

**University of North Carolina at Chapel Hill  
Health Care Consulting  
Spring 2008**

Instructor	Marci Thomas
Home Telephone	Monday, Tuesday
Cell phone	Monday 4:00- 6:50 pm
Office Hours	
Classroom and time	

**Introduction:**

Healthcare management consulting is a fascinating business and a career to which many students in the healthcare field aspire. **However, it is important to note that the skills used by management consultants are valuable to students who wish to pursue careers in almost any facet of healthcare.** As healthcare costs continue to rise, leaders of healthcare organizations are under pressure to do more with the resources they currently have. The ability to think analytically and suggest improvements in business processes will make the student a truly valued member of any organization. To that end, a major goal for this course is to help students understand the theory and practice of organizational diagnosis and intervention. We will also focus on presentation skills both written and oral.

**Course objectives:**

This course is designed to provide students with a working knowledge of the practice of management consulting. The course consists of class lectures, case studies, group exercises and presentations to enable students to:

- Understand and apply the consulting process
- Handling clients
- Plan and conduct interviews to obtain information
- Apply analytical thinking to problem solving
- Effectively work in teams
- Participate effectively on conference calls
- Understand and apply project management skills
- Provide and receive constructive feedback
- Create and deliver presentations

**Working with clients:**

Students will have the opportunity to work on a consulting engagement with a client which will help them to reinforce the material with practical experience. This is a very important part of this course. Since you will be working with clients it is important to maintain an attitude of professionalism. This will be stressed in the course. You will have 3 weeks where class is not held to give you additional time to work on your projects.

**Conference calls and Meetings**

Part of working with clients is the ability to communicate with the project team and with the client via conference call. This semester you will have 2 opportunities to practice conference calls. The calls will be held as outlined in the syllabus during the weeks when you are working on your projects and do not have class. You are expected to send me an agenda, conduct the call which will be in the form of a status report (requirements for each call will be available on Blackboard the week before the call). One person from the group will lead the call. The others should be on the call and make comments where appropriate but one person will have the responsibility of taking the lead role and bringing others into the conversation. This is one of the most valuable skills you will learn during the course. I will be evaluating the content and direction of the call. Each call is worth 5 points. A different person should lead the call each time. Although there is not a sufficient number of calls for each person to get a chance to lead, the students who do not lead the calls will be expected to take lead roles in other areas of presentation.

The conference calls will be conducted via the web using SKYPE. You can go to <http://www.skype.com/download/#intro> to download the software free. You are responsible for setting the time of the call. I will schedule the call for 30 minutes or if you think you need more time just let me know and I will block off more time. The purpose of the call will be to give me an update on how the project is going and ask questions. I may ask you questions about your project so I can be sure everything is running smoothly but the time is really for your group to ask questions specifically about your project.

Skype can also be personally or by the group used if you don't want to call me directly to ask other questions. However, if the call is more personal and you would prefer to use a land line, just let me know your number and I can call you.

Another important part of communication is the ability to have a structured meeting with the client. Similar to the conference calls you will be responsible for a status meeting with the instructor at the midcourse point. The structure will be similar to the conference call in that one person will lead, there will be an agenda etc. However, it will be held in person.

**Requirements and Grading:**

Following are student requirements for the course:

Class attendance and participation in conference calls <b>(You are expected to attend class and participate in team calls. Failure to do so will lower your overall grade 5 points for each event missed. One absence permitted).</b>	10%
Talking Document	5%
Workplan- detailed to be signed off by the client	15%
Data analysis project	10%
Presentation- Status Report	10%
Final project (5% of the grade will be the oral presentation to the client, 15% will be the deliverable)	20%
Conference call and meeting facilitation	15%
Client evaluation	15%
<b>Total</b>	<b>100%</b>

You will receive information on each assignment including criteria for grading the week each one is discussed in class. All of this information will be up on BlackBoard before class.

**Pre-review:**

This course is meant to simulate experience in a consulting firm. Therefore, the expectation is that you will have your work pre-reviewed before you give any deliverables to the client. All pre-reviews must be sent to me a week before you need them back to make changes. Pre-reviews give me the opportunity to work with you one on one and for you to clear review notes prior to handing assignments in. This simulates on the job training.

Any documents that you review with the client prior to the pre-review should be marked DRAFT with the understanding that you will very likely make changes based on my pre-review. **All documents must be reviewed by me before they are given in final form to the client. No exceptions.** This course only lasts one semester and the projects must be sized accordingly. I will help you do this. The clients are familiar with this time frame so they are sensitive to the fact that you have courses besides this one.

**Text:**

The optional text for this course is The McKinsey Mind.

You may also find that Writing Winning Business Proposals by Richard C. Freed, Shervin Freed & Joe Romano, Secrets of Question Based Selling, Thomas A. Freese and Flawless Consulting by Peter Block are helpful. Peter Block has also written a companion to Flawless Consulting, the Flawless Consulting Fieldbook.

Attendance in this class is mandatory. You will be learning concepts that will help you in analytical thinking and group presentations. Participation is also an important part of your grade as is evidenced by the weight attached above. Class discussion will only be as meaningful as the effort you put into it and your group will be graded on the in class cases analyses debrief.

**Written Assignment Deadlines**

Talking document	February 18 <sup>th</sup> (5 slide presentation on your project)
Work plan	Due electronically 3/5 (this is a major deliverable that <b>must</b> be accompanied by a signoff from the client. The workplan will be no more than 15 slides in total. It must stand alone and convey the workplan without oral explanation. The client's signoff may be an email to your group approving the workplan as drafted. This will not occur until the workplan has been returned to you with my final signoff. Then the client needs to send confirmation to me that they have agreed to the scope and approach of the project.
Data Analysis	March 3 <sup>rd</sup> in <b>hard copy</b> form.
Status reports	March 31 <sup>st</sup> (this is a 10 minute presentation on the project and results to date. It may be no more than 15 slides in total). Your classmates will ask questions designed to help you determine if you are getting your point across to an audience that is unfamiliar with your project.
Final project	April 21 <sup>st</sup> (20 minute presentations in class. Be prepared that this class may last a little longer than the others to give each group time to present) Client presentations TBD

**Consulting  
Class Schedule**

<b>Date</b>	<b>Topics</b>	<b>Concepts/Readings to be Discussed</b>
1/14	What is consulting? Why is it important to you? Understanding and working with the Client-Consulting Process Pt 1.	Consulting is More than Giving Good Advice- <b>to be discussed in class- mandatory reading</b>  Managing Your Team (Chapter 6 MM-optional but helpful)
1/28	Consulting Process- Part 2 Meet the clients (Clients will be discussing the projects chosen and their expectations).  Presenting Your Ideas Part 1	When consultants and clients clash – <b>to be discussed in class- mandatory reading</b>  Managing your client (Chapter 7 MM-optional but helpful)  Presenting Your Ideas (Chapter 5 MM-optional but helpful)
2/4	The Workplan	Framing the problem (Chapter 1 MM-optional but helpful) Designing the analysis (Chapter 2 MM-optional but helpful)
2/11	Conference call	Status report on project
2/18	Selling Yourself and Your Ideas	Guest Presentation (Gene Pinder)
2/25	Performing Data Analysis Part 1	Gathering Data (Chapter 3 MM- optional but helpful) Kevin Tate's Top Tools for Analysis
3/3	Performing Data Analysis Part 2	Interpreting the Results (Chapter 4 MM)- Kay Grinnell
3/10	<b>Spring Break</b>	
3/17	Work on projects	No conference call- ACHE week
3/24	Making recommendations	
3/31	Status Report	10 minute oral presentation by student groups
4/7	Managing yourself	
4/14	Work on projects	Conference call
4/21	Final Presentation to the class- this class may extend past the regularly scheduled class time to ensure that everyone has ample time to present.	<b>Final project due</b> <b>Final project presentation to class</b>

Note: Final presentations to the client will be scheduled during the period April 21-24. Get this on your client's calendar early.

## The Honor Code

The University of North Carolina at Chapel Hill is one of over a hundred universities in the country with an honor code system in place. All students at UNC are bound by the Honor Code and Campus Code. *The Instrument of Student Judicial Governance* (<http://www.unc.edu/student/policies/isjq/>) is the definitive document on student conduct and the judicial system. Related documents pertaining to Academic Integrity and Ethics and Graduate School Policies and Procedures can be found at: <http://www.ais.unc.edu/sis/admissions/grad/publications.html>

### **The Honor Code**

“It shall be the responsibility of every student at the University of North Carolina at Chapel Hill to obey and support the enforcement of the Honor Code, which prohibits lying, cheating, or stealing when these actions involve academic processes or University, student or academic personnel acting in an official capacity.” [*Instrument of Student Judicial Governance, II.A.* (<http://www.unc.edu/student/policies/isjq/>) found August 12, 2002]

### **The Campus Code**

“It shall be the further responsibility of every student to abide by the Campus Code; namely, to conduct oneself so as not to impair significantly the welfare or educational opportunities of others in the University community.” [*Instrument of Student Judicial Governance, II.B.* (<http://www.unc.edu/student/policies/isjq/>) found August 12, 2002]

**Note: You may not consult other groups in this class or former consulting students when preparing assignments and deliverables. Last year’s workplans and final projects will be on the Blackboard site for you to review.**