

MGT448.01/548.01/BA 448 M01-- Small Business Consulting

4 to 6:30 PM Mon BC 204

Fall 2008

David M. Boje, Ph.D.

Office: BC 318

Home: 532-1693



Assistanta:

Teaching Assistant: TBA

Talking Stick Assistants:

OFFICE HOURS: 12:30 to 2 PM Mon in

Frenger Food Court (new Dynasty) Otherwise

by apointment; Just after class is also good
ime

David Tobey

dhtobey@hotmail.com 540-860-9172 cell <http://talkingstick.info/>

Course details are at Small business Tool box is at

<http://business.nmsu.edu/~dboje/sbc/sbc.html> &

<http://business.nmsu.edu/~dboje/448/>

Syllabus is at <http://business.nmsu.edu/~dboje/448/448template.htm> WebCT has the required texts for you to print out.

Start with SEAM overview <http://web.nmsu.edu/~dboje/TDseam.html> -

required & There is are slides online of topics we cover in class

<http://business.nmsu.edu/~dboje/448/SEAM2.htm> to give you overview

Small Business Consulting Service CLIENT APPLICATION

<http://business.nmsu.edu/~dboje/448/SBAAssistanceApplication.htm>

and in WebCT Class Materials (Due by 2nd class meeting). (e.g., [Artist business](#); [arts service organizaiton](#); [galleries or museums](#)) at <http://talkingstick.info/>

IN THE NEWS: April 30 2008 - NMSU plans to put Las Cruces art on the map (6:18 a.m.) Sun-News report

Article Launched: 04/29/2008 06:18:31 AM MDT LAS CRUCES Faculty and students from the New Mexico State University College of Business are working with the City of Las Cruces and local artists to let the world know about the Las Cruces arts scene. They believe the community is missing out on what could become a major enterprise and the revenue that a vibrant art scene would generate. There are several news articles that have been done as a result of work in Mgt448/548. These articles have helped to stimulate interest Las Cruces moving from an unknown to a much better known arts industry.

1. May 2008 - "[Las Cruces Arts and Culture Scene can Contribute to Economic Development in Southern New Mexico](#)" Dr. David M. Boje, New Mexico Business Outlook.
2. "Arts and culture is a major employment source for the State of New Mexico," said David Boje, management professor at NMSU. "Right now, Las Cruces is under the shadow of Santa Fe and Taos. Las Cruces should have that same potential." [See entire article](#)

SEAM is Socio Economic Approach to Management. SEAM is most advanced approach to Small Business consultation in the world. NMSU is one of the only US Universities to be authorized by Memorandum of Understanding with ISEOR France (University 3 of Lyon France) to train you in SEAM.

If you would like to go to France Summer I and get more advanced SEAM training (& credit for 2 NMSU courses), contact professor Boje for details.

3. April 29 2008 [NMSU Plans to Put Las Cruces Art on the Map. Press Release](#) by Jusin Bannister, NMSU
4. April 18 2008 [City to consider art commission NMSU professor to propose networking organization](#) by Joel Courtney
The Las Cruces Bulletin p. C4 Arts & Lifestyles Section [Campus organization breathes life into LC art scene](#) -
By: Christina Brigance 11/12/07 Section: Arts and Entertainment, Round-Up, Vol ,109 (issue 24): p. 11
5. The Las Cruces Bulletin - "[NMSU Teams with Locals to Improves Art Scene: Talking Stick Institute works to bolster the 'business of art.'](#)" Article by Jessica Rodrigo, Friday, November 30, 2007. p. C8.
6. [Arts forum explores visual, literary and performing arts](#) By S. Derrickson Moore/Sun-News reporter Article Launched: 07/01/2008 12:00:00 AM MDT "Glenn Cutter, a member of the New Mexico Arts Commission, left, shows a pop-quiz Tuesday as David Boje, director of the Talking Stick Institute at New Mexico State University, questions the audience regarding the number of art service organizations that exist in Las Cruces during the 2008 Arts Forum at the Rio Grande Theatre. (Sun-News photo by Shari Vialpando)" Answer: As of Jun 30 08 there were 82.

