

**Instructor** Bill Peterson  
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(please include section number in the subject of all emails)

Office hours: Tuesday 9-11am (via Zoom - <https://utexas.zoom.us/j/91368252499>)  
or by appointment

**Class** MW 3:30 – 5:00pm  
UTC 1.144

**Required Materials** (none)

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**Course Overview and Objectives:**

MKT372, “Strategy Consulting”, is a hands-on introduction to the science and art of strategy consulting with a focus on the application of marketing principles. Through discussion of consulting concepts, several assignments, and especially by executing an actual consulting engagement with a client company, successful students will gain a solid understanding of strategy consulting principles.

The objectives of this course include:

- Develop a working knowledge of, and actual experience with, strategy consulting.
- Refine ability to “frame” complex problems and make them analyzable – a critical skill in consulting and business (and in case-based interviews).
- Understand the various segments of the consulting industry and other business situations where consulting skills are important.
- Gain additional experience in applying marketing concepts.
- Develop additional competencies in the “soft” skills which are critical to consulting and business success: working with a client, working with teams, verbal and written communications, project management, etc.

**Course Prerequisite:** Marketing 337 or 337H

**Course Format:**

The majority of this class will consist of student teams executing an actual consulting project. These projects are extremely realistic opportunities for student teams to plan and execute a complete consulting engagement. Via a bid process, students will be assigned to a consulting team, and each team will execute a consulting engagement with a local company (i.e. the “client”). Each team will work with their client to understand their opportunity/problem, create a work plan and proposal, execute market research, conduct analysis and modeling, and structure their recommendations into a final report and presentation. Generally, teams will meet with their client at least monthly and with their instructor weekly to review progress and receive guidance for their project.

The class will meet in a traditional classroom format for the first several weeks and occasionally thereafter. Many weeks, however, there will be no class meeting. Instead, teams will work independently and meet individually with the instructor to review progress on their consulting project and receive feedback/guidance.

There will be several interim deliverables during the project. During the last two weeks of class, student teams will present their final recommendations to the client as well as present an executive summary of their project to the class.

While the class will include some time in a traditional classroom setting, much of the work (and much of the learning) will happen outside of the classroom: in team meetings, in meetings with the client, in meetings with the instructor, and in individual work. This is a rigorous class and students are expected to fully apply themselves and be prepared for each activity. Generally, it is expected that students will spend an average of 2-3 hours outside of class for each hour in class (i.e. an average of 6-9 hours outside of class each week).

**Deliverables and Grading:**

Component	Percent of Semester Grade			Evaluator			
	Team	Individual	Total	Client	Instructor	Peers	Team
Proposal	20%		20%	✓	✓		
Research Review	20%		20%	✓	✓		
Final Recommendations	40%		40%	✓	✓	✓	
Individual Contribution		20%	20%	✓	✓		✓
	80%	20%	100%				

A brief description of each grading component is as follows:

- **Proposal:** On the front end of the client engagement, consulting teams will prepare a proposal summarizing the objective, scope, work plan and other details of the proposed project. The proposal will be in the form of a MS Word document, no more than 4 pages (plus any appendices), 11-point font, single spaced, submitted via email to the client and instructor no later than the deadline communicated in class. Ideally this proposal will be presented to, and discussed with, the client. Additional details will be provided in class. Grading criteria will include the degree to which the Proposal includes:
  - Effective definition of project scope (balancing client needs/input vs. the realities of the time and resources available during the semester)
  - Effective definition of a SMART objective(s) for the project which reflects accurate use of framing techniques

- Effective and complete use of secondary research
- An effective work plan which defines the appropriate use of primary data collection to support the project objective
- Clear articulation of team commitments (deliverables, schedules, etc.) and client commitments (provision of data, access to employees/customers/partners/etc., budget, etc.)
- Delivery to the client (and instructor) in a professional and effective manner

Note it will be the original submission of the proposal to the client which will be graded (not any subsequent revisions).

