

Develo

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

2:30-3:45 PM Mon & Wed BC 204  
Spring 2009

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Assistant:  
Teaching Assistant: TBA  
Talking Stick Assistant:

OFFICE HOURS: 12:30 to 2 PM Mon in Frenger Food Court (new Dynasty) Otherwise Joe by appointment; Just after class is also good time Gladstone <mailto:joeg@nmsu.edu>

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 COURSE SEAM MANUAL 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 organization](#); [galleries or museums](#)) at <http://talkingstick.info/>

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.

## Schedule

Monday & Wed Classes - gray boxes are required classes - white boxes are required team meetings with instructors (20 minutes each)

Jan 14 (Wed) - We have a great learning event -- please select clients for organizations listed at <http://talkingstick.info> and Please visit them and Give them [SMALL BUSINESS APPLICATION](#) and invite them to our next class event.

Introduction to course <http://business.nmsu.edu/~dboje/448/> ;

**Homework for next class:** proof of visit to **one event** in *Arts Scene as you begin to study history of Arts Scene*: 1st Fri each month is ARTS RAMBLE on downtown mall 5-7PM; every Wed/Sat mornings (8-noon) is [Crafts Market](#) & every Sunday/Thurs is [Mesilla outdoor market!](#) (Thurs) 11 a.m.-4 p.m.; (Sun) 12-4 p.m. Or set up your own contact - databases at <http://talkingstick.info/>

1. For next class Please Print the 180 page Socio-economic online SEAM MANUAL/handbook by Henri Savall, Veronique Zardet& Marc Bonnet (in WebCT) PLEASE WRITE IN PAGE NUMBERS FOR EASY REFERENCE TO SEAM TOOLS; in WebCT Class Materials - bring it to class.

2. Memorize [4 Leaf Clover](http://business.nmsu.edu/~dboje/sbc/sbc.html) top leaf for next class <http://business.nmsu.edu/~dboje/sbc/sbc.html>

3. 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)

4. Review [Mid Term Check List](#) - begin with HISTORY

6. Propose client for your group to work (each individual in group does one application each, then group chooses one - next class); databases at <http://talkingstick.info/>

TONIGHT: Boje will introduce you to 6 SEAM Tools you will use with 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. 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. 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)** - What are /their strong, weak, and critical competencies to develop? (pp. 118-120 in SEAM Manual; also 96-99 & 56-59)
4. **TM (Time Management) Self Analysis** “ this is a diary of time usage. (pp. 121-125), This is where the client learns 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).
5. **SPILB (Strategic Piloting Indicators Log Book)** “ Your Black Composition Notebook serves as your SPILB “ no other book will do. Develop 5 types of indicators for IESAP, PAP, etc. pp. 126-129 in SEAM MANUAL
6. **PNAC (Periodically Negotiable Activity Contract)** - PNACs, your contract for three objectives your team will complete with your client. PNAC is renegotiated several times during the term to keep your objectives in sync with client 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 to meet each objective (time from specific parsons, 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)

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. **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**

NOTE: Students who missed the first class, please submit proof of your visit to ARTS SCENE and summary of one interview with potential client - thank you for continuing!

Your team will work in cooperation with the leadership class during Spring term - see <http://business.nmsu.edu/~dboje/388/assignments.htm> - Good intro paper of the problem/opportunity saturated Arts Scene  
[http://business.nmsu.edu/~dboje/388/2009\\_book/pdf/Arts%20Scene%20Theatre%20of%20Leadership%20thematics.pdf](http://business.nmsu.edu/~dboje/388/2009_book/pdf/Arts%20Scene%20Theatre%20of%20Leadership%20thematics.pdf)

How to coordinate - Small Business Consulting will focus on SEAM organization intervention; Leadership class will focus on leadership intervention.

**10 CLIENT ORG TYPES** see <http://talkingstick.info/> for contact info

**For Each of the following Do a Census of WHO are the organizations in the Arts Scene - sort them by public, private, & grassroots; develop history of entire sector, and figure out how to get them involved, which ones to focus on as client. Work both with entire sector, and with clients that exemplify the sector.**

I. Museums (public, private, & grassroots types)

II. Galleries (public, private, & grassroots types)

III. Media covering Arts (print, radio, Internet)

IV. Visual Arts Service Organizations (oil & watercolor painting, wood & metal sculpture, pottery)

V. Performing Arts Organizations (includes Theatre, Street Theatre & PowWow)

VI. Economics & Government for Arts (Winterfest in Sept; can there be a Spring-fest?)

VII. Education in Arts (University, Community College, High School & Crafts Training)

VIII. Literary Arts Service Organizations (Border Book Festival is Apr 16-19 2009; also Poetry, publishing, writers)

IX. Music Arts (from HipHop to [Classic](#) Opera & Choir)

X. Arts Convention Planning (Spring) & Implementation (Fall) - 6 W's (Who will host it in long run, What will happen, When will it be, Where will it be held, Why is this a contribution to economy, & Wow ways that this is an exciting, important, milestone event not to be missed!)

Jan 19 - MLK Holiday (Mon) - NO CLASS

Jan 21 (Wed) - Please get Small Business Application completed -to get your client application and invite client to the next scheduled class -- Students who miss class are required to write make up assignments (no exceptions)

Review completed Client Applications (one per each team member is due today). See -- <http://talkingstick.info/> databases to select your client

**STUDENT ASSIGNMENT:** For this class - results client meeting, review VERBATIM notes in your BLACK COMPOSITION NOTEBOOKS & ; Each Team please Do a Census of WHO are the organizations in the Arts Scene in your sector and bring it to next class meeting.

