



Password for all videos: **KF-COOL**

**Module 1, Part 1:**

<https://vimeo.com/348059738>

**Module 1, Part 2:**

<https://vimeo.com/348059706>

**Module 2, Part 1:**

<https://vimeo.com/348209124>

**Module 2, Part 2:**

<https://vimeo.com/348268176>

**Module 3, Part 1:**

<https://vimeo.com/348885482>

**Module 3, Part 2:**

<https://vimeo.com/348911993>

**Module 4, Part 1:**

<https://vimeo.com/349104880>

**Module 4, Part 2:**

<https://vimeo.com/349107395>

**Module 5, Part 1:**

<https://vimeo.com/349508217>

**Module 5, Part 2:**

<https://vimeo.com/349519415>

**Module 6, Part 1:**

<https://vimeo.com/350108606>

**Module 6, Part 2:**

<https://vimeo.com/350164173>

**Module 7, Part 1:**

<https://vimeo.com/350824419>

**Module 7, Part 2:**

<https://vimeo.com/350829444>

**Module 8, Part 1:**

<https://vimeo.com/350842653>

**Module 8, Part 2:**

<https://vimeo.com/350846173>

**Module 9, Part 1:**

<https://vimeo.com/350859403>

**Module 9, Part 2:**

<https://vimeo.com/350865956>

# **We have 3 primary goals**

---

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



**Consulting Skills & Frameworks**

**Thank you!**

**Have a GREAT night 😊**



**Consulting Skills & Frameworks**  
**Class 2- Overview and Teamwork**

**BUSI 554H**  
**Fall 2019**

# Agenda

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- 1 Learning Objectives
- 2 Course Overview
- 3 TEAM- Theory and Exercises



# Learning Objectives



# Meet your tour guide for the journey...

## Identity

- Associate Professor at KFBS in the S&E Group
- Married to Meredith (KFBS BSBA and MAC)
- Father of Nicholas Roy (Born 7.27.07)

## Experience

- McKinsey & PWC
- Co-Author of The McKinsey Mind and author of The McKinsey Engagement

## Education

- MBA and PhD, The Kenan-Flagler Business School at the University of North Carolina



Visit my website for videos and decks related to team problem solving: [www.paulfriga.com](http://www.paulfriga.com)

# The TAs are additional valuable resources



Name: Ravi Malik

973-223-4845 | Ravi\_Malik@kenan-flagler.unc.edu

Year: Senior

Majors: Business & Computer Science

- I was stranded on top of a volcano
- I survived a plane crash
- I was born blind
- I rode a camel through the Sahara



Name: Kaitlyn Yakaboski

919-710-5995 | Kaitlyn\_Yakaboski@kenan-flagler.unc.edu

Year: Senior

Majors: Business & IDST – Global Human Empowerment

- My family has been to Disney > 10 times
- I slept in a treehouse in Laos
- I camp in a tent for 2 weeks every year
- I'm unusually good at cornhole

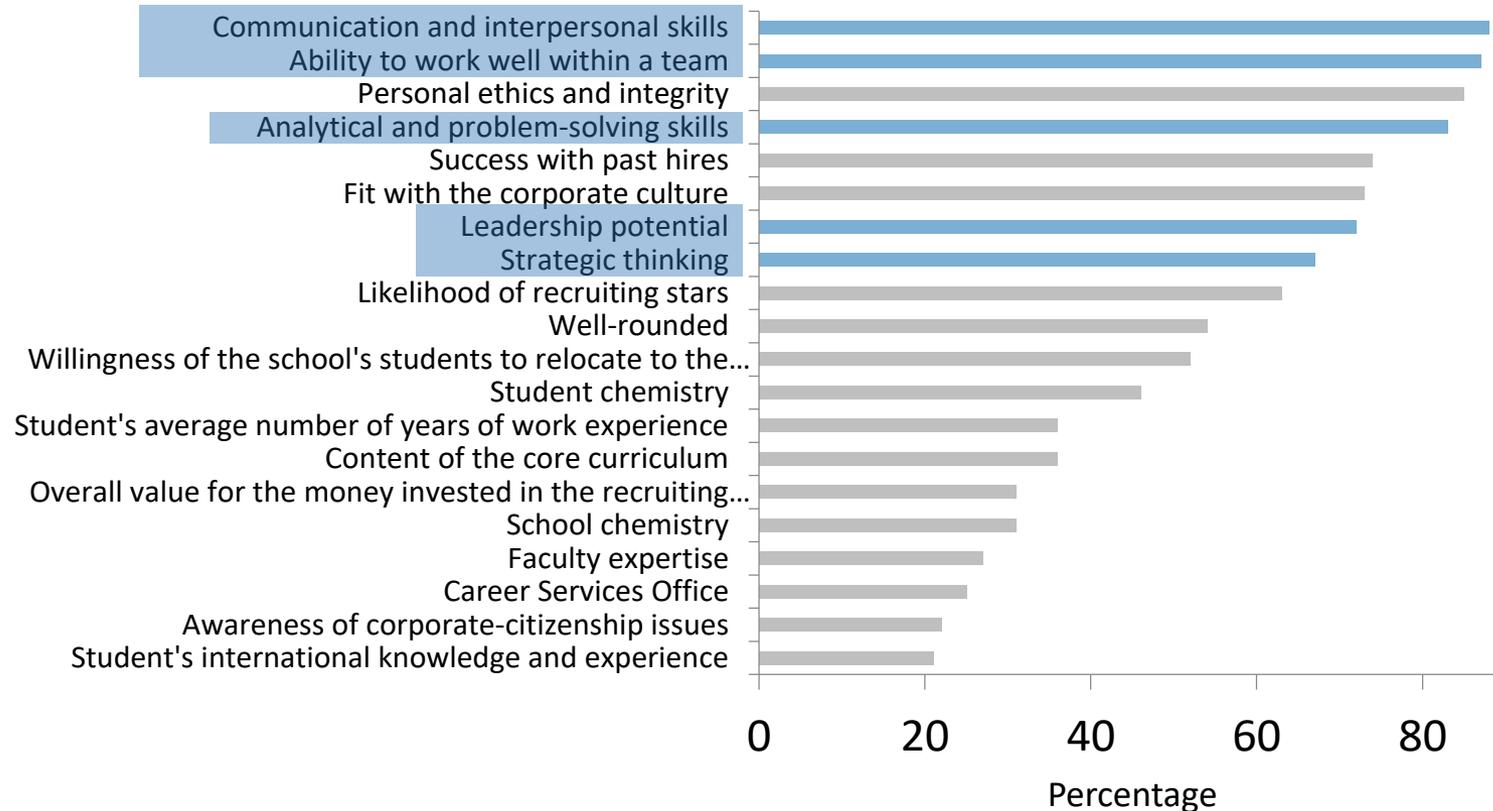
Feel free to contact the TAs for help with assignments, PowerPoint, resumes, case preparation, career placement or any other needs.

