

**PSY 645 Organizational Consulting
Summer Semester 2007**

Location: Business, Education, Psychology Building - BEP 425

Course description: This course presents a comprehensive overview of organizational consulting, including its history, specializations and contexts. Fundamental principles, effective practices, and emerging issues will be studied. The “mindset” of the contemporary consultant will be the focus of the course with special attention to education, skills and professional integrity. Students will read and discuss a *text* on the contemporary consulting industry and a *reader* on consulting as a professional calling. The course includes panel presentations and insights from practitioners, gate keepers and buyers of consulting services. Students will complete a term project that will personalize learning.

Course Resources:

- a. Text – The Contemporary Consultant: Handbook of Management Consulting, Larry Greiner and Flemming Poulfelt (eds.), Thomson South-Western, U.S., 2005. This text provides a comprehensive overview of the current status of the consulting industry. It is written by world experts who provide information and insight. Historical perspectives and practical examples assure a useful text for academics, practitioners and users of consulting services. Contents include 1) consulting skills and professionalism, 2) major practice areas in consulting (IT, strategy and organization, marketing, operations, and human resource consulting), 3) consulting in different contexts (CEO and Boards, global consulting, and public sector consulting), 4) intervention and solution strategies, 5) managing and growing a consulting firm, and 6) the future of organizational consulting.
- b. Reader – The Consultant’s Calling: Bringing Who You Are to What You Do, Geoffrey M. Bellman, Jossey-Bass, San Francisco, 2002. This book provides a portrayal of consulting as a way of life rather than an abstract function. It will be of interest to anyone who wants to know what consulting is as a career, as a living, as a life. Contents include foundations for the work, building client relationships, the proper use of influence, understanding organizations, succeeding in the market place, and the quest for meaning through work.
- c. Handouts – provided as needed

Student Learning Outcomes:

- 1) Knowledge of the contemporary consulting industry, including contexts and practice areas.
- 2) Knowledge of the consulting profession as a way of life, including challenges, satisfactions and current issues.

Methods of Assessing Student Learning:

- a. Participation – Students are expected to be proactive learners. This includes attendance at all classes and active participation in discussion and class activities.
- b. Course journal (one to two page *reaction entry* on each Part of the *text* (6), each half of the *reader* (2), and each class panel/presentation (6), including: 1) related personal experience; 2) personal beliefs and opinions; 3) issues and questions

triggered; 4) what was interesting or useful that you want to remember). Evaluation will be based on knowledge, comprehension and application of the subject.

- c. Term project (approximately 20 pages with minimum of 10 references; no more than three Internet references with no .com). Options include case study/experience report; term paper on consulting topic of interest; feasibility paper or written plan to be a consultant (APA style/format). Assessment will be based on analysis, synthesis and evaluation of literature on the subject.

Academic Integrity: The work you will do in this course is subject to the Student Honor Code. The Honor Code is a commitment to the highest degree of ethical integrity in academic conduct, a commitment that, individually and collectively, the students of Northern Kentucky University will not lie, cheat, or plagiarize to gain an academic advantage over fellow students or avoid academic requirements.

Accommodations: Students with disabilities who require accommodations (academic adjustments, auxiliary aids or services) for this course must register with the Disability Services Office. Please contact the Disability Service Office immediately in the University Center, suite 320 or call (859) 572-6373 for more information. Verification of your disability is required in the DSO for you to receive reasonable academic accommodation. Visit our website at www.nku.edu/~disability/.

The contents of this syllabus should be viewed as a working plan for the semester. Unforeseen circumstances may necessitate changes in this plan during the term. Any and all such changes will be at the discretion of your instructor in consultation with the class.

Session I Friday, May 11

6:15 – 9:00 p.m.