- Research Review: At approximately the mid-point of the semester, consulting teams will present a summary of their research findings to the client. The deliverable will typically consist of an annotated PowerPoint document of about 20 slides (plus appendices, if any) provided to the client and instructor no later than the deadline communicated in class. Time permitting, this research review will be presented to the class for discussion. Additional details will be provided in class. Grading criteria will include the degree to which the Research Review includes:
  - Effective use of data collection techniques
  - Clear explanation of the linkage of the data collected to the objective of the project
  - An effective hypothesis on the likely final recommendations
  - Delivery to the client (and instructor) in a professional and effective manner
- Final Recommendations: At the conclusion of the project, consulting teams will present their final recommendations to the client. The deliverable will typically consist of an annotated PowerPoint document of about 30 slides (plus appendices, if any) presented to the client and instructor no later than the deadline communicated in class. Each team will also present a summary of their project to the class. Additional details will be provided in class. Grading criteria will include the degree to which the Final Recommendations include:
  - Accomplishment of the objective(s) of the project
  - A credible, data-driven approach for all recommendations
  - Accurate applications of consulting methodologies
  - Accurate applications of marketing concepts
  - Effective financial analyses and implementation plans, as appropriate
  - Delivery to the client (and instructor) in a professional and effective manner
  - Effective presentation of summary of project to class
- Individual Contribution: All students are expected to “carry their weight” and make impactful contributions to their team consulting project. Students who are blatantly unparticipative in team projects will be subject to additional penalties including being “fired” from the team. Additionally, all students are expected to make meaningful contributions in all other aspects of the class (class discussions, presentations, instructor meetings, client meetings, etc.). Individual Contribution grades will be based on the extent to which students meet these expectations:
  - Positive contribution to the results of the team
  - Professional and effective interactions with the client
  - Constructive participation in class discussions, instructor meetings, and other elements of the class
  - Demonstration of a sense of dedication and urgency throughout the semester

50% of the Individual Contribution grade will be based team member input. The other 50% will be based the instructor's assessment of individual contribution in class discussions, presentations, instructor meetings, and client meetings using this rubric:

- Present and contributing especially insightful comments which enhance the learning of other students: 9-10 points
- Present and actively contributing to the discussion: 8 points
- Present and not obviously unprepared: 7 points
- Present but unprepared: 5 points
- Not present: 0 points

Appealing a Grade: If you believe there is a grading error which is cause for review, you may make an appeal. All appeals must be submitted via email (not Canvas) to [bill.peterson@mcombs.utexas.edu](mailto:bill.peterson@mcombs.utexas.edu) and must be received no later than 11:59pm on the 7<sup>th</sup> calendar day after the grade is posted on Canvas or otherwise communicated to you. Your appeal must include a detailed, fact-based explanation of why you think the grade is in error. Note that an appeal is not an opportunity to provide new information or explain a previous submission but instead to correct a legitimate grading error. Your grade may be increased or decreased as a result of the appeal. Appeals for team deliverables must be agreed to by all team members (and the outcome will apply to all team members). Due to tight grading timelines at the end of the semester, no appeals will be considered during the final two weeks of the semester.

Final Grades: Final grades will be assigned as follows:

Semester Average	Grade	Grade Points
93-100	A	4.00
90-92	A-	3.67
87-89	B+	3.33
83-86	B	3.00
80-82	B-	2.67
77-79	C+	2.33
73-76	C	2.00
70-72	C-	1.67
67-69	D+	1.33
63-66	D	1.00
60-62	D-	0.67
59 or less	F	0.00

Consistent with the guidelines for business electives suggested by the Undergraduate Program Office, the average grade for this course will be between 3.4 and 3.6 (or ~90%).

To avoid any misunderstanding regarding rounding methodology, grades will NOT be rounded up - an 89.99 (as close as it is to 90) will still be a B+.

Note that the grade calculations shown on Canvas are occasionally in error. The official grades for this class will be calculated as described in this syllabus and may be different than the grade calculations shown on Canvas.

Out of fairness to all students, I do not arbitrarily change grades or give additional extra credit opportunities. There will be no exceptions. The way to get the grade that you want is by earning it *during* the semester, and not by asking for an exception at the end of it.

