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**MEMORANDUM** 

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**ATTENTION** Senate

**DATE** August 23, 2023

**FROM** Mary O'Brien,  
Chair of Senate Graduate Studies  
Committee (SGSC)  
**RE:** New Courses

**For information:**

Acting under delegated authority at its meeting of July 13, 2023, SGSC approved the following New Course, effective **SUMMER 2024**:

**Beedie School of Business**

New Course: BUS 605 Applied Project in Business in the Americas

Segal Graduate School

Office of the Associate Dean  
500 Granville Street  
Vancouver, BC V6C 1W6TEL 778.782.9255  
FAX 778.782.5122**Memo to SGSC**

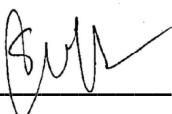
**To:** Senate Graduate Studies Committee  
**From:** Sudheer Gupta, Associate Dean, Graduate Programs  
**Re:** ~~Course Change Forms for BUS 687, BUS 605 New Course, EMBA Americas Program~~  
**Date:** Friday May 26, 2023 (Rev. June 20, 2023)

The following curriculum revisions have been approved by the Beedie School of Business and are forwarded to the Senate Graduate Studies Committee for approval.

Please include them on the next SGSC agenda.

- ~~IBL Course Change for BUS 687~~
- New Course: BUS 605
- ~~EMBA Americas Program Change form~~

Thank you for your attention herein. Should you have any questions or concerns, please do not hesitate to contact me.



**Sudheer Gupta**

Associate Dean, Graduate Programs, Beedie School of Business

## New Graduate Course Proposal

Course Subject (eg. PSYC) <b>BUS</b>	Number (eg. 810) <b>605</b>	Units (eg. 4) <b>3</b>
Course title (max. 100 characters) <b>Applied Project in Business in the Americas</b>		
Short title (for enrollment/transcript - max. 30 characters) <b>Americas Applied Project</b>		
Course description for SFU Calendar (course descriptions should be brief and should never begin with phrases such as "This course will..." or "The purpose of this course is...") If the grading basis is satisfactory/unsatisfactory include this in the description) Provides the opportunity to apply student learning in the context of a management or globalization challenge outside of the classroom. Supported by the instructor, an industry partner, and working in a cross-cultural team, students will integrate their knowledge across courses to develop skills important to relationship management and organizational development.		
Rationale for introduction of this course This course replaces the previous 6 credit pass/fail project course BUS 696 with a graded 3 credit course. Students will be enrolled twice and receive a grade for each enrolment so that they can receive timely feedback on their performance and recognition of the significant work needed to produce interim deliverables at the end of the first semester of enrolment.		
Term of initial offering (eg. Fall 2019) <b>Summer 2024</b>	Course delivery (eg. 3 hrs/week for 13 weeks) <b>2x 8 days per term</b>	
Frequency of offerings/year <b>2</b>	Estimated enrollment per offering <b>15</b>	
Equivalent courses (courses that replicates the content of this course to such an extent that students should not receive credit for both courses) <b>BUS 696 is equivalent to two sections of this course</b>		
Prerequisite and/or Corequisite <b>Enrollment in the Americas stream of the EMBA</b>		
Criminal record check required? <input type="checkbox"/> Yes if yes is selected, add this as prerequisite	Additional course fees? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
Campus where course will be taught <input type="checkbox"/> Burnaby <input type="checkbox"/> Surrey <input checked="" type="checkbox"/> Vancouver <input type="checkbox"/> Great Northern Way <input checked="" type="checkbox"/> Offcampus		
Course Components* <input type="checkbox"/> Lecture <input checked="" type="checkbox"/> Seminar <input type="checkbox"/> Lab <input checked="" type="checkbox"/> Independent <input type="checkbox"/> Capstone <input type="checkbox"/>		
Grading Basis <input checked="" type="checkbox"/> Letter grades <input type="checkbox"/> Satisfactory/Unsatisfactory <input type="checkbox"/> In Progress / Complete		
Repeat for credit? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	Total repeats allowed? <b>4</b>	Repeat within a term? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Required course? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	Final exam required? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	Capstone course? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Combined with a undergrad course? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If yes, identify which undergraduate course and the additional course requirements for graduate students:		

\* See important definitions on the curriculum website.