# You are indeed a special forces unit



# We focus on attributes that recruiters deem important

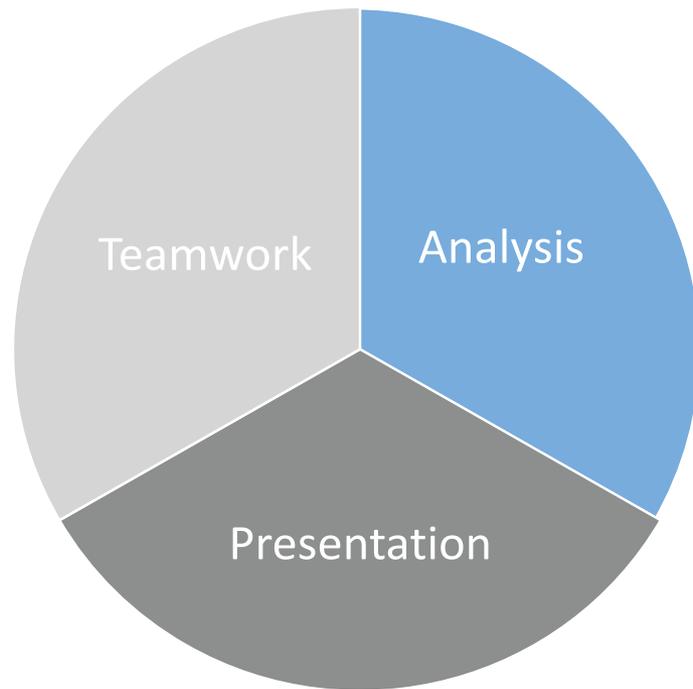
## Importance of Student and School Attributes (As Ranked by Recruiters – source WSJ 2006)



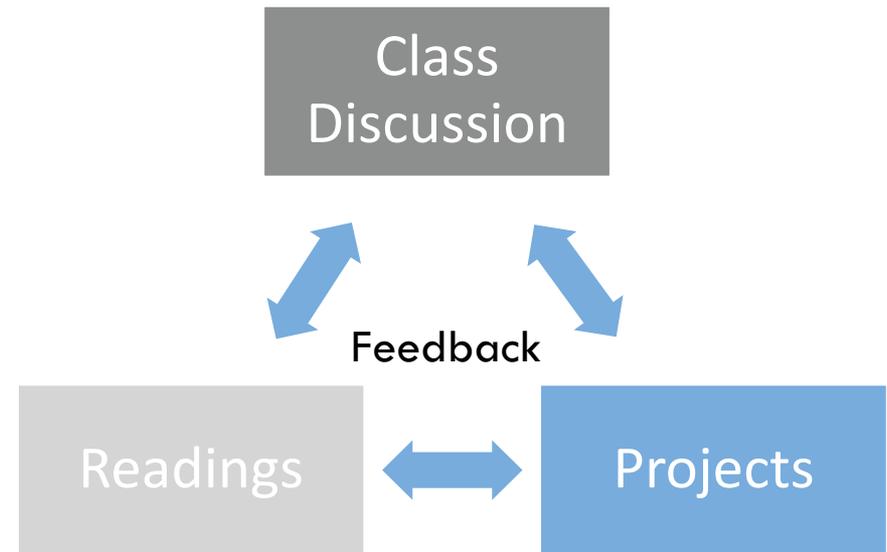
# Course Approach and Methodology

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## Approach (TAP)



## Methodology



# TEAM FOCUS Framework

## “Rules of Engagement”

T E A M

F O C U S

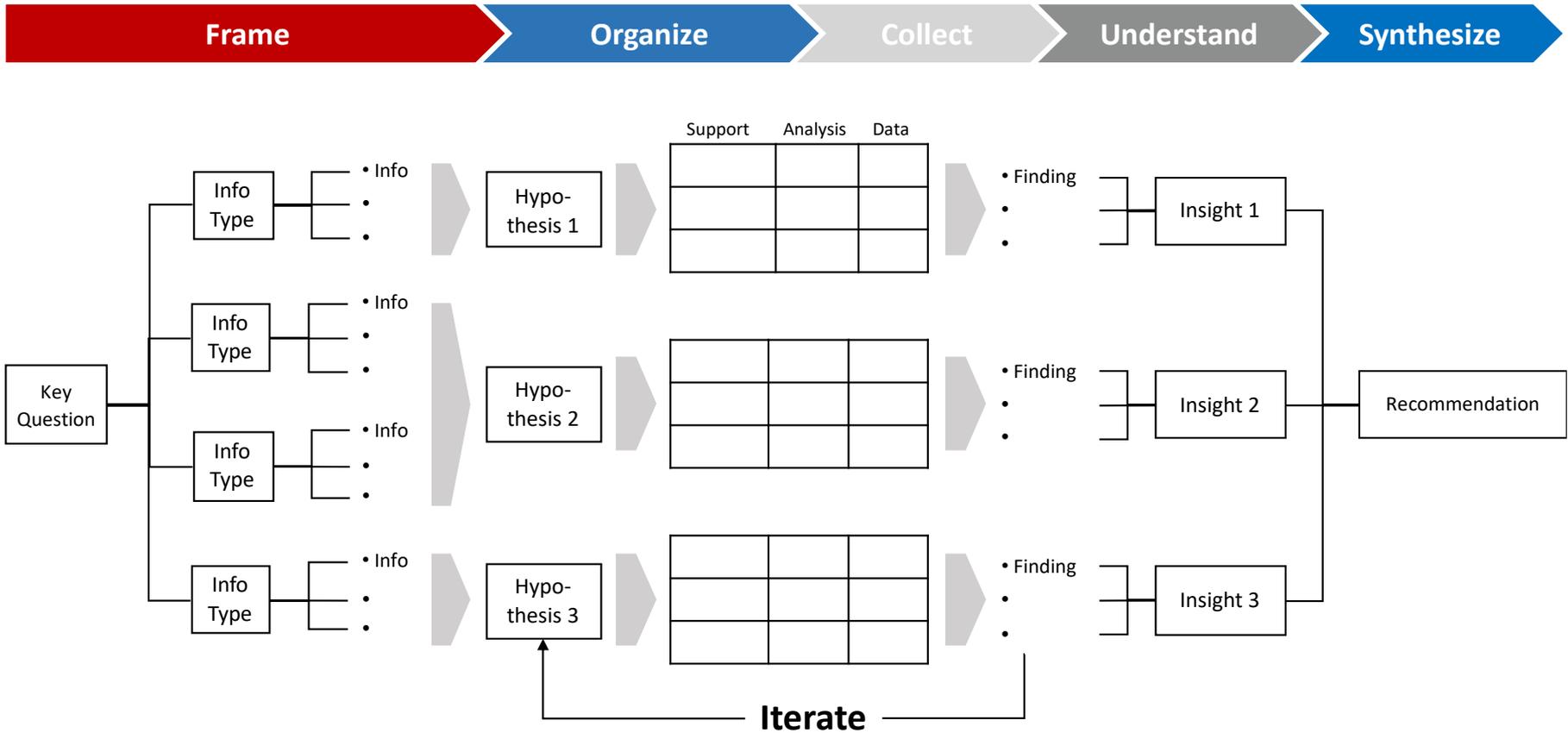
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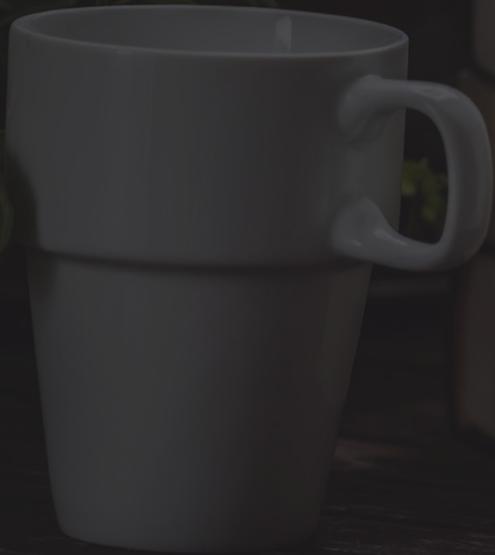
# FOCUS Analytical Process Map

