



Handout 1: Leading and Managing Projects

Joe Leung PhD (Warwick)

2021

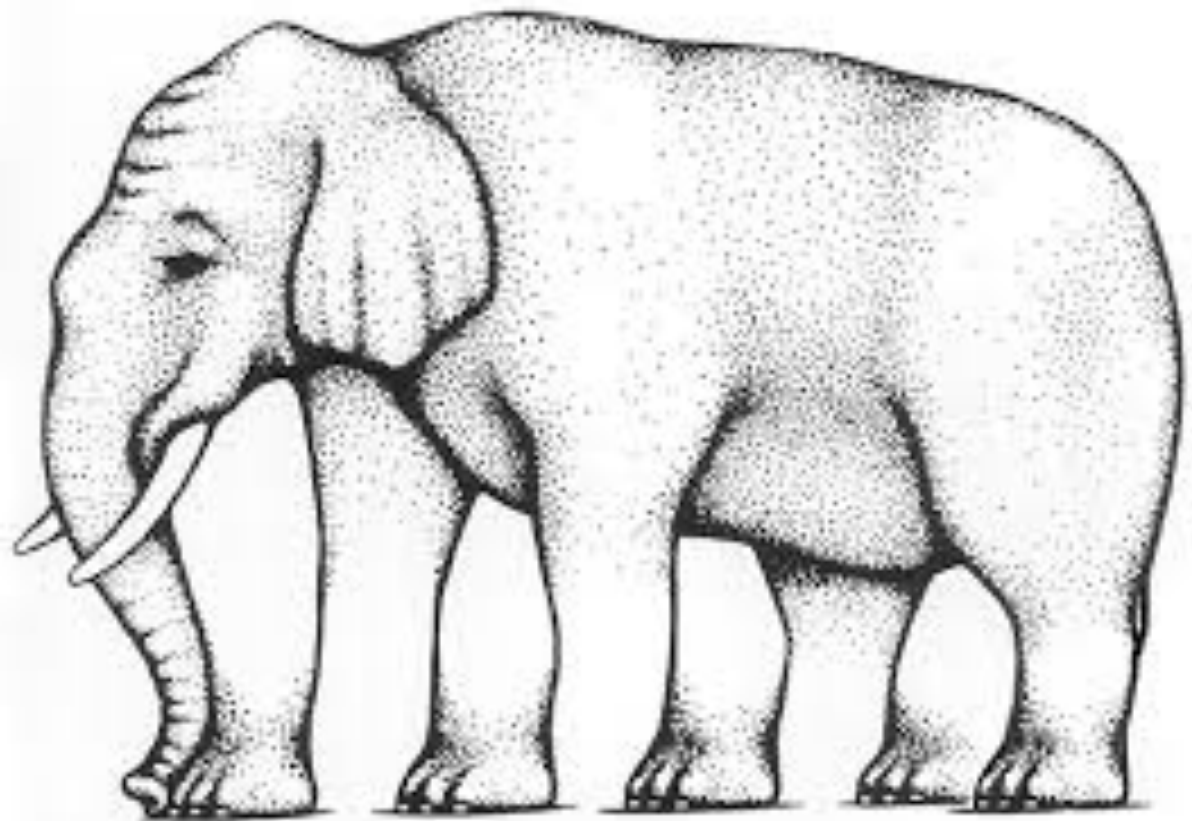
Dr. Joe Leung

Mobile Phone: 9103 3586

e-mail: drjoeleung@gmail.com

- Dr. Leung is the Principal Consultant of Organisational Learning Consultancy Ltd. which specializes in growth and change strategy. His doctoral degree was awarded by Warwick University (U.K.) in the study of Chinese Culture “Learning Organisation”. Throughout these years, Dr. Leung has surveyed more than 100 Hong Kong companies and has advised more than 50 companies. He concluded that a company’s rise and fall was the result of its ability to realize and response to the rapidly changing challenges.
- In his recent study, Report of Rejuvenating an Aging Organisation, he discovered that many Hong Kong companies have fallen into the Strategic Drift and Flux Stages where they response to their challenges in a wrong way owing to “Organisation Aging”. To avoid the decline, they should restart their learning engine to activate the growth drivers.
- Since 2003, Dr. Leung has provided the consultancy of “Learning Organisation” and “Corporate Governance” to Hong Kong companies. Working with Hong Kong Institute of Directors, he completed a government funded project: Guide on Corporate Governance for SMEs which covers the implementation steps of Corporate Governance and total solution to Hong Kong companies. Dr. Leung assisted two corporate clients successfully to win the "2019 and 2020 Directors of the Year Awards" issued by the Hong Kong Institute of Directors, demonstrating that they have achieved a high level of achievement and sustainable development in the implementation of Corporate Governance.