Schedule	
	Monday Classes meeting 4 to 6:30 PM - gray boxes are required classes - white boxes are required team meetings with instructors (20 minutes each)
1	<p>25 Aug - We have a gret learning event. We are hosting 3 meetings of ARTS CONVENTION (service orgs, museums, city departments, mayors, city council, economic dev specialists, & galleries)- please select clients for organizations listed at http://talkingstick.info and Please visit them and Give them SMALL BUSINESS APPLICATION and have them show up 8 Sep to the Convention. Introduction to course http://business.nmsu.edu/~dboje/448/ ; Go To: How to Get Started; How to Listen & take client notes; Exercise: telling story of small business problems</p> <p>HOMEWORK:</p> <ol style="list-style-type: none"> 1. Print the 180 page Socio-economic online handbook by Henri Savall, Veronique Zardetm & Marc Bonnet (in WebCT) PLEASE WRITE IN PAGE NUMBERS FOR EASY REFERENCE TO SEAM TOOLS; in WebCT Class Materials 2. Memorize 4 Leaf Clover for next class http://business.nmsu.edu/~dboje/sbc/sbc.html 3. Each person in class distributes 25 invitations in person (follow up with call), and figure out 3 mostpotential clients from http://talkingstick.info/ to 8 Sept Convention; Please choose 1 of 3 as your team's SMALL BUSINESS APPLICATION (from URL above or in WebCT Class Materials) & print out & give client CONFIDENTIALITY AGREEMENT, & begin client PRISMA (See PRISMA

[example](#))

4. Get your Black COMPOSITION NOTEBOOK (composition style) from Big Lots (has a 100% recycled one) you can take notes at Sep events (bring tape recorder & camera)

5. Review [Mid Term Check List](#) (on Resources page of WebCT) of what you will do

6. Print and review this analysis of the [Las Cruces Arts Scene industry potential](#) to prepare you for 8 Sep event

The following is a list of high priority client's to give [SMALL BUSINESS APPLICATION](#) to (find contact info at <http://talkingstick.info/>):

1. Dona Ana Arts Council - Contact Person is Heather Pollard
2. Perceptions Art Center - Artist Cooperative - Contact Person is Trina Dunbar
3. [Art de Romero](#) - Contact - Virginia Maria Romero - See Artist Registry for contact info
4. [Downtown Mainstreet](#) - Contact Cindi Fargo (see [Mainstreet directory](#))
<http://www.lascrucesdowntown.org/>
5. Alma D Arte Charter High School - Irene Oliver Lewis
6. ArtForms: Artists Association of New Mexico - Catherine Brenner (see Unsettled Gallery for contact info)
7. Justus Wright Galeria (also Del Vale Printing who is doing the Galleries Guide for Las Cruces)
8. And many others on the Art Service Organizations, Galleries, and other lists at [Talkingstick.info](#)

TONIGHT: Boje will introduce you to 6 SEAM Tools you will use with task forces and with the clients. This is AXIS B for chart with the 3 axes On line

<http://www.iseor.com/images/prse4.gif> - and please print and use the online [6 TOOLS Examples - Boje](#) or the [PDF version](#)

1. **IESAP Internal/External Strategic Action Plan** - This is SAP for internal organization and external environment change. IESAP covers 5 years. Do one for your client and one for the task team you work with. It's also a good idea to do one for you as a person (optional). It is a simple chart with 3 objectives and a 5-year implementation schedule. (pp. 112-113 in SEAM Manual)
2. **PAP Priority Action Plan** -for one semester (Make one for client & your team, and one for task force and you (and whoever works with you on that). This is a simple chart translating the IESAP goals to specific sub-objectives, with priority actions, and who is responsible, and when it gets done during the semester. (pp. 114-117)
3. **CG Competencies Grid (aka Scale of Skills)** - Do one for your client and for your task force and for yourself, before and after the project intervention. What are your/their strong, weak, and critical competencies to develop? (pp. 118-120 in SEAM Manual; also 96-99 & 56-59)

