Content and Objectives

In this course, you will learn how to leverage a unique combination of design thinking and strategic planning to design, prototype and test solutions to real problems faced by communities, businesses, people and organizations. By the end of this course, you should be able

- To reframe the challenges faced in a given situation from true empathy for the people involved;
- To formulate and articulate a clear plan of action with compelling evidence for expected outcomes;
- To design and implement a strong implementation plan with contingencies for the inevitable challenges and adjustments;
- To craft and execute solid evaluation of impact relative to goals with objective recommendations for future action.

The learning objectives for this course will be accomplished through a combination of lecture, discussion and semester-long hands-on projects. Lectures are delivered electronically through the course website for each session. Acting as a hired consultant for a real client, you and your team will design and propose a strategic plans to your client, implement accepted plans, and evaluate the effect on the client's performance. Each in-class meeting will begin with a discussion of your questions and summaries of the material. The remainder of class time will be spent engaging with the lecture content for your particular project.

You and your team will work with your client throughout the semester. Each of your clients has provided reports, data and a video interview to support your initial immersion in the situation they have asked you to address. You are expected to maintain communication, asking questions and keeping your clients updated throughout the process. Your final presentation and report in this class will be delivered to your client and their feedback will factor into your grade.

At the beginning of the course, you will provide me with your project requests (1st, 2nd, and 3rd choices) and any team member preferences. One of the benefits of this course is the diversity of majors. I will assemble the most diverse teams possible taking into consideration your project preferences and team member requests. As you think about your team, consider the fact that in the “real world” you rarely get to choose your team. Learning to work with the teammates and resources you have is a critical skill to have if you want to be successful and have a meaningful impact. Now is a perfect time to try. Each team will also be assigned a peer mentor who will support your application of course materials to the project you have been assigned.

The pre-requisite for this course is junior or senior standing. Students who will be most successful in this course are those who have content knowledge from the required courses of their majors and are
seeking a means of applying that body of knowledge to solving real problems. No specific courses are required as pre-requisites as a diversity of majors are encouraged to apply. To date, there have been seven different majors represented in the course.

**Course Design:**

The course is broken into three stages: Strategic Planning, Implementation and Evaluation. You will provide a written report at the end of each stage which will become appendices in your final report.

**Stage 1: Strategic Planning (Day 1 through Executive Committee Presentation)**

The first stage is formulation of your strategy and plans for implementation and evaluation leveraging a creative combination of design thinking and strategy planning. This stage commences with your definition of the challenge based on a review of the current situation and iterative empathy exercises, moves to your idea or solution to that challenge based on practical ideation, and ends with Executive Committee approval of your plan. To proceed to the second stage, your strategy and implementation/evaluation plans must be accepted and funded by the Executive Committee. The Executive Committee will be comprised of representatives of your client as well as faculty who are knowledgeable on the topic of your project. This plan must include a detailed description of how you plan to bring your idea to life and to evaluate results, including a clear definition of “success” for your effort.

Success in this stage requires you to master the design thinking + strategic planning processes we will employ. You must find the right balance of creativity, practicality and impact in your thinking. Take the perspective of the consumer, your client, and other stakeholders or beneficiaries of your efforts. Generate many relevant ideas and then challenge those ideas. Leverage existing events or patterns, special or mundane and draw heavily on your existing knowledge and experience. Mastery will come from engagement in the materials and exercises.

**Stage 2: Implementation (Executive Committee Approval through about Week 12)**

The second stage is implementation of your plans. In this stage, you will refine and then execute the plans you presented to the Executive Committee. You will begin this stage with a healthy dose of project management by developing

1) A detailed time and action plan including key milestones, tasks and resources allocation and
2) A communication plan including key collaborators, messages and timing to ensure you have the necessary buy-in and support.

During implementation of your plans, you must keep detailed records of the money spent and notes of how the implementation actually occurred. You must also stay in contact with client to ensure that your efforts are aligned with theirs. Implementation is always the most difficult part of such efforts and must be monitored carefully.

