

MGMT892 SYLLABUS – Spring 2020

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

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Course Load:	1 cu
Mandatory Classroom sessions:	First session: Wed, Jan 22, 2020 6pm-9pm ET JMHH 240 Second session: TBD (around mid-point of the semester)
Location for faculty and sponsor meetings:	Room 3453, SHDH 3 rd floor
Office Hours with faculty:	Wednesdays 3pm – 5pm ET at Room 3457, SHDH 3 rd floor and on Fridays by appointment

A. 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.

B. 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.

C. DELIVERABLES

The course has the following 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, some emailed, and some are updates to Google doc; please check the schedule summary in page 7 for details. Faculty and AD's are to be included in all correspondence and meetings with sponsors. Templates for deliverables are found in the 'Files' tab on Canvas. 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.

D. 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 AD'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 AD's for any help/concern/guidance.

Assigning member roles

The team will start the project with assigning roles to each member: Liaison, Leader, Manager, and Analysts (see 'F. SOME NOTES' section for details). The Liaison will be in-charge of interactions with the sponsor and will be responsible for scheduling all meetings including initial scoping meeting.

Timeline

Below is a timeline overview for the course. Detailed timeline can be found in page 7.

Activity	Duration
Scoping and faculty meetings (1 weekly report)	2 weeks
Project progress (4 weekly reports)	4 weeks
Mid-point presentation	2 weeks
<i>Spring break</i>	<i>1 week</i>
Project progress (6 weekly reports)	6 weeks
Final presentation	2 weeks
Total Working Weeks	16 weeks

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 check-ins (once in two weeks) 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 AD's: (1) Scope of work (2) Timeline (draft) with actionable items and milestones, and (3) Alternate week check-in times with sponsor.

- Scope of work document 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 meetings and reports

Teams meet at least twice every week:

1. At least once within themselves for group work, and for reporting on research and progress for the week. **AD's will be a part of these meetings to guide the teams**
2. Once to report on project progress to sponsor and faculty on alternate weeks. That is, they will meet once in two weeks 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. A few sponsors request meeting every week to report on progress, in which case teams are expected to accommodate the request and split up meeting attendance. That is, if the sponsor meetings are held weekly, the entire team need not be present every week for the sponsor check-in

All team members are to be present for all meetings. Non-attendance will impact your team's progress and your grade.

Weekly reports on project progress are due on the team's assigned Google doc by 9am ET every Monday (**this is an individual assignment and needs to be completed by each team member.**) Note the due dates in 'Course Schedule Summary' section later in this document.

For all sponsor meetings:

- Calendar invites have to be sent out by the due date to sponsors and AD'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 AD'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 AD's a day in advance.**

E. 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 or even F 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 sponsor interaction (including clarity in communications, responsiveness, professionalism, rigor of analyses, meeting project objectives, and sponsor evaluation) **50%**
2. Team co-ordination and peer evaluation **20%**
3. Project delivery **20%**:
 - a. Mid-point presentation
 - b. Final output
4. Process management (including project content and progress as well as consistency of progress) **10%**

Along with focusing on the objective the team should pay attention to the process of achieving the objective and individual participation in the team's efforts. ***Low performance in any one of the components (regardless of their grading weightage) while over achieving in others could still earn the team and/or the individual a low grade.*** The objective is to strive for excellence in all components of grading.

F. SOME NOTES

Course Readings: The faculty will assign reading material after the first meeting with teams to discuss their scope of work.

Submissions: All submissions due to the sponsor are to be sent via email to your sponsor contact with a copy to faculty and AD's. Group assignments such as sponsor meeting and presentation invites are due on email/calendar. Individual assignments such as weekly progress reports are due on the team's assigned Google doc 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, Faculty, and Sponsor meetings: Teams will meet on alternate weeks with sponsors and faculty. During the scoping meeting, teams will determine standing alternate week 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 AD's will make themselves available when team meetings, sponsor meetings, and presentations are scheduled; **teams needn't worry about their availability for scheduling.**

Faculty and AD's are to be included in ALL communications with the sponsors.

