**READING SUMMARY MEMO #3**

IST 325: Information Management Consultation

Tuesdays & Thursdays, 3:30PM-4:50PM

*Flawless Consulting,* Peter Block

**Directions:** In memo format (template provided on page 2), answer each prompt below. Submit via BlackBoard by the due date. A grading rubric is provided on page 3.

* **Relevant Reading:** Chapters 7-11
* **Due Date:** November 11, 2021
* **Total Points:** 25 points

**Prompts (400-500 words)**

1. Using the framework defined in Chapter 15, describe (in your own words) how you would hold a ‘Meeting for Action.’ Be sure to:
   1. Summarize Block’s framework for executing this meeting
   2. Identify pieces of Block’s framework that are critical components of a ‘Meeting for Action’
   3. Identify pieces of Block’s framework that you disagree with or what you would do differently
2. Your choice: Identify a process or framework that Block (2011) discusses in the book.
   1. Summarize the framework
   2. Apply the framework – describe a relevant situation in your past internship, job, or group work experience that supports the application of the framework
   3. Recommend an enhancement to the framework (an additional step, a new perspective, or new application of the framework)
3. Reflect on the content learned in class. What do you feel like you understand really well? What is still confusing or not completely understood? What do you wish you knew more about?

**RESPONSE FORMAT**

Name: William Chen

Date: 11/4/2021

Reading Summary #1

**Prompt #1**

Word Count: 480

If I were holding a meeting for action, I’d follow Block’s framework for executing the meeting (with slight changes). According to Block, you go through many phases to manage a meeting, such as keeping the picture in focus, presenting data, managing and focusing on the meeting, and not taking things personally (p. 230). Block explains that most of the time is spent asking the client for reactions and whether the meeting is going as expected. The steps to manage the meeting are stating the contract and structure of the meeting, presenting recommendations and data, asking for feedback and whether or not to proceed, and then giving yourself feedback, answering client concerns, and providing support. These steps and phases ensure you get what you want (the manager to implement the solutions), and the manager gets what they want (a productive meeting with solutions that meet their expectations). As mentioned earlier, most of the meeting is spent receiving feedback from the client and getting reactions. This is the most critical component of managing a meeting because you want to ensure the client is getting what they want, which means there’s a higher chance of them implementing whatever the proposal is. Block states that there were multiple times when he asked the manager about the meeting at the end, and the managers were disappointed or didn’t like the recommendations proposed (p. 238). By receiving feedback in the middle of the meeting, you can alter your recommendations and listen to the manager's problems to help relieve them of their issues, causing a higher chance of implementation and willingness to work with you.

One critique of Block's framework is establishing the managers' goal and what they want to see in the meeting. Although you’re presenting a recommendation and establishing the meeting structure, I think it’s good to ask the manager what they expect to see in the meeting. If they say something you didn’t include or won’t talk about, you can try to incorporate the response wherever it makes sense. I think half an hour to talk about how the meeting is going is excessive because you can tell how they feel or what they’re thinking based on facial reactions. If I presented a solution that they disagree with, they’d likely make a face representing those feelings. I also think you should mention that the manager can stop the meeting at any point, but they must explain why. This way, if the meeting isn’t meeting their expectations, they can reschedule it when you have a better solution/presentation. Block also says that you should spend nine minutes presenting data and recommendations (to allow more time for client reactions). As mentioned earlier, you can likely see how clients are reacting, and I don’t think responses and feedback need 40 minutes. I feel more time can be devoted to presenting data to convince the manager because it will support your recommendation.

**Prompt #2**

Word Count: 441

A framework that Block discusses that I’ve experienced is the agonies of contracting (specifically, dealing with low motivation) (p. 107). Many of my group projects have been with people that don’t do any work or do the bare minimum. I’ve had to take the lead in many projects, and unfortunately, do most of the assignments alone. According to Block, the agonies of contracting are when the “client’s motivation toward the project is low,” but they’re willing to move on with the project (p. 107). Block states that when there is low motivation, you should ask the client to speak to their manager because the client likely doesn’t want to proceed with the project, but the manager is forcing them to proceed. Block advises how to deal with low motivation, such as not doing the project, asking if the client is pressured (and if you’re proceeding with the project, work on a small piece of the project and assess other concerns with ways to reduce those concerns) (p. 107). Since I don’t have the option to forgo the school projects, I have to deal with the low motivation and deal with it.