	<p>4. TM (Time Management) Self Analysis â€” “ Do one on yourself in relation to 448/548 and help your client & task team to each do their TM self analysis. (pp. 121-125), This is where the client (& you) learn to delegate) and eliminate tasks so a space can open up for strategic actions. In the words of Peter Drucker, "There is surely nothing quite so useless as doing with great efficiency what should not be done at all." (Drucker, Harvard Business Review, 1963).</p> <p>5. SPILB (Strategic Piloting Indicators Log Book) â€” “ Your Black Composition Notebook serves as your SPILB â€” “ no other book will do. Develop 5 types of indicators for IESAP, PAP, etc for yourself, your client, and your taskforce. pp. 126-129 in SEAM MANUAL</p> <p>6. PNAC (Periodically Negotiable Activity Contract) - 2 PNACs, one for your contract for three objectives your team will complete with your client and the other for the PNAC for your taskforce. PNAC is renegotiated several times during the term to keep your objectives in sync with client/taskforce and instructor expectations. The PNAC builds on the SMALL BUSINESS APPLICATION and it goes further. Here your 3 intervention project OBJECTIVES get specific piloting indicators, you work out how the supplementary incentives (for you its grades) for workers (its bonus etc) work out. And you plan out the resources and means allocated by client or task force to meet each objective (time from specific personnel, work space, copy machine, etc you need to get your intervention to happen. Note: PNAC change from the first agreements in early part of term, to the middle, and before the end. Plan on it.(pp. 130-134)</p> <p>Your task is to get not only yourself using the 6 tools, which are the main parts of your final report, but to get your client trained in using the tools.</p>
	<p>1 Sep - No Class - Labor Day - Please get Small Business Application completed - use this week to get your client application and invite at least three arts organizations or galleries to 8 Sep Convention</p>
	<p>2 Sep (OPTIONAL but Strongly encouraged - NOTE: Tonight at 6:30 there is a special invitation to go to Las Cruces Downtown MainStreet office to meet with Cindi Fargo - one of our client projects will be Las Cruces Downtown - http://www.lascrucesdowntown.org/</p>
2	<p>8 Sep NMSU Small Business Classes hosts 1st ARTS Convention: Form 10 Task Forces & Get to know one another; Learn to Hear & Tell one anotherâ€” TMs Stories; Where: Corbett Center - Dona Ana Room at New Mexico State University). See instructions at http://peaceaware.com/talkingstick/task_forces.htm - Please show up early for class, before 4PM for set up help for this event.</p> <p>STUDENT ASSIGNMENT: help the task forces come up with 3 OBJECTIVES in a PAP (priority action plan) for the semester. Students act as Talking Stick Circle Facilitators for the task groups, take VERBATIM notes in your BLACK COMPOSITION NOTEBOOKS - review guidelines</p> <p>HOMEWORK: SEAM Root Cause & Story Charting; PRISMA Training; Client application due today; SEAM Hidden Cost & SEAM Coding training ; Bring print out from WEBCT for Prisma, Confidentiality, BMAQ, & SEAM BOOKLET (or be on stage)</p>

3	<p>15 Sep - NMSU Small Business Classes (Mgt 448 & 548) & System Complexity Class (Mgt 655) hosts 2nd inaugural "open meeting" of the Las Cruces Arts CONVENTION - Otero Room in Corbett Center (10 task forces) to meet to make action plans to make "Las Cruces Arts Scene" a Strategic Identity for the City & Region. Talking Stick Institute will provide the meeting facilitation. Welcome by Mesilla Mayor Michael Cadena; Mayanna Howard (Mesilla Valley Fine Arts Gallery); Special presentation by Rich Williams - New Mexico Main Street Director & State Coordinator of New Mexico's Arts and Cultural Districts - to kick off the event</p> <p>15 Sep : Story Noticing exercise; Bring your WEBCT - codebook to class; SEAM Mirror Effect Psychoanalytic-SEAM; Invite client to SMALL BUSINESS INSTITUTE event (no shows you write paper); Your Team PNAC (2nd PRISMA; PNAC means Periodically Negotiable Activity Contract, i.e. the 3 goals for your client, 2 of which can be just doing your Root Cause/Story Charting & assembling verbatim quotes for the Mirror Effect) is due. Will do some training in STORY NOTICING in your field notes, and in theatre of everyday life of consultant and client telling and listening to one another - as routes into the COMPLEXITY of story/narrative.</p> <p>STUDENT ASSIGNMENT: Show up early for set up. Tonight help each team come up with 3 OBJECTIVES, and their own PAP (Priority Action Plan), plus outline an INTERVENTION PROJECT that students and each task force will co-design, co-implement, and co-evaluate for completion by 8 December. Students to act as Talking Stick Circle Facilitators for task groups - review guidelines</p>
4	<p>22 Sep - NMSU Small Business Classes (Mgt 448 & 548) & System Complexity Class (Mgt 655) hosts 3rd open meeting of 10 Task Forces and of Las Cruces ARTS CONVENTION (Dona Ana Room in Corbett Center at New Mexico State University). Talking Stick Institute will provide the meeting facilitation.</p> <p>STUDENT ASSIGNMENTS: Students to be task force Talking Stick Circle Facilitators - review guidelines</p> <p>22 Sep : 448/548 Submit 1st draft of STRATEGY for your client, include client's documents, and please fill in the Business Model Assessment Questionnaire (BMAQ) for today; please confirm your client will attend Workshop during the following week</p>
5	<p>29 Sep milestone: Negotiate 3 objectives with each client and each task force --</p>