## ► RESOURCES

If additional resources are required to offer this course, provide information on the source(s) of those additional resources.

Faculty member(s) who will normally teach this course

**Andrew von Nordenflycht**

Additional faculty members, space, and/or specialized equipment required in order to offer this course

N/A

## ► CONTACT PERSON

Academic Unit / Program <b>Beedie Grad</b>	Name (typically, Graduate Program Chair) <b>Ariel Johnson</b>	Email <b>busgradprogram@sfu.ca</b>
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## ► ACADEMIC UNIT APPROVAL

A course outline must be included.

Non-departmentalized faculties need not sign

Graduate Program Committee	Signature	Date
Department Chair	Signature	Date

## ► FACULTY APPROVAL

The course form and outline must be sent by FGSC to the chairs of each FGSC(fgsc-list@sfu.ca) to check for an overlap in content

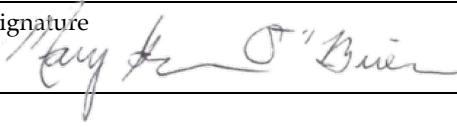
Overlap check done?  YES

This approval indicates that all the necessary course content and overlap concerns have been resolved. The Faculty/Academic Unit commits to providing the necessary resources.

Faculty Graduate Studies Committee <b>Sudheer Gupta</b>	Signature 	Date <b>May 26, 2023</b>
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A library review will be conducted. If additional funds are necessary, DGS will contact the academic unit prior to SCSC.

## ► SENATE GRADUATE STUDIES COMMITTEE APPROVAL

Senate Graduate Studies Committee <b>Mary O'Brien</b>	Signature 	Date <b>August 24, 2023</b>
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### ADMINISTRATIVE SECTION (for DGS office only)

Library Check: \_\_\_\_\_

Course Attribute: \_\_\_\_\_

Course Attribute Value: \_\_\_\_\_

Instruction Mode: \_\_\_\_\_

Attendance Type: \_\_\_\_\_

If different from regular units:

Academic Progress Units: \_\_\_\_\_

Financial Aid Progress Units: \_\_\_\_\_

## Americas EMBA: BUS 605 Applied Project in Business in the Americas 2023 - 2024

Instructor	Institution	Contact Information
Samantha Mazzero	Fundacao Instituto de Administracao (FIA)	<a href="mailto:smazzero.fia@outlook.com">smazzero.fia@outlook.com</a>
Marco Moran	Instituto Tecnologico Autonomo de Mexico (ITAM)	<a href="mailto:marco.moran@itam.mx">marco.moran@itam.mx</a>
Erin Raccah	Vanderbilt University	<a href="mailto:erin.raccah@vanderbilt.edu">erin.raccah@vanderbilt.edu</a>
Andrew von Nordenflycht	Simon Fraser University (SFU)	<a href="mailto:vonetc@sfu.ca">vonetc@sfu.ca</a>

### Course Description

The Applied Project in Business in the Americas asks students to apply management concepts and problem-solving techniques as part of a global team on behalf of a client organization.

The students come from four partner schools across the Americas: SFU, Vanderbilt, ITAM and FIA. Each team will have students from all four universities. Each team will be engaged on a project sponsored by a client company. Under the coaching of the instructors, the teams will use tools and concepts from prior courses and several concepts introduced in this course to develop recommendations for the client's objectives. The projects will be introduced in August and will conclude by early March with a final presentation to the client sponsor. One enduring lesson from this course is **Critical Thinking**. A second enduring lesson is **Collaboration**.

### Objectives

Our learning objectives for the course include:

- Introduce several problem-solving, project-management, and consulting techniques that are applicable to any context
- Practice using those techniques, as well as other business analysis frameworks, by applying them in the context of a real-world business question or issue—most likely in the context of an industry with which you are not familiar
- (More) practice with team process techniques and skills
- Increase understanding of how business is conducted across the Americas
- Develop cross-cultural management skills on a multi-national team

### Course Expectations

Students are expected to stay committed to supporting their team mates and delivering quality work to the client. Separately from the scheduled class and time with your coach, students will likely need to spend 5 hours per week on project work, which includes regular team meetings. Attendance at all plenary class sessions, client meetings and coach meetings are required.

