

## MGMT892 SYLLABUS – Fall 2019

Facilitated by The Mack Institute for Innovation Management  
The Wharton School | University of Pennsylvania

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<b>Course Load:</b>	1 cu
<b>Mandatory Faculty Meetings:</b>	The first meeting will be the week of Sept. 9 and the second Oct. 24 & 25 as in the schedule below
<b>Office Hours with faculty:</b>	By appointment

### **COURSE DESCRIPTION**

Unlike other electives you've taken so far, MGMT892 is a high impact and high visibility course. You will interact with senior management of large corporations and your interactions will *DIRECTLY INFLUENCE* Wharton's relationship with the project sponsor at the External Affairs level. Your performance and contributions hence matter profoundly to not just the sponsor you are assigned to but to Wharton as well. To see how Mack Institute partnerships work, please see: <https://mackinstitute.wharton.upenn.edu/corporate-partnership/>.

In this course, you will address real-life organizational issues through an action learning approach. By working on consulting projects for leading global companies, you will develop and apply your knowledge about innovation management to help these firms better understand the challenges and opportunities posed by emerging technologies and markets.

The objectives of the course are three-fold: (1) to develop a deeper understanding of managerial challenges/issues that affect large corporations; (2) to gain practical knowledge on how best to identify key influencing factors, research and analyze information, and apply strategic frameworks; and (3) to develop strategic and implementable solutions.

### **COURSE EXPECTATIONS**

Team work is critical to this course. Teams are expected to work in cohesion and also keep a healthy interaction channel with the project sponsor (corporate partner). Throughout the semester teams will have continuous interactions with the project sponsor to discuss their

progress and to obtain additional information/guidance. It is critical that you keep the communication channel frequent to make sure you are working in the right direction and there are no surprises at the end. Each team member has an obligation to report non-performance or shirking of responsibility of any member.

This course has a 'No Drop' policy, which means you are *NOT permitted to drop* the course without penalties.

### **DELIVERABLES**

1. Scope of work
2. Timeline with Actionables and Milestones
3. Weekly check-ins and weekly reports on project progress
4. Mid-point presentation
5. Final presentation
6. Team evaluations

Some deliverables are to be uploaded on canvas and some emailed; please check the schedule summary for details. TA's are to be included in all meetings and correspondence with sponsors. Templates for deliverables are found in the 'Files' tab. Deadlines and other dates can be found at the end of this document.

Note that sponsors are sometimes unavailable for multiple weeks at a stretch, so plan your meetings and presentations with them well ahead of time to ensure that you don't miss your course deadlines.

### **HOW THE COURSE WORKS**

The course has four broad parts:

1. The teams begin by understanding the problem and sponsor expectations, and scope the project with the project sponsor
2. Once the project is scoped, teams size up the problem, define future state, and identify action points and timelines (teams can revisit point #1 at this stage and iterate)
3. Teams then conduct the required research and analyses, and come up with recommendations/solutions. This stage involves continuous interactions with the sponsor team
4. Teams present their findings and solution to the project sponsor team through mid-point and final presentations

The faculty and TA's will assist in refining content and deliverables for the projects. Research guidance can be provided where necessary. You are encouraged to utilize the office hours or write to the faculty with CC's to the TA's for any help/concern/guidance.

### **Assigning member roles**

The team will start with assigning roles to each member: Liaison, Leader, Scribe and Analysts (see 'Other Notes' section for details). The Liaison will be in-charge of interactions with the sponsor and will be responsible for scheduling all meetings.

### **Scoping meeting and follow-up deliverables**

Teams will come prepared to this meeting by doing some background work and preparing a set of questions and clarifications. They will ask questions and discuss the project objectives and deliverables. By the end of the meeting the teams should have a clear idea of what is expected of them, and should've agreed with the sponsor on a workable project scope as well as the final deliverables. It is important at this stage to mutually agree on the final deliverables. The teams will also discuss during the call a suitable time for bi-weekly check-ins with the sponsor to report progress and discuss the project further.

Within 48 hours of the scoping meeting, the teams should email the sponsor, faculty, and TA's: (1) Scope of work (2) Timeline (draft) with actionable items and milestones, and (3) Bi-weekly check-in times with sponsor.