	accepted for SEAM consultation - SEAM IS NOT ENFORCING CONSULTANT'S WAY OF DOING THINGS. CONSULTANTS AND CLIENT BUILD THE GOALS AND THE PROJECT FOR INTERVENTION COOPERATIVELY WITH OWNERS, MANAGERS, & EMPLOYEES. ALONG THE JOURNEY YOUR GOALS WILL CHANGE. PLEASE PLAN FOR THIS. - THANK YOU
6	6 Oct : milestone: do AXIS A - implementation project - Chapter 6 of SEAM BOOK
7	13 Oct : milestone: Do 6 tools of AXIS B - Chapter 7 SEAM book
8	20 Oct :milestone -AXIS C - Policy and Stratetic Decisions
9	27 Oct MID TERM PRESENTATION of 3 AXES OF REPORTâ€” all Mid Term Check List items are due today!
10	Nov 3: team consultaiton meetings with instructors; milestone: work on implementation of project (AXES A)
11	Nov 10 team consultaiton meetings with instructors; Milestone: AXES B - keep using the tools
12	Nov 17 team consultaiton meetings with instructors -- Bring Final Check List to class; rehearsals for final REPORT presentation
13	24 -- 28 Nov fri NO CLASS THANKSGIVING BREAK
14	1 Dec Final Rehearsals of Final Presentation of FINAL REPORT
15	<p>8 Dec (Mon) 3:30-5:00PM (note time difference)-Scheduled Final presentation (like to run the ARTS CONFERENCE part from 4PM to 6PM, so we need to schedule student presentations accordingly). Note: some groups may present between 6 and 8 PM (so schedule accordingly).</p> <p>FINAL MEETING in CORBETT CENTER of ARTS CONVENTION TASK FORCES - this is where students present the IMPLEMENTATION PROJECT and INDICATORS of results, and TASK FORCE and INSTRUCTOR assign FINAL GRADES. This is where we find out which 448/548 students succeeded in consultation, in getting their clients and task forces to use the 6 SEAM tools.</p> <p>Your Final report due by 5 PM with copy of completed Final Check List signed confidentiality statement, and evalutaions by client; Final evaluation of SEAM projects by client, and the SEAM learning by students; please insure your client can attend the presentation and evaluation event - please include your mid-term check list.</p>

10 Task Forces are an Influencer Group

Influencer Group: Over 100 leaders and interested artists to work in developing Roles, Rules, and Goals for to City's Commission:

10 Task Force Options: **(Please Join one of the following taskforces)**

1. Sculptors, potters, craftspeople Task Force: How to market their art
2. Painters, quilters, weavers, photographers Task Force: How to market their art
3. Literary (including publishing, poetry, short story, novels, etc) Task Force

4. Performing Arts Task Force (including thespians, musicians, singers, dancers, etc)
5. Downtown Galleries Task Force (includes Las Cruces Galleries & Mesquite, Espina, etc); Mesilla Galleries (within City of Mesilla): how to attract art buyers that buy
6. Museums Task Force(includes all museums in Doña Ana County, including NMSU): developing more economic support for museums
7. City & State Task Force: 3 Representatives to New Mexico Arts; 2 Las Cruces Cultural Affairs (on payroll in the City); 1 Convention Center & Visitor's Business Bureau; Downtown Main Street (someone in revitalization of the City's downtown)
8. Greater Chamber and the Hispano Chamber Task Force(members from each work on marketing)
9. Education Task force: New Mexico State University (Arts & Science & Business Colleges); Arts High School at NMSU (This is the new HS funded by the State); Alma D Arte Charter High School of Las Cruces, & others) & Doña Ana Community College arts faculty.
10. **Economic Development**

REQUIRED TEXTS (Available on WebCT Class Materials)

1. **FROM WEB CT SEAM MANUAL** Savall, H., Zardet, V. & Bonnet, M. (2000). Releasing the untapped potential of enterprises through socio-economic management. France: ISEOR. (is available on webct - its 150 pages, but then its free to you instead of paying \$75 for it. - PLEASE PUT IN THE PAGE NUMBERS - THANK YOU
2. Boje, D. M. 2008. Course Materials for 448/548 (contains many of the on line web documents and study guides). Also Free and available on web ct
3. Boje, D. M. & Rosile, G. A. 2002. Small Business Consulting Manual & The Metatheatre Intervention Manual. Published by ISEOR Research Institute of University of Lyon 2, France. MUST OBTAIN BY 2nd class. links at web ct (free)
4. Tobey, David H. 2005. 3-10-N Methodology Business Model Assessment Questionnaire. Published by *Talking Stick Institute of Las Cruces*. (web ct)