T E A M

F O C U S

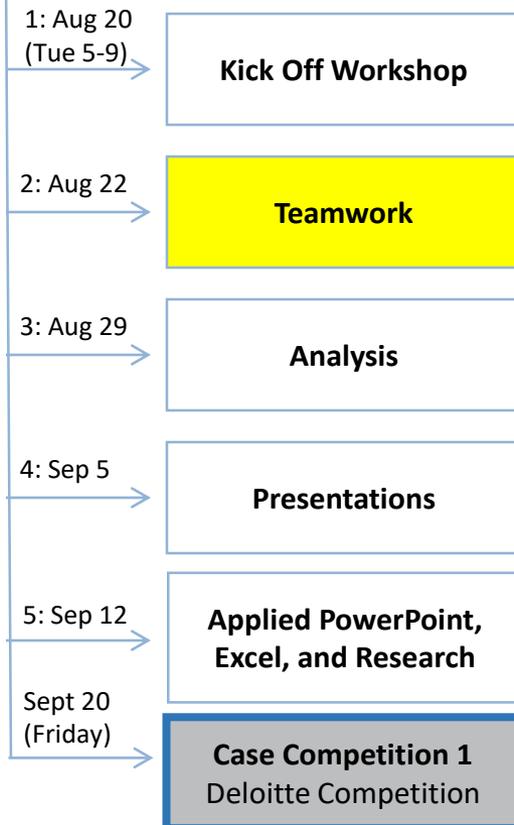


# Course Overview

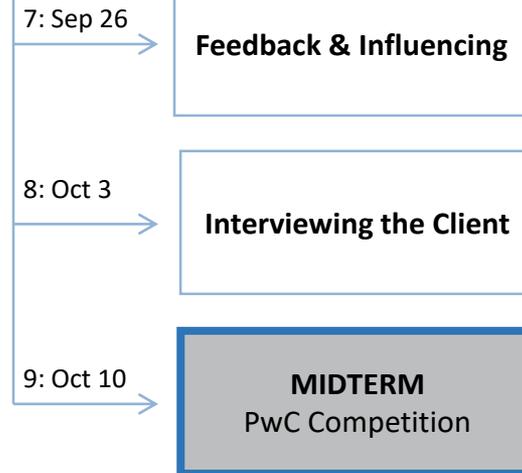


# Consulting Skills & Frameworks Overview

## Consulting Foundations



## Consulting Interactions



## Consulting Frameworks



- = Discussion Days
- = Presentation Days

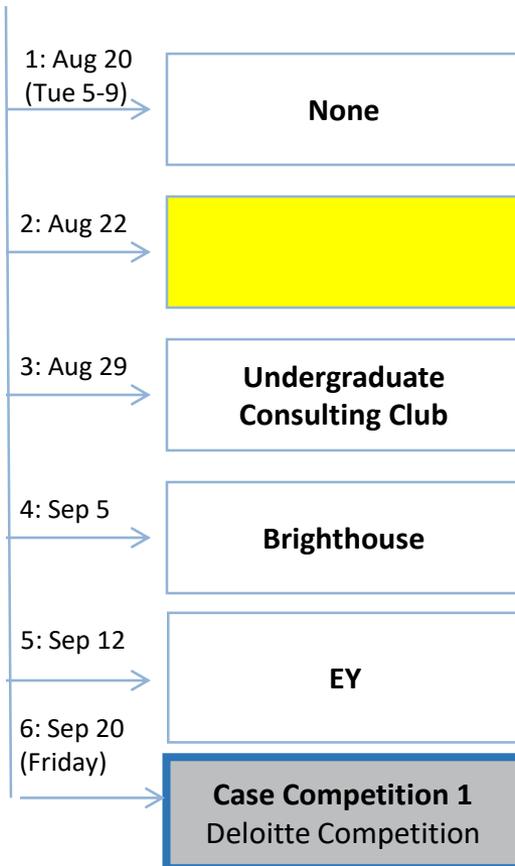
**“It goes by really fast” – Dr. Friga,  
every class of every semester**