**Tentative Class Schedule:**

Date	Day	Class	Class Type	Class Topics
8/25	W	1	Discussion	Course Overview
8/30	M	2	Discussion	The Consulting Process
9/1	W	3	Discussion	The Initial Client Meeting and the Proposal
9/6	M			(Labor Day)
9/8	W	4	Presentations	Secondary Research Presentations
9/13	M	5	Discussion	Framing the Problem
9/15	W	6	Discussion	Data Collection Strategies
9/20	M	7	(no class meeting)	Instructor Meeting
9/22	W	8	(no class meeting)	Instructor Meeting
9/27	M	9	Discussion	Best Practices for Data Collection
9/29	W	10	(no class meeting)	Instructor Meeting
10/4	M	11	(no class meeting)	Instructor Meeting
10/6	W	12	TBD	
10/11	M	13	Discussion	Best Practices for Research Reviews
10/13	W	14	TBD	
10/18	M	15	Presentations	Research Review Summary Presentations
10/20	W	16	Presentations	Research Review Summary Presentations
10/25	M	17	(no class meeting)	Research Reviews with Client
10/27	W	18	(no class meeting)	Research Reviews with Client
11/1	M	19	Discussion	Strategy Formulation and Modeling
11/3	W	20	(no class meeting)	Instructor Meeting
11/8	M	21	Discussion	Implementation Planning and Packaging
11/10	W	22	(no class meeting)	Instructor Meeting
11/15	M	23	(no class meeting)	Instructor Meeting
11/17	W	24	(no class meeting)	Instructor Meeting
11/22	M	25	TBD	
11/24	W			(Thanksgiving)
11/29	M	26	Presentations	Project Summary Presentations to Class
12/1	W	27	Presentations	Project Summary Presentations to Class
12/6	M	28	(no class meeting)	Final Presentations to Client

Adjustments will be made to this schedule as required (for example, to accommodate the schedules of guest speakers). Schedule updates and assignments will be communicated prior to each class, either in the preceding class or on Canvas.

**Firing a Team Member:**

Occasionally, an unproductive team member can negatively impact the opportunity for a team to have a meaningful learning experience (and negatively impact the quality of the work for the client). In such circumstances, teams can consider “firing” the offending team member. The process for firing a team member is as follows:

- If a team is having an issue with a team member that cannot be resolved internally, the team must first meet with the instructor and present a proposed “Performance Improvement Plan” (PIP) for the offending team member. The PIP must detail the performance issues and the specific improvements which are required. If approved by the instructor, the offending individual has one week to comply with the PIP.
- Seven calendar days after the PIP is delivered, and if the performance improvement plan has not motivated adequate improvements, the team can propose to fire the offending individual. This requires unanimous consent of the remaining team members and approval of the instructor.
- Remaining team members will be held accountable for completing the work of the fired student. In other words, the team will be granted no slack because they are down one team member.
- The fired student will independently complete a project similar to the one assigned to the team (to be defined by the instructor), but which will be evaluated completely separately and will involve no client interaction.

## Important Disclosures

(Additions to the standard UT/McCombs disclosures are noted in red font.)

### **Policy on Scholastic Dishonesty**

The McCombs School of Business has no tolerance for acts of scholastic dishonesty. The responsibilities of both students and faculty with regard to scholastic dishonesty are described in detail in the BBA Program's Statement on Scholastic Dishonesty at <http://my.mcombs.utexas.edu/BBA/Code-of-Ethics>. By teaching this course, I have agreed to observe all faculty responsibilities described there. By enrolling in this class, you have agreed to observe all student responsibilities described there. If the application of the Statement on Scholastic Dishonesty to this class or its assignments is unclear in any way, it is your responsibility to ask me for clarification. Students who violate University rules on scholastic dishonesty are subject to disciplinary penalties, including the possibility of failure in the course and/or dismissal from the University. Since dishonesty harms the individual, all students, the integrity of the University, and the value of our academic brand, policies on scholastic dishonesty will be strictly enforced. You should refer to the Student Conduct and Academic Integrity website at <http://deanofstudents.utexas.edu/conduct/> to access the official University policies and procedures on scholastic dishonesty as well as further elaboration on what constitutes scholastic dishonesty.

