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The Consulting Challenge: A Case Competition

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Abstract

The Consulting Challenge is a yearly case competition in which teams of graduate students respond to a request for proposals (RFP) for consulting services. The case and RFP are based on a problem that a host organization has experienced. Over 3 days, students meet with representatives of the host organization, analyze data, prepare a proposal for a consulting project, and then present the proposal to a panel of judges. This article includes a description of the Consulting Challenge, sample cases, and a planning guide. This article also includes an assessment of the competition completed by contestants and judges who had participated in one or more Consulting Challenge events over a 13-year period. Participants felt that the Consulting Challenge helped them be effective teammates, manage heavy workloads, apply theory, solve organizational problems, present a persuasive argument to a client, and manage their emotions. Judges and participants indicated that these skills are relevant to success in human resource management and consulting jobs.

Keywords

case competition, experiential education, consulting skills, human resource management education

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A case competition is a simulation in which teams of students analyze a business problem and recommend solutions to a panel of judges. In a typical case competition, teams of three or four students are assigned a business case. Teams have 24 hours to analyze the case, develop action plans, and prepare a presentation. Judges are usually business leaders from a host organization. The case describes a problem that the host organization has faced. National case competitions focus on accounting, business communication, construction bidding, information technology, investment banking, human resources, marketing, operations management, mergers/acquisitions, social enterprise, sports management, stock selection, and venture capital. Case competitions differ by topic, size of the teams, and the number of days that teams have to analyze the case. However, what is consistent across competitions is that teams solve difficult, real-world problems in a short amount of time.

Case competitions are growing in popularity and have been described as "the varsity sport of MBA programs" (UNC Kenan–Flagler, 2009). It is difficult to say exactly how many competitions are held each year because there is no central source of information about the contests. However, a Google search of the term *Case Competition* yields a list of more than 150 annual intercollegiate, national, and international competitions. This number does not include qualifying rounds for tournaments, nor does it include the many intradepartmental competitions held each year.

Proponents of case competitions suggest that the contests offer students the benefits of grounded learning (Mosca & Howard, 1997; Schwarz, 1985) and experiential education (Dewey, 1938; Kolb, 1984). These benefits include real-world experience, optimized learning transfer, integrated theory/practice, and a shift of learning responsibility to the students (Corner et al., 2006). Case competitions also share similarities with problem-based learning exercises. Problem-based learning, which has roots in medical training (Norman & Schmidt, 1992), involves teams of students solving unstructured, real-world problems. Student teams are expected to be actively involved in defining the problem, collecting information, and proposing solutions. Advocates of problem-based learning claim that this approach can help students develop problem-solving skills, improve focus on practice-relevant knowledge, improve knowledge integration, and develop teamwork skills (Hmelo-Silver, 2004; Smith, 2005).

In addition to helping students develop skills, case competitions can sensitize students to the relevance of job-related knowledge, skills, and attitudes. Even if participation in a case competition does not last long enough for

participants to master job-related skills, participation can help students understand the importance of skills, and it can direct attention to personal strengths and weaknesses. Similarly, Fletcher and Kerslake (1992) note that participation in an assessment center can help focus participants' attention on their own skill deficiencies. Case competitions, like assessment centers, may help students identify important areas where they need improvement.

Case competitions can also be of value to host organizations and judges. The hosts enjoy having bright and motivated students work on a problem. Judges have the opportunity to scout potential employees (Dunham, 2003). For these reasons, consulting firms, including Accenture, AT Kearney, Deloitte, Booze Allen Hamilton, Ernst & Young, and JP Morgan, sponsor competitions.

Given the popularity of case competitions, there are surprisingly few resources available to faculty who would like to start a case competition. Published papers describing competition formats, judging, or tournament logistics are rare. It is also surprising that there have been very few empirical tests of the benefits of case competitions (Corner et al., 2006; Orlitzky & Benjamin, 2003). There is relevant research on business simulations suggesting that simulations can shape attitudes and facilitate learning (see Anderson & Lawton, 2008, for a review), but there are few studies that have examined case competitions in particular. With these issues in mind, we present a description of an annual consulting case competition and an assessment of the competition's effectiveness. We provide examples of cases in Appendix A, feedback forms in Appendix B, and a timetable for planning the competition in Table 1. This article is intended as a resource for faculty who would like to start a case competition.

The Consulting Challenge

The Consulting Challenge[1] was originally designed to help graduate students in human resource management programs build consulting-related competencies in six broad areas: performing in a team, managing heavy workloads, applying research/theory, solving organizational problems, presenting persuasive arguments, and managing emotions/stress. During the yearly contest, teams of graduate students spend 3 days responding to a request for proposal (RFP) for a consulting project. The RFP is hypothetical but is based on a real problem that the host has experienced. Teams analyze data, meet with representatives of the host organization, prepare a proposal for a consulting project, and then present the proposal to a panel of judges.

Table 1. Consulting Challenge Planning Schedule

Six months before the competition
- Invite organizations to host the competition. This usually involves contacting alumni and judges of previous competitions. The invitation details the host's responsibilities, including providing the case, providing two or three judges, and providing judging rooms. Most hosts provide refreshments for judges. Some hosts purchase lunch for judges.