- Introductions
- Preview of course and learning outcomes: This is a comprehensive course about the field of organizational consulting – history, current practice areas, and future challenges. It is also a course about being a consultant and doing the work, including the preparation, attitude, skills and principles of successful consulting. Students will learn the products, processes, problems, principles and practices of organizational consulting.
- The professor's lens -- stories, anecdotes, and lessons learned
- Guest presentations and discussions

Who? Human Resource Consulting Services (Ron Heineman, CEO, ELS Human Resource Solutions)

Topic: Human Resource Outsourcing and Executive Coaching

Questions: What do you do? How do you do it? What are the results? What are the issues and trends in HR consulting?

Who? Human Resource Consulting Services (Jennifer Graft/Doug Mathews/Terri Logan/Greg Love, Right Management Consulting)

Topic: Products and Services of a National Firm, including outplacement consulting and assessment

Questions: What is the nature of your work? Who uses your services? What is the history, current status, and likely future for outplacement consulting and executive services?

Who? Bob Herrick, Senior Vice President, Corporate Planning and Development, The Health Alliance

Topic: Large Scale Internal Consulting and Performance Improvement

Questions: What is the nature of your work? What are the costs and benefits of performance improvement consulting?

Who? Rebecca White, Director of the Fifth Third Entrepreneurship Institute

Topic: The Entrepreneurship Spirit

Questions: What are the qualities of a successful consultant? What are the ingredients of a successful consulting practice, firm, company? What are 5 musts for business success with case(s) in point?

- Observations, questions and open discussion (including SALTS)
- Homework assignment – Text Part 1, The Consulting Industry, Skills and Professionalism; Text Part 2, Major Practicing Areas in Consulting (IT, strategy and organization, marketing, operations, human resource consulting)

Session II Saturday, May 12

9:00 a.m. – 5:00 p.m.

- Text chapters and discussion – Text Part 1, The Consulting Industry, Skills and Professionalism; Text Part 2, Major Practicing Areas in Consulting (IT, strategy and organization, marketing, operations, human resource consulting)
- Term project progress report
- Guest Presentations and discussion

Who? Individual Practitioner External Consultants (Peter Block, author and consultant; Margaret Casarez, Casarez Associates; Gordon Duke, Duke and Associates/former Secretary of Finance, Commonwealth of Kentucky, Patti Holmes, Holmes Associates; Joan Fox, Fox Associates; Evan Gay, organizational consultant; Grant Karnes, CM/PG Cost Management Performance Group; Diane Strickland-Jordan, Managing Principal, HRC Consulting Group)

Topic(s):

- 1) Getting Started as an Organizational Consultant (including trials, tribulations and triumphs)
 - 2) Growing and Maintaining a Consulting Practice (including a day in the life of a consultant)
 - 3) Management, Financial and IT Consulting (including business, government and not-for-profit perspectives)
 - 4) Industrial/Organizational Consulting (including Personnel Assessment and Management Development)
 - 5) Products and Services of a Local Firm (including compensation consulting)
 - 6) Customer Service Consulting (including physical and social demands of travel)
 - 7) Cost Management and Performance Consulting (including expense reduction, performance improvement, and organization design)
- *Questions:* What do you do? How do you do it? What are the results? What are the satisfactions and frustrations? What are the issues and trends in external consulting? Is external consulting on the rise or fall? What are the best practices being used?
 - Tutorial – Building Community in the Workplace (interventions and cases)
 - Observations, questions and open discussion (including SALTS)
 - Homework assignment – Text Part 3, Consulting in Different Contexts; Text Part 4, Implementation and Change

**Session III Friday, June 15
6:15 – 9:00 p.m.**

- Text chapter and discussion – Text Part 3, Consulting in Different Contexts (CEO and boards, global consulting, and public sector consulting)
- Term project progress report
- Guest Presentations and discussion

Who? Business Consulting (Tom Hayes, Principal, Keating and Associates)

Topic: What consulting services do businesses really need? Observations of a CEO turned consultant

Questions: What do you do? How do you do it? What are the results? What are the issues and trends in business consulting?