Note that, much like an actual consulting engagement, resourcefulness is required and encouraged for MKT372. Given the uniqueness of each project in this class and unless otherwise indicated, you will need to access outside resources. This is acceptable provided that:

- All analysis, recommendations, and deliverables are prepared solely by the students.
- Any information from sources other than class discussion and assigned readings is clearly and completely attributed.

Any other use of outside resources is considered a violation of the academic integrity standards for this class and is subject to the maximum penalties.

All class discussion material, exams and quizzes used in this class are copyrighted. Additionally, some class material is covered by non-disclosure agreements with client companies. Reposting or distributing class material is heavily punishable independent of the University of Texas Honor Code.

### **Sharing of Course Materials is Prohibited**

No materials used in this class, including, but not limited to, lecture hand-outs, videos, assessments (quizzes, exams, papers, projects, homework assignments), in-class materials, review sheets, and additional problem sets, may be shared online or with anyone outside of the class without explicit, written permission of the instructor. Unauthorized sharing of materials promotes cheating. It is a violation of the University's Student Honor Code and an act of academic dishonesty. The University is well aware of the sites used for sharing materials, and any materials found on such sites that are associated with a specific student, or any suspected unauthorized sharing of materials, will be reported to [Student Conduct and Academic Integrity](#) in the [Office of the Dean of Students](#). These reports can result in sanctions, including failure of the course.

## **Class Recording Privacy**

Class recordings are reserved only for students in this class for educational purposes and are protected under FERPA. The recordings should not be shared outside the class in any form. Violation of this restriction by a student could lead to Student Misconduct proceedings.

## **Late Work**

No late assignments are accepted. No submissions will be accepted after the due date/time for any assignment because assignments usually have some sequential follow-on activity such as discussion in class, peer reviews, or subsequent assignments. Due dates and times will be communicated in class and/or on Canvas.

## **McCombs Classroom Professionalism Policy**

The highest professional standards are expected of members of the McCombs community. The collective class reputation and the value of the McCombs experience hinges on this. Please let me know right away if this ever is not the case.

Faculty are expected to be professional and prepared to deliver value for each and every class session. Students are expected to be professional in all respects. Classroom expectations of students include:

- Students will arrive on time.
- Students will be fully prepared for each class.
- Students will attend the class section to which they are registered.
- Students will respect the views and opinions of their colleagues. Disagreement and debate are encouraged. Intolerance for the views of others is unacceptable.
- Phones and wireless devices are turned off unless otherwise instructed by the professor.

All students in MKT372 are businesspeople, as is the instructor. Correspondingly, businesslike conduct is expected in class and we are all expected to conduct ourselves professionally. This includes arriving to class on time, silencing and putting away your electronic devices, refraining from personal conversations and texting during class, not making gratuitous comments in an effort to increase individual contribution grades, and being respectful of your classmates, guest speakers, the TAs, and your instructor. Students not conducting themselves in a businesslike manner will receive a decrement to their individual contribution grade, be subjected to additional penalties, and/or be asked to leave the classroom for the remainder of the class period.

## **Notification Regarding BBA Recruiting Conflicts**

Conflicts occasionally arise between classes and the search for employment. We understand how important the job search process is to you, and McCombs provides many resources in support of career exploration and search. However, UT is first and foremost an educational institution and your BBA degree will be the credential that certifies your education. As such, education will take precedent whenever such a conflict arises.

All companies that recruit at McCombs are informed of this fact. Should a conflict arise, we recommend the following steps:

- Check the syllabus to see if an exception is provided that would allow you to satisfy class obligations while still attending the job event (e.g., paper instead of quiz, allowed quiz drops, etc.).



- Note that a job-related conflict, whether a current job or a potential one, is usually not an acceptable reason for missing an exam or taking a make-up, and may not be acceptable in other circumstances either. If any doubt exists, check with your professor.
- If no exception is provided, inform the company that an academic conflict exists and request an accommodation.
- If no accommodation is provided by the company, and you have done everything within your power to resolve the situation, contact a BBA Career Coach and request their assistance in resolving the situation.

