

## MGMT892 SYLLABUS – Fall 2020

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 Classroom Sessions :</b>	First session: Tue, Sep 01, 2020   5pm-7:30pm ET   Virtual Second session: TBD (around mid-point of the semester)
<b>Location for faculty and sponsor meetings:</b>	Zoom (details will be announced on Canvas)
<b>Office Hours with faculty (virtual):</b>	Wednesdays 3pm – 5pm ET 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**

Teamwork 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.

**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

Deliverables that are due to the sponsor can be done via email but deliverables due to the faculty have to be done on canvas; please check the schedule summary in page 7 for details. **Faculty and ADs 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 as well as on Canvas in the Assignments page.

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 ADs will assist in refining content and deliverables for the projects. Research guidance can be provided where necessary. You are encouraged to utilize the virtual office hours or write to the faculty with CC's to the ADs 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	Weeks	Duration
Scoping and faculty meetings	Week 0 – 1	2 weeks
Project progress (5 weekly reports)	Week 2 – 6	5 weeks
Mid-point presentation	Week 7 – 8	2 weeks
Project progress (5 weekly reports)	Week 9 – 13	5 weeks
Final presentation	Week 14 – 15	2 weeks
<b>Total Working Weeks</b>		<b>16 weeks</b>

### 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 or more) with the sponsor to report progress and discuss the project further.

Within 48 hours of the scoping meeting, the teams are required to email the sponsor, faculty, and ADs: (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 is required to be submitted on canvas and sent to sponsor.

### Meetings and reports

Teams meet:

1. Within themselves: At least once every week for group work
2. With the sponsor: At least once in two weeks to discuss the project, report on project progress, and take feedback. The entire team is expected to be present for the sponsor meetings. 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
3. With the faculty: At least four times over the duration of the course to discuss progress and concerns

For sponsor and faculty meetings, 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.**) You can find a link to the shared doc in the Assignments page on Canvas. Note the due dates in 'Course Schedule Summary' section later in this document. These **individual** reports will be collected and compiled by the ADs in a single pdf for each week to show the team's progress.

Teams will receive access to Google Drives set up by the Mack Institute for their project work. Past weekly reports can be found in the drives.

For all sponsor meetings:

- Calendar invites must be sent out by the due date to sponsors and Mack Institute.
- 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 ADs 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 ADs 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, weekly progress reports 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 overachieving 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 may assign relevant 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 ADs. 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. Draft and final versions of presentations too 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. 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 meetings will be held at least 4 times during the semester. Faculty and ADs will make themselves available when team meetings, sponsor meetings, and presentations are scheduled; **teams needn't worry about their availability for scheduling.**

**Faculty and ADs are to be included in ALL communications and meetings with the sponsors.**

**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 their exam weeks.

Project progress are required to 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 ADs 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 evaluations will be made anonymous and provided to each student.

**Teamwork 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. Zoom details will be posted on Canvas. Appointments can also be made by email. ADs are available by phone, WhatsApp, and email.

**Online Meeting Etiquette:** Since most meetings with sponsors and faculty this semester will all be virtual, please make sure that your internet connections are strong and stable, and prepare to be in a quiet room in advance of the meeting. Be mindful of your mic and camera at all times. Do not eat, smoke, or browse non-relevant windows during meetings.

**COURSE SCHEDULE SUMMARY:**

Assignment	Date(s)	Task
<b>CLASSROOM SESSION AND PREPARATION</b>		
Individual	Tue 9/1	First classroom session (5pm-7pm ET, Zoom details announced on Canvas)
Group	Thu 9/3	Team roles and team's weekly internal meeting times are due on Canvas
<b>INTRODUCTIONS AND SCOPING THE PROJECT</b>		
Group	Tue 9/1 - Fri 9/4	Meeting (#1 of 4) with faculty for team introductions and reviewing scope (Each team meets with the faculty BEFORE meeting with the sponsor)
Group	Wed 9/2 - Fri 9/11	Conducting scoping meetings with sponsors (Team liaison to initiate the conversation)
Group	Within 48 hours of scoping meeting	Email Scope of Work and Timeline docs to sponsors (Include faculty and ADs on the email)
Group	Within 1 week of scoping meeting	Iterate and finalize the Scope of Work and Timeline docs with the sponsors and email them to sponsors (Include faculty and ADs on the email). Upload final versions on Canvas.
<b>WEEKLY MEETINGS AND SUBMISSIONS</b>		
Group	Wed 9/2 – end of term	Periodic check-ins (weekly or once in two weeks) with sponsors
Individual	Mon 9am ET on 9/14, 9/21, 9/28, 10/5, and 10/12	Weekly progress reports (5 weeks) (Update team Google doc by 9 am ET every Monday)
Group	Tue 9/22 – Fri 9/25	Team check-ins (#2 of 4) with faculty
<b>MID-POINT PRESENTATIONS</b>		
Group	Mon 10/5	Deadline for scheduling mid-point presentations with sponsors
Group	One week prior to mid-point presentation date	Deadline for submitting a draft deck to faculty (Due on Canvas)
Group	Mon 10/5 – Fri 10/16 (The week prior to mid-presentation date)	Team check-ins (#3 of 4) with faculty (Draft deck review with faculty)
Group	Mon 10/19 – Fri 10/30	Conducting midpoint presentations
<b>CLASSROOM SESSION</b>		
Individual	TBD	Second classroom session
Individual	Mon 11/2	Deadline for interim peer evaluations (Due on Canvas)
<b>WEEKLY MEETINGS AND SUBMISSIONS</b>		
Individual	Mon 9am ET on 11/2, 11/9, 11/16, 11/23, and 11/30	Weekly progress reports (5 weeks) (Update team Google doc by 9am ET every Monday)
<b>FINAL PRESENTATIONS</b>		
Group	Mon 11/9	Deadline for scheduling final presentations with sponsors (Include Mack Institute on calendar invite)
Group	One week prior to mid-point presentation date	Deadline for submitting a draft deck to faculty (Due on Canvas)
Group	Mon 11/16 – Fri 11/25	Team check-ins (#4 of 4) with faculty
Group	Mon 12/7 – Fri 12/18	Conducting final presentations (Decks are to be emailed to the sponsors, faculty, and AD's the previous night)
Individual	Thur 12/17	Deadline for final Peer evaluations (Due on Canvas)



**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.

<b>Role and Member</b>	<b>Rank</b>	<b>Reason</b>
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.

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

Additional Comments :