COURSE FORMAT

The scheduled class meetings that are highlighted will be the only meetings involving the entire class. A schedule of meeting times with instructors will be set up for individuals &/or groups to report on the progress of their case. Approximately once every week, individuals or team members must meet with the instructor to discuss their progress. **ALL MEMBERS OF ANY TEAM MUST ATTEND EACH OF THE MEETINGS. THESE MEETINGS WILL MAKE UP A VERY IMPORTANT PART OF THE COURSE. MISSED MEETINGS WITHOUT MAKE UP WILL RESULT IN A GRADE PENALTY!**

PLEASE TAKE THIS PRE-TEST

QUESTIONS	DON'T KNOW -- - KNOW ALL
1. WHAT IS MIRROR EFFECT IN CONSULTING?	0 1 2 3 4 5 6 7
2. WHAT IS ROOT CAUSE CHART?	0 1 2 3 4 5 6 7
3. WHAT IS STORY CHART?	0 1 2 3 4 5 6 7
4. WHAT IS HIDDEN COST & UNTAPPED REVENUE AUDIT?	0 1 2 3 4 5 6 7
5. HOW TO DO STORY NOTICING?	0 1 2 3 4 5 6 7
6. WHAT DOES SEAM MEAN?	0 1 2 3 4 5 6 7
7. WHAT DOES IESAP?	0 1 2 3 4 5 6 7
8. WHAT IS PAP?	0 1 2 3 4 5 6 7
9. I KNOW HOW TO CONSULT TO A SMALL BUSINESS?	0 1 2 3 4 5 6 7
10. I CAN USE SEAM TO CREATE OR RUN A SMALL BUSINESS?	0 1 2 3 4 5 6 7

TAKE THE ABOVE TEST AS A POST-TEST WHEN YOU HAVE COMPLETED THE COURSE TO ASSESS YOUR LEARNING

GRADING

<p>PERIOD PROGRESS ASSESSMENTS (based on mid-term check list)</p> <ol style="list-style-type: none"> Instructor evaluation including timeliness of work, preparedness for meeting with instructor, effort as reflected in the rough drafts, participation in class &/or group meetings & maintaining confidentiality throughout the project. Deduct 5% for each absence not made up. Client's Final Exam day - evaluation of students' report, co-participation, timeliness of intervention & results achieved. Peer evaluation of each team member (for teams only); note this can significantly lower individual scores. SEAM notebooks • Notebook must have detailed verbatim notes of the interview sessions (outlines are not accepted); each team member takes their own notes and SPILB. Instructor may require tape recording and transcription if notes are not comprehensive and complete (do not outline). 	<p>30%</p>
<p>CLIENT/TASK FORCE SHOWS UP AT SEPTEMBER EVENTS - Evidence of co-participation of students with client in implementing Project, 6 SEAM tools, and Policy/Strategic Decisions</p>	<p>10%</p>
<p>MIDTERM presentation of work done to date on the 3 AXES p 33 of Manual - see Project</p>	<p>10%</p>

FINAL PRESENTATION of 3 AXES Report see Project	20%
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FINAL REPORT Project QUALITY & Attendance of Client to the Final presentation	30%
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Each team member will be graded on his or her total effort. Peer evaluations, where appropriate, will be filled out at the end of the semester by all team members & will be reviewed & considered before assigning final individual grades. Team member inequity of contribution (slacker) will lower an individual's grade. Lack of professionalism affects final grade**

NOTE: An important aspect of all business decisions is their timeliness; therefore, rough drafts & final reports must be turned in at the agreed time to obtain full credit. Report tardiness will result in a grade penalty.

**** Professionalism:** Professionalism will be determined by classroom and team behavior. Professionalism will include such variables as attendance, participation, teamwork, attitude, etc. Attendance is required and will be taken at every class meeting (more than 2 absences will be considered excessive). You are expected to participate in classroom discussion and group work activities. Excessive absences or tardiness, sleeping, reading newspapers, failing to participate, whispering in class, and doing assignments for other classes are just some examples of behaviors that would cause you to lose your professionalism points. Cheating or plagiarism will result in loss of all professionalism points and failure of the course.