Note that while CMCR does have influence with the companies that recruit at McCombs, not all conflicts can be resolved and we have little or no influence with companies that do not recruit through the RecruitMcCombs system.

### **Diversity and Inclusion**

It is my intent that students from all diverse backgrounds and perspectives be well served by this course, that students' learning needs be addressed and that the diversity that students bring to this class can be comfortably expressed and be viewed as a resource, strength and benefit to all students. Please come to me at any time with any concerns.

### **Student Rights & Responsibilities**

- You have a right to a learning environment that supports mental and physical wellness.
- You have a right to respect.
- You have a right to be assessed and graded fairly.
- You have a right to freedom of opinion and expression.
- You have a right to privacy and confidentiality.
- You have a right to meaningful and equal participation, to self-organize groups to improve your learning environment.
- You have a right to learn in an environment that is welcoming to all people. No student shall be isolated, excluded or diminished in any way.

With these rights come responsibilities:

- You are responsible for taking care of yourself, managing your time, and communicating with the teaching team and with others if things start to feel out of control or overwhelming.
- You are responsible for acting in a way that is worthy of respect and always respectful of others.
  - Your experience with this course is directly related to the quality of the energy that you bring to it, and your energy shapes the quality of your peers' experiences.
- You are responsible for creating an inclusive environment and for speaking up when someone is excluded.
- You are responsible for holding yourself accountable to these standards, holding each other to these standards, and holding the teaching team accountable as well.

## Religious Holy Days

By [UT Austin policy](#), you must notify me of your pending absence at least fourteen days prior to the date of observance of a religious holy day. If you must miss a class, an examination, a work assignment, or a project in order to observe a religious holy day, you will be given an opportunity to complete the missed work within a reasonable time after the absence.

## University Resources for Students

Your success in this class is important to me. We will all need accommodations because we all learn differently. If there are aspects of this course that prevent you from learning or exclude you, please let me know as soon as possible. Together we'll develop strategies to meet both your needs and the requirements of the course. There is also a range of resources on campus:

### SERVICES FOR STUDENTS WITH DISABILITIES

This class respects and welcomes students of all backgrounds, identities, and abilities. If there are circumstances that make our learning environment and activities difficult, if you have medical information that you need to share with me, or if you need specific arrangements in case the building needs to be evacuated, please let me know. I am committed to creating an effective learning environment for all students, but I can only do so if you discuss your needs with me as early as possible. I promise to maintain the confidentiality of these discussions. If appropriate, also contact [Services for Students with Disabilities](#), 512-471-6259 (voice) or (512) 410-6644 (video phone).

### COUNSELING AND MENTAL HEALTH CENTER

Do your best to maintain a healthy lifestyle this semester by eating well, exercising, avoiding drugs and alcohol, getting enough sleep and taking some time to relax. This will help you achieve your goals and cope with stress. All of us benefit from support during times of struggle. You are not alone. There are many helpful [resources](#) available on campus and an important part of the college experience is learning how to ask for help. Asking for support sooner rather than later is often helpful. If you or anyone you know experiences any academic stress, difficult life events, or feelings like anxiety or depression, we strongly encourage you to seek support. A [Counselors in Academic Residence \(CARE\) Program](#) is available in each college from the [Counseling and Mental Health Center](#).

### THE SANGER LEARNING CENTER

Did you know that more than one-third of UT undergraduate students use the Sanger Learning Center each year to improve their academic performance? All students are welcome to take advantage of Sanger Center's classes and workshops, private learning specialist appointments, peer academic coaching, and tutoring for more than 70 courses in 15 different subject areas. For more information, please visit [Sanger Learning Center](#) or call 512-471-3614 (JES A332).

### STUDENT EMERGENCY SERVICES

UT's [Student Emergency Services](#) provides assistance, intervention, and referrals to support students navigating challenging or unexpected issues that impact their well-being and academic success. If you need to be absent from class due to a family emergency, medical or mental health concern, or

academic difficulty due to crisis or an emergency situation, please register with [Student Emergency Services](#). SES will verify your situation and notify your professors.