- Scope of work letter will contain the team's understanding of the project requirements, tentative project plan for fulfilling the project objectives, and proposed approach.
- Timeline will contain a list of actionable items that lead to the project milestones, which will sum up to the final deliverables. This timeline document will become your anchor to report progress on the project to the faculty and sponsors.

Over the week following the scoping meeting, the team will (1) solicit comments from the sponsor and (2) meet with the faculty to receive comments on the draft timeline and discuss their project plan. The finalized timeline should be submitted on canvas and sent to sponsor.

### **Weekly check-ins and canvas submissions**

To report on project progress, teams will have weekly meetings alternatively with sponsor and faculty. That is, they will have bi-weekly check-ins with sponsor to discuss the project, and during the weeks they do not meet the sponsor they will meet with the faculty to report on their progress. Weekly reports on project progress are due on Canvas every Sunday (this is individual assignment to be completed by each team member.) Note the due dates in 'Course Schedule Summary' section later in this document. Format for weekly reporting will be determined by faculty during the team's bi-weekly check-in with the faculty.

For all sponsor meetings:

- Calendar invites have to be sent out by the due date to sponsors and TA's
- Summary of the meeting and actionable items should be emailed to everyone at the end of the meeting. This is critical to ensure the sponsor is in alignment with your plan

### **Mid-point presentation**

Teams will give a mid-point presentation to their project sponsor and will reflect on progress thus far and plans for completion. The presentation should identify key questions, issues identified, hypotheses developed, research methods (e.g., surveys, interviews, and library research) used/ to be used, and findings so far. **A draft of the presentation should be emailed to the faculty a week in advance to obtain his comments. The final presentation should be emailed to sponsor with a CC to faculty and TA's a day in advance.**

### **Final presentation**

Teams will present final output of their project to the sponsor. Some project sponsors may require the submission of additional files such as a memo and executive brief on key findings. Teams have to make sure they understand at the very beginning what their project sponsor wants as the final output. **A draft of the presentation should be emailed to the faculty a week in advance to obtain his comments. The final presentation should be emailed to sponsor with a CC to faculty and TA's a day in advance.**

### **GRADING**

There are two components of grading, project delivery and process management. Both these are important and failure in one can lead to overall low grade even if you've done well in the other component. Grades are determined at both team and individual levels. Failure in individual performance can result in a low grade for the individual even if the team has done well. Note that weekly reports and peer evaluations are individual assignments, so they contribute to the individual's grade. Details:

1. Project delivery **40%**:
  - a. Mid-point presentation 20%
  - b. Final output 20%
2. Process management **60%**:
  - a. Project content and progress (including consistency of progress, rigor of analyses, and meeting project objectives) 30%
  - b. Project sponsor interaction (including clarity in communications, responsiveness, professionalism, and sponsor evaluation) 20%
  - c. Team co-ordination and peer evaluation 10%

Process management reflects the team's attention to the process of achieving the objective, and individual participation in the team's efforts as a team member and his/her role (Leader, Scribe, Liaison, Analyst). Weekly check-ins and weekly report submissions count towards process management. The objective is to strive for excellence in all components of grading.

### **OTHER NOTES**

**Course Readings:** The faculty will assign reading material after meeting with the teams to discuss scope of work. Reading material will be assigned to teams based on their projects.

**Submissions:** All submissions due to the sponsor are to be sent via email to your sponsor contact with a copy to faculty and TA's. Group assignments such as sponsor meeting and presentation invites are due on email/calendar. Individual assignments such as weekly progress reports and peer evaluations are due on Canvas.

**Submission deadlines:** Project sponsors are sometimes unavailable during the scheduled time, or may have a need to bring in other executives to hear what the students have to say. Dates for final presentations that are changed by the sponsor will have no bearing on due dates for course materials. Even if the sponsor delays the final presentation, the slide decks must be turned in on canvas by the dates noted. Delays or changes requested by the sponsor will not affect grading.