Who? Industrial/Organizational Consulting (Hank Cohen, Cohen and Associates)

Topic: Psychological Consulting Services – A Thirty Year Perspective

Questions: What are the issues and trends in psychological assessment, selection and counseling? What are the professional characteristics of a successful consultant?

Who? Large Specialty Consulting Practice (Vince Brown, President, Global Lead; Mike Ellis, Independent Consultant; Michael Washington, Professor, Northern Kentucky University; Beverly Watts, Watts Associates/former Director, Kentucky Commission on Human Rights; Maria White, Consultant Partner, Pope and Associates)

Topic: Diversity Consulting in American Business, Industry and Government (including personal experiences and lessons learned)

Questions: What is the nature of diversity consulting? Who is doing it today? What are the issues, trends and best practices being used?

Who? Non-Profit/Social Agency Consulting (Terri Stewart, President, Just the Basics, Inc.)

Topic: History, Current Status, and Future of Not-for-Profit/Social Agency Consulting

Questions: Is not-for-profit/social agency consulting on the rise or fall? Who is doing it? What are the issues, trends and best practices being used?

- Observations, questions and open discussion (including SALTS)

**Session IV Saturday, June 16
9:00 a.m. – 5:00 p.m.**

- Text chapter and discussion – Text Part 4, Implementation and Change
- Term project progress report
- Guest presentations and discussion

Who? Gail Love, Love Associates; Sue Russell, Russell Associates; Chai Voris, President, Dynamic Change Solutions; Gordon Barnhart, President, Compass Group; David Krings, Krings Associates/former President of International Association of City and County Administrators)

Topics:

1) Managing Organizational Change (including personal experience and lessons learned)

Questions: Is organizational change consulting on the rise or fall? Who is doing it today? What are the issues, trends and best practices being used?

2) Public sector consulting (including personal experience and lessons learned)

Questions: What is the nature and what are the customs of government consulting? What principles/practices work best?

3) Quality and Participation Consulting in American Business, Industry and Government (including personal experience and lessons learned)

Questions: Is quality and participation consulting on the rise or fall? Who is doing it today? What are the issues, trends and best practices being used?

4) Consulting Relationships – What Works/What Doesn't Work?

Questions: What are the forms of consulting partnerships? What are the principles and practices that should be followed?

- Tutorial – Helping People Through Change (interventions and cases)
- Observations, questions and open discussion (including SALTS)
- Homework assignment – Text Part 5, Managing and Growing the Consulting Firm; Text Part 6, Looking Ahead at Management Consulting; and Reader, The Consultant's Calling, first half of book

Session V Friday, July 27

4:00 – 6:00 p.m.

- Text chapter and discussion – Text Part 5, Managing and Growing the Consulting Firm
- Term project progress report
- Guest Presentations and discussion

Who? Internal Consultants (Connie Burkart, Vice President, Human Resource Development, Western Southern Insurance Company; Jeff Walter, Vice President, Human Resources Development, Great American Insurance Company; Jenny Skinner, Vice President, Organizational Leadership, TriHealth; Mary Martin, Director, Education and Development, Federated Department Stores; Gerry Kaminski, Director, Organizational Development, Children's Hospital; Steve McMillen, Chief Learning Officer, O'Charley's Inc.)

Topic: Human Resource Consulting - The Role and Challenges of Internal/External Consultants

Questions: What do you do? How do you do it? What are the results? What are the satisfactions and frustrations of internal consulting? What are the issues and trends in internal consulting? What are the personal and professional pitfalls to avoid in human resource consulting?

Who? University Professor/Consultant (Matt Shank, Chair, Management and Marketing, College of Business, Northern Kentucky University)

Topic: Marketing Consulting/Marketing Consulting Services

Questions: Is marketing consulting on the rise or fall? Who is doing it today? What are the issues, trends and best practices being used? What are the do's and don'ts in marketing oneself as a consultant?

- Observations, questions and open discussion (including SALTS)

Session VI Saturday, July 28

9:00 a.m. – 5:00 p.m.

