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# *Consulting Skills*

ATTD 6460

## Course Syllabus

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University of North Texas

Department of Learning Technologies

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*Instructor:*

Dr. Jeff M. Allen

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**Office Location:**

University of North Texas  
Department of Learning Technologies  
Discovery Park, G170  
3940 N. Elm, Denton, Texas 76207

**Office Hours**

<http://sageperformance.com/drjeffallen/scheduleappointment.htm>

**Contact Information**

Office Phone: (940)565-4918

E-mail: [Jeff.Allen@unt.edu](mailto:Jeff.Allen@unt.edu)

TDD Access: 1-800-735-2989

# Consulting Skills

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## Course Description

Overview of the role of the consultant in the field of organizational performance. Skills of organizing a practice, marketing consulting services, performing consulting services, and employing a managed changed process. This course consist of three distinct areas: theory of consultancy (internal and external), theory-to-practice (utilizing in-class exercise), and practice (creation of an “RFP” request-for-proposal response for bid)

## Credit Hours

3 hours.

## Course Philosophy

This course is organized to assist graduate students who are interested in learning how to serve as an internal or external change agent to help organizations reach optimal effectiveness by bringing out the best in their people via training, education, and development activities.

As a doctoral level course, it is significantly different from an undergraduate or master level course. Students are expected to contribute to discussions and to spend a significant period outside of class gather knowledge that can be contributed to the knowledge of their fellow students.

Attendance is a very important component in a seminar class and is expected of all students.

## Work Allocation

**This course is a 15-week course requiring up to ~20 hours a week from the student:**

- ❖ Reading = ~88 hours (based on 30 pages an hour)
- ❖ Online discussion = ~24 hours (8 topics at 3 hours a topic)
- ❖ Class meetings = ~21 hours (7 weeks at 3 hours a week)
- ❖ Consulting strategy = ~15 hours
- ❖ Consulting project = ~120 hours
- ❖ Consulting business action plan = ~32 hours

## Course Objectives

Upon successful completion of this course, students will be able to:

1. Define organizational performance improvement and related terms.
2. Formulate a realistic picture of the consulting profession.
3. Identify essential ethical competencies of performance improvement consultants.
4. Market their services to a client.

5. Develop a formal consulting proposal.
6. Secure a consulting services contract.
7. Plan an organizational performance improvement intervention.
8. Implement an organizational performance improvement intervention.
9. Transition an organizational performance improvement intervention.
10. Develop a plan for organizing an ongoing consulting services business.

**Required Text**

- A) Biech, E. (2007) *The Business of Consulting: The basics and beyond*, Jossey-Bass/Pfeiffer, ISBN # 978-0-7879-6238-8
- B) Rothwell, W., Sullivan, R., & McClean, G. (2005). *Practicing Organization Development: A Guide for Consultants*. San Francisco, CA: Jossey-Bass/Pfeiffer. ISBN: 0-88390-379-2
- C) American Psychological Association (2001). *The Publication Manual of the American Psychological Association* (5<sup>th</sup> Edition), ISBN #1-55798-790-4.

**Recommended Text**

- Beich, E. (2001) *The Consultant's Quick Start Guide: An action plan for you first year in business*, Jossey-Bass/Pfeiffer, ISBN # 9780470385937
- Nelson, B., Economy, P (1997) *Consulting for Dummies*, IDG Books, ISBN #0-7645-5034-9

**Course Evaluation**

**Evaluation Scale**

- |     |              |     |          |
|-----|--------------|-----|----------|
| A = | 90 – 100%    | B = | 80 – 89% |
| C = | 70 – 79%     | D = | 60 – 69% |
| F = | 59% or below |     |          |

**NOTE:** *ALL LATE PROJECTS WILL RECEIVE A LETTER GRADE OF "F".*

*Missing deadlines is not a business practice that allows consultants to earn a living – for very long.*

<u>Assignments</u>	<u>Percentage of Final Grade</u>	
<b>Consulting Strategy</b>	<b>10%</b>	
• Corporate Mission		2%
• Corporate Philosophy		2%
• Resume		2%
• Fee Structure		2%
• Follows APA		2%
<b>Consulting Proposal</b>	<b>20%</b>	
• Application of content (Rothwell & Biech)		2%
• Proposed approach		4%
• Application of Rothwell's intervention phases		4%
• Timeline		2%
• Investment and responsibilities		4%
• Follows APA		4%
<b>Consulting Contract</b>	<b>10%</b>	
• Agreement		2%
• Project responsibilities and obligations		2%
• Responsibilities for each party		2%
• Consideration, Travel, Term		2%
• Confidential information, No transfer, Taxes, Notices, Effect of partial invalidity		2%
• Follows APA		
<b>Consulting Report</b>	<b>30%</b>	
• Application of content		6%
• Description and history of the business		3%
• Analysis of the problem		3%
• Method (project scope and means of gathering data)		3%
• Analysis (data collected, data results)		4.5%
• Recommendations and suggested action plan		4.5%
• Follows APA		6%
<b>Consulting Business Action Plan</b>	<b>10%</b>	
• Business Description		2%
• Marketing Plan		2%
• Management Plan		2%
• Financial Plan		2%
• Follows APA		2%
<b>Online Discussion</b>	<b>20%</b>	

All assignments can accessed at: [www.sageperformance.com/drjeffallen/teaching/downloads.htm](http://www.sageperformance.com/drjeffallen/teaching/downloads.htm)

## Course Outline

<i>Week</i>	<u>Module</u> ▪ Lessons	Related Readings	AS-x: Assignments - Week Due DT-x: Online Discussion Topic – Week Discussed	Class Meetings Schedule ▪ Topics
<b>1</b>	<u>Housekeeping</u> 1. Course overview  <u>Principles of PI Consulting</u> 1. Future trends in performance improvement consulting 2. A bird's eye view of the consulting profession	Rothwell: Ch. 15 OTHERS Biech: Ch. 1, 2		Week 1 ▪ Consultant panel presentation – good, bad, & ugly ▪ Transferability of existing skills to a consulting business ▪ Transferability of consulting skills to employment situations ▪ Sources for consulting projects/clients
<b>2</b>	<u>Principles of PI Consulting</u> 1. Models for improving organizational performance 2. Ethics	Rothwell: Ch. 1, 2, 14 Biech: Ch. 9	DT-2: Obstacles to Change DT-2: Ethics Case Studies AS-2: Identify potential client	
<b>3 - 4</b>	<u>Preparing for the Intervention</u> 1. Entry 2. Start-Up	Rothwell: Ch. 3, 4 Biech: Ch. 3 Biech: 104-106, 149-159	AS-4: Hold initial client meeting DT-4: Results of client meeting AS-4: Consulting Strategy	Week 3 ▪ Students present polished draft of consulting strategy and share information on prospective client ▪ Instructors prepare students for initial client meeting
<b>5-7</b>	<u>Preparing for the Intervention</u> 3. Proposal 4. Contract	Biech: pp. 107-119	AS-6: Consulting Proposal AS-7: Consulting Contract AS-13 Consulting Report	Week 5 ▪ Peer review of client proposals
<b>8</b>	<u>Preparing for the Intervention</u> 5. Assessment and Feedback 6. Action Planning	Rothwell: Ch. 5, 6	DT-8: Delivering “bad news” DT-8: Failing to plan	
<b>9</b>	<u>Executing the Intervention</u> 1. Steps to success	Rothwell: Ch. 8 Biech: pp. 160-163		Week 9 ▪ Consulting project progress reports
<b>10 – 12</b>	<u>Transitioning the Intervention</u> 1. Evaluation 2. Adoption 3. Separation	Rothwell: Ch. 10 - 12 Biech: pp. 163-164	DT-10: SWOT Analysis DT-11: Consulting vs. Deciding DT-12: Contracting vs. Consulting	Week 11 (optional) ▪ Peer review of rough draft of consulting reports
<b>14 - 15</b>	<u>Building a Consulting Practice</u> 1. Business Action Plan	Biech: Ch. 4-6, 10-11	AS-14: Action Plan	Week 14 ▪ Students present action plan Week 15 ▪ New Business Resource Panel

## Dr. Allen's Course Attendance Policy

*Attendance in this course is essential, expected and required.* Every absence from a full semester course (10 to 16 sessions) may lower the student's final course grade by ½ letter grade. If there are 10 or less sessions during the semester, each absence may lower the student's final course grade by a one full letter grade. If a student is penalized for a total of 1 ½ letter grades, the instructor may request of the Registrar that a student be dropped from the course (W or WF).

While I understand that there are valid reasons for missing a class session, we need your participation in the course discussions. Please take the above very seriously and plan your semester schedule accordingly.

### University Policy of Absence for Religious Holidays

In accordance with state law, students absent due to the observance of a religious holiday may take examinations or complete assignments scheduled for the day missed within a reasonable time after the absence if the student has notified the instructor of each class of the date of the absence within the first 15 days of the semester. Notification must be in writing, either personally delivered with receipt of the notification acknowledged and dated by the instructor, or by certified mail, return receipt requested.

Only holidays or holy days observed by a religion whose place of worship is exempt from property taxation under Section 11.20 of the Tax Code may be included. A student who is excused under this provision may not be penalized for the absence, but the instructor may appropriately respond if the student fails to satisfactorily complete the assignment or examination.

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## Course Communications:

There are four standard modes of communication during this course. This information can also be accessed at: [www.sageperformance.com/drjeffallen/contact.htm](http://www.sageperformance.com/drjeffallen/contact.htm)

Telephone: (940)565-4918

Email: [Jeff.Allen@unt.edu](mailto:Jeff.Allen@unt.edu), Please list course # in the subject line, for example -  
**SUBJECT: ATTD 6460 – name of assignment**

Postal Mail: *Dr. Jeff M. Allen, Interim Department Chair*  
University of North Texas  
Department of Learning Technologies  
Discovery Park, G170  
3940 N. Elm, Denton, Texas 76207

Campus Appointment: <http://sageperformance.com/drjeffallen/scheduleappointment.htm>

If you need an appointment outside of my advising times, you must contact me directly.

