

**PSY 645 Organizational Consulting**  
**Instructor: George Manning**  
**Location: Business, Education, Psychology Building**  
**Summer 2009**

**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 (10), 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/](http://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 the instructor in consultation with the class.

## Session I Friday, May 15 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?* 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 outsourcing?



*Who?* Jennifer Graft/Doug Mathews/Terri Logan, 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?* Peter Jordan, Vice President, Radisson Hotels; Bob Herrick, The Health Alliance

*Topic(s):* Hospitality Consulting; Healthcare Consulting; Performance Improvement

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

*Who?* Terri Stewart, Just the Basics; Linda Gravett, Gravett Consulting Associates; Rebecca White, Director, Fifth Third Entrepreneurship Institute

*Topic(s):* The Entrepreneurship Spirit; Starting and Sustaining a Consulting Practice; Non-profit/Social Agency Consulting

*Questions:* 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)

## **Sessions II and III Saturday, May 16**

**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?* Peter Block, author and consultant; Connie Burkart, Vice President, Human Resource Development, Western Southern Insurance Company; Gordon Duke, Duke and Associates, former Secretary of Finance, Commonwealth of Kentucky; Patti Holmes, Holmes Associates; Evan Gay, organizational consultant; Grant Karnes, CM/PG Cost Management

Performance Group; Steve Martin, Vice President, Organization Development, The Huber Company; Diane Strickland-Jordan, Managing Principal, HRC Consulting Group; Amy Stoll, Director of Organizational Effectiveness, Cincinnati Children's Hospital Medical Center; Rob Snyder, Executive Director, METS, Northern Kentucky University; John Wagner, Vice President, Labor Relations, The Kroger Company; Vince Brown, President, Global Lead; John Rees, former COO, Corrections Corporation of America/Secretary of Corrections, Commonwealth of Kentucky; Jeff Groob, Groob and Associates.

*Topic(s):*

- 1) University sponsored consulting services
  - 2) Getting Started as an Organizational Consultant (including trials, tribulations and triumphs)
  - 3) Growing and Maintaining a Consulting Practice (including a day in the life of a consultant)
  - 4) Management, Financial and IT Consulting (including business, government and not-for-profit perspectives)
  - 5) Industrial/Organizational Consulting (including Personnel Assessment and Management Development)
  - 6) Products and Services of a Local Firm (including compensation consulting)
  - 7) Cost Management and Performance Consulting (including expense reduction, performance improvement, and organization design)
  - 8) Special Challenges of Diversity, Political, Healthcare, Criminal Justice, and Labor Relations Consulting
- *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 your field of consulting? 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; Text Part 5, Managing and Growing the Consulting Firm; Reader – The Consultant's Calling, 1<sup>st</sup> half of book

**Session IV Friday, June 12  
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?* Tom Hayes, Legal and Business Consultant; Wendy Nepute, Director of Organizational Consulting, Cincinnati Children's Hospital Medical Center; Joan Fox, Fox Consulting Associates; Mark Donaghey, General Manager of Dayton (RTA).

*Topic(s):*

- 1) What consulting services do businesses really need? Observations of a CEO turned consultant
- 2) Challenges and satisfactions of internal consulting in a large organization
- 3) Challenges and Satisfactions of external consulting, including physical and social demands of travel
- 4) Issues and trends in business, transportation, healthcare, and customer service consulting

*Questions:* What do you do? How do you do it? What are the results? What are the qualities of a successful internal/external consultant? What are the do's and don't's of marketing oneself as a consultant?

- Observations, questions and open discussion (including SALTS)

**Sessions V and VI Saturday, June 13  
9:00 a.m. – 5:00 p.m.**

- Reader -- The Consultant's Calling, 1<sup>st</sup> half of book
- Term project progress report
- Guest presentations and discussion



*Who?* Bob Veverka, Executive Director, Executive Education, College of Business, University of Cincinnati; Gerry Kaminski, Organizational Improvement, Cincinnati Children's Hospital; Nancy Byrd, Vice President, Human Resources Development, The Health Alliance; Dan Keefe, Vice President, Human Resources, Great American Insurance Company; Paul Quealy, Vice President, Human Resources, Milacron; Gema Bahns, Director, Hispanic Business Development, Fifth Third Bank; Jenny Skinner, Vice President, Organization Development, TriHealth; Mary Martin, Vice President, Education and Development, Federated Department Stores; Gordon Barnhart, President, The Compass Group; Henry Cohen, Cohen and Associates; Dick Boyle, former president of Kentucky Power/Vice President of Commercial Operations, American Electric Power; David Hrovat, Director of International Studies/Development, Northern Kentucky University.

*Topic(s):*

- 1) Organizational Consulting Do's and Don'ts – Secrets to Success and Biggest Mistakes
- 2) Psychological Consulting Services
- 3) Managing External Consultants
- 4) International Consulting – special challenges
- 5) Issues and trends in university/institute sponsored consulting services
- 6) Using the internet for marketing consulting services

*Questions?* Gatekeeping and standards -- who hires and coordinates external/internal consultants? What are your experiences, 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, July 17  
6:15 – 9:00 p.m.**

- Guest presentations and discussion

*Who?* Greg Love, Director of Coaching and Development, 5/3<sup>rd</sup> Bank; Steve McMillen, former Chief Learning Officer, Thomson Publishing, Hillenbrand Industries, O'Charley's, Inc.; Dale Browning, CEO Tech Collaboration; Mike Ellis, Independent Consultant, Northern Kentucky University.