### Important Safety Information

If you have concerns about the safety or behavior of fellow students, TAs or Professors, call BCCAL (the [Behavior Concerns and COVID-19 Advice Line](#)): 512-232-5050. Your call can be anonymous. If something doesn't feel right – it probably isn't. Trust your instincts and share your concerns.

### CLASSROOM SAFETY AND COVID-19

To help preserve our in-person learning environment, the university recommends the following.

- Adhere to university [mask guidance](#). Masks are strongly recommended, but optional, inside university buildings for vaccinated and unvaccinated individuals, except when alone in a private office or single-occupant cubicle.
- [Vaccinations are widely available](#), free and not billed to health insurance. The vaccine will help protect against the transmission of the virus to others and reduce serious symptoms in those who are vaccinated.
- [Proactive Community Testing](#) remains an important part of the university's efforts to protect our community. Tests are fast and free.
- The university has determined that all students coming to campus for the fall semester must receive a viral COVID-19 test in their local community within 72 hours prior to arrival in Austin for move in. If they already reside in Austin, they must test within 72 hours of moving into the residence where they will reside for the academic semester. Finally, individuals who are already living in the residence in Austin where they will reside this academic semester should test within 72 hours (3 days) prior to the start of class on Aug. 25.
- We encourage the use of the [Protect Texas App](#) each day prior to coming to campus.
- If you develop COVID-19 symptoms or feel sick, stay home and contact the [University Health Services' Nurse Advice Line](#) at 512-475-6877. If you need to be absent from class, contact [Student Emergency Services](#) and they will notify your professors. In addition, to help understand what to do if you have been had close contact with someone who tested positive for COVID-19, see this University Health Services link.
- [Behavior Concerns and COVID-19 Advice Line](#) (BCCAL) remains available as the primary tool to address questions or concerns from the university community about COVID-19.
- Students who test positive should contact [BCCAL](#) or self-report (if tested off campus) to [University Health Services](#).
- Visit [Protect Texas Together](#) for more information.

### TITLE IX REPORTING

Title IX is a federal law that protects against sex and gender-based discrimination, sexual harassment, sexual assault, sexual misconduct, dating/domestic violence and stalking at federally funded educational institutions. UT Austin is committed to fostering a learning and working environment free from discrimination in all its forms. When sexual misconduct occurs in our community, the university can:

1. Intervene to prevent harmful behavior from continuing or escalating.

2. Provide support and remedies to students and employees who have experienced harm or have become involved in a Title IX investigation.
3. Investigate and discipline violations of the university's [relevant policies](#).

Faculty members and certain staff members are considered “Responsible Employees” or “Mandatory Reporters,” which means that they are required to report violations of Title IX to the Title IX Coordinator. I am a Responsible Employee and must report any Title IX-related incidents that are disclosed in writing, discussion, or one-on-one. Before talking with me or with any faculty or staff member about a Title IX-related incident, be sure to ask whether they are a responsible employee. If you want to speak with someone for support or remedies without making an official report to the university, email [advocate@austin.utexas.edu](mailto:advocate@austin.utexas.edu). For more information about reporting options and resources, visit the [Title IX Office](#) or email [titleix@austin.utexas.edu](mailto:titleix@austin.utexas.edu).

## CAMPUS SAFETY

The following are recommendations regarding emergency evacuation from the [Office of Campus Safety and Security](#), 512-471-5767,

- Occupants of buildings on The University of Texas at Austin campus must evacuate buildings when a fire alarm is activated. Alarm activation or announcement requires exiting and assembling outside.
- Familiarize yourself with all exit doors of each classroom and building you may occupy. Remember that the nearest exit door may not be the one you used when entering the building.
- Students requiring assistance in evacuation shall inform their instructor in writing during the first week of class.
- In the event of an evacuation, follow the instruction of faculty or class instructors. Do not re-enter a building unless given instructions by the following: Austin Fire Department, The University of Texas at Austin Police Department, or Fire Prevention Services office.
- For more information, please visit [emergency preparedness](#).