

MGMT8920 SYLLABUS – Fall 2022

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

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Course Load:	1 cu
All-Class Sessions:	First session: Aug 30'22 6:30pm-9:00pm ET Virtual Second session: Oct 17 '22 6:30pm-9:00pm ET Virtual Workshop/Guest Lectures (2): TBD (fall/early winter)
Tas:	Will Meyer (meyerw@wharton.upenn.edu) Vandita Kamath (vandita@wharton.upenn.edu)
Location for faculty and sponsor meetings:	3020 SHDH and/or Online
Office Hours (3400 SHDH):	Thursdays 2pm – 4pm ET and by appointment

A. COURSE DESCRIPTION

MGMT8920 is a high impact and high visibility course. You will interact with senior management of large corporations and your interactions will influence Wharton's relationship with the project sponsors. 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 frameworks and recommend strategies for 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 and skills 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 and PROCESSES

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 that there are no surprises at the end. Each team member has an obligation to report non-performance or avoidance of responsibility of any member.

This course has a ‘No Drop’ policy, which means you are *NOT permitted to drop* the course once you have been assigned a team and registered.

The course has four broad parts:

1. Understanding the problem and sponsor expectations, and scoping the project with the client
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, interviews, and analyses, and to define recommendations/solutions. This stage involves continuous interactions with the sponsor, alumni network, and Wharton Faculty
4. Teams present their findings and solution to the project sponsor team through mid-point and final presentations

The faculty, Tas, and Mack Institute Associate Director 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 TAs for any help/concern/guidance.

C. DELIVERABLES and TIMELINES

The course has the following deliverables:

1. Scope of Work & Timeline with actionables and milestones & Team Liaison Member assignment (due: two days after scoping meeting with client)
2. Mid-point presentation draft (due: one week before mid-point presentation)
3. Mid-point presentation
4. Draft of final paper (due: one week after $\frac{3}{4}$ check-in with faculty)
5. Final presentation draft (due: one week before final presentation)
6. Final presentation
7. Final paper
8. Peer evaluations

Activity	Weeks	Duration
Scoping and faculty meetings; Scope of Work, Timeline and Team Liaison Member assignments due	Week 0 – 1	2 weeks
Project progress $\frac{1}{4}$ check-in (team meetings)	Week 2 – 6	5 weeks
Mid-point presentation	Week 7 – 8	2 weeks
Project progress $\frac{3}{4}$ check-in (team meetings)	Week 9 – 13	5 weeks
Final presentation, final paper and peer evaluations due	Week 14 – 15	2 weeks
Total Working Weeks		16 weeks

Deliverables that are due to the sponsor can be sent via email, but deliverables due to the faculty must be submitted via Canvas. **The Mack Institute and your team's TA must be CC'ed on all correspondence and meetings with sponsors to ensure proper oversight.** 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.

Scoping and Faculty Meetings

▪ **Assigning Liaison Role**

Each team should assign one member to be the "Liaison." The Liaison will be in charge of interactions with the sponsor and will be responsible for scheduling all team meetings with the client. The liaison will also inform the team about sponsor views of the project as it evolves. The Mack Institute will initiate the project kick-off/scoping meeting as well as the required check-in meetings with faculty. **The Liaison should also keep the client abreast of how the project is evolving, particularly prior to both the mid-point and final presentations.**

▪ **Scoping Meeting**

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 have 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 every two weeks or more frequently) with the sponsor to report progress and discuss the project further. The scoping document is a crucial piece of the project work, as translating the firm's questions and concerns into actionable deliverables is a key skill that will be refined during this course.

▪ **Timeline with Actionables and Milestones**

Within 48 hours of the scoping meeting, the teams are required to email the sponsor and Mack Institute/TA: (1) Scope of Work (2) Timeline (draft) with actionable items and milestones, and (3) identification of the Liaison and planned check-in times with sponsor.

- **Scope of Work** 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) receive comments from the faculty/TA on the draft timeline and their project plan. The finalized timeline is required to be submitted on Canvas and sent to the sponsor.

Project Progress

- **Team meetings with the sponsor:** At least once every 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.
 - **Calendar invites must be sent out by the due date to sponsors and Mack Institute/TA**
 - Summary of the meeting and actionable items should be emailed to/shared with everyone at the end of the meeting. This is critical to ensure the sponsor is in alignment with your plan.
- **Team meetings with the faculty:**
 - Each team will have two meetings with the faculty: once before the mid-point presentation, and once about $\frac{3}{4}$ of the way through the semester.
 - Faculty will attend the initial scoping meeting, the mid-point presentation, and the final presentation.
- **Check-in meetings with the TA:** At least four times over the duration of the course. Ideally, these meetings will occur before key meetings with faculty and/or sponsors (see course summary).

Mid-point and Final Presentations

- **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/shared with the faculty and TA by the end of week 6 to obtain comments. A final copy of the presentation should be emailed to the sponsor with the Mack Institute and your team's TA CC'ed 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/shared with the faculty and TA by the end of week 13 to obtain comments. The final presentation should be emailed to the sponsor with the Mack Institute and your team's TA CC'ed a day in advance.**

Final Paper

In a short paper (1000 – 1500 words), report key lessons and insights you learned from your work on the project. You should start working on this paper after your mid-point presentation, to get agreement from the client about the content. Most likely, this paper will not be very firm-specific (unless the client is fine with this), but could for instance describe recent trends in the client's industry. Our intent is to publish these reports (obviously with your names on it) via the Mack Institute's media channels (e.g., insights from one of the Spring 2022 teams [here](#)). Thus, your main audience are other managers.

Workshops and Guest Lectures

There will be 2 workshops/guest lecture sessions throughout the semester related to teamwork, strategies for consulting engagements, and frameworks for defining innovation ROI for clients. These sessions will last approximately 1 hour and will be held virtually. Attendance is mandatory as the content will directly benefit your effectiveness as individuals and teams.

D. GRADING

Your grade is comprised of the following:

1. Scope of Work & Timeline document(s): 5%
2. Mid-point presentation/analysis: 15%
3. Final presentation/analysis: 50%
4. Client evaluation of process and final presentation (see Appendix B): 15%
5. Peer Evaluations (midpoint and final): 5%
6. Final paper: 10%

While the grading components are team submissions, we reserve our right to make adjustments at the individual level given the feedback we receive from clients and your peers (see peer evaluation in Appendix A).

E. 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 Mack Institute and the team's TA. Group assignments such as sponsor meeting and presentation invites are due on email/calendar. All other submissions 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.

Mack Institute and TA must be included in ALL communications and meetings with the sponsors.

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 (unless otherwise determined with the sponsor and Mack Institute). 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 hold office hours every Thursday from 2pm to 4pm ET and by appointment. Zoom details will be posted on Canvas. Appointments can also be made by email. TAs are available by phone, WhatsApp, and email.

COURSE SCHEDULE & ASSIGNMENTS SUMMARY:

Assignment	Date(s)	Task	Submission Method
ALL CLASS SESSION AND PREPARATION			
Individual	Mon 8/30	First all-class session (6:30pm-9pm ET, Zoom)	
Group	Fri 9/2	Team Liaison identified Team's internal meeting times set and sent to faculty and Mack Institute/TA	Email
INTRODUCTIONS AND SCOPING THE PROJECT			
Group	Tue 8/30 – Fri 9/9	Conducting scoping meetings with sponsor and faculty	Email
Group	Within 48 hours of scoping meeting	Email Scope of Work and Timeline docs to sponsors (include Mack Institute/TA on the email)	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 Mack Institute/TA on the email). Upload final versions on Canvas.	Canvas and Email
WEEKLY MEETINGS AND SUBMISSIONS			
Group	Mon 9/5 – Mid-point	Internal team meetings and periodic check-ins (weekly or once every two weeks) with sponsors. Mack Institute/TA must be made aware of all meetings with sponsors.	
Group	Mon 9/5 – Mid-point	Team check-ins with faculty, TA and Mack Institute	
WORKSHOPS & GUEST LECTURE SESSIONS			
Group	TBD	Two workshops and lectures on teambuilding, consulting best practices, innovation management processes, return on investments for innovations	
MID-POINT PRESENTATIONS			
Group	Week 5: Due Date Fri 9/30	Deadline for scheduling mid-point presentations with sponsors (include Faculty/Mack Institute/TA on calendar invite)	Email
Group	Due week of 10/10 (One week before mid-point presentation)	Deadline for submitting a draft deck to faculty for review	Email
Group	Due weeks of 10/17 or 10/24	Team check-ins with TA and Mack Institute	
Group	Due weeks of 10/17 or 10/24	Mid-point presentations (decks are to be emailed to the sponsors and Mack Institute/TA the previous night)	Canvas/Email
CLASSROOM SESSION			
Individual	Mon 10/17	Second Classroom Session (6:30pm-9pm ET, Zoom)	
Individual	Fri 10/28	Deadline for interim peer evaluations (due on Canvas)	Canvas
WEEKLY MEETINGS AND SUBMISSIONS			
Group	Mid-point – end of term	Internal team meetings and periodic check-ins (weekly or once every two weeks) with sponsors. Mack Institute/TA must be made aware of all meetings with sponsors.	
Group	Mid-point – end of term	Team check-ins with TA and Mack Institute	
FINAL PRESENTATIONS			
Group	Fri 11/18	Deadline for scheduling final presentations with sponsors (include Mack Institute/TA on calendar invite)	Email
Group	Due week of 11/28 (One week prior to final presentation date)	Deadline for submitting a draft deck to faculty for review	Email
Group	Mon 12/5 – Fri 12/16	Final presentations (decks are to be emailed to the sponsors and Mack Institute/TA the previous night)	Email/Canvas
Group	Fri 12/16	Final paper (Executive Summary of Project) due to faculty	Canvas
Individual	Fri 12/16	Deadline for final peer evaluations (due on Canvas)	Canvas

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

Your name _____

Please evaluate each member of your team ***including yourself*** on a scale of 1 to 5:
1 = did not meet expectations at all; 2 = below average contributions; 3 = average contributions; 4 = above average contributions; 5 = clear leader, went beyond expectations.

If everyone contributed equally to the project, it's perfectly fine to give everyone a 3. One key reason for this feedback form is to identify significant free-riding.

Please provide the reasons for your choice in the reasons box, including yourself.

Name	Evaluation	Reasons

Any other feedback regarding the course that you'd like to add: _____

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

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)**.

	Strongly Agree	Agree	Neutral	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

Please provide feedback on individual students as applicable (If they’ve stood out positively or negatively, kindly mention that too): _____

Any feedback you have on the CIP program and The Mack Institute (How can we improve and what would you like to see in future projects?): _____