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### Course Structure

This course involves general sessions during the international residencies when the instructors will introduce concepts, plus monthly meetings with the coach, but the majority of the work will take place in teams outside of any scheduled class time. Teams will submit a variety of interim deliverables over the course of the project, leading up to the final presentation.

The course is modeled after the problem-solving process used by McKinsey & Co., a leading global consulting firm. There are three key components:

- An efficient team management approach
- A hypothesis-driven problem-solving methodology
- Structured communication of recommendations to the client

Importantly, students will develop critical listening skills as they aim to understand their client's issue. They will also collaborate across cultures, learning tolerance and negotiation among members of a diverse team with different backgrounds.

Each instructor is a "coach", not a project manager: he or she will help define the key question for the client, introduce planning and analytic techniques, review and provide feedback on team output, and facilitate team "self-help" in addressing within-team conflicts. He or she will not develop a detailed workplan for each team, monitor short-term progress, or address individual student performance or accountability.

### Book and Materials

The materials are based on The McKinsey Engagement, by Paul Friga. We will discuss the concepts from the book and apply the skills through our deliverables.

### Learning and Assessments

#### Assessment summary

	<u>Deliverable</u>	<u>Percentage %</u>
1	Team Charter	5%
2	Engagement Letter (aka Scoping Agreement)	5%
3	Baseline Client & Industry Research	5%
4	Draft of Issue Tree / Hypo Tree	5%
5	Issue Tree / Hypo Tree	15%
6	Content Plan	5%
7	Peer Evaluation #1 (grade is based on your peers' rating of you)	5%
8	Draft of Story Board (aka Ghost Deck)	5%
9	Story Board (aka Ghost Deck)	5%

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10	Interim Report (aka Summary of Analysis to Date)	5%
11	Rough Draft & Dry Run	5%
12	Final Presentation	20%
13	Peer Evaluation #2 (grade is based on your peers' rating of you)	10%
14	Debrief Report Out	5%
	<b>TOTAL</b>	<b>100%</b>

### Other Information

#### Deliverable Due Dates and Grading

You will have a series of deliverables due on various dates. The project deliverable due dates are found on CANVAS. All deliverables must be submitted by one team member via CANVAS.

Deliverables are assigned and graded as a team with the exception of the Peer Evaluation. The team will remain the same throughout the project unless there is an irreconcilable conflict (see below). Collaborating with team members of different backgrounds and empowering one another in order to deliver a high-quality product for the client is key to the success of the team.

Due dates will be posted in CANVAS. Dates are firm but coaches can allow for flexibility if needed due to client conflicts that become a factor for the team. If teams have not received prior approval for a later due date, deliverables will receive a 10% penalty on the first day past the due date. An additional penalty of 5% will be administered for each additional week past the due date.

#### Academic Integrity

Refer to the existing honor code of each team member's respective school.

#### Confidentiality Agreement

Everyone in the course is bound by a blanket confidentiality agreement to protect the proprietary information of all of our client companies. Teams will use caution to protect any confidential information provided by client companies. Company information may be discussed in normal classroom settings with classmates and coaches. All classmates and faculty must agree prior to their participation to protect confidential company information. Individual client companies may require a Non-Disclosure Agreement (NDA) signed by all members of the team.

At the end of the course, personal hardcopies and electronic files of all work material and presentations must be destroyed or deleted.

#### Proprietary Work Product

All data, analysis, concepts, opportunities, product ideas, potential customer lists, presentations, notes, and any other work product created by the team during the course of this project will be owned by the client company.

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### Honor Code

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**No Use of Client Data outside of Course:** This is a collaborative course and sharing of ideas and information with your teammates is encouraged. Team members are also free to discuss aspects of their projects with classmates and coaches. However, failure to protect confidential client information or use of any information or work product developed during the project outside of the context of the course will be considered a violation of the Honor Code and may result in a failing grade for the course.

**Original Research:** Student teams are responsible to research and write an original presentation as part of this course. Plagiarism and/or failure to credit sources of key information used in your report or presentation will result in loss of partial or all credit for this assignment.