- Text chapter and discussion – Text Part 6, Looking Ahead at Management Consulting; Reader, The Consultant's Calling, first half of book
- Term project progress report
- Guest Presentations and discussion

Who? University Sponsored Consulting Services (Rob Snyder, Executive Director, METS (Metropolitan Education and Training Services), Northern Kentucky University; Bob Veverka, Executive Director, Executive Education, College of Business, University of Cincinnati)

Topic: Organizational Consulting Do's and Don'ts – Secrets to Success and Biggest Mistakes

Questions: What do you do? How do you do it? What are the satisfactions and frustrations? What are the issues and trends in university/institute sponsored consulting services?

Who? Organizational Gatekeepers (HR officers – Nancy Byrd, Vice President, Human Resources Development, The Health Alliance; Dan Keefe, Vice President, Human Resources, Great American Insurance Company; Steve Martin, Vice President, Organization Development, The Huber Company; Wendy Nepute/Amy Stohl, Vice President, Organization Development, Duke Energy; Paul Quealy, Vice President, Milacron)

Topic: How Do You Manage External Consultants?

Questions? Who hires and coordinates external/internal consultants? What are your policies and practices? What qualities do you seek in an organizational consultant? What problems do you encounter?

- Tutorial – Fostering a High Performance Workplace (interventions and cases)
- Observations, questions and open discussion (including SALTS)
- Homework assignment – Reader, The Consultant's Calling, second half of book

Session VII Friday, August 10

6:15 – 9:00 p.m.

- Time, Money, People – Mike Ellis, Human Resource Development, Northern Kentucky University
- Reader discussion – The Consultant's Calling, second half of book
- Course Journal due and discussion
- Term project due and discussion
- Guest presentations and discussion

Who? Organization Owner/Presidents (Presidents Organization (YPO/SPO) panel –Larry Albice, Jim Akers, Bert Amann, Wick Auk, Jim Bushman, Wayne Carlisle, Jack Cook, Bob Coughlin, Mark Daly, Allen Dohan, Thomas Gerdes, Bob Johnson, Steve Kent, Shenan Murphy, Chip Nielson, Jim Pearce, Rene Robichard, Kevin Roche, Jane Rollinson, Rob Sibcy, Bob Scanlon, Gary Thompson, Marius Van Melle, Bill Ward, Claus von Zychlin, etc.)

Topic: Using Organizational Consultants

Questions? Who do you hire to do what and why? How do you find them, pick them, and pay them? Success stories, mistakes made, and lessons learned.

- Observations, questions, and open discussion (including SALTS)

Session VIII Saturday, August 11

9:00a.m. – 9:00 p.m.

- Tutorial – Group Dynamics and Processes (interventions and cases)
- Observations, questions and open discussion (including SALTS)
- Course review and evaluation

TERM PROJECT EXAMPLES

Case study/experience Report Example

IRS service improvement and reorganization initiative, 2000 – who, what, why, when, where, how report including results and lessons learned.

Term Paper on Consulting Topic Examples

1. Building client relationship
2. The use of influence
3. Organization success factors
4. Succeeding in the market place
5. The quest for meaning

Feasibility Plan To Be A Consultant

1. IT
2. Strategy and Organization
3. Marketing
4. Operations
5. Human resources

SALTS

Stories, Anecdotes, and Lessons to Share

1. The early years – Philosophy and Psychology as foundation disciplines
2. False start in Arkansas and UC salvation
3. Lucien Cohen, I/O Psychology and Eureka on I-75!
4. First challenge to teach – from swimming pool lifeguard to UC/UD instructor (with Jenny Bean out of sight)
5. First stress interview (failure and lessons learned) – General Motors and Ralph Nader
6. Graduation and first adult job – Milacron, Kroger and Ford (I go with Ford under false pretenses)
7. The most important year of my life, 1967 – professional work, marriage (with children), new baby, new home, UC doctoral program
8. The second most important year of my life, 1963-64 – University of Vienna, Oscar Robertson, Viktor Frankl and Israeli Kibbutzism