Jan 26 & 28 (Mon & Wed) - NMSU Small Business Classes (Mgt 448 & 548) - SEAM PROJECT TRAINING

**STUDENT ASSIGNMENT:** Tonight help each team come up with 3 OBJECTIVES, and their own PAP (Priority Action Plan), plus outline an INTERVENTION PROJECT that students and client will co-design, co-implement, and co-evaluate for completion by Finals Day.

Feb 2 & 4 (Mon & Wed) - NMSU Small Business Classes (Mgt 448 & 548) - SEAM PROJECT Training

**STUDENT ASSIGNMENT :** 448/548 Submit 1<sup>st</sup> draft of your ARTS SCENE sector-HISTORY - and sketch out your Client's IESAP STRATEGY

9 Feb (Mon) :team consultation meetings with instructors; milestone:begin AXIS A - implementation project - Chapter 6 of SEAM BOOK- we have team meeting appointments

16 Feb (Mon): team consultation meetings with instructors;milestone: Do 6 tools of AXIS B - Chapter 7 SEAM book --- 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)

23 Feb (Mon) team consultation meetings with instructors;:milestone -AXIS C - Policy and Strategic Decisions -- codebook to class; SEAM [Mirror Effect Psychoanalytic-SEAM](#);

2 Mar (Mon) team consultation meetings with instructors;; team consultation meetings with instructors; milestone: work on implementation of project (AXES A)

REQUIRED: Mar 9: **MID TERM PRESENTATION** of 3 AXES OF REPORTâ□□ all [Mid Term Check List](#) items are due today! This is your 6 tools, the project your are doing with the client.

Mar 16 (Mon) team consultation meetings with instructors; review results of mid-term review

Mar 23-29 NO CLASS ) Spring Break

Mar 30 -- Bring [Final Check List](#) to class; team consultation meetings with instructors;

Apr 6 Team meetings with instructor

Apr13 Team meetings with instructor

Apr 20 Team meetings with instructor

Apr 27 FULL CLASS MEETING - rehearsals of project presentations

**May 4th Your Final report due by 5 PM with copy of completed [Final Check List](#)** signed confidentiality statement, and evaluations 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.

**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

**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**

<b>PERIOD PROGRESS ASSESSMENTS (based on mid-term check list)</b>	<b>30%</b>
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1. **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.
2. **Client's Final Exam day** - evaluation of students' report, co-participation, timeliness of intervention & results achieved.
3. **Peer evaluation** of each team member (for teams only); note this can significantly lower individual scores.
4. **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).

<b>CLIENT SHOWS UP AT EVENTS - Evidence of co-participation of students with client in implementing Project, 6 SEAM tools, and Policy/Strategic Decisions</b>	<b>10%</b>
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<b>MIDTERM presentation of work done to date on the 3 AXES p 33 of Manual - see <a href="#">Project</a></b>	<b>10%</b>
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<b>FINAL PRESENTATION of 3 AXES Report see <a href="#">Project</a></b>	<b>20%</b>
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<b>FINAL REPORT <a href="#">Project</a> QUALITY &amp; Attendance of Client to the Final presentation</b>	<b>30%</b>
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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 judgment 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 FaÅšade*™; 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 socioeconomic tools such as priority action plans, time management, etc
  3. Develop interpersonal skills in oral and written presentation, team participation, and cooperative behavior with consulting clients.
  4. Design meaningful recommendations to problems and feedback to client using Mirror Effect
  5. Design a useful implementation plan for integrating recommendations into an ongoing business & for controlling the integration & impact of those recommendations (The Implementation)
  6. Perform research of current literature with regard to small business

7. Study the dynamics of the environment, its history, and develop antenarratives of the future as context to work with client organization.
8. Listen, analyze, question & recommend business objectives, strategies, policies & procedures

#### MBA GOALS (Mgt 548 students)

1. Demonstrate well-developed oral and written communication skills (measured in report & presentations)
2. Demonstrate well-developed critical thinking skills (measured in use of antenarrative, root cause, and intervention)
3. Demonstrate proficiency in quantitative analysis (measured in indicators logged into notebook field notes & report)
4. Demonstrate well-developed interpersonal skills (measured by behavior with clients and in team)
5. Demonstrated proficiency in dealing with ethical and legal issues in business (measured in Axis C - ethical behaviors analysis & in answerability for conduct in consultation)

#### 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. It is a simple chart with 3 objectives and a 5-year implementation schedule.
2. **PAP Priority Action Plan** -for one semester (Make one for client). 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.
3. **CG Competencies Grid (aka Scale of Skills)** - Do one for your client, before and after the project intervention. What are your/their strong, weak, and critical competencies to develop?
4. **TM (Time Management) Self Analysis** by client of time use then see what can be delegated or eliminated.
5. **SPILB (Strategic Piloting Indicators Log Book)** " Your Black Composition Notebook serves as your SPILB " no other book will do. Develop 5 types of indicators for IESAP, PAP, etc for yourself, & your client.
6. **PNAC (Periodically Negotiable Activity Contract)** - PNAC, your contract for three objectives your team will complete with your client. PNAC is renegotiated several times during the term to keep your objectives in sync with client and instructor expectations.

### SECTION " AXIS C: POLICY & STRATEGIC DECISIONS (See chapter 8)

1. **STRATEGIC STORY CHOICES STORY** " 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** – See p. 87 Figure 6.3 (includes financial evaluation). Tell the story of how your intervention improves human potential
3. **ENTERPRISE STRUCTURES IMPROVEMENT STORY** – See p. 136 for examples of physical, technological, organizational, demographic, and mental structure improvements.
4. **BEHAVIOR ETHICS STORY** – 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). 1<sup>st</sup> 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