**Peer Evaluation Confidentiality:** Individual peer evaluations are strictly confidential and should not be discussed or shared with any other students. Students must rate each other individually and not collaborate on an agreed upon rating.

### Team Conflict Escalation Process

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Teams experiencing conflict are expected to exhaust all possible resources and make every effort to resolve issues in order to maximize their team learning and complete all team deliverables. In the rare instance that a team fails to resolve their internal issues, there is a team escalation process.

The basic outline for addressing communication or performance issues is as follows:

First, communicate specific observations with the team member directly.

*If that does not bring about agreed upon improvement ...*

Second, conduct a full team meeting to discuss observations, come to shared understanding and agreement for change going forward,

*If that does not result in agreed upon improvement ...*

Third, request a meeting with the project Coach. Professors or administrators who observe team dysfunction may also refer students to work with the project Coach.

Fourth, the project Coach may seek additional support from a team-dynamics expert to consult with the team

If the escalation process fails to resolve a team member's behavior, that team member will face a penalty to be determined in consultation with the school administration.

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## Reading and Course Schedule

Readings are from The McKinsey Engagement by Paul Friga.

COURSE EVENT	Description	TIME FRAME
<b><u>PREPARE</u></b>		
All School Capstone Introduction	Introduce Capstone course, coaches and projects. Explain schedule, process and syllabus high level overview.	August 1, 2023 4:00 p.m. PST / 6:00 p.m. CST / 8:00 p.m. BST
Project Survey	Project selection survey will be open Aug. 1 - 8, 2023 for you to rank order your project preferences.	August 1-8, 2023
READING PREP	The McKinsey Engagement <b>chapters 1-4</b> (pp. 1-67) TEAM skill sets	August 18, 2023
READING PREP	The McKinsey Engagement <b>chapters 5-6</b> (pp. 87-122) FOCUS skill sets	August 19, 2023
READING PREP	The McKinsey Engagement <b>chapters 7-9</b> (pp. 127-174) FOCUS skill sets	August 20, 2023
Client/Team First Meetings	Each team and its coach will schedule at least one client meeting during SFU residency	August 21, 2023
READING REFRESH	Friga, chapters 1-4 “ <b>TEAM</b> ”	
Assignment #1: Team Charter (50 pts)	Agreement on how team will collaborate, coordinate and resolve conflict; provides contact information for each team member; sets time and platform for team meeting. Upload to Canvas.	Due August 26, 2023
Assignment #2: Letter of Engagement (50 pts)	This letter sets specific expectations with the client. It includes the problem statement, scope and overall timeframe for the project. It includes contact information for stakeholders and for client team members who will provide data to the team. Final version with client approval is uploaded to Canvas.	Due August 26, 2023

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Assignment #3: Baseline Industry/Client Research (50 pts)	This analysis requires teams to familiarize themselves with the industry, competitive advantage, customers and broad issues to consider. Meet with your coach to discuss this. Upload to Canvas.	Due September 16, 2023
READING REFRESH	Friga, chapter 5 “ <b>FRAME</b> ”	
Virtual Learning – Hypo Tree Videos	Videos posted to CANVAS that explain Issue trees/Hypo trees in greater detail	Watch by October 13, 2023
Assignment #4: Draft of Issue Tree and Hypothesis Tree (50 points)	The Issue Tree and Hypothesis Trees give structure for your analysis. It provides a logical way to review the issues that need to be considered to successfully answer the core question of the project (project objective). You will submit a draft before FIA residency via Canvas. You will work with coaches to finalize it during the residency. You will submit a final version after the residency.	Due October 11, 2023
Assignment #5: Issue Tree and Hypothesis Tree (150 pts)		Due October 21, 2023
READING REFRESH	Friga, chapter 6 “ <b>ORGANIZE</b> ” and chapter 7 “ <b>COLLECT</b> ”	
Assignment #6: Project Content Plan (50 pts)	This plan lays out what information will you need to analyze, and what data do you need to go find in order to get that information? It helps you to be more efficient and only look for relevant data. Upload to Canvas.	Due November 18, 2023
Assignment #7: Peer Evaluation #1 (50 pts)	Peer evaluation will be done in confidence via online tool. Your grade reflects how your peers rate you; it is not a completion grade.	
Assignment #8: Interim Report to Client (50 pts)	This is a Word document to synthesize your findings to date. It will help you to check-in with the client to assess progress and revise work plan accordingly. Upload to Canvas.  You will share highlights verbally with client. It is up to you and your coach whether to give the Word document to the client or not.	Due December 16, 2023
READING REFRESH	Friga, chapter 8 “ <b>UNDERSTAND</b> ”	
Webinar	Coaches will present the key points for preparing your Ghost Deck/Story Board in an online session	December 18, 2023