In my capstone class, I was put in a group of five, and no one did anything until the day before the assignment was due (even after I reminded them of the assignment multiple times). Everyone lacked the motivation to do the project, and when I told everyone that I had already done my part, they started working on the assignment. I had to push my group members to do the assignment, and after the presentation, I got many thanks for keeping the team on track and “carrying” the presentation. I also faced resistance from my group members because they weren’t doing the assignment. I also had to rewrite most of the assignment anyways because the stuff they wrote was wrong or irrelevant. I did this to minimize my concerns about the project and to ensure a better grade. Block said, “hope for the best” (p. 109), and that's exactly what I did. Something I think that can enhance this framework is to create a reward system. Since there’s a lack of motivation to complete the project, you should incentivize yourself and your client to complete the project. For example, besides getting paid to do the project, you could set up milestone goals where when you complete a task, you do something you like (such as eating at your favorite restaurant for lunch). The client can do the same by supporting you and themselves (creating a more personal relationship with you) to make the project go smoothly and lower concerns.

**Prompt #3**

Word Count: 419

As I’ve mentioned before, consulting is and always will be a broad category because there are many different types of consultants. Regardless, this class helped me understand the processes of a consulting project. The group checklists put us in the shoes of consultants, and we had to apply the knowledge and frameworks we learned in class to finish the project. The biggest takeaway is listing assumptions and the first few steps to starting a project/tackling a problem. Thinking back to what my cousins do (who are also consultants), I don’t think they’ve ever done what we talked about in class. It’s interesting to see the differences in what consultants can do because they’re essentially people who fill wanted positions in other companies (like staff augmentation). The work I’ve seen my cousins do is more on the data side, so I haven’t heard them talk about what we learned in class. I also like how we learn and use a little bit of everything we’ve learned in the iSchool. It reinforces the ideas and frameworks taught in other classes and shows us that we’ll encounter these things in the future (like SOW, RFP, current state analysis, and project management approaches). I liked how the classes gave us experience as consultants because we could apply the stuff we learned in class with our projects.

Another thing I feel like I know is how to attack case studies for consulting. I feel confident that I can work on a case study using the stuff we learned in class. Something that I don’t understand is the RACI chart. I know that the chart is used to delegate responsibilities and roles among people in a project, but I don’t know how to make/utilize the chart. This is also something I wish to know more about. I want to learn how the RACI chart is used in the real world and examples of how these responsibilities are given to each person. Something I am also confused about is the difference between an SME and a consultant. Both a consultant and an SME have expert knowledge of an industry, but how do they differ? Despite the lack of knowledge of these topics, I have a better understanding overall of how consultants do their jobs. I enjoyed Ruthnie coming into class and talking to us. She gave an inspirational lecture on finding our strengths and using them to our advantage. I wish that there was an activity to find our strengths or find ways to strengthen them.

***Notes:***

* Use Calibri size 12 font
* Double space
* Use page numbers
* Writing Tips:
  + Feel free to use bullet points to summarize important points.
  + Remember, these are short responses. Eliminate filler words. Be concise.

**GRADING RUBRIC**

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| --- | --- | --- |
| **Category** | **Description** | **Total Points** |
| **Talking to the Text** | Provide specific text examples, summarize key points, and demonstrate mastery of concepts/frameworks. | 5 |
| **Formatting** | Correct word count, use template. | 5 |
| **Writing** | Use correct grammar, limit filler words, and answers each prompt without talking in circles. | 5 |
| **Creativity** | Clearly outline and examples with cohesive context and background. | 5 |
| **Completeness** | Answers each prompt with all required components. | 5 |
| *Total Points* | | 25 |