Professor: Dr. Paul Friga  
CSF Fall 2019

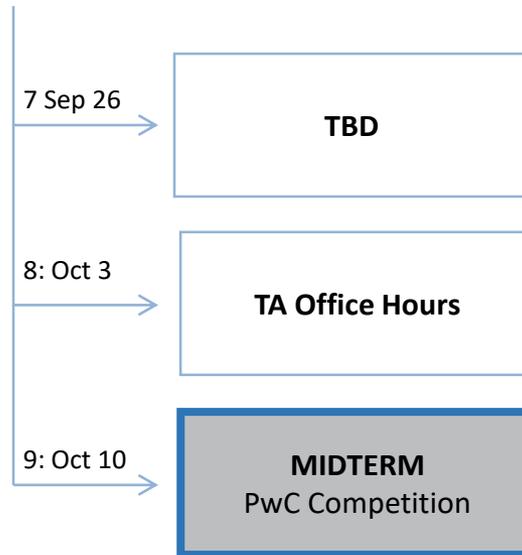
# CSF “Dine and Discover” Sessions

## Optional: Thursday 5-6PM (Food provided)

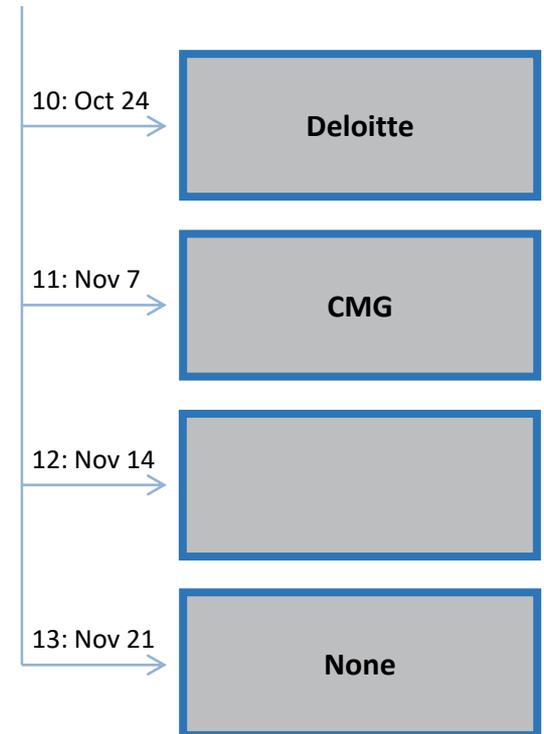
### Consulting Foundations



### Consulting Interactions



### Consulting Frameworks



= Discussion Days  
 = Presentation Days

“It goes by really fast” – Dr. Friga,  
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# Detailed Course Schedule

## Consulting Foundations

<b>2</b>	<b>Aug</b>	<b>22</b>	Class Meeting: Overview and Teamwork	Preparation: <ul style="list-style-type: none"> <li>• <u>The McKinsey Engagement</u>: Chapters 1-4</li> <li>• The Discipline of Teams (Katzenbach)</li> <li>• Module 3 (Evaluate), Module 4 (Assist), and Module 5 (Motivate) on Dr. Friga's website – COMPLETE (EASY) 5 QUESTION QUIZZES</li> </ul>
<b>3</b>	<b>Aug</b>	<b>29</b>	Class Meeting: Analysis	Preparation: <ul style="list-style-type: none"> <li>• <u>The McKinsey Engagement</u>: Chapters 5-8</li> <li>• Module 6 (Frame), Module 7 (Organize) and Module 8 (Collect) on Dr. Friga's website – COMPLETE (EASY) 5 QUESTION QUIZZES</li> </ul> <p>Video: Ocean's 11</p> <p>Class Exercise: Issue Tree Development</p>
<b>4</b>	<b>Sep</b>	<b>5</b>	Class Meeting: Presentations	Preparation: <ul style="list-style-type: none"> <li>• <u>The McKinsey Engagement</u>: Chapter 9</li> <li>• Zelazny, <u>Say it with Presentations</u> (pp. 42-55) (Zelazny)</li> <li>• Minto, <u>The Pyramid Principle</u> (pp. 5-17) (Minto)</li> <li>• Minto, Clear Writing</li> <li>• Presentation Training - Zelazny, <u>Say it with Charts</u> (read pp. 1-128, 195-219; skim 129-191)</li> <li>• Module 9 (Understand) and Module 10 (Synthesize) on Dr. Friga's website – COMPLETE (EASY) 5 QUESTION QUIZZES</li> </ul> <p>Class exercise: Storyline practice &amp; presentation examples</p>

# Course Schedule CTD

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## Consulting Interactions

5	Sep	12	Class Meeting: PowerPoint Essentials and Slide Examples	Preparation: <ul style="list-style-type: none"><li>Review Consulting Resources Website</li></ul>
6	Sep	20	Case Competition 1	
7	Sep	26	Class Meeting: Feedback & Influencing	Preparation: <ul style="list-style-type: none"><li>Cannon, "Actionable Feedback"</li></ul> Class exercise: Role plays & sample feedback sessions
8	Oct	3	Class Meeting: Interviewing the Client	Role Play
9	Oct	10	Mid-term (You will be required to attend one 1.5 hour presentation session)	Individual Presentations Case: Mini-case TBD

# Course Schedule CTD

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## Consulting Frameworks

<b>10</b>	<b>Oct</b>	<b>24</b>	Class Meeting: Finance Frameworks	Deloitte offers frameworks, tools and exercises
<b>11</b>	<b>Nov</b>	<b>7</b>	Class Meeting: Marketing Frameworks	All teams present – ranked by class and professors Case: TBD
<b>12</b>	<b>Nov</b>	<b>14</b>	Class Meeting: Strategy Frameworks	Preparation: <ul style="list-style-type: none"><li>• All strategy videos on Dr. Friga's website</li></ul> All teams present – ranked by class and professors Case: TBD
<b>13</b>	<b>Nov</b>	<b>21</b>	Case Competition #2 (Followed by a celebratory gathering)	

# There are high expectations for this course

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This course is based upon experiential learning, and consists of just 14 critical sessions (once a week). In order to develop and refine the skills you will need to analyze and present cases, I expect you to:

- Attend each class
- Prepare for each class by reading and thinking about the assigned materials prior to attending class and completing both of the exercises
- Contribute materially to your teams' preparation and presentations of the cases

## Classes 1-6

Develop the building blocks for case analysis, presentation, and teamwork through lectures, discussions, and a series of in- and out-of-class exercises, including one team case competition

## Classes 7-9

Learn the key communications skills necessary for a consulting engagement, including giving and receiving feedback, influencing clients and colleagues, developing presentations and interviewing the client. Apply learnings through the individual mid-term mini-case

## Classes 10-13

Get introduced to some of the key frameworks used to solve functional area consulting problems (finance, strategy, operations and marketing) that you can use in cases and projects. Note that this is just an introduction and overview –your other courses are critical!

## Class 14

Wrap up the class with 1 more case competition and have a final insights write up that focuses on learnings

# Feedback is a gift

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## Purpose

Once you have assembled the building blocks, you will have an opportunity to apply the skills learned and thereby to gain experience in two case competitions, one in-class case presentation, and one internal mini-case. The case competitions will be judged by external consultants and other faculty, as well as Professors Friga and Cochran, & TAs.

## Team Formation

Students will work in teams of four to five on the cases. We will assign students to teams with the goal of bringing together diverse skills and backgrounds, thereby enabling students to draw on and learn from each other's strengths. Each student will be a member of five teams during the semester, two for the two case competitions and one for each of the three internal class presentations.