**Scheduling Team and Sponsor meetings:** Teams will meet with sponsors every other week. During the scoping meeting, teams will determine standing bi-weekly (check-in) meetings for the entire semester (preferably). Teams will do a similar exercise internally and determine a common time for members to meet weekly. Faculty and TA will make themselves available when sponsor meetings and presentations are scheduled; teams needn't worry about their availability for scheduling.

Students are to meet in 3400 Suite for bi-weekly meetings with sponsors, and meetings are to be scheduled on Zoom for easy facilitation by Mack Institute (teams can alert Mack Institute for scheduling once meeting times are determined.)

**Project plan and progress:** Since the timeline doc is an anchor for project progress and reporting, teams should determine what portion of the project will be completed by mid-point keeping in mind exam and holiday weeks. A semester timeline doc is available on canvas in Files folder for your reference.

Project progress should be submitted **weekly** on Canvas by midnight every Sunday. Format for weekly submissions will be determined by the faculty during the team's bi-weekly check-in with him. Note that project progress and process management represents 60% of your grade.

**Team roles:** Each team is required to designate an individual for each of the four major team roles and submit before their first meeting with the faculty on 9/10 or 9/11. These roles are chosen by the teams themselves and members may change roles during the course of the project if they find it necessary to do so. The faculty and TA's have to be informed of the change since individual grades are dependent on these roles too. The responsibilities are:

- **Team Leader** – Leader's responsibility is to manage the process the team chooses to follow. A collaborative approach is encouraged for choosing the process, setting milestones and making decisions.
- **Team Scribe** – The scribe assures the team of reliable documentation consistently. It is critical that team decisions be documented along with key discussion items. Any issues and concerns that arise within the team should be documented too.
- **Team Liaison** – The liaison assumes the primary responsibility to be the single point of contact with the sponsor. This responsibility includes communicating with the sponsor, scheduling all meetings, receiving questions, comments, direction from the sponsor and communicating such with the other team members, etc.
- **Team Analyst(s)** – The team will have one lead analyst and one or two supporting analysts. This does not preclude other roles from performing the necessary research and

analyses. One individual will lead the process as well as capture and characterize information as required.

**Project Sponsor Evaluations:** Team evaluations will be sought from the sponsors of your project. Sponsor evaluations will be used in determining the final grade. The sample evaluation form is attached in Appendix B.

**Team Peer Evaluations:** Team members will evaluate their own performance and contribution as well as that of other team members. The team average from these member peer evaluations will be used in determining the individual final grade on the project. The sample evaluation form is attached in Appendix A.

**Team work and Obligation to report:** Every team member has an obligation to report the non-performance of other members. Team success is the responsibility of all members; participation, conflicts, effort and team dynamics all affect final outcomes. Teams are responsible for identifying and addressing any issues that arise and members are encouraged to be both transparent and understanding of their fellow team members. If they are unable to resolve issues, team members are expected to approach the faculty and the faculty reserves the right to make adjustments where necessary. **Having problems, team management-related or otherwise, will not affect your grade; not seeking help to resolve them will.**

**Confidentiality:** Some projects may need to be undertaken under Confidentiality and Non-Disclosure Agreements, and all information received by the team is electronically stored on Canvas. While the Mack Institute team will support and advise each team, the students take ownership and primary responsibility for the successful delivery of the project.

**References/Citation:** All submissions to the sponsor and on Canvas should have appropriate references and sources cited. Students are required to follow Wharton's Reference/Citation policies.

**Faculty/TA availability:** The faculty will be available to the teams by email. TA's are available by phone and email or at the Mack Suite in SHDH. Refer page#1 for contact details.