**Stage 3: Evaluation (Executive Committee Approval through Final Presentation and Report)**
The final stage is evaluation of your plans, although planning and preparing for evaluation must begin with implementation planning so you will know what data to gather while you are working. You have two documents to submit for this stage.

1) Your evaluation plan including the measures you will use, the comparisons you will make and how you will collect your data
2) Your evaluation report including the results of your evaluation

Success in evaluation begins with a clear project and definition of success for that project. Knowing what you need to measure and what your comparison will be are critical to a successful evaluation. If your evaluation plan proposed to the Executive Committee is strong and your implementation was straightforward, this stage will be relatively simple to complete. If one or both of those conditions fails to hold, evaluation may get a little trickier. By the end of this stage you are responsible for providing a written report of your project intentions, program, implementation, evaluation approach, results, and recommendations for next steps or future efforts. This report must include a detailed accounting of the budget and money spent.

Remember that while you are applying these stages to a specific project, the objective of this course is to build your capacity to apply design thinking and strategic planning to any project you encounter. Think of it as a tool kit you are developing for yourself.

**Typical Class Sessions**

This course is somewhat unique in that lectures will not occur in the classroom. They are all pre-recorded and online (roughly 20 to 30 minutes in length). You are expected to view the lectures, complete the readings, and submit your summaries/questions prior to the class session. Class time is used primarily for team work as it is the one time that you are all scheduled to be in one place. Your work in class will be the application of lecture and reading material to your project. You should plan your in-class time as a team, seeking to leverage what you are learning/hearing outside of class to move your project forward. **Use the course schedule as a guide to your focus for each class session.** As you get into your individual project, you may need to make a few adjustments while sticking to the overall structure to allow you to complete your project on time. You will not be able to complete your entire project in the class time available and should expect to spend time outside of class completing the required work. The idea is that these outside of class sessions will not require the entire team, but can be meetings of subsets of your team assigned a particular set of tasks from your overall plan.

At the beginning of the semester, you will spend more time outside of class in readings and client-provided materials. As the semester progresses, your time will shift more toward group work outside of class. **Average time in minutes spent per week over the course of the semester:**

3
The objectives of this approach are to establish a learning environment in which you can absorb class materials in an actionable way and to build your ability to apply those materials quickly and effectively to real world examples. In addition to the content learning objectives, there are several critical skill-based objectives here. These include the ability:

- To conduct research/gather and filter inputs
- To think critically
- To formulate and articulate a point-of-view
- To work effectively with a team
- To present your ideas/case and respond to feedback over time

As this course is very hands-on, studying the material before you come to class and active participation in class are essential for your success. If you engage with the materials, class discussion and team projects, you will walk away from this class with the capacity to address the most important questions in consumer strategy today. You will be able to hold a conversation with any C-Suite representative on issues that matter most to them today. You will be able to recommend sound approaches to pursuing any opportunity or addressing any issue that might be facing the organization.

In this course, you will be assigned to a team and each team will design, implement and evaluate a project for your selected client. The teams will stay together for the entire semester. I recognize that not everyone can or should work together. Some people are just that different. If you find that to be the case, please let me know. I can try to help you work through things or can assign you to a different team. In addition, each team will be assigned a peer mentor. Peer mentors are students who have successfully completed this course in previous semesters. They will be useful guides in your application of course material and your interactions with clients. During class sessions, peer mentors will spend time with each of their assigned teams. They will also be available outside of class for team meetings and questions.

In general, the flow of a specific class will follow this path:

- Prior to each class, you will be expected to prepare by reviewing the materials available online for that week and any individual work you and your team agree needs to be completed prior to the next day. Use the Cornell Note Taking method which we will cover on day one to extract the most important elements of the materials that week and to submit any questions you have for our class discussion. Think of these notes as an on-going dialogue with me. I will read every one
you submit and will respond to specific questions or concerns either directly or through class discussion.