9. The third most important year of my life, 1970 – Executive General, NKU, and life as I have known it for 35 years

10. Five early decisions that proved to be good:

A. *deciding* what I could do best and want to do most

- a. training and development*
- b. personnel selection/assessment
- c. labor relations

B. *Diversifying* clients – having no more than 1/4th of projects and activities with one business, industry or government organization

- a. Criminal justice
- b. Transportation
- c. IBM/AT&T
- d. Healthcare

C. *Specializing* in 3 services and 8 areas of expertise that would be enjoyable and doable. The three kinds of services are 1) presentations, 2) facilitations (planning, teambuilding, and problem-solving), and 3) professional/management development (seminars and coaching). The eight areas encompassing the Human Side of Work are: morale, productivity, ethics, motivation, stress, communication, group dynamics, and leadership.

D. *Using* time management principles based on values, yearly goals, and a daily “to do” check list; keeping paper work simple (IRS and the two greased pigs)

E. *Executing* a daily work regimen – every working day, doing something for an old client, something for a current client, and something for a prospective client (making a call, sending a book, solving a problem, etc.)

11. The absolute need to live and work by five core principles for consulting success.

Five Finger Consulting

- 1) focus on mission and values vs. style and techniques (quality of work/quality of work life) – putting client interests *first*
- 2) tell the truth as you see it (value full versus value free)
- 3) keep job knowledge current (concepts and skills)
- 4) plan and prepare, but remain flexible (whatever it takes)
- 5) deliver results (satisfaction guaranteed)

12. How teaching helps consulting and vice-versa:

Courses Taught and Lessons Learned

- a. Economics (growth through professional challenge)
- b. Management and Organization (learning the functions and settings)
- c. Behavior Theory and Business Practice (learning history and work behavior *masters* – Taylor, Mayo, Lewin, Drucker, Maslow, McGregor, Argyris, Hertzberg, Likert, Gellerman, Levinson,

Lippitt, Demming, Bennis, etc.)

d. Small Business Management (learning the business of business)

e. T-Group Theory and laboratory training (experiential learning and group dynamics)

13. How writing helps consulting and vice-versa (writing on the road)

a. The Human Side of Work (series)

b. Building Community (St. John Six)

c. Stress: Living and Working in a Changing World (Puerto Rico)

d. The Art of Leadership (home in Maine)

14. Working Unfettered – Consulting success and the Ghost in the Machine (is it Casper or Spooky?)

a. The kite and the string

b. Can do/will do/the factor of fit

15. The Brain, the terrain and creating your niche – Ben Carson's story

16. Consulting partnerships – where one plus one can be more than two

a. Joe

b. Kent

c. Steve

d. Mike

e. Bev

f. Jeff

d. Dan

17. Mistakes of commission – The Ford Years

1) Pandorf (safety glasses)

2) Bowling (representation)

3) Dying in the file cabinet (Iacocca and Sam Shepherd's cell mate)

4) Brooks (the night daddy ate a bad sandwich)

5) 10 years ahead of my time – The Naked Ape, The Little Prince, and the Art of Loving

18. Do what you love (learn and teach), for the right reasons (morale and productivity), in the right way (other's interest first), and *enough* money will follow. So, how much should you charge? (no more than you would be happy to pay)

19. The asexual consultant – Sex can sell/but never do it (lessons learned from Indiana to the Pokonos to IBM Southbeach)

20. My list of mosts:

a. Most *challenging* assignments – NIH/UAW/Teamsters

b. Most *physical* group – Al Austin and Company

c. Most *dangerous* clients – LSD and Buttons

d. Most *glamorous* assignments – Palm Springs, Bermuda, Hawaii, Chicago Yacht Club, Strasbourg

e. Most *unusual* story – Boris, Dino and the 3000 suit

f. Most *political* group – Commission on Human Rights/Kentucky State Board

g. Most *appreciative* group – Beverly nursing homes

21. Large scale consulting

- a. Kentucky government (3 pivotal projects)
- b. FAA (Generals, egos, and the paperwork imperative)
- c. Marion Merrell Dow (stiff in Strasbourg)
- d. Kentucky Power and AEP today (CEO's get what they want and will work for)
- e. CCA (The leadership pyramid)
- f. Cardinal Hill (trust, spirit, time and the nifty fifty)
- g. The Health Alliance and Tri Health today (Building Community and Building Culture)