*Topic:*

- 1) Executive leadership/coaching
- 2) Large scale technical consulting
- 3) Preparation and training for a consulting career
- 4) Time, money, people – activity/discussion

*Questions:* What are typical career paths for organizational consultants? What are the satisfactions and frustrations of being a consultant in small, middle, and large organizations?

- Observations, questions and open discussion (including SALTS)



**Sessions VIII and IX Saturday, July 18**  
**9:00 a.m. – 5:00 p.m.**

- Text chapter and discussion – Text Part 4, Implementation and Change; Text Part 5, Managing and Growing the Consulting Firm
- Term project progress report
- Guest presentations and discussion



*Who?* Gail Love, Love Associates; Bob Edwards, Edwards Management Consultants; Michael Washington, Professor, Northern Kentucky University; Beverly Watts, Watts Associates/former Director, Kentucky Commission on Human Rights; Maria White, Consultant Partner, Pope and Associates; Sue Russell, Russell Associates; Chai Voris, President, Dynamic Change Solutions; David Krings, Krings Associates/former President of International Association of City and County Administrators; Michael O'Brien, O'Brien Group; George Stoll, Stoll Associates; Diane Menendez, Executive Development, Fifth Third Bank; Margaret Casarez, Executive Director, The Phoenix Place; Phil Jones, Director, Xavier Consulting Institute, Xavier University.

*Topics:*

- 1) Diversity Consulting in America Business, Industry and Government
- 2) Managing Organizational Change (including personal experience and lessons learned)
- 3) Principles, Practices and Examples of Public sector consulting
- 4) Quality Improvement Consulting (current themes and practices)
- 5) Consulting Relationships – What Works/What Doesn't Work?
- 6) Community social change consulting
- 7) Finding your nich (calling)

*Questions:* What are the forms of consulting partnerships? What are the principles and practices that should be followed? What are the customs and best practices for being paid for consulting services?

- 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, second half of book



## Session X Friday, August 14

6:15 – 8:00 p.m.

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



*Who?* Jeff Walter, Vice President, Human Resource Development, Great American Insurance Company; Mike Campbell, Director (ret), Kentucky Power Company

*Topic(s):* Organizational Consulting – The Role and Challenges of Internal/External Consultants; The Life of a consultant – Capstone questions and answers

*Questions:* What do you do? How do you do it? What are the satisfactions and frustrations of consulting? What are the issues and trends in organizational consulting? What are the personal and professional pitfalls to avoid in providing consulting services?

*Who?* Matt Shank, Dean of Business, University of Dayton

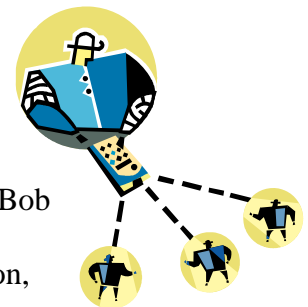
*Topic:* Marketing Consulting/Marketing Consulting Services

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

## Sessions XI and XII Saturday, August 15

9:00a.m. – 5:00 p.m.

*Who?* Organization Owner/Presidents (Young 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, Tom Frinkman, 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).



*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)
- Course Journal due and discussion
- Term project due and discussion



- Tutorial – Group Dynamics and Processes (interventions and cases)
- Course review and evaluation

## **TERM PROJECT EXAMPLES**

### Case study/experience Report Example

IRS service improvement and reorganization initiative – 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 Examples

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 39 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 1/4<sup>th</sup> of projects and activities with one business, industry or government organization
  - a. Criminal justice
  - b. Transportation
  - c. IBM/AT&T/GE
  - 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 (annual and national meetings – keynote, concurrent sessions), 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 technique (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 Method (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, including the SPOT Manifesto:

- 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 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. Joe Ward, Jimmy Stewart – the Toyota news story/the power of the pen

33. 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)
- h. Bangor Hydro (management development)
- i. Maine Public Broadcasting Network (professional development)

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

- a. Outward Bound (independent study)
- b. North Carolina State University – The Wolf Pack Way
- c. Ten Broeck Today (the blue arm alarm)
- d. The Trust Walk at the Horse Park/Executive Inn
- e. Van Melle (war in the woods)



35. Allegiance must be crystal clear – the noble purpose/the meaningful mission
36. Attention and Effort – (23) working hard to learn (46) working hard to remember (66)
37. SERDI Learning – 911 (on the ground), Government Accounting 101, and Virginia's black box
38. Dodging Stones – Courts, Corrections and CitiCorp
39. It's a Small World – The Path of a Book: New York, Chicago, Iowa, Pennsylvania, Greece, Ireland, North Carolina, Canada
40. Stretched in Nashville – The night it couldn't be done
41. Unexpected loss and the Phoenix Phenomenon – from blackboard to flashdrive
42. Repetitio est mater studiorum – repetition is the mother of learning (38 x 80/100 = 3040/3800)