- Each class will begin with announcements/reminders (3 to 5 minutes in most cases). You can use this time to ask any questions about what is due, how things are graded or other technical elements of the course.
- Each class will also start with a brief (typically 10 to 20 minute) discussion of your questions from the lecture and reading materials, either the ones submitted in your summaries or the ones you raise in class. You can use this time to clarify anything in the materials, to ask what-if questions or to share ideas that the lecture/readings generated for you. This is a good time to be sure you are staying on track with the content of the course. We may have guest speakers on occasion, some in person and some remote.
- For the remainder of the class time, you will break into your teams to work on your strategic plans, implementation planning or evaluation, leveraging the content of the course. For example, you will view the situation analysis lecture, complete the situation analysis readings, come to class to discuss the materials and then complete your situation analysis with support from me and your peer mentor.

**ASSESSMENT**

Your overall performance in the course will be evaluated on the following basis. You begin this course with 100 points and keep those points based on your performance on each of the following items.

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<th>Assessment Item</th>
<th>Points</th>
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<tr>
<td>Strategic Plan</td>
<td>20pts</td>
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<td>Including Executive Cmte acceptance</td>
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<tr>
<td>Final Presentation</td>
<td>10 pts</td>
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<tr>
<td>Final Report</td>
<td>25 pts</td>
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<tr>
<td>Content Examination</td>
<td>25 pts</td>
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<tr>
<td>Class Participation</td>
<td>20 pts</td>
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<tr>
<td>Based on team participation (as rated by team members), participation in class discussions, submission of note summaries, attendance</td>
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Letter grades are determined as follows:
The components of your grade are described below. For details on how the grades are determined, please see the attachments to this syllabus.

### Strategic Plan

You and your team will be responsible for the development of a strategic plan designed to address your selected client’s need(s). This plan must include the following:

- A “design challenge” based on a situation analysis including, among other items, the realities within which your plan must work as well as empathy and reframing exercises to help you see the situation from a creative and optimistic perspective
- Definition of the opportunity including size and nature
- Your plan (a.k.a. solution to the design challenge) and how it will allow your client to capitalize on the opportunity
- An implementation assessment, including a clear statement of the specific actions required, anticipation of barriers and how you plan to overcome
- A budget with a request for funding
- An evaluation plan defining success and how you will not only measure it, but the comparisons you will use to attribute any success to your actions versus other events or circumstances

You will be provided with some materials regarding the situation. Then it is your responsibility to gather additional inputs using the Design Thinking and Strategic Planning methods discussed in the lectures and found in your readings.

Prior to your Executive Committee presentation, you will present your plan to the entire class to obtain feedback from your peers. Then you will have one class session to refine your plan before you present to the Executive Committee (see Course Schedule for dates). (Note that we are finalizing the schedules of the Executive Committee. Depending on their calendars, you may be presenting outside of class. If so, we will coordinate with your schedules as well.) The Executive Committee may recommend changes and will determine the funding you receive for your efforts. Part of your grade will be based on your ability to absorb and respond effectively to the feedback you receive from your peers and from the Executive Committee. You are responsible for submitting to me a copy of your presentation and written proposal per the Course Schedule. Your plan must be delivered in a presentation (PowerPoint or similar.

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<th>Grade</th>
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<tr>
<td>A</td>
<td>94-100</td>
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<td>AB</td>
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<td>B</td>
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<td>D</td>
<td>64-73</td>
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<td>F</td>
<td>&lt;64</td>
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format) and in a formal written proposal (Word or similar format). Note that if you choose to use Prezi, you must provide a printed copy of your slides in pdf or other format.

In class times devoted to team work, we plan to join each team for a period of time to listen, observe and participate as appropriate to help guide you to an effective presentation. You are to think of us as additional members of your team. If we were truly an outside consultant, I would be the head of strategy, Kelly and Paige would be the directors, and you would be the strategy teams. It would be (and is) our responsibility to ensure that you have the resources you need and that you are headed down a productive path. As you work, there may be broader findings or questions that require us to stop and have a broader class discussion. Representatives from our “clients” and other guests may join us from time to time as well. If you need someone to attend a particular class session, you are welcome to reach out to them directly or to ask one of us to assist in setting that up.