Assignments: You may choose the best way to communicate your work (electronic or hard copy). **Assignments are due no later than 6:00pm on the designated date unless otherwise specified in the course syllabus.** Please consider postal mail time and electronic communication difficulties. The student is responsible for all course deadlines. Be sure to keep a copy of your assignments (just in case).

### ***Classroom Disability Accommodations***

The University of North Texas does not discriminate on the basis of an individual's disability and complies with Section 504 and Public Law 101-336 (Americans with Disabilities Act) in its admissions, accessibility, treatment and employment of individuals in its programs and activities. A copy of the College of Education ADA Compliance Document is available in the Dean's Office, Matthews Hall 214. *It is the responsibility of the student to inform the instructor of any disabling condition that will require modifications.* The following information is from : <http://www.unt.edu/oda/oda-facg.htm>. Additionally, this site provides a set of FAQ for students and faculty.

### **University Policy of Disability Accommodations**

In accordance with Section 504 of the federal Rehabilitation Act of 1973 and the Americans with Disabilities Act of 1990, the University of North Texas endeavors to make reasonable adjustments in its policies, practices, services and facilities to ensure equal opportunity for qualified persons with disabilities to participate in all educational programs and activities.

Whenever a special accommodation or auxiliary aid is necessary in order to ensure access to and full participation by students with disabilities in University programs or services, the department or agency responsible for the program or service to which the individual requires access will work with the Office of Disability Accommodation and appropriate federal and state agencies to ensure that reasonable accommodations are made.

The student requiring special accommodation or auxiliary aids must make application for such assistance through the Office of Disability Accommodation. Proof of disability from a competent authority will be required, as well as information regarding specific limitations for which accommodation is requested.

The University assumes no responsibility for personal assistance necessary for independent living nor for specialized medical care. Students requiring personal attendants or mobility assistants must employ such persons at their own expense before completion of registration. Students requiring specialized medical care above and beyond that ordinarily offered through the Student Health Center should be prepared to bear the expense of this care through a general hospital or a private physician/clinic of their choice.

Changes may be made as long as it does not compromise the quality of education. Cooperation of faculty, staff, and students is needed to help with physical access and to meet academic requirements. For example, giving extra time on tests or assignments, substituting courses, or adapting classroom presentations (like allowing tape recorders, note takers, or asking a professor to face the class when speaking to allow students to lip read) may be done.

Questions or concerns about discrimination on the basis of disability or about equal educational opportunities for persons with disabilities should be directed to Cassandra Berry, Equal Opportunity Office, Room 203, Administration Building, 565-2456. Information concerning specific accommodations to provide equal opportunities is available: The **Office of Disability Accommodation, Suite 324, Union, (940)565-4323.**

## University Policy of Honesty and Integrity

The UNT Code of Student Conduct and Discipline provides penalties for misconduct by students, including academic dishonesty. Academic dishonesty includes cheating and plagiarism. The term “cheating” includes, but is not limited to, (1) use of any unauthorized assistance in taking quizzes, tests, or examinations; (2) dependence upon the aid of sources beyond those authorized by the instructor in writing papers, preparing reports, solving problems, or carrying out other assignments; and (3) the acquisition, without permission, of tests or academic material belonging to a faculty or staff member of the university. The term “plagiarism” includes, but is not limited to, the use of the published or unpublished work of another person, by paraphrase or direct quotation, without full and clear acknowledgement. It also includes the unacknowledged use of materials prepared by another person or agency engaged in the selling of term papers or other academic materials. If a student engages in academic dishonesty related to this class, the student will receive a failing grade on the test or assignment and a failing grade in the course. In addition, the case will be referred to the Dean of Students for appropriate disciplinary action.

### ***GNDE Statement***

#### **Endorsements and Certifications:**

These specialty offerings by the department are to assist you in upgrading your skills or qualifications. You need to make an appointment with the program coordinator to determine prescribed classes and requirements. You can earn an endorsement or certification without selecting a major field of study or being accepted as a degree seeking student in one of the various programs. **NONE OF THE COURSE WORK YOU APPLY TOWARD EITHER AN ENDORSEMENT OR CERTIFICATION MAY BE APPLIED TOWARD A GRADUATE DEGREE UNLESS YOU ARE ACCEPTED INTO A GRADUATE DEGREE PROGRAM PRIOR TO COMPLETING 12 HOURS OF COURSE WORK.**

#### **Master's and Doctoral Programs:**

In order to successfully complete one of these graduate degrees you must first be accepted into the desired program of study. Acceptance into the graduate school does not guarantee acceptance into a program. To be accepted into a program you must meet the prescribed criteria for the specific program. **YOU CANNOT COUNT MORE THAN 12 HOURS TOWARD ANY GRADUATE DEGREE WITHOUT FIRST BEING ADMITTED INTO A PROGRAM.** Any hours earned over 12 hours working on a certification or endorsement as a non-degree seeking student will not be accepted as work toward a degree. Prior to being considered for acceptance into a degree program you must complete the GRE (or GMAT where applicable) with an acceptable score. The GRE or GMAT should be taken **BEFORE YOU COMPLETE** your first semester of enrollment and may be taken more than once to improve your score.