## Case Logistics

For each case competition, you will be given a factual scenario (including some relevant data) and asked to analyze the issue(s) presented in the case and to prepare a presentation with your conclusions and recommendations. The internal class presentations will be based upon the framework content under review that week. Other students, faculty, TA and guests will evaluate the presentations.

## Grading

For each case, each student will receive both a team and an individual grade. Team grades are based on analysis, slides, and presentation. The individual grade will be based on peer evaluation. Each member of the team will evaluate each of the others based on two criteria: (a) his or her contribution to the team's analysis and presentation, and (b) his or her teamwork. Your individual grade for each case will be the average of your teammates' evaluations of you.

# We seek open and regular communication

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## Receiving Communication

Canvas will be utilized for course information and announcements, assignment submission, and grade posting

Articles may be posted or sent via email

## Issuing Communication

Dr. Paul N. Friga

Email: [pnf@unc.edu](mailto:pnf@unc.edu)  
Work Phone: 919-962-3786  
Mobile: 919-809-4520  
Office Hours: By appt.

T.A. Kaitlyn Yakaboski  
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[Kaitlyn\\_Yakaboski@kenan-flagler.unc.edu](mailto:Kaitlyn_Yakaboski@kenan-flagler.unc.edu)  
[Ravi\\_Malik@kenan-flagler.unc.edu](mailto:Ravi_Malik@kenan-flagler.unc.edu)

# The Readings are very important

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- **Book:** The McKinsey Engagement (2008), Paul Friga
- **Book:** Say It With Charts (4<sup>th</sup> ed. 2001), Gene Zelazny
- **Supplementary readings (access to electronic material will be provided)**
  - Gene Zelazny, Say It With Presentations 42-55 (2006) (“Determine Your Message,” “Craft the Story Line,” “Write the Introduction”).
  - Barbara Minto, The Pyramid Principle 5-17 (1995) (Chapter 1: “Why a Pyramid Structure”).
  - Barbara Minto, *Think Your Way to Clear Writing*, J. of Mgmt. Consulting, May 1998, 33-40.
  - Barbara Minto, *Think Your Way to Clear Writing (Part Two)*, J. of Mgmt. Consulting, Nov. 1998, 45-53.
  - Jon R. Katzenbach & Douglas K. Smith, *The Discipline of Teams*, Harv. Bus. Rev., July-Aug. 2005, 162-171.
  - Mark D. Cannon & Robert Witherspoon, *Actionable Feedback: Unlocking the Power of Learning and Performance Improvement*, 19 Acad. Of Mgmt. Exec. 120 (2005).

# Working with KFBS Communication Coaches

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1. You may work with a Consultant in the Business Communication Center to refine writing and presentation skills in assignments for this course (excluding the final exam).
2. Consultants work with you to polish your communication skills; they do not proofread, edit, nor generate assignment content for you.
3. Here is a link to the Business Communication Center website where you'll find hours, appointment availability, and additional information: <http://public.kenan-flagler.unc.edu/buscommctr/>

# Points can be earned from cases and class contribution

Grading Activity	Points
Class Contribution* (40)/Scavenger Hunt (10)	50*
Case Competition #1 <ul style="list-style-type: none"><li>▪Team presentation and analysis – 70 pts.</li><li>▪Peer evaluation – 30 pts.</li></ul>	100
Mid-term – Individual Case <ul style="list-style-type: none"><li>▪Slide deck</li><li>▪Presentation</li></ul>	100
Mini-Cases – Consulting Frameworks <ul style="list-style-type: none"><li>•Strategy Frameworks – 50 pts.</li><li>• Marketing Frameworks – 50 pts.</li></ul>	100
Case Competition #2 <ul style="list-style-type: none"><li>▪Team presentation and analysis – 70 pts.</li><li>▪Peer evaluation - 30 pts.</li></ul>	100
Reflection Paper	50
<b>Total</b>	<b>500</b>

## \*Class Contribution:

14 classes

0 = No show

1= Attendance and no participation or makeup

2 = Attendance and average participation, and participation mini-cases

3= Case competitions and one MVP for each mini case team and exceptional contributions

Total possible points: 42

100% class contribution grade at 40

# Grading will be on a curve

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## Approximate Distribution

Grade	Percentage	Points
A	≥90%	≥450
B	80 – 89%	400 – 449
C	70 – 79%	350 – 399
D	60 – 69.9%	300 – 349
F	≤60%	≤299

We may add pluses and/or minuses to grades on the margins. We will decide whether or not to do so, and if we do so what grades would qualify, only at the end of the semester (after we have an opportunity to look at the distribution of total points by student).

We reserve the right to depart from the above scale if we find doing so to be desirable to achieve an appropriate class grade distribution.

# Attendance Policy

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Attendance is required for all classes - we don't have that much time together. In the case of an unavoidable conflict:

1. Tell the TAs/Kathy Kay/Dr. Friga in advance
2. Review video from class (available on Canvas\*)
3. Make up any quizzes and/or assignments

\*Some assignments require groups and must be completed immediately after reviewing the video—if you miss class, please do not watch the video before consulting with us.

Unexcused absences will negatively impact your grade;

Each unexcused absence will lower your grade by one half letter grade (**1** unexcused absence = A- maximum grade, **2** unexcused absences = B+ maximum grade).

Password for all videos: **KF-COOL**

**Module 1, Part 1:**

<https://vimeo.com/348059738>

**Module 1, Part 2:**

<https://vimeo.com/348059706>

**Module 2, Part 1:**

<https://vimeo.com/348209124>

**Module 2, Part 2:**

<https://vimeo.com/348268176>

**Module 3, Part 1:**

<https://vimeo.com/348885482>

**Module 3, Part 2:**

<https://vimeo.com/348911993>

**Module 4, Part 1:**

<https://vimeo.com/349104880>

**Module 4, Part 2:**

<https://vimeo.com/349107395>

**Module 5, Part 1:**

<https://vimeo.com/349508217>

**Module 5, Part 2:**

<https://vimeo.com/349519415>

**Module 6, Part 1:**

<https://vimeo.com/350108606>

**Module 6, Part 2:**

<https://vimeo.com/350164173>

**Module 7, Part 1:**

<https://vimeo.com/350824419>

**Module 7, Part 2:**

<https://vimeo.com/350829444>

**Module 8, Part 1:**

<https://vimeo.com/350842653>

**Module 8, Part 2:**

<https://vimeo.com/350846173>

**Module 9, Part 1:**

<https://vimeo.com/350859403>

**Module 9, Part 2:**

<https://vimeo.com/350865956>

# Upholding KFBS Values

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Value	Faculty Responsibility	Student Responsibility
<b>Excellence</b>	<ol style="list-style-type: none"><li>1. <i>To provide rigorous, meaningful, and relevant course content and deliverables.</i></li><li>2. <i>To adhere to KFBS grading standards for evaluating performance.</i></li><li>3. <i>To seek out and incorporate feedback from students, faculty, and staff regarding course improvements.</i></li><li>4. <i>To deliver timely feedback on assignments.</i></li></ol>	<ol style="list-style-type: none"><li>1. <i>To prepare thoroughly for each class session.</i></li><li>2. <i>To participate actively and constructively in class discussions.</i></li></ol>