**Final Report**

Your final report is a major percentage of your grade and should be a well-formed documentation of the project and its outcomes. This report will be delivered to your clients. Its objectives are 1) to explain your impact on the situation and 2) to recommend next steps based on your findings. You were given a client project and you spent client money on that project. Your final report is what they get in return. The writing should be clear, concise and complete.

You have already completed the building blocks for this report:

- What you intended to do and the impact you expected it to have (the Strategic Plan),
- What you actually did, how it differed (if at all), and the factors that influenced implementation (the Implementation Plan)
- What impact you actually had (the Evaluation Report)

Now you need to add your interpretation and perspective for a business audience. This final report should read like an extended executive summary of the project with key findings and recommendations for action. It should be an engaging story about the project that can inspire action in a direction supported by your findings. It should also provide all of the details necessary for someone to replicate your work at another time or in another setting. While each story will be a little different, some of the points it should address include:

- Your perspective on the current situation and the opportunities/challenges it represents
- The opportunities you selected for focus and reasons for your selection
- How you planned to address the opportunities and what you thought the potential impact would be
- What you implemented, including any challenges you had in implementation
- Your evaluation plan including a strong compared to what – how were you going to know what you did
- Your evaluation of results including a detailed accounting of what was spent and the estimated return on investment
Your interpretation of your efforts and the results – what did you learn? What advice would your project provide for the café and for future teams?

To this report, you would attach your previously submitted Strategic, Implementation and Evaluation reports as appendices including any other materials (data collection forms, creative, time & action, etc.) that would allow someone to replicate what you did exactly.

This final report is due no later than the end of our final exam period (see Course Schedule). Since the final report is so important to your final grade, there are two opportunities for you to submit a draft of the report sections for feedback. You will receive feedback on your strategic plan from the Executive Committee presentation and report so these two opportunities focus on implementation and evaluation. While they will be written in terms of what you are GOING to do, they still represent opportunities for you to think through the contents and obtain the necessary feedback.

**Implementation Plan & Tracking**

Your strategic plan will include a high-level view of your implementation plan. Following approval of this plan, you will be required to develop a more detailed implementation plan including a **time & action calendar with key milestones and target dates**. You will also need to develop a **communication plan** laying out key partners and constituents and how/when you will communicate with them. In this plan you must also identify the key obstacles to your success – what could go wrong, and how you plan to prevent and/or address what might occur.

Once you have your plan, you will need to set up a **means of tracking progress** toward your goal(s) and flagging any issues or adjustments that must be made.

Within 1 week of strategic plan approval (see Course Schedule), you will be required to submit your implementation plan. Every week thereafter, you will submit an update of your progress noting any issues or surprises (positive or negative). At various points, you will present these updates to me verbally during our class session.

**Evaluation Plan & Analysis**

As with implementation, your strategic plan will include a high-level view of your evaluation plan. Following approval of the plan, you will need to develop a **more detailed evaluation plan including a description of what you need to measure and how you will go about measuring it**. This will include any data collection forms your will use and/or a description of the administrative data you will require. Your report must also include blank tables showing how you will use/present the information once you collect it. This will include the definition of your comparison and explanation of why this comparison is valid. You must also describe how you will use the results of your evaluation to recommend future actions (e.g., continuing the program, rolling it out to a broader audience, ceasing the effort, etc.).

Within 2 weeks of strategic plan approval (see Course Schedule), you will be required to submit your detailed evaluation plan.
You are also responsible for delivering a **written evaluation report** (see Course Schedule for due date). This report contains the findings and interpretation of your actual evaluation and will occur after you complete your data collection during implementation. In some ways, the evaluation report is the evaluation plan with the proposed tables filled with data and your explanation of what you found.