**COURSE SCHEDULE SUMMARY:**

Assignment	Date	Task	Notes
<b>CLASSROOM SESSION</b>			
Individual	Wed 09/04	First classroom session (Vance Hall B10 6pm-7:15pm)	
<b>SCOPING THE PROJECT</b>			
Group	Tue 08/27 - Mon 09/09	Conducting scoping meetings with sponsors	
Group	Within 48 hours of scoping meeting with sponsor	Email Scope of Work and Timeline to sponsors (Include faculty and TA's on the email)	
Group	Tue 09/10 - Wed 09/11	Faculty meeting sessions with teams <i>(Each team meets with the faculty separately. Meetings are scheduled with the help of TA's. Team roles are to be submitted by this day.)</i>	
<b>WEEKLY MEETINGS AND SUBMISSIONS</b>			
Group	Mon 09/09 - Mon 12/13	Weekly check-ins (with sponsors and faculty alternatively)	
Individual	Sun 09/15, 09/22, 09/29, 10/06, Mon 10/14	Weekly progress reports (5 weeks) (Upload to Canvas by midnight every Sunday)	
<b>MID-POINT PRESENTATIONS</b>			
Group	Wed 10/09	Deadline for scheduling mid-point presentations with sponsors (Include faculty and TA's on calendar invite)	
Group	One week prior to mid-point presentation date	Deadline for submitting a draft deck to faculty	
Group	The week prior to mid-presentation date	Draft deck review period (meeting with faculty for comments)	
Group	Mon 10/07 - Fri 10/25	Conducting midpoint presentations	
<b>CLASSROOM SESSION</b>			
Individual	Wed 10/23	Second classroom session (JMHH F55 6pm-8pm)	
Individual	Thu 10/31	Deadline for interim peer evaluations (Upload to Canvas)	
Group	Thu 10/24 - Fri 10/25	Faculty meetings with teams for debriefing on mid-point presentations	
<b>WEEKLY MEETINGS AND SUBMISSIONS</b>			
Individual	Sun 11/03, 11/10, 11/17, 11/24, Mon 12/02	Weekly progress reports (5 weeks) (Upload to Canvas by midnight every Sunday)	
<b>FINAL PRESENTATIONS</b>			
Group	Wed 11/27	Deadline for scheduling final presentations with sponsors (Include faculty and TA's on calendar invite)	
Group	One week prior to mid-point presentation date	Deadline for submitting a draft deck to faculty	
Group	The week prior to final presentation date	Draft deck review period (meeting with faculty for comments)	
Group	Mon 12/02 - Thu 12/19	Conducting final presentations (Decks are to be emailed to the sponsors, faculty, and TA's the previous night)	
Individual	Wed 12/11	Deadline for final Peer evaluations	

**APPENDIX A: COLLABORATIVE INNOVATION PROGRAM --- PEER FEEDBACK FORM**

Your name \_\_\_\_\_

Your Role \_\_\_\_\_

Please provide a reason for your choice in the expectation box you select for each member – including for yourself.

ROLE	1. BELOW YOUR EXPECTATIONS	3. MET YOUR EXPECTATIONS	3. EXCEEDED YOUR EXPECTATIONS
LEADER			
SCRIBE			
LIAISON			
ANALYST			
OTHER			

**APPENDIX B: COLLABORATIVE INNOVATION PROGRAM --- CORPORATE PARTNER  
EVALUATION FORM**

Name: \_\_\_\_\_

Organization: \_\_\_\_\_

This short survey provides us with valuable feedback on the CIP team. Please select a number to rate our team's performance on a scale from **5 (strongly agree) to 1 (strongly disagree)**. We thank you for your input.

	<b>Strongly Agree</b>	<b>Agree</b>	<b>Neutral</b>	<b>Disagree</b>	<b>Strongly Disagree</b>
1. The student team developed a good understand of our business and needs.	5	4	3	2	1
2. The scope of the project and deliverables were clearly communicated.	5	4	3	2	1
3. The team members were responsive and accessible.	5	4	3	2	1
4. The students exhibited the industry knowledge, technical competencies, and consulting skills to fulfill the project responsibilities.	5	4	3	2	1
5. The students demonstrated professionalism in their behavior, attitude, and appearance.	5	4	3	2	1
6. The student team kept us informed of progress and (if applicable) any changes with project scope and deliverables.	5	4	3	2	1
7. The student team provided us with deliverables that met or exceeded our expectations.	5	4	3	2	1
8. The student team presented their deliverables in an effective manner.	5	4	3	2	1
9. Overall, we were very satisfied with the performance of the team.	5	4	3	2	1
10. I would recommend the use of a Wharton-Mack CIP team to other organizations.	5	4	3	2	1

Additional Comments:

**APPENDIX C: REQUIRED READINGS**

Readings will be assigned to each team individually based on the context of their project.