All faculty meetings and sponsor presentations are conducted in Room 3453 of SHDH 3rd floor. Meetings with sponsors will be scheduled on Zoom for easy facilitation **by Mack Institute**. Mack Institute has professional subscription to the service (please do not use the trial version as it can only support meetings up to 45 minutes among other drawbacks). Teams should 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 the team's assigned Google doc by 9 am every Monday. Note that project success depends almost entirely on how well you manage the progress.

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. 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 AD'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
- **Project Manager** – The manager assures the team of reliable documentation, reporting, progress, updates, etc. consistently. The manager will help keep the rest of team accountable on

deliverables. Any issues and concerns too that arise within the team should be documented and reported

- **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 since 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 as a requirement by the sponsor, and all information received by the team from the sponsor 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/AD availability: The faculty will hold office hours every Wednesday from 3pm to 5pm ET and by appointment on Friday at Room 3457 on the 3rd floor of SHDH. Appointments can also be made by email. AD's are available by phone and email or at the Mack Institute, Suite 3400 on the 3rd floor of SHDH. Refer page#1 for contact details.

COURSE SCHEDULE SUMMARY:

Assignment	Date(s)	Task
CLASSROOM SESSION AND PREPARATION		
Individual	Wed 1/22	First classroom session (6pm-9pm ET, JMHH 240)
Group	Thu 1/23	Team roles and weekly team meeting times are due on Canvas
INTRODUCTIONS AND SCOPING THE PROJECT		
Group	Wed 1/15 - Fri 1/31	Conducting scoping meetings with sponsors (Team liaison to initiate the conversation)
Group	Wed 1/15 - Fri 1/31	Conducting faculty meetings for team introductions and reviewing scope (Each team meets with the faculty separately. Meetings are scheduled with the help of AD's)
Group	Within 48 hours of scoping meeting	Email Scope of Work and Timeline docs to sponsors (Include faculty and AD's on the email)
Group	Within 1 week of scoping meeting	Finalize the Scope of Work and Timeline docs and email them to sponsors (Include faculty and AD's on the email)
WEEKLY MEETINGS AND SUBMISSIONS		
Group	1/26 – end of term	Weekly check-ins (with sponsors and faculty alternatively)
Individual	Mon 9am ET on 1/27, 2/3, 2/10, 2/17, 2/24	Weekly progress reports (5 weeks) (Update team Google doc by 9 am ET every Monday)
MID-POINT PRESENTATIONS		
Group	Mon 2/10	Deadline for scheduling mid-point presentations with sponsors (Include faculty and AD'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 2/24 – Mon 3/16	Conducting midpoint presentations
CLASSROOM SESSION		
Individual	TBD	Second classroom session
Individual	Wed 3/18	Deadline for interim peer evaluations (Upload to Canvas)
Group	Thurs 3/19 - Fri 3/20	Faculty meetings with teams for debriefing on mid-point presentations
WEEKLY MEETINGS AND SUBMISSIONS		
Individual	Mon 9am ET on 3/23, 3/30, 4/6, 4/13, 4/20, 4/27	Weekly progress reports (6 weeks) (Update team Google doc by 9am ET every Monday)
FINAL PRESENTATIONS		
Group	Mon 4/20	Deadline for scheduling final presentations with sponsors (Include faculty and AD'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 4/20 – Tue 5/12	Conducting final presentations (Decks are to be emailed to the sponsors, faculty, and TA's the previous night)
Individual	Tue 5/12	Deadline for final Peer evaluations

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

Your name _____

Your Role _____

Please rank each member of your team *including yourself* on a scale of 1 to 5 with 1 as the highest rank.
Please provide a reason for your choice in the reason box.

Role and Member	Rank	Reason
Leader		
Manager		
Liaison		
Lead Analyst		
Supporting Analyst		

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.

	Strongly Agree	Agree	Neutra l	Disagree	Strongly Disagree
1. The student team developed a good understanding 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: