

MGMT8920 SYLLABUS – Spring 2023

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

Faculty:	Xu Han (Henry) Email: hanxu@wharton.upenn.edu Cell: 607-759-8352
Mack Institute Associate Director:	Joseph Nebistinsky Email: jneb@wharton.upenn.edu Cell/WhatsApp: 717-877-7330 Suite 3400 SHDH Mack Institute: mackinstitute@wharton.upenn.edu
Course Load:	1 cu
Class Time:	Tuesdays 7:00pm-9:00pm ET Virtual
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:	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 define recommendations/solutions. This stage involves continuous interactions with the sponsor, alumni network, and Wharton Faculty.
4. Teams present their findings and recommendations/solutions to the sponsor through mid-point and final presentations

The faculty, Mack Institute Associate Director, and TAs 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 email the faculty with the TAs copied for any help/concern/guidance.

C. DELIVERABLES and TIMELINES

The course has the following deliverables:

1. Scope of Work & Timeline with action items and milestones
2. Team Liaison Member assignment
3. Mid-point presentation draft
4. Mid-point presentation
5. Draft of final paper
6. Final presentation draft
7. Final presentation
8. Final paper
9. Peer evaluations

Activity	Weeks	Duration
Scoping and faculty meetings; Scope of Work, Timeline and Team Liaison Member assignments due	Week 1-2	2 weeks
Project progress check-in (team meetings)	Week 3 – 7	5 weeks
Mid-point presentation	Week 8 – 9	2 weeks
Project progress check-in (team meetings)	Week 10 – 14	5 weeks
Final presentation, final paper and peer evaluations due	Week 15 – 16	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 copied 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 under 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 the single point of contact and responsible for interactions with the sponsor. Each Liaison 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, 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 Action Items and Milestones**

The teams are required to email the sponsor and Mack Institute/TA: (1) Scope of Work (2) Timeline (draft) with action items and milestones, and (3) identification of the Team Liaison Member and planned check-in times (once every two weeks or more frequently).

- **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 action 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.

During 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 Scope of Work. The finalized Timeline and Scope of Work are 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.
 - Summary of the meeting and action items should be emailed to/shared with everyone directly after the end of the meeting. This is critical to ensure the sponsor is in alignment with your next steps.
- **Progress report presentations:**
 - Each team will present progress reports during the class time throughout the semester. The schedule and format of the progress report presentations are available on Canvas.
- **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.

Mid-point and Final Presentations

▪ **Mid-point presentation**

Teams will give a mid-point presentation to their sponsor that reflects progress to date and plans for completion. The mid-point presentation should identify key questions, issues, 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 7 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 sponsors may require the submission of additional files such as a memo and/or executive brief on key findings. Teams must make sure they understand at the very beginning of their project what their sponsor want as the final output. **A draft of the presentation should be emailed to/shared with the faculty and TA by the end of Week 14 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 your team learned from working on the project. Teams should start working on this paper after the 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 approves), 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 a couple of workshops/guest sessions throughout the semester related to market research, hypothesis testing, 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: 25%
4. Client evaluation of process and final presentation: 35%
5. Final paper: 10%
6. Peer evaluations: 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.

E. NOTES

Course Readings: The faculty may recommend 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 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 deadline 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 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:

Week	Date(s)	Activities/Assignments	Submission Method
MODULE 1: KICK-OFF AND PREPARATION			
Week 1	Tue 1/17	First all-class session (7:00pm-9:00pm ET, Zoom) <ul style="list-style-type: none"> Team roles identified Team's internal meeting times set 	
MODULE 2: SCOPE OF WORK AND PROJECT PLANNING			
Week 1-2	Tue 1/17 – Fri 1/27	Conducting scoping meetings with sponsor and faculty	
	Fri 1/27	Share the draft of Scope of Work and Timeline docs with sponsors and faculty	Email/Google Drive
	Fri 2/2	Finalize and share the Scope of Work and Timeline docs with sponsors and faculty	Email/Canvas
MODULE 3: PROJECT PROGRESS			
Week 3-7	Tuesdays	Workshops and guest lectures on market research, interviews, hypothesis testing and consulting best practices	
	Tuesdays	Progress check-in presentations	Google Drive
	TBD	Check-in meeting with sponsors and TAs	
MODULE 4: MID-POINT PRESENTATION			
Week 8-9	Fri 3/3	Draft of mid-point presentation Deadline for scheduling mid-point presentations with sponsors	Google Drive
	Tue 3/7	Second all-class session (7:00pm-9:00pm ET, Zoom)	
	Mon 2/27 – Fri 3/10	Mid-point review meeting with Faculty	
	Mon 3/6 - Fri 3/17	Mid-point presentations <ul style="list-style-type: none"> Decks are to be emailed to the sponsors and submitted on Canvas 	Email/Canvas
MODULE 5: PROJECT PROGRESS			
Week 10-14	Fri 3/31	Draft of final paper	Google Drive
	Tuesdays	Workshops and guest lectures on innovation frameworks	
	Tuesdays	Progress check-in presentations	Google Drive
	TBD	Check-in meeting with sponsors and TAs	
MODULE 6: FINAL PRESENTATIONS			
Week 15-16	Fri 4/21	Draft of final presentation Deadline for scheduling final presentations with sponsors	
	Mon 4/24 – Fri 4/28	Final presentation review meeting with faculty	
	Mon 4/24 - Fri 5/5	Final presentations Decks are to be emailed to the sponsors and submitted on Canvas	Email/Canvas
	Fri 5/5	Deadline of final paper	Canvas
	Fri 5/5	Deadline of peer evaluation form	Canvas