POLICY: You must contact David Boje if you miss any scheduled class or your Team's appointment with instructor for consultation, *for any reason.*

Individuals missing a scheduled class (for whatever reason: sick, sports, sleeping, wedding, etc.) owe a 2-page makeup assignment based on the web links in schedule for day you missed. Deduct 10% of final grade for any outstanding makeups.

TEAM POLICY: Each team will do a 360 peer review. Those peer reviews will weight the final grade, and can lower individual team member's grades. The client also does a final assessment of your project, which weights the final grade. The instructor uses judgement in determining how it is weighted. If you have a problem team member, the team may elect to fire them. The fired team member can be picked up by another team, or do their own independent project. Please fire early, to leave individual sufficient time to move along in their growth and development.

INTRODUCTION: Bring back small business. Between 1865 and WWI, and again in 1990s, "Small Businesses were replaced by rigidly hierarchical and authoritarian industrial organizations that relied on the cheap and plentiful [sweatshop] labor supplied to new waves of immigration" and in far flung global supply chains (Hellinger & Judd, 1991: 24, ~The Democratic Faade™; Brooks Cole Publishing). Table 1 presents alternatives to rigid hierarchical authoritarian leader styles, and relates this to the SEAM methodology of small business consulting. Table 1 is for students who have had the Mgt388G course from Boje:

The main Leadership IN THE BOX/OUT OF THE BOX web site is at

<http://business.nmsu.edu/~dboje/388> and SEPTET
<http://business.nmsu.edu/~dboje/septet/> For application see Enron Metatheatre
website at <http://business.nmsu.edu/~dboje/enron/>

COURSE OBJECTIVES

1. **General: To provide a practical experience in SEAM analysis & decision-making with respect to the problems & opportunities associated with small business & entrepreneurship.**
2. **Specific: Develop & demonstrate this ability by these metrics:**
 1. Read, understand & analyze an actual experiential field case in small business consulting
 2. Investigate & describe a business situation using Root Cause, Story Chart & Mirror Effect
 3. Identify Hidden Costs and Root Cause problems of specific small business
 4. Determine priorities for solution of problems (Root Cause)
 5. Design meaningful recommendations to problems and feedback to client using Mirror Effect
 6. Design a useful implementation plan for integrating recommendations into an ongoing business & for controlling the integration & impact of those recommendations (The Implementation)
 7. Perform research & surveys of current literature with regard to small business
 8. Communicate clearly & concisely in verbal & written form
 9. Listen, analyze, question & recommend business objectives, strategies, policies & procedures

PROJECT DETAILS

- The end of the second or third class meeting you will identify individuals or teams consisting of from two to four persons. No team larger than four persons is permitted.
- Students will work as assigned to aid specific local businesses. Each individual or team's job for the semester includes, but is not limited to, diagnosing the firm's current situation (all aspects), preparing an analysis of the industry to which the firm belongs, identifying the firm's problems, providing recommended solutions to each problem & integrating the solutions into a feasible plan for the entrepreneur to follow.
- The individual or team members will introduce themselves to the business owner & work with the owner, visiting the premises as often as required in order to produce the best report possible. **AT LEAST 10 (TEN) VISITS ARE REQUIRED.** NOTE: Weekly "Progress Assessment" visits with your instructor are required (unless otherwise directed). These are usually 15-20 minutes - depending up sign up order (first come first serve).
- During the course of the semester & during meetings, rough drafts of different sections of the report will be reviewed, analyzed & edited by the instructor &/or the coordinator. This permits the students to receive regular feedback & guidance in order to produce a high quality & useful finished report.
- After completing the report on the assigned small business, individuals or team members deliver a final, finished, bound copy (after obtaining the instructor's approval) to the business owner. The students are to go over highlights of the report with the business owner & obtain feedback from the owner.

NOTE: there is a peer assessment of teams. This means that slackers will not get the same grade as their team.

PROJECT REPORT OUTLINE

See p. 33 (Fig 4.1) of WEB CT document: Savall, H., Zardet, V. & Bonnet, M. (2000).
"Releasing the untapped potential of enterprises through socio-economic management" • -- for chart with the 3 axes On line
<http://www.iseor.com/images/prse4.gif>

SECTION - AXIS A: PROCESS OF IMPROVEMENT (See chapter 6)

1. **DIAGNOSIS of 6 Dysfunctions** (WO, WC, 3Cs, TM, TNG, SI) that includes root cause and story chart, Mirror Effect direct quotes from stakeholders (copied out of your Notebook interview & observation verbatim quotes) & hidden revenue/hidden cost (use p. 68 & p. 162 Fig 3.2 and p. 172 Fig 5.9) as templates
2. **PROJECT INTERVENTION** that is co-designed with your client and is over and done by the end of the semester. Please tell the story of the project intervention and how it was co-designed
3. **IMPLEMENTATION** " please tell the implementation story of your project implementation.
4. **ASSESSMENT OF RESULTS** " how are you measuring the results of the intervention and its implementation? Note: Client must agree to be present on Final Exam day to provide oral assessment of results.