Seeing is Believing?



What is a consultant?



A consultant is an person who provides professional or expert advice in a particular field of science or business to either an organization or individual.

Why do clients hire consultants?

- Firstly, a consultant provides expertise that a client lacks or support that a client is unable to fulfill. In return for their professional services, the consultant charges a fee.
- Secondly, a consultant operates independently from the client, implying that, from the respective consultant, there is no conflict of interests between the client's issue and the services.
- Thirdly, a consultant operates in a professional manner, which ranges from having the right qualifications to ensuring high quality service delivery and a solid internal operation.

A consultant is...



A client hires a consulting firm to provide expert advice that ultimately (should) lead to the resolution of an issue within the client's organization. There are however more reasons why consultants are hired:

- Consultants are independent and provide an objective view on dilemma's and solutions
- External consultants are less susceptible to internal politics and/or sensitive situations
- Hiring consultants may in certain areas be cheaper than retaining the expertise in-house
- When firms find themselves short in capacity for projects/positions consultants can backfill
- Consultants can easier do the 'dirty work', i.e. take the decisions no one internally wants to make

Introducing yourself

Let other know you...
Your name
Your work or
your hobby?



Introducing yourself

Name	Work	Hobby	Mobile	E-mail
Dr. Joe Leung	Consultancy	badminton	9103 3586	drjoeleung@gmail.com

Well begun is half done!

Aristotle

- Understand the module of the programme
- Know your classmates
- Learn from each other

Learning Outcomes

- Have an in-depth understanding of consultancy
- Critically evaluate external and/or internal influences that impact upon an organization's ability to serve and bring about outstanding customer service, product and service innovation.
- Timely progress of consultancy projects from initial idea to the presentation of persuasive, pertinent and actionable reports.
- Conduct critical and relevant literature and research reviews
- Understand research methods and their relevance to different projects.

Programme requirements

1. Project Initiation Document, PID (20% scores – 1,000 words, submission date: 15 March 2021)
2. Ethics Form*
3. Consultancy Project Assignment (80% scores – 4,000 words, submission date: 12 April 2021)
4. Student Self-Evaluation Form

Remarks:

- All assignments/documents must be submitted to Turnitin.
- Passing mark 50%.
- Late submission (up to one week), maximum mark 50%.

* Ethics Form is only compulsory to submit (signed by Dr. Joe Leung) if students intend to do direct fieldwork, i.e. interviews, focus group or questionnaire. If the consultancy project assignment is case study based or simply a feasibility study without fieldwork, you do not need to provide the Ethics Form.

1. Project initiation document (PID)

- Describe project initial idea and the background of the chosen organisation.
- Define your role and responsibilities.
- Explain aims and objectives, risk, information sources, research method and time plan.

Remark:

See attached copy

4. Ethics Form

In order for research to result in benefit and minimise risk of harm, it must be conducted ethically. A researcher may not be covered by the University's insurance if ethical approval has not been obtained prior to commencement.

Ethics Form covers 11 sections

- Section A: About You
- Section B: Approval for Research Activity
- Section C: External Ethical Guidance Materials
- Section D: External Collaborative Research Activity
- Section E: Details of Research Activity
- Section F: Scope of Research Activity
- Section G: Intended Participants
- Section H: Anticipated Risks
- Section I: Feedback, Consent and Confidentiality
- Section J: Data Protection and Storage
- Section K: Declaration

Remark:

See attached copy

3. Consultancy project assignment

- Select an organization as the assignment background (either the student's preferred company or a chosen public-list company).
- Identify a management problem and issue (e.g. customer services, process improvement, product and services innovation, strategy or strategic change management) and provide a consultancy solution for the company.
- Conduct a timely and professional consultancy service for the chosen organization and prepare a consultancy report. The report needs to reflect a critical understanding of consultancy management tools and business research methods.