Five months before the competition
- Select host organization.
- Select dates for the competition.
- Invite schools to participate.

Three months before the competition
- Invite judges to participate.
- Reserve rooms at a hotel close to the competition host.

Two months before the competition
- Work with host to find a suitable problem for the case.
- Write the request for proposals. If possible, use an existing request for proposals.
- Obtain any data related to the problem. This may involve clearing legal offices and cooperating with a consulting firm that collected the data. Remove personal or incriminating data. Modify the data if need be to make the central problem more easily identifiable.

One month before the competition
- Collect names and e-mail addresses of all participants.
- Ask Graduate Program Directors to rate their contestants on public speaking ability, project management potential, and technical/computer skills.
- Seed teams combining one student from each school to balance teams on skills.

One week before the competition
- Send a note to all competitors with the names and email addresses for their teammates.
- Send a note to all judges with meeting time, location, and parking information.
- Print packets containing request for proposals, rules, and confidentiality agreements.

During the competition
- Day one
  - Meet with students at hotel.
  - Ask students to sign confidentiality agreement.
  - Students begin work on proposal and presentation.
  - Students contact host to setup a time for a meeting on day two.
- Day two
  - Students meet with host during scheduled meetings.
  - Students continue work on proposals and presentations.
- Day three
  - 8:00 a.m. order of presentations announced to teams.
  - 9:00 a.m. judges meet to review case and discuss judging criteria.

(continued)

Table 1. (continued)

10:00 to 3:00 p.m. Student presentations and judging in two rooms.
4:00 p.m. Top two teams are announced. Judges meet with these teams and provide suggestions for improving the presentation. Teams make small adjustments.
5:00 p.m. Finals—Top teams present to the group of judges who have not seen the presentation.
6:00-7:00 p.m. Judges meet and select a winner.
7:00 p.m. Awards dinner.

After the competition

Summarize feedback forms for each team and email the summary to the team.
Organize discussion sections with participants in which participants create an action plan for improving performance in similar projects.
Send thank you notes to judges.
Send thank you notes to the host and to the host's supervisor.

The Host

The competition organizer meets with a representative of the host organization to create a case 2 months before the competition begins. We look for host organizations that are large enough that their human resource departments are subdivided into specialty departments (change management, employee selection, compensation, employee opinion, etc.). For example, 3M, American Express, Ameriprise Financial, Cargill, Best Buy, Data Recognition Corporation, HealthPartners, Mayo Health Systems, Medtronic, Target, and United Health Group have hosted the Consulting Challenge.

Creating the case is usually a simple process because most host organizations start with an RFP they have issued within the last few years. The cases are typically modified so that students can feel reasonably comfortable generating solutions. For instance, we generally focus on problems at the department or unit level. Students have an easier time imagining how they could make changes at this level rather than the corporate level. We try to avoid cases where the solution is highly technical (e.g., HR database program) or where the issue involves complex legal issues.

We include a survey data set with most RFPs. Students are asked to analyze and prepare a summary of the data. The data set illustrates the problem that the host organization is experiencing. For some events, the host requires that the students sign a nondisclosure agreement. Obviously, the host does not want sensitive information to leak to competitors, the consulting community, or the media.

Appendix A contains sample Consulting Challenge RFPs. The first example is detailed, and the subsequent examples have the redundant information (information that is included every year) omitted. We included cases related to job satisfaction, turnover, training, employee engagement, and work/life balance. We did not include the data sets illustrating the problems for confidentiality reasons, but the cases could serve as a starting point for faculty who would like to generate cases.

The Teams

One unique aspect of the Consulting Challenge is that schools do not compete against each other. Instead, each team is composed of students from different universities. In a typical year students from 4 universities will fill 10 teams. This structure simulates an aspect of corporate life where teams of strangers have to work together.

A few weeks before the competition, professors from each university submit ranked lists of students so the Consulting Challenge organizer can draft teams. The students are ranked according to their project management skills, presentation skills, and writing skills. Students are then seeded to balance the teams.

The Location

Students meet on the first morning of the competition at a designated hotel near the host organization. The students stay in the hotel for 2 nights working on the project. The host organization is in a city that is 2 to 6 hours from the campuses of the participants. Students are not allowed to return to their home campus over the 3 days of the competition. Teams have to complete the project using only what they bring to the hotel, what they can find via the Internet, and what they can buy in local stores. We do inform team members that they will need to bring textbooks, basic office equipment (paper, staplers, pens, etc.), and laptops (we always make certain the hotel has wireless access). During the first day, students review the case, collect background information on the host organization, analyze data, and start to develop solutions. Students also schedule a meeting with the host for the following day.

Meeting With the Client

Students meet with the Consulting Challenge client on the second day of the contest. The client is a member of the host organization that ostensibly issued

the RFP. The client serves as the point of contact with the host organization. The students use the meeting to clarify the RFP and learn more about the problem. Either the students can meet in person with the client or they can set up a conference call. Although there is detailed information in the RFP, the host and the organizer intentionally hold back information from the RFP so that students would have to discover this information during the discussion with the host.

The Presentations

Teams are e-mailed a presentation schedule early on the third day of the competition. All students have to be ready to present by 10:00 a.m. even if their scheduled presentations are later in the day. During the day, students present their proposals in a conference room in the host organization. Student teams are given 50 minutes for their presentations. Teams are not allowed to watch another team present on the day of the competition (although the presentations are video taped for later viewing). The presentations are more formal than most meetings between consultants and clients. Despite the formality, the students understand that their job is to *sell* their services to the host organization.

The Judges

The judges include faculty from the participating schools, the previous year's Consulting Challenge winners, representatives from the host organization, and management consultants from the community. Judges act in the role of a representative from the host organization. They are instructed to ask challenging questions, and they are reminded that the Consulting Challenge is a "safe place for students to fail." In other words, judges test the limits of the students' mastery of the case.

The Rules

Students may not collaborate with participants on other teams. Students are not allowed to contact any past participant of the Consulting Challenge, nor are they allowed to contact faculty at participating schools. Finally, students may not contact anyone who works at the host organization except the designated client. Beyond these sources, students are free to contact whomever they like as long as they do not violate the terms of any nondisclosure agreement. Breaking the rules leads to disqualification. Cheating has not been a problem. There

has only been one incident of a student breaking a nondisclosure agreement. This violation turned out to be unintentional and harmless, but all participants hear a cautionary tale about the incident during registration.

The Proposals

Students are required to provide a full written proposal to accompany their presentation. The proposal includes an executive summary, a description of the team members' backgrounds, a summary of any data analyses, a description of the proposed intervention, an intervention implementation plan, and a timeline. Participants are instructed to tie whatever intervention they propose to research and theory. Thus, teams have to review relevant academic literature to support their proposed intervention. The programs that participate in the Consulting Challenge emphasize a scientist–practitioner model, and we want students to refer to the research literature whenever they prescribe solutions for organizational problems.

Teams are also required to include detailed budgets in their proposals. This requirement is a challenge for most students because few academic programs teach students how to price consulting services or estimate costs. Most teams dramatically underestimate the cost of implementing a large-scale project. As is evident in the assessment below, budgeting is an area for improvement for the competition.

The Winners

Teams are randomly assigned to one of two judging rooms. Each judging room selects the best presentation out of the four or five they watch. The teams reassemble after all of the teams have presented. The two top teams are then announced. These top teams then present their proposal to the group of judges who did not see their first presentation.

Before teams give their presentations for a second time, judges meet with the teams they nominated. The judges take 30 minutes to provide specific suggestions for improving the presentations. After the meeting, students have another 30 minutes to adjust their slides and presentations. Consultants and sales personnel are often required to make last minute changes to presentations. The feedback meeting tests the students' ability to respond to feedback and modify their presentations quickly.

All judges assemble in one room following the final presentations. The judges discuss the presentations, review rating forms, review the proposals,

and select a winner. The winner is announced at a reception that follows the event. Members of the winning team receive a trophy.

Many national case competitions include cash prizes for the winning team. We have found that cash prizes can be problematic. First, money is not necessary to motivate the students. Second, when we gave a cash prize to the winners in the early years of the competition, the losing teams were resentful. Third, we have found that money that would normally be spent on a prize is better spent by giving all students financial assistance for hotels, food, and transportation.

The Feedback

Judges rate each team on a detailed feedback form. See Appendix B. The comments are summarized, transcribed, and given to individual team members. It is useful to give students an opportunity for self-reflection and an opportunity to discuss the competition with their classmates. It is also useful to ask students to create an action plan for improving their performance.

What to Expect

The Consulting Challenge is stressful. The offices, boardrooms, and judges intimidate students. Many of the students are as nervous about presenting to their senior classmates as they are presenting to the potential employers on the panel. In addition to the sheer amount of work, collaborating with strangers can be exhausting. Stress and fatigue are compounded because most teams get very little sleep. The typical participant will only get 1 or 2 hours of sleep during the second night of the competition. It is helpful to coach students by reminding them to manage their sleep and plan their work.

One of the most common problems that students face is presenting too much information to the judges. This is a *forest-for-the-trees* problem. By the time students are ready to present, they are so familiar with the case and the details of their proposals that they have a difficult time presenting the proposal without including overwhelming detail. Although we remind students that they "cannot win if the judges do not understand the proposals," students still struggle with detail.

The Costs

Students pay a small entry fee, and this fee is used to buy nonacademic judges a small honorarium. The honorarium is typically a gift certificate to an upscale restaurant. The students pay for their own hotel rooms, transportation, and

printing. The host provides two conference rooms and a waiting/staging area for teams. All hosts provide refreshments for the judges and some provide lunch. Participating universities donate funds for the awards dinner, and most schools help students with hotels. University administrators have been generous with funds to help defray the students' expenses. Administrators are attracted to the competition's intercollegiate cooperation, job relevance, and connection to regional business.

Assessing the Consulting Challenge

In an effort to assess the effectiveness of the Consulting Challenge, we distributed a survey to contestants and judges who had participated in the Consulting Challenge over the previous 13 years. The survey was designed to test the extent to which the Consulting Challenge helped build consulting-related skills and to evaluate the relevance of those skills in real-world settings.

Participants

A total of 195 people who had served as Consulting Challenge contestants, judges, or both were invited to complete an online survey. Of those invited 135 people responded to the survey (response rate = 68%). Within this group, the sample included 35 respondents who were currently employed in external consulting, 74 respondents employed in human resources positions, 3 faculty members, and 23 current students. One hundred twenty-five of the respondents had been contestants. The sample included contestants from every year of the competition between 1996 and 2008.

Procedure

In 2008, we e-mailed all past contestants and judges an invitation to complete an anonymous electronic survey. This letter stated that we "are trying to assess the effectiveness of the Consulting Challenge," and we are "focusing on: 1) How well the Consulting Challenge facilitates skill development and, 2) How important these skills are in the real world." Participants who elected to respond clicked on an embedded link that directed them to the survey.

Measures

Skills. Contestants indicated the degree to which participation in the Consulting Challenge improved each of 22 skills. The skills are listed in Table 2. More

Table 2. Ratings of Skill Improvement as the Result of Participation

Skill	Mean Skill Rating	Percent Who *Agree* or *Strongly Agree*
Work in teams		
Cooperate with teammates	4.0	82.4
Work on a team with strangers	3.9	75.2
Work with difficult teammates	3.6	57.1
Manage workload		
Perform under short deadlines	4.5	88.6
Complete large amount of work in a short time	4.4	87.7
Manage time	4.2	84.1
Manage emotions		
Handle nervousness/stress	4.1	80.7
Manage my emotions	3.5	52.6
Apply theory and tesearch		
Use theory to prescribe a solution	3.8	70.8
Use empirical research to prescribe a solution	3.6	66.4
Analyze data	3.6	63.7
Solve problems		
Create structure for an ambiguous assignment	4.3	88.5
Generate alternative solutions to a problem	3.9	75.5
Prioritize problems	3.9	79.8
Uncover the not-so-obvious problem	3.6	62.3
Interact with a client to identify the client's needs	3.4	53.5
Persuade a client		
Answer difficult questions from a client	4.8	82.5
Present ideas to a critical audience	4.4	89.5
"Sell" a project to a client	4.1	81.5
Present technical data in an understandable way	3.9	76.3
Write a convincing proposal	3.6	64.6
Budget a project	2.9	36.9

Note: $N = 113$. Responses to the item: "The Consulting Challenge improved my ability to ___." 1 = *strongly disagree*, 5 = *strongly agree*.

specifically, participants were asked to "Think back to the year when you were a contestant in the Consulting Challenge. Indicate the extent to which you agree with the following statements: The Consulting Challenge improved my ability to ___." Participants responded on a 5-point scale where 1 = *strongly disagree*, 2 = *disagree*, 3 = *neither agree nor disagree*, 4 = *agree*, and 5 = *strongly agree*. The skills fall into six categories corresponding with the educational goals of the Consulting Challenge: to help students perform in a team, manage heavy workloads, apply research and theory, solve organizational problems, present a persuasive argument to a client, and manage emotions/stress.[2]

Skill importance. Contestants and judges were also asked to "Use the following scale to indicate the extent to which each of the skills is important in your current job." Participants responded to each item on a 5-point scale where 1 = *not at all important*, 2 = *nice but not important*, 3 = *somewhat important*, 4 = *important,* 5 = *absolutely essential*.

In addition to the questions about skills and importance, contestants were asked if they "talked about the Consulting Challenge during the interview process for your first professional job?" Participants also identified the year when they were a contestant and/or the year(s) they served as a judge. Judges who had never been contestants only answered questions about the importance of the skills.

Results

Skill assessment. First, we examined the self-reports to understand the extent to which the Consulting Challenge improved the participants' skills. The means for this analysis are in Table 2. Overall, participants felt that the Consulting Challenge helped students answer difficult questions from a client, present ideas to a critical audience, perform under short deadlines, manage time, complete large amount of work in a short time, and create structure for an ambiguous assignment. Participants felt the Consulting Challenge was less effective in helping students budget a consulting project, work with difficult teammates, manage emotions, and interact with a client to identify the client's needs.

Skill importance. Next, we examined the extent to which respondents felt that the skills used in the Consulting Challenge were important in the business world. For this analysis, we excluded data from faculty and any students who were currently enrolled in graduate school and/or had been in the Consulting Challenge in the previous year. The results of this analysis appear in Table 3. Participants indicated that the most important skills in their human

Table 3. Participants' Ratings of Skill Importance in Their Current Positions

Skill	Mean Real-World Importance	Percent Who Labeled Skill *Important* or *Absolutely Essential*
Work in teams		
Cooperate with teammates	4.4	92.0
Work on a team with strangers	3.4	52.0
Manage workload		
Perform under short deadlines	4.2	82.0
Work with difficult teammates	3.9	68.0
Complete large amount of work in a short time	4.2	82.0
Manage time	4.6	98.0
Manage emotions		
Handle nervousness/stress	3.9	72.0
Manage my emotions	4.0	77.0
Apply theory and research		
Use theory to prescribe a solution	3.1	41.0
Use empirical research to prescribe a solution	3.4	54.0
Analyze data	4.2	79.0
Solve problems		
Create structure for an ambiguous assignment	4.1	82.0
Generate alternative solutions to a problem	4.4	92.0
Prioritize problems	4.5	95.0
Uncover the not-so-obvious problem	4.1	81.0
Interact with a client to identify the client's needs	4.5	88.0
Persuade a client		
Answer difficult questions from a client	4.4	89.0
Present ideas to a critical audience	4.6	94.0
"Sell" a project to a client	4.2	79.0
Present technical data in an understandable way	4.4	89.0
Write a convincing proposal	3.7	63.0
Budget a project	3.4	57.0

Note: $N = 100$. Participants' rating of the "extent to which each of the skills is important in your current job." 1 = *not at all important*, 5 = *absolutely essential*.

resource-related jobs were ability to manage time, present ideas to a critical audience, prioritize problems, interact with a client to identify the client's needs, cooperate with teammates, generate alternative solutions to a problem, present technical data in an understandable way, and answer difficult questions from a client.

We next examined whether the ratings of skill importance differed as a function of the participants' current seniority. To test this relationship, we calculated the correlation between skill importance rating and the number of years that had passed since the respondent had participated in the Consulting Challenge. There were significant correlations for five skills: present ideas to a critical audience, $r(87) = .34$, $p < .001$; write a convincing proposal, $r(87) = .29$, $p < .009$; budget a project, $r(87) = .30$, $p < .005$; sell a project to a client, $r(87) = .24$, $p < .03$; and generate alternative solutions to a problem, $r(87) = .22$, $p < .05$. Thus, the Consulting Challenge participants who had participated in the contest's early years, and who presumably had greater seniority on the job, rated these skills as more important than did the participants who had recently participated in the Consulting Challenge. The correlations suggest that the Consulting Challenge may tap a number of skills that become more important throughout a student's career.

We also tested whether skill importance ratings differed for consultants and nonconsultants. The only significant differences were for interacting with a client to identify the client's needs (consultants $M = 4.7$, nonconsultants, $M = 4.3$, $F(1, 97) = 3.94$, $p < .05$), performing under short deadlines (consultants $M = 4.6$, nonconsultants $M = 4.0$, $F(1, 97) = 11.60$, $p < .001$), and using theory to prescribe a solution (consultants $M = 2.8$, nonconsultants $M = 3.3$, $F(1, 97) = 4.02$, $p < .05$). In general, the consultants and the nonconsultants rated the importance of the skills similarly. Even though the competition is called the *Consulting* Challenge, the skills emphasized in the contest are also important for general human resource practice.

Finally, we examined whether students used participation in the Consulting Challenge to help sell themselves to potential employers. The Consulting Challenge appears to be a notable event for most students. Seventy percent of the 104 Consulting Challenge participants indicated that they had talked about the Consulting Challenge during the interview process for their first professional job.

Discussion

Overall, the Consulting Challenge helps contestants in six general areas. These areas include working in a team, managing heavy workloads, applying

research and theory, solving organizational problems, persuading a client, and managing emotions and stress. More specifically, participants felt that the Consulting Challenge helps students build specific skills, including answering difficult questions from a client, presenting ideas to a critical audience, performing under short deadlines, managing time, completing large amount of work in a short time, and creating structure for an ambiguous assignment. The judges felt that the Consulting Challenge emphasized skills that are relevant to success in consulting and human resource management jobs.

With a larger sample and more detailed information about the participants' jobs, one could create profiles of skills and skill importance for various types of jobs across various career stages (early, mid, late). The results of this study indicated that there were a few differences between early and later stage participants and between consultants and nonconsultants, but it is difficult to generalize from the limited sample without more detailed information about the respondents. This is a topic for future research.

It is certainly worth noting that a better assessment of the Consulting Challenge, or any other simulation, would involve more than self-report measures of skill improvement (Anderson & Lawton, 2009). In an ideal setting, we would have had time to create objective assessments or make behavioral observations of skill development. Nonetheless, the assessment data suggests that participants and judges think the Consulting Challenge helps students develop job-related skills.

Despite the favorable skill and importance ratings, there is room for improvement. The findings suggest that we could adjust the competition to better emphasize interacting with a client, prioritizing problems, and generating alternative solutions to a problem. As the Consulting Challenge is currently configured, students do not get to spend enough time talking with the client in the simulation. Providing opportunities for multiple fact-finding meetings would more closely approximate real-world consulting. Another problem related to time constraints is that the two top teams are only allowed a short amount of time to adjust their presentations before they present for a second time. It would be better if teams had more than an hour to make adjustments. The students are often so fatigued and stressed that it is difficult for them to work off script. In general, a longer period for the competition would be beneficial.

Budgeting skills is another area for improvement. Project budgeting is not included in the coursework of the programs represented in the competition. Students have difficulty finding budgeting information online. Consulting companies seldom publish prices or hourly rates. Although students struggle with budgeting, we feel that it is important to leave it in the competition.

A number of students have commented that the pricing makes the process of proposal writing seem more "real." At the very least, students would find it convenient if we gave them a price sheet with standard hourly rates.

A variety of questions are left unanswered regarding the effectiveness of the Consulting Challenge in particular and case competitions in general. For instance, we think that case competitions should increase interest in the case topic and should foster a sense of camaraderie among students. However, we did not collect data on these issues. We would also like to have known more about the extent to which the Consulting Challenge provided the espoused benefits of experiential education, grounded learning, and problem-based learning. Did the competition improve problem-solving skills, focus on practice-relevant knowledge, and knowledge integration (Hmelo-Silver, 2004; Smith, 2005)? Did the competition optimize learning transfer and shift learning responsibility to the students (Corner et al., 2006)? Researchers interested in the benefits of case competitions should focus on these questions.

Conclusion

The Consulting Challenge was originally designed to give students in human resource management programs the opportunity to develop consulting skills. The cases in Appendix A reflect this. However, the format of the Consulting Challenge would work for a wide variety of business disciplines. In fact, the specific skills that we assessed in the study are skills that would benefit most business leaders. The Consulting Challenge format could easily be adapted by changing the case to fit the discipline. We would like to see more schools participate in case competitions and broader use of case competitions in human resource programs. Although there should certainly be more rigorous tests of case competitions, the contests seem to complement the classroom experience by providing students with a grounded, experiential, and enjoyable way to learn.

Appendix A

Request for Proposals for Consulting Services: Yearly Satisfaction Survey

Overview of the Organization. (A 100-200 word description of the organization goes here.)

Project. The Yearly Satisfaction Survey (YSS) is an annual organizational climate survey administered to all employees of Company X. The questionnaire is

(continued)

Appendix A (continued)

completed anonymously and survey summaries are reported at the group level only. The questionnaire contains questions regarding leadership, organizational effectiveness, and job satisfaction.

Employees in Office Y are showing a decline in satisfaction. We are interested in your analysis of the results of the survey and suggestions for interventions. More specifically, the Director of HR would like a contractor to help interpret the survey results, identify strengths and weaknesses, diagnose the causes of any problem(s), and propose a plan for implementing changes to alleviate the problem(s).

Bidding Instructions. Contractors interested in bidding on this project must address the following:

I. Provide a 500 word executive summary (abstract).
II. Describe your company background.
   A. Provide a short description of your company history, philosophy, and mission.
   B. Identify project staff. Include a statement of staff roles. Include resumes for each of your consultants.
III. Provide an interpretive summary of the results of the Yearly Satisfaction Survey (YSS) for Department Y.
   A. Examine the attached survey data and corresponding report. Identify strengths and weaknesses.
IV. Provide a step-by-step intervention plan addressing the problems illustrated by the survey.
   A. Summarize the intervention(s) procedures, e.g., training, redesign, reorganization, team building, activity, program, etc.
   B. Provide a theoretical or empirical basis for the procedures.
   C. Summarize any intervention measures, training curriculum, tools, etc.
   D. Discuss your plan for maintaining employee confidentiality.
   E. Detail the mechanism for evaluating the effectiveness of the intervention(s).
   F. Describe how you will report the effectiveness of the interventions.
   G. Propose a detailed communication/implementation strategy that will "set-the-stage" (reduce resistance, create readiness)

(continued)

Appendix A (continued)

for the intervention. This might include presentations, brochures, roundtables, etc. This is important.

H. Provide a time line.
I. Submit a budget.

The vendor must provide any supplies, training, implementation processes, monitoring processes, staff, documents, and materials needed to complete the intervention for the duration of the contract.

V. Describe client interaction and responsibilities

We expect that any systems or processes implemented will be consistent with Company X Values.

Attachments:

1. Data Files with Yearly Satisfaction Survey data
2. Reports from Yearly Satisfaction Survey

Request for Proposals for Consulting Services: Turnover Project

Project. The Annual Employee Survey is an organizational climate survey administered to all employees of Company Q. The questionnaire contains questions regarding leadership, organizational effectiveness, turnover, and job satisfaction.

The Director of Compensation would like a contractor to help interpret the survey results, identify the causes of intentional turnover among Company Q leaders, diagnose any glaring problems, propose a turnover model, and then propose a plan for testing the model. More specifically, we are interested in the variables that affect senior leaders' (Directors and above) decision to leave Company Q. We would like a vendor to develop and then test a turnover model. As part of the bidding process, we would like bidders to examine the enclosed data file and find the correlates of intention to leave the organization. We would like the bidders to pay particular attention to the extent to which compensation is related to turnover. There has been some speculation that this may be the central issue, and we would like to know if the data warrant this belief. We would also like to know what the academic research says about the causes of intentional turnover at the highest levels of high tech and medical organizations. Of course, we would also like you to summarize immediate opportunities for development/improvement.

(continued)

Appendix A (continued)

Ultimately, we would like to have a valid Company Q Turnover Model. The model will help Company Q implement changes that will reduce turnover. The turnover model is the first step in a series of projects that Company Q will undertake. We need your help with the first step.

Bidding Instructions. Contractors interested in bidding on this project must address the following:

I. Examine the data file included with this RFP.
   A. Identify and summarize the variables that are driving senior leadership's intentions to leave Company Q.
   B. Identify and summarize any immediate opportunities for development/improvement. In other words, how satisfied are employees with the various aspects of the job that are related to intention to leave? Are there any areas where immediate action is needed?
   C. What role does compensation play in an employee's intention to leave?
II. Provide a review of the important empirical literature about the causes of managerial turnover in high tech industries.
   A. What are the best predictors of turnover or, more specifically, intentions to leave the organization?
   B. What are the costs of turnover and the benefits of reducing turnover?
III. Create a model of turnover identifying the most important predictors from the data analysis and the literature review.
IV. Propose a study to test/refine the model over the next 5 years.
   A. How would you gather more information to refine and validate the model?
   B. Propose a detailed communication/implementation strategy that will "set-the-stage" (reduce resistance, create readiness) for any interventions related to model testing and development. This might include presentations, brochures, roundtables, etc.

Request for Proposals for Consulting Services: Managerial Training Course

Project. We are requesting proposals (RFP) for the development and the delivery of a managerial training course. The course should: 1) help managers

(continued)

Appendix A (continued)

interpret the results of our Annual Employee Survey, 2) help managers convey the results of the survey to their subordinates, 3) help managers create cooperative action plans to address any problems that are illustrated by the survey data.

The Yearly Satisfaction Survey (YSS) is an annual organizational climate survey administered to all employees. The questionnaire is completed anonymously and survey summaries are reported at the group level only. The questionnaire contains 60 questions regarding leadership, organizational effectiveness, and job satisfaction. Twelve subscales are created by summing items within a section of the questionnaire (see attached questionnaire). Subscale scores are compared with means from previous surveys.

Approximately 400 managers, each of whom supervises between 20 and 40 direct reports (subordinates), receive a summary of the responses of his or her subordinates on the Yearly Satisfaction Survey. A sample report is enclosed.

Managers are required to provide their subordinates with a summary of the survey results. The reports are, however, quite detailed. It is difficult, and often unnecessary, for managers to convey all of the results of the survey to their subordinates.

We would like you to deliver a course that would help managers: identify strengths and weaknesses (interpret results), to convey those strengths and weaknesses to the subordinates (run an effective feedback meeting), and to enlist the help of subordinates to develop strategies for addressing problems (develop an action plan).

Bidding Instructions. Contractors interested in bidding on this project must:

I. Present a sample-training course to a panel of judges. The course may be no longer than 50 minutes. This sample course should be *very* similar to the course that your firm will deliver to the managers if you win the contract. The course should:
   A. Provide a method or technique for identifying the "important" strengths and weakness illustrated by The Yearly Satisfaction Survey.
   B. Provide a method, technique, or technology for conveniently summarizing and presenting the "important" strengths and weakness illustrated by The Yearly Satisfaction Survey. This may involve some form of presentation template.

(continued)

Appendix A (continued)

C. Provide guidelines that the managers can use to feed back survey results to groups of subordinates. Keep in mind that the survey data may occasionally suggest that the manager's own behavior or attitudes are a problem.
D. Provide guideline for action planning. We strongly encourage subordinates to be involved in any action planning.

II. Provide a training rollout plan for approximately 400 managers.
A. Summarize: who will do the training, when the training will occur, the number of managers in a class, etc.

Request for Proposals for Consulting Services: Employee Engagement Project

Project. HR Measurement Systems at Company Z is requesting a proposal (RFP) for a global employee engagement program. The Standard Employee Opinion Survey is a yearly organizational climate survey administered globally to all employees. The survey is completed anonymously and survey data are reported in aggregate. There are 63 core items on the Standard Employee Opinion Survey, covering a variety of dimensions (values, innovation, growth, communications, supervision, performance management, feedback, job demands, recognition, commitment, responsibility, work group/team, leadership, resource allocation, career progress, customer focus, survey, job satisfaction, satisfaction index).

Company Z is currently interested in transitioning to an employee opinion model that includes an engagement management protocol while maintaining the successful elements of the existing survey.

The successful bidder will examine existing data for underlying dimensions of employee engagement, summarize these findings with respect to problems and development opportunities, and develop an engagement intervention to be used globally. Company Z is also interested in possible cultural differences in engagement and best practices related to surveying the construct of employee engagement. We expect that any systems or processes implemented will be consistent with Company Z values.

For the purposes of this project, you will be provided with a sample of seven datasets. These data represent responses from employees from the different divisions and subsidiaries.

(continued)

Appendix A (continued)

Bidding Instructions

I. Provide an interpretive summary of the results of the Company Z Standard Opinion Survey.
   A. Examine the attached data files and propose an analysis plan to examine employee engagement and any cultural differences.
II. Provide a step-by-step intervention plan for increasing employee engagement.
   A. Summarize the intervention(s) procedures. Training, redesign, reorganization, team building, activity, program, etc.
   B. Provide a theoretical or empirical basis for the procedures.
   C. Summarize any intervention measures, training curriculum, tools, etc.
   D. Detail the mechanism for evaluating the effectiveness of the intervention(s).
   E. Describe how you will report the effectiveness of the interventions.
III. Propose a detailed communication/implementation strategy that will "set-the-stage" (reduce resistance, create readiness) for the intervention. This might include presentations, brochures, round-tables, etc. This is important.

Request for Proposal for Consulting Services: Work/Life Balance Project

Project. We are requesting proposals (RFP) for consulting services that will help us identify and solve potential problems related to work/life balance in Department W. More specifically, we would like your organization to provide a proposal for identifying and address work/life problems. We would like specific information about how employees in Department W could benefit from work/life programs. We would also like to know whether advertising our company as a family friendly company could help our recruiting efforts.

Bidding Instructions

I. Provide a data based analysis and summary of any problems.
   A. Examine the enclosed questionnaire data. Identify and summarize the extent of any problems related to work/life issues.

(continued)

Appendix A (continued)

II. Provide a step-by-step intervention plan addressing the problems illustrated by the data.
   A. Summarize the intervention(s) procedures that involve:
      1. collecting more information
      2. making changes including, but not limited to, training, action planning, new benefits, activities, program, etc.
      3. if you recommend training, please provide an outline of the training topics
   B. Provide a theoretical or empirical basis for the procedures where possible
   C. Summarize the internal and external benefits for family friendly practices in Department W.
   D. Summarize measures and data management (questionnaires, surveys, interview protocol, etc.)
   E. Discuss your plan for maintaining employee confidentiality
   F. Detail the mechanism for evaluating and reporting the effectiveness of the intervention(s).

Request for Proposals for Consulting Services: Linkage Project

Project. Employee engagement is one of Company G's key performance measures. Within Company G we utilize a corporate engagement survey and "mini-surveys." As part of our culture of continuous improvement, we have taken advantage of many opportunities to improve the engagement of our employees. However, we employ a large number of nonexempt production technicians in our production facilities, and within this group, we still see many challenges with improving engagement. We are looking for key drivers of engagement for that group, as well as proposed interventions based on analysis of the engagement data, exit interviews, safety indices, and CQI (Customer Quality Index).

Bidding Instructions

I. Provide an analysis linking the engagement data to our exit interview, safety statistics and CQI.
   A. How is engagement linked to safety at each plant? Is it linked to the business overall?
   B. How is engagement linked to CQI?

(continued)

Appendix A (continued)

C. How is engagement related to the trends we see in the exit interviews?
D. Are CQI and safety related? If so, how?

II. Proposed intervention(s).
A. Provide options for increasing engagement in our production workforce.
B. Describe the program(s)/interventions for increasing engagement and define successful implementation.

Appendix B

Consulting Challenge Presentation
Rating Form: Yearly Satisfaction Survey Project

Team Members: _____ _____ _____

Please rate each aspect of the team's performance using the following scale:

1 = *unsatisfactory* 2 = *satisfactory* 3 = *good* 4 = *outstanding*

_____ Presentation. Weight = ×2
Were the speakers effective (clear, organized, persuasive, etc.)?
Did they introduce themselves?
Did they avoid overly technical jargon?
Were graphs, charts, and tables useful (graphic, pertinent, specific, understandable)?
Did presenters seek feedback from the audience?
How well did they handle questions?
Did the team present themselves in a professional manner (friendly, cooperative, dressed appropriately, etc.)?

_____ Data Summary. Weight = ×2
Did the team provide an interpretive summary of the results of the Yearly Satisfaction Survey for Department Y? Did they identify strengths and weaknesses?

_____ Intervention Plan. Weight = ×3
Did the team provide a step-by-step intervention plan addressing the problems illustrated by the survey?
Did they summarize the intervention(s) procedures including training, redesign, reorganization, team building, activity, program, etc?
Did they provide a theoretical or empirical basis for the procedures?

(continued)

Appendix B (continued)

Did they summarize any intervention measures, training curriculum, tools, etc?
Did they discuss a plan for maintaining employee confidentiality?
Did they describe client interaction and responsibilities?
Did they propose a detailed communication/implementation strategy that will "set-the-stage" (reduce resistance, create readiness) for the intervention? This might include presentations, brochures, roundtables, etc.

_____ Assessment. Weight = ×.5
Did the team detail a mechanism for evaluating the effectiveness of the intervention(s)?
Did they describe how they would report the effectiveness of the interventions?

_____ Budget and Timeline. Weight = ×1
Was the timeline reasonable?
Did the team submit a detailed budget? Did they budget to cover supplies, training, implementation processes, monitoring processes, staff, documents, and materials needed to complete the change management program for the duration of the contract?

Additional Comments

_____ Total of weighted ratings

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Notes

1. There are a variety of case competitions that are also named the *Consulting Challenge*. Walsh College holds a 24-hour *After Hours Consulting Challenge* in which teams of four students are given a business case and must provide an information technology security solution. UCLA's Anderson School of Business hosts the *Net*

Impact Consulting Challenge that brings together nonprofit organizations with teams of MBA students. The University of Southern California, Marshall School of Business, organizes a yearly *Global Consulting Challenge*. In this strategy competition, teams from various business schools are provided information about a specific company over a 1-month period. The competition culminates in a 2-day event where students finalize solutions and give presentations to representatives of the host organization.

2. The skills tested in the competition can be found within lists of consultant skills/competencies developed by Warrick and Donovan (1979), Sullivan, Rothwell, and Worley (2001), the American Psychological Association (2007), and Cummings and Worley (2009). Certainly, the Consulting Challenge cannot help students develop all of the skills they need to function as a consultant, but we believe that the skill set we emphasize serves students well in a variety of consulting settings.

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