SECTION " " AXIS B: 6 SEAM TOOLS (See Chapter 7)

1. **IESAP Internal/External Strategic Action Plan** - This is SAP for internal organization and external environment change. IESAP covers 5 years. Do one for your client and one for the task team you work with. It's also a good idea to do one for you as a person (optional). It is a simple chart with 3 objectives and a 5-year implementation schedule.
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6. **PNAC (Periodically Negotiable Activity Contract)** - 2 PNACs, one for your contract for three objectives your team will complete with your client and the other for the PNAC for your taskforce. PNAC is renegotiated several times during the term to keep your objectives in sync with client/taskforce and instructor

expectations.

SECTION 8.1 “ AXIS C: POLICY & STRATEGIC DECISIONS (See chapter 8)

1. **STRATEGIC STORY CHOICES STORY** 8.1 “ tell story of the external environmental changes: products, markets, rules, interorganizational collaboration, and new technologies choices. And the internal story, that includes founding story, mission, vision, values, motto and logo you develop jointly with client
2. **QUALITATIVE & QUANTITATIVE DEVELOPMENT OF HUMAN POTENTIAL STORY** 8.1 “See p. 87 Figure 6.3 (includes financial evaluation). Tell the story of how your intervention improves human potential
3. **ENTERPRISE STRUCTURES IMPROVEMENT STORY** 8.1 “ See p. 136 for examples of physical, technological, organizational, demographic, and mental structure improvements.
4. **BEHAVIOR ETHICS STORY** 8.1 “Story of five ethical areas: individual behavior ethics, group activity behavior ethics, sectoral behavior ethics (i.e. across units), pressure group ethics, & collective behavior ethics.

End your report with your version of Figure 8.1: Four Main Kinds of Strategy. Tell story of the intervention moving the organization from one type of strategy to a more favorable one.

Course Policy on doing Your Own Work: Anyone who plagiarizes part of their reports or enters bogus data into the Web CT data archive will be given a “F” for the entire course. Please reference others' work, "put other people's work in quotation marks" and give full citation. A "F" will also be given for anyone who falsifies attendance sheets or for team members who fail to get by on others' work (including members who collaborate in the deception). Each student is responsible for understanding what is plagiarism. Please consult on line Student Policy on plagiarism. <http://lib.nmsu.edu/instruction/plagiarismforstudents.htm>

Course Policy regarding Cell Phones. Turn off cell phones and pagers during class time (each violation lowers your grade by one unit). Do not accept or place calls or text message during class time (no exceptions). 1st offense is volunteering in Bojeâ€™s improv theatre training; repeated offense will lower one grade.

Disabilities/Employee Relations: Call the Director of Institutional Equity at 505.646.3635 with any questions you may have about NMSU's Non-Discrimination Policy & complaints of discrimination, including sexual harassment. Call the Coordinator of Services for Students with Disabilities at 505.646.6840 regarding student issues related to the Americans with Disabilities Act (ADA) and/or Section 504 of the Rehabilitation Act of 1973. All medical information will be treated confidentially.

GOAL OF THE SMALL BUSINESS INSTITUTE (SBI): The goal of the SBI program is completion of a report intended to assist entrepreneurs. We will hold two no cost SBIâ€™s during the term. Their purpose is to help small businesses work on strategy that will enable them to become more economically viable. This helps to build the economic health of New Mexico.

CLIENTS: Clients of the SBI program should be owners or owner/managers of small business as defined by the Small Business Administration. Occasional exceptions are allowed with the approval of the SBA & the instructor.

FINAL REPORT & CLIENT RAPPORT: Three copies of the final report are required. The report should contain a plan for implementing the recommendations made to ease identified problems. It is neither the responsibility nor the intention of the student, the instructor, the university, SCORE or SBA to force the entrepreneur to take this advice. The advice must be "sold," like any other product/service, to the consumer client. This selling process will be ongoing during the semester as the students interact with the entrepreneur. The rapport between consulting students & consumer clients will have a significant effect on whether or not the advice will be taken. IT IS THE STUDENT'S RESPONSIBILITY TO MAKE EVERY EFFORT AT DEVELOPING & MAINTAINING A GOOD RAPPORT WITH THE CONSUMER CLIENT.