Remark:

- **Length:** 4,000 words +/- 10% (any deviation will be penalized).
- **Formatting:** Typed on A4 paper in Times New Roman or Arial font 12 with at least 2.5 centimetre space at each edge, double spaced and pages numbered.
- **Document format:** Ensure a clear title, course, and name or ID number is on a cover sheet and a bibliography using Harvard referencing throughout is also provided (<https://www.uwtsd.ac.uk/library/infoskills/referencing-handbooks/>) or see attached copy.
- **Referencing:** about 25 sources

Guidance for students in the completion of consultancy project tasks

■ Engagement with Literature Skills

It is important that these reports are not overloaded with theory. You need to include and refer to academic theory, but only as a basis – consultancy reports are not dissertations where academic theory need to be discussed in detail.

■ Knowledge and Understanding of skills

You need to demonstrate a genuine understanding of the management issue chosen and of the environment in which your chosen organisation is operating. Use research and (academic and applied) academic references to underpin your knowledge.

■ Cognitive and Intellectual Skills

You must provide justification for your arguments and judgements. Evidence that you have reflected upon the ideas of experts within the subject area is crucial to you providing a reasoned and informed debate within your work. Sound, valid, persuasive conclusions are necessary and must be derived from the content of your work.

■ Practical Skills

You need to demonstrate the use of a range of consultancy and project management tools, and if required, be able to select and evaluate appropriate business research methods.

■ Transferable Skills for Life and Professional Practice

This is an important area – time management, research skills and the presentation of your report will all show your professionalism.

4. Student Self-Evaluation Form

The Student Self-Evaluation Form will be filled by the students at the end of the project assignment. Using these criteria, tick the box that best indicates the level of achievement you feel you have achieved with regard to each of them.

Evaluation Areas:

1. Engagement with literature
2. Knowledge and Understanding
3. Cognitive and intellectual skills
4. Practical Skills
5. Transferable Skills for Life and Professional Practice

Remarks:

See attached copy

Learning Methods

- Business Consultancy Concepts
- Business Consultancy Skills
- Business Consultancy Models
- Business Consultancy Approach (Business Case Study and Feasibility Study)
- Real Company Cases
- Video Company Cases
- Group Discussion and PID Sharing

References

- Ethan M. Rasiel (1999), *The McKinsey Way*, McGraw-Hill Education.
- Gerald M. Weinberg (2014), *More Secrets of Consulting: The Consultant's Tool-Kit*, Leanpub.
- John Hays (2014), *The Theory and Practice of Change Management*, Palgrave Macmillan.
- John P. Kotter (2002), *The Heart of Change*, Harvard Business Review Press.
- Louise Wickham and Jeremy Wilcock (2016), *Management Consulting: Delivering an Effective Project*, Pearson.
- Matthias Kipping and Timothy Clarg (ed.) (2013), *The Oxford Handbook of Management Consulting*, Oxford University press: Oxford .
- Mick Cope (2000), *The Seven Cs of Consulting*, Prentice Hall.
- Michael Hammer and James Champy (1994), *Reengineering The Corporation: A Manifesto for Business Revolution*, Nicholas Brealey Publishing.
- Milan Kubr (ed.) (2002), *Management Consulting: A Guide to the Profession*, International Labour Office: Geneva.
- Peter Block (2011), *Flawless Consulting: A Guide to Getting Your Expertise Used*, Jossey-Bass.
- Patrick Dawson and Constantine Andriopoulos (2017), *Managing Change, Creativity and Innovation*, SAGE.
- Richard Newton (2012), *The Management Consultant: Mastering the Art of Consultancy*, Pearson.
- Robert S. Kaplan and David P. Norton (1996), *The Balance Scorecard: Translating Strategy into Action*, Harvard Business School Press.
- Robert S. Kaplan and David P. Norton (2001), *The Strategy-Focus Organization*, Harvard Business School Press.
- Simon A. Burtonshaw-Gunn (2010), *Essential Tools for Management Consulting: Tools, Models and Approaches for Clients and Consultants*, Wiley.
- Theodore Levitt (1974), *The Marketing Imagination*, The Free Press.
- W. Chan Kim and Renee Mauborgne (2006), *Blue Ocean Strategy*, Harvard Business School Press.