22. The Stabilus Story – cross cultural communication and business success

- a. German owners
- b. Japanese customers
- c. Mexican suppliers
- d. American managers

23. Train the Trainer Initiatives:

- a. AT&T – Mandated Restructuring
- b. IRS – Helping People Through Change
- c. Criminal Justice in Kentucky – The Human Side of Work
- d. Kroger Company – Management Development, Building Community, and Training Effectiveness
- e. Queen City Metro – Valuing Diversity in the Workplace
- f. Marriott – Quality Improvement Through the Team Concept
- g. IBM – Participative Management Primer

24. Going Hollywood – Sara Lee, Dolly Parton, and The Stress of Change (summer in the dark room)

25. Most *Stressful* Groups:

- 1) Physicians – handling the Frenzy, Frustrations and Fatigue
- 2) Attorneys – Managing the Stress of Being a Lawyer
- 3) City Managers – Building Your Personal Infrastructure
- 4) CFOs – Post Enron Stress Disorder

26. What I didn't know that I didn't know that I wish I did know:

- a. The red bus *drink* delivery – The Board Retreat
- b. The manager's "Hidden Agenda" – AT&T Long Lines
- c. Gun and Knife Show, Sunday morning church, Ku Klux Klan, and the Kentucky State Board of Regents

27. Be prepared – The motto of a good scout (the importance of knowing a day in the life of the client)

- a. Bluegrass Foods – (watching sausage being made)
- b. Independent Anesthesiologists (miracles a minute)
- c. Children's Emergency Department (An Artist at Work)
- d. Pre-program profiles (The Jack Eversole lesson)

28. Working Sick in Delaware – when the going gets tough, the tough get going (with a lot of help from their friends)

29. How do you change others? You don't, they do – and then only if you are a way they want to be, or if you teach knowledge and skills they choose to use. People do what they want when you are not there.

30. Be a continuous learner (every teacher needs a teacher)

- a. Leadership (UC/Stewart)
- b. Teambuilding (Frisch's/Martin)
- c. The Quality Imperative (AQP/Lindsay)
- d. The Power of Vision (ATE/Stewart)
- e. Stress and Change (AT&T/McMillen)
- f. Ethics (IBM/Petrick)

31. Evaluation criteria for organizational interventions:

- a. Pace
- b. Relevance
- c. Value
- d. Participation

32. Maine projects and activities:

- a. Maine Development Foundation (leadership summit)
- b. Cianbro (sustaining culture through leadership development)
- c. VHA New England (leadership development/affinity groups)
- d. Martin's Point Medical Foundation (physician leadership/organizational development)
- e. Casco Bay CVB (The Human Side of Hospitality)
- f. Bangor Savings (new leadership development)
- g. Jackson Lab (Building Community – Working Together Effectively)

33. Using outdoor initiatives as a personal growth/OD Tool – limits, liabilities and testimonials

- a. Outward Bound (independent study)
- b. NC State – The Wolf Pack
- c. Morris Massey says
- d. Ten Broeck Today
- e. The Trust Walk at the Horse Park/Executive Inn
- f. Van Melle (war in the woods)

34. Allegiance must be crystal clear – the noble purpose/the meaningful mission

35. SERDI Learning – 911 (on the ground), Government Accounting 101, and Virginia's black box

36. Dodging Stones – Courts, Corrections, CitiCorp

37. Repetitio est mater studiorum – repetition is the mother of learning (37 x 80/100 = 2960/3700)