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Assignment #9: Draft of Story Board/Ghost Deck (50 pts)	This is a PPT in which you lay out your IDEAL form of presentation. It helps you to organize your content even before you have finished collecting your data. You will submit your draft on Canvas before the ITAM residency.	Due January 23, 2024
Assignment #10: Story Board/Ghost Deck (50 pts)	You will work with the coaches to finalize the Story Board during the ITAM residency. You will submit the final on Canvas after the residency.	Due February 3, 2024
READING REFRESH	Friga, chapter 9 “SYNTHESIZE”	
Assignment #11: Dry Run / Draft Presentation (50 pts)	This is a very strong draft of your final presentation to share in a Dry Run with your coach. The presentation should be nearly complete at this point. Upload to Canvas.	Due February 17, 2024
Assignment #12: Final Client Presentation (200 pts)	Your presentation of the final recommendations to your Client. It will be held via video conference for non-resident students and your coach. Upload final version to Canvas.	Due February 29, 2024
Assignment #13: Peer Evaluation #2 (100 pts)	Peer evaluation will be done in confidence via online tool.	
Assignment #14: Reflection (50 pts)	To be presented at final class. Upload to Canvas.	Due April 12, 2024

### About the Course Instructors



#### Samantha Mazzero

Prof. Mazzero is a mathematician by University of São Paulo (USP), holds an MBA in Marketing, MBA in economic & financial management, and MSc and Ph.D. in Business from USP in Corporate Foresight & Strategy area. Her professional experience includes more than 18 years in multinational pharmaceutical companies in Business Intelligence and marketing. She has been a professor for postgraduate students since 2008 for research & market analysis, segmentation and targeting. She joined FIA in 2013 teaching International Management for the International MBA.

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### Marco Moran

Marco Moran is a highly experienced business and information technology executive with over 24 years of experience in consulting, project management, business process improvement, and digital transformation. Marco earned his bachelor's degree in mechanical engineering from U.N.A.M, his master's in business administration from ITAM, and a Master's in Global Management from the A.B. Freeman School of Business at Tulane University. Additionally, he has taught MBA Consulting and Strategy classes at ITAM and served as a project coach for the Americas MBA program from 2014 to 2018



### Andrew von Nordenflycht

Andrew von Nordenflycht is an Associate Professor of Strategy at the Beedie School of Business at Simon Fraser University in Vancouver, as well as an International Research Fellow with the Centre for Professional Service Firms at Oxford's Said Business School. He teaches MBA and Executive MBA courses in Strategy and Organizational Analysis. He publishes research on the challenges of governing and managing human capital-intensive firms, especially professional services. He works with executives to facilitate strategic analysis and strategic planning. He has worked with executives in the engineering consulting, investment advisory, advertising, and software development industries, among others. He received a BA from Stanford University (with distinction, Phi Beta Kappa) and a PhD from the MIT Sloan School of Management. Prior to his academic career, he worked as a management consultant for The Monitor Group in Los Angeles and Boston.



### Erin Raccah

Erin Raccah is an Adjunct Professor of Management at Vanderbilt University Owen Graduate School of Management, as well as Associate General Counsel, Corporate Law, at Sylvamo in Memphis, TN, USA. She serves as the Coordinator for the Capstone Program. She earned her BS degree in Economics from the Wharton School, University of Pennsylvania in Philadelphia, her Juris Doctorate degree at Brooklyn Law School, New York (with distinction, magna cum laude), and her Masters in Business Administration at Vanderbilt University's Owen Graduate School of Management.