SELECTION: Most clients are referred to the SBI program by the SBA, SCORE, NMSU's Small Business Assistance Program, the local banks & other institutions dealing with small business owners. All clients must sign an agreement to participate in the program & to hold the university & the SBA harmless for the report's recommendations. The instructor gives this form to the clients before students are assigned to the case.

CONFIDENTIALITY: The relationship between the client & the consultant requires complete confidentiality. Students will not discuss a case with anyone outside of the class. This confidentiality matter will be fully discussed in class.

RESPONSIBILITIES

- Clients
 - Clients do have responsibilities, among which are to fully & actively cooperate with the students in providing relevant information about the business & the owner/manager or key employees. Such relevant information includes financial statements, educational & experiential backgrounds, motivations for opening the business, goals & objectives of the business & known or suspected problems. If a cooperation problem with the client arises, it will be the students' responsibility to inform the instructor immediately. Waiting until the end of the semester will be too late to correct the problem
 - Finally, clients will be asked to evaluate the student team & the value of the report to the client & the business.

- Consulting Teams
 - Each member of any team is expected to carry his or her load & is expected to cooperate fully with the client & the other team members. If a cooperation problem with a team arises, it will be the student's responsibility to inform the instructor immediately. Waiting until the end of the semester will be too late to correct the problem.
 - Individual students & team members have several responsibilities during the course of the semester. Among these are
 - Interviewing the client & key employees of the business
 - Analyzing the industry of which the client's business is a part
 - Preparing each part of the report & the final report
 - Maintaining the confidentiality of information given to students during the course of interviews & research
 - Obtaining approval, according to procedures set by NMSU, before conducting any research on human beings
 - Making a final presentation to the client
 - Completing peer evaluation forms & submitting them to the instructor
 - Being on time for all meeting with the class, instructor & business owner & participating fully in these meetings

MISCELLANEOUS READINGS- [Read about Small Business Facts for New Mexico](#)

- Small Business Institute: Student Consultants Manual.
<http://business.nmsu.edu/mgt/handout/sba/stdthdbk/index.html>
- Supplementary reading material & handouts will be distributed, & students are directed to use outside resources including publications of the following:
 - [Small Business Administration](http://www.sbaonline.sba.gov/) <http://www.sbaonline.sba.gov/>
 - [Bank of America](http://www.BankAmerica.com/) <http://www.BankAmerica.com/>
 - For more info on Small Business Management please consult:
 - <http://www.score.org/>
 - <http://www.sba.gov/>
 - SCORE Partner sites:
 - <http://www.dnb.com/>
 - <http://www.microsoft.com/smallbiz>
 - Basics of Developing Mission, Vision and Values Statements
http://www.mapnp.org/library/plan_dec/str_plan/stmnts.htm#anchor521412
 - Business Plan Outline - Good for knowing what questions to ask your client for your SWOT and Root Problem Analyses
<http://www.smartbiz.com/sbs/arts/kh2.htm>
 - How to Write a Mission Statement (some small businesses do not have one, so you can help them to write it) <http://www.teamtrac.com/mission.htm>
 - Material from the Las Cruces [Chamber of Commerce](http://www.lascruces.org/chamber/)
<http://www.lascruces.org/chamber/>
 - Greater Las Cruces Economic Development Council, [Mesilla Valley Economic Development Alliance](http://www.lascruces.org/mveda/) <http://www.lascruces.org/mveda/>
 - [City of Las Cruces](http://www.ci.las-cruces.nm.us/) <http://www.ci.las-cruces.nm.us/>
 - State of NM [Government Information](http://www.state.nm.us/Welcome.html) <http://www.state.nm.us/Welcome.html>
 - New Mexico [Taxation & Revenue](http://www.state.nm.us/tax/) Department
<http://www.state.nm.us/tax/>
 - NMSU Center for Business Research & Services
 - NMSU State Data Center
 - New Mexico [Dept. of Labor](http://www.state.nm.us/dol/) <http://www.state.nm.us/dol/>
 - New Mexico [Department of Economic Development](http://www.edd.state.nm.us/)
<http://www.edd.state.nm.us/>
 - New Mexico Bureau of Business & Economic Research

- & other such support organizations may be helpful. There are some additional resources in BC 218.

Center for Entrepreneurship & Small Business at <http://business.nmsu.edu/~ecenter/>