# Upholding KFBS Values

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Value	Faculty Responsibility	Student Responsibility
<b>Leadership</b>	<ol style="list-style-type: none"><li>1. <i>To communicate the goals of the course and the relevance of these goals to your business education.</i></li><li>2. <i>To call on students other than just volunteers to contribute to class discussions.</i></li><li>3. <i>To challenge students to push themselves by thinking critically about the course content.</i></li></ol>	<ol style="list-style-type: none"><li>1. <i>To challenge your peers during class discussions and study team meetings to think critically, question assumptions, and develop analytical thinking skills.</i></li></ol>

# Upholding KFBS Values

Value	Faculty Responsibility	Student Responsibility
<p style="text-align: center;"><b>Integrity</b></p>	<ol style="list-style-type: none"> <li>1. <i>To set clear expectations for students regarding what is and is not a violation of the Honor Code in this class.</i></li> <li>2. <i>To enforce these expectations by reporting suspected violations of the Honor Code to the Honor Court.</i></li> <li>3. <i>To set clear expectations for you regarding acceptable classroom behavior, and to enforce these expectations by providing feedback to those who deviate from acceptable classroom behavior.</i></li> </ol>	<ol style="list-style-type: none"> <li>1. <i>To understand and uphold the behaviors mandated by the Honor Code in this class.</i></li> <li>2. <i>To report any suspected violations of the Honor Code by peers to me.</i></li> <li>3. <i>To understand and uphold the behavioral standards for classroom conduct.</i></li> </ol>

# Upholding KFBS Values

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Value	Faculty Responsibility	Student Responsibility
<b>Community</b>	<ol style="list-style-type: none"> <li>1. <i>To develop, communicate, and enforce a policy regarding appropriate (and inappropriate) use of technology in the classroom.</i></li> <li>2. <i>To start and end each class on time.</i></li> <li>3. <i>To use a variety of pedagogical approaches to engage and involve you in the learning process.</i></li> </ol>	<ol style="list-style-type: none"> <li>1. <i>To understand and adhere to the policy regarding technology use in the classroom.</i></li> <li>2. <i>To be on time for each class session. Once in class, do not leave until the end of the session. Treat each class session as a key work meeting. If your excuse wouldn't be legitimate for missing work, it's not legitimate for missing class.</i></li> <li>3. <i>To attend your assigned class section, rather than another section, unless given prior approval by me.</i></li> </ol>

# Upholding KFBS Values

Value	Faculty Responsibility	Student Responsibility
<b>Teamwork</b>	<ol style="list-style-type: none"> <li>1. <i>To set explicit standards for class attendance and consequences for absences.</i></li> <li>2. <i>To provide opportunities for team assignments</i></li> <li>3. <i>To make myself available to you for questions or discussions outside of class time.</i></li> </ol>	<ol style="list-style-type: none"> <li>1. <i>To attend each class session – if you're absent, you can neither teach, nor learn.</i></li> <li>2. <i>To self-police, rather than rely on faculty-policing, of attendance – if you're absent, inform the faculty member. Failure to do so is considered a violation of the honor code.</i></li> <li>3. <i>To contribute constructively to all group assignments.</i></li> <li>4. <i>To come to my office hours or contact me if you have concerns or questions about the course material.</i></li> </ol>

# Honor Code

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**Academic Dishonesty.** It shall be the responsibility of every student enrolled at the University of North Carolina to support the principles of academic integrity and to refrain from all forms of academic dishonesty, including but not limited to, the following:

**Plagiarism** in the form of deliberate or reckless representation of another's words, thoughts, or ideas as one's own without attribution in connection with submission of academic work, whether graded or otherwise.

**Falsification, fabrication, or misrepresentation** of data, other information, or citations in connection with an academic assignment whether graded or otherwise.

**Unauthorized assistance or unauthorized collaboration** in connection with academic work, whether or not for a grade.

**Cheating** on examinations or other academic assignments, whether graded or otherwise, including but not limited to the following:

- Using unauthorized materials and methods (notes, books, electronic information, telephonic or other forms of electronic communication, or other sources or methods);
- Violating or subverting requirements governing administration of examinations or other electronic assignments;
- Compromising the security of examinations or academic assignments;
- Representing another's work as one's own; or
- Engaging in other actions that compromise the integrity of the grading or evaluation process.

**Deliberately furnishing false information** to members of the University community in connection with their efforts to prevent, investigate, or enforce University requirements regarding academic dishonesty.

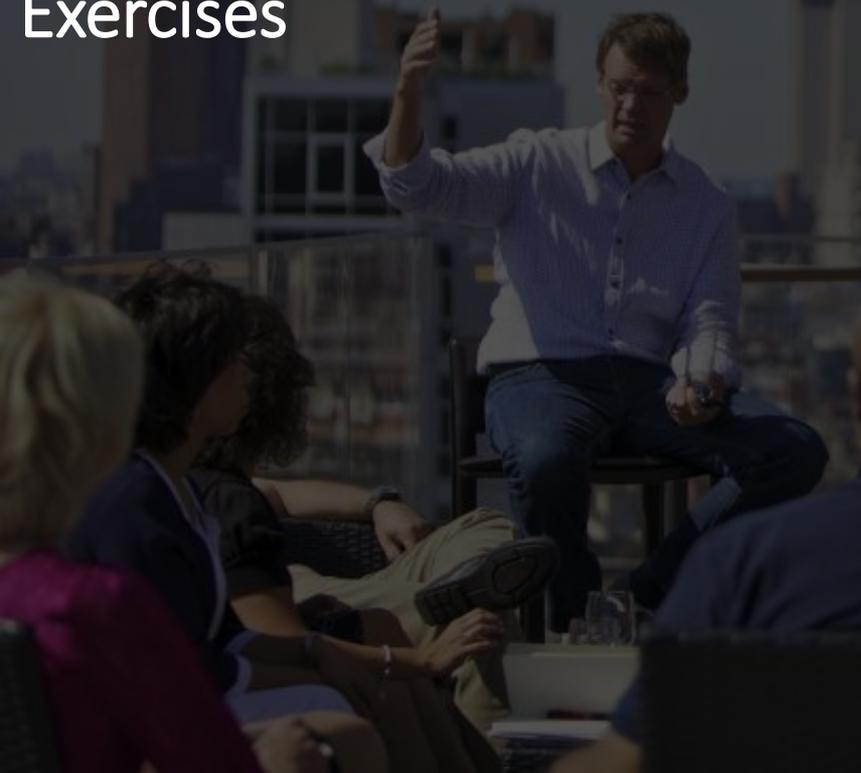
**Forging, falsifying, or misusing** University documents, records, identification cards, computers, or other resources so as to violate requirements regarding academic dishonesty.

