

THE OHIO STATE UNIVERSITY
Fisher College of Business
Department of Finance

COURSE SYLLABUS

Business Finance 6226

FINANCE CONSULTING PRACTICUM

Spring Semester (Term II) 