**Final Report Presentation**

In our last two class sessions, you will present the contents of your final report to your peers and possibly clients (depending on schedules). This presentation must be a compelling and appropriately complete story of your project, findings and recommendations. You will receive feedback on your work and are expected to use that feedback to improve your final report. It will be graded based on your ability to

1. Help your audience understand what your objective was
2. Present a clear fact-based story
3. Make a compelling case for your recommendations
4. Select appropriate details to share
5. Demonstrate the use of design thinking and strategy planning in the project
6. Engage/inspire your audience

**The Content Exam**

Much of this course comes from your work in teams. There is a tremendous amount to be gained from those efforts. At the same time, it is important to assess how well each of you understand and can apply the concepts individually. That is the purpose of our two exams – individual assessment.

In this exam, questions will assess

- Your knowledge of the course concepts
- Your ability to apply that knowledge
- Your ability to interpret the application of that knowledge

Question formats can include true/false, multiple choice, fill in the blank, short answer, scenarios and other formats that are appropriate to the knowledge and abilities being assessed.

See Course Schedule for content exam date. The exam will cover material leading up to the exam day.

**Class Participation**

Your class participation grade is based on four components.

First, for each lecture and set of reading assignments leading up to your strategic plan presentation, you will be required to submit a summary of the subject and any questions you have about the material. The format will be based on the Cornell Note Taking method. These notes are due by 10 p.m. the night before class. Please consider them as an on-going dialogue between the two of us about your class
experience, the knowledge you are gaining and the questions you have. If you do them well, they will be invaluable in preparing for your exam, contributing effectively to your team project and using this method for another purpose in your life or career.

Second, your engagement in the team project as assessed by me, the TAs and by your teammates. This will be evaluated via a peer rating completed at the end of the semester by each team member. Upon submission of your final project (so no later than our scheduled exam time), you must each submit the team evaluation form rating the participation of each member. While we each have different ways of contributing, the objective is that each member would contribute an equal amount (even if different in kind). This form provides an opportunity for you to communicate the relative contribution of each member. These results will factor into the class participation grade as explained on the feedback form.

Third, your participation in class discussions, including your feedback on classmate presentations and submission of time & action reports, implementation logs, interim tracking reports, and measurement tools.

Finally, attendance. It is very difficult to learn much from a learning-by-doing type course without coming to class. If you cannot make class, you must let your team know (in addition to telling me).

**EXPECTATIONS**

You are expected to make every effort to attend class on time. Class sessions are the times each week that you and your entire team are scheduled to be in the same place at the same time. This class is structured to allow you to take advantage of that time together. When you do not attend for these team meetings and work session, you are putting 20 percent of your semester grade in jeopardy. Should you not be able to attend class on time or at all, I expect that you let me and your team know your reasons in advance.

While you are in class, you are expected to be engaged in the lecture, discussion or assignment. No electronics of any kind may be used during class unless being used for class-related work. No multi-tasking. Email, texts, Facebook, etc. can wait until you are out of class, unless related to your group work.

My intention is to be inclusive and welcoming so that all students feel comfortable in the classroom while also being challenged to learn and grow. If a class topic or discussion makes you feel unwelcome or unsafe please talk to me about your concerns. If you are not comfortable speaking directly to me, you can contact SoHE’s Senior Assistant Dean, Annette McDaniel, amcdaniel@wisc.edu.

**ACADEMIC DISHONESTY**

You are required to adhere to the standards of academic integrity set forth by the University of Wisconsin-Madison (http://students.wisc.edu/doso/acadintegrity.html). These standards include working independently unless otherwise instructed and properly citing any words or ideas borrowed
from other sources. Your work must be your own! This includes looking at someone else’s paper, at an unauthorized electronic device or source, or talking with a peer during an exam.

**STUDENT ACCESS**

If there are circumstances that may affect your performance in this class, please let me know as soon as possible (within the first two weeks of class) so that we may work together to develop strategies for adapting assignments to meet both your needs and the requirements of the course. The McBurney Disability Center (263-2741 / 702 W. Johnson Street, Suite 2104, [http://www.mcburney.wisc.edu](http://www.mcburney.wisc.edu)) provides resources for students with disabilities. You will need to provide documentation of disability to them in order to receive official university services and accommodations. Let me know during office hours if you require assistance or accommodations and we can work to meet your learning goals.