**Violating other University policies** that are designed to assure that academic work conforms to requirements relating to academic integrity.

**Assisting or aiding another** to engage in acts of academic dishonesty prohibited

**KEY POINTS: INDEPENDENT WORK. CITE SOURCES.**

# TEAM- Theory and Exercises



# TEAM FOCUS toolkits can be used in implementation

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## 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



# Template: Team Charter

**T E A M**

**F O C U S**

<b>Team Name</b>	
<b>Client Name</b>	
<b>Project Description</b>	
<b>Potential Issues</b>	
<b>Success Goals</b>	

<b>Name</b>	<b>Role</b>	<b>Myers Briggs</b>	<b>Strengths</b>	<b>Weaknesses</b>	<b>Email</b>	<b>Phone</b>

# Personality Profiles are not perfect – so use them cautiously

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## Benefits

**Learn about yourself** – explore your strengths, weaknesses, recommended career paths, etc.

**Understand others** – learn to appreciate and leverage differences in order to work together more effectively

**Mitigate conflict** – Identify potential conflicts or hot-buttons you may face with others

**Tailor your approach** – practice consciously altering your style to accommodate others

## Risks

**Beware of labeling** – no one is a ‘red’ or an ‘E.’ No one fits perfectly in one style and styles will change over time and depending on the situation

**Be fair** – there is no ‘better’ or ‘worse’ style, but it is very easy to speak with bias which may be offensive

**Assessments are imperfect** – you may disagree, be surprised, disappointed, or pleased. Use these tools as aides – not as finite truths

# You can improve your interactions using Myers Briggs

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1. Identify interaction opportunities
2. Learn your default personality (e.g. Myers Briggs)
3. Learn how to identify others' types
4. Understand the influence styles and tactics
5. Practice using multiple styles/tactics
6. Understand the importance of listening

# The scaling is done on a continuum

**Extraversion**

**Introversion**

(Direction of Focus)

(Direction of Focus)

**Sensing**

**Intuitive**

(Ways of gathering information)

**Thinking**

**Feeling**

(Ways of coming to conclusions, decision making)

**Judgment**

**Perception**

(Attitude toward the outer world)

## So What is Your Sign?

# Template: Myers-Briggs Profile Descriptors

T E A M

F O C U S

E

## Extroverts

Comfortable with people and things; express emotions easily, and are friendly, talkative, and easy to know

I

## Introverts

Comfortable with ideas and thoughts; do not express emotions easily and are reserved, quiet, and hard to know

S

## Sensors

Use the five senses to become aware of things, like precise and routine work, are not comfortable with solving new problems, and take pleasure in the current moment

N

## Intuitives

Use subconscious ideas or associations to become aware of things and like solving problems, planning for the future, and forging ahead in new areas

T

## Thinkers

Use logic, make decisions based on facts, like to analyze and organize, don't like to confront or express emotions, and are skeptical when approaching problems

F

## Feelers

Like relationships to work well, enjoy people, are sensitive to others, make decisions based on values and impact upon people, and are trusting when approaching problems

J

## Judgers

Are orderly and organized, like to finish tasks, like to make quick decisions, and like to make plans

P

## Perceivers

Are curious, adapt well to change, like to start many projects but may have trouble finishing them, and may have difficulty making decisions

# How do we compare to others?

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- The following slides were compiled real time from the 180 consulting and STAR Program students in the audience in January 2013
- The first slide is a count of the different types represented in the class
- The second slide compares the class to the general population as well as “managers” in graphical form
- What insights can you draw?

# Fall 2019: 2–5PM

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<b>ISTJ</b>	<b>ISFJ</b>	<b>INFJ</b>	<b>INTJ</b>
Inspector 3	Protector 0	Counselor 1	Mastermind 1
<b>ISTP</b>	<b>ISFP</b>	<b>INFP</b>	<b>INTP</b>
Crafter 0	Composer 0	Healer 1	Architect 0
<b>ESTP</b>	<b>ESFP</b>	<b>ENFP</b>	<b>ENTP</b>
Promoter 2	Performer 1	Champion 4	Inventor 0
<b>ESTJ</b>	<b>ESFJ</b>	<b>ENFJ</b>	<b>ENTJ</b>
Supervisor 7	Provider 1	Teacher 3	Field Marshal 2

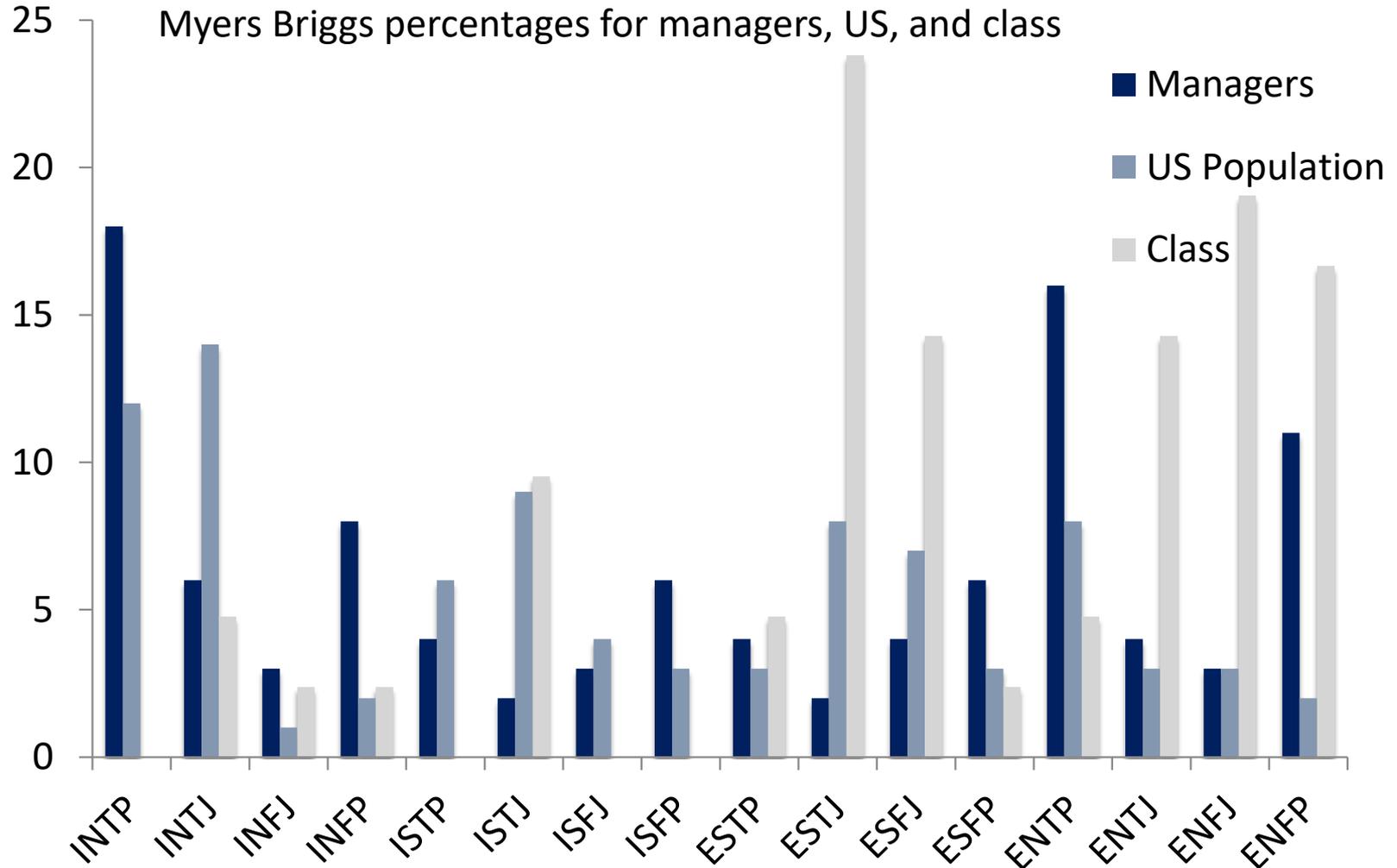


# Fall 2019: 6—9PM

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<b>ISTJ</b>	<b>ISFJ</b>	<b>INFJ</b>	<b>INTJ</b>
Inspector 1	Protector 0	Counselor 0	Mastermind 1
<b>ISTP</b>	<b>ISFP</b>	<b>INFP</b>	<b>INTP</b>
Crafter 0	Composer 0	Healer 0	Architect 0
<b>ESTP</b>	<b>ESFP</b>	<b>ENFP</b>	<b>ENTP</b>
Promoter 0	Performer 0	Champion 3	Inventor 2
<b>ESTJ</b>	<b>ESFJ</b>	<b>ENFJ</b>	<b>ENTJ</b>
Supervisor 3	Provider 5	Teacher 5	Field Marshal 4

# How do we compare to managers and the US population?



# Working with different types – Extroverts

- Create a social environment for work
- Give them assignments
- Involve them in brainstorming and planning
- Use their presentation skills
- Avoid asking them to work alone on long projects

# Working with different types – Introverts

- Expect them to say less in meetings
- Give them work to do aloud
- Allow them to write their ideas before presenting them
- Avoid interrupting them unnecessarily
- Make social interactions safe (don't embarrass them in public)
- Be patient and a good listener

# Working with different types – Sensors

- Be specific and factual
- Provide evidence to support conclusions
- Don't ask them to take things on faith
- Outline plans step by step
- Make recommendations practical and show the feasibility
- Provide examples and anecdotes from experience

# Working with different types – Intuitors

- Use their ability to make leaps of faith and see the big picture
- Use them to challenge the status quo and to play “Devil’s Advocate”
- Ask them to theorize and think about possibilities
- Allow them to daydream
- Don’t overload them with details

# Working with different types – Thinkers

- Be logical, analytical and objective
- State the principles involved
- Be well organized
- Use graphs and data
- Ask them to review and assess your own analysis
- Remind them of the human impacts of decisions

# **Working with different types – Feelers**

- Show a concern for the effects of plans and decisions on other people
- Be responsive to them
- Use their interpersonal skills to build teams and relationships
- Ask them to evaluate how people will respond to a decision
- Use them to determine what is important

# Working with different types – Judges

- Be as time conscious as possible
- Use detailed agendas
- Make materials neat
- Avoid surprising them and changing things at the last minute
- Use them to monitor time and “to do” lists
- Ask for assistance in project management

# Working with different types – Perceivers

- Be flexible and adaptable
- Avoid giving them tight deadlines
- Be process focused and ask them to evaluate processes
- If last-minute changes are necessary – ask them to handle them
- Use for exploratory or new assignments
- Don't expect them to monitor time well

# Toolkit Support Files

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- TEAM FOCUS – Overall Model
- Toolkit 1 – TEAM
- Other toolkits and templates are available for you on Canvas and many slide deck examples are available for you on UNC Consulting Resources

# Class Exercise

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Subarctic Survival?



OR

Earthquake Survival?



# Team Assignments

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## Section 1 (2-5:00 PM)

Team 1 - 1105	Team 2 - 1106	Team 3 - 1107	Team 4 - 1108	Team 5 - 1109	Team 6 - 1110
Harrison Lewis Eli DeGregorio Jacob Spence Pryce Martin Justin Smith	Gabriel Oliveira Cole Davies Anna Concepcion Elizabeth Ritger Lauren Graham Cole Kirkpatrick	Lauren Gornto Ben McGuigan Samuel Kirkman Zachary Washburn Stephanie Thomas Nate Miller	James DePolo Jake Garner Carter Searcy Kirstie Moore Sara Fran Greene	Lawton Ives Hidy Akila Gabriel Bouslav Julia Sefler Gavit Agarwal Matt Allen	Mason English Gabrielle Kmiec William Bower Charlotte Lutz Austin Dowler

## Section 2 (6-9:00 PM)

Team 7 - Classroom	Team 2 - 1106	Team 3 - 1107	Team 4 - 1108	Team 5 - 1109	Team 6 - 1110
Trey Tajuacto Carson Pledger Jacob Randall Michael Sheslow Courtney Loughran	Emma Verdi Jenny Suwanmanee John Spence Siddharth Vasisht	Nikita Billman Lindsey McFarland Drew Jacobs Carey Harrell	Madeline Creatore Ansley Hardison Adam Lewis Nisarg Shah Simon Geiser	Megan Lambert Darshan Patel Alec Lanzas Sam Canney Miriam Ta	Jennifer Zhang Allie Reiter Jake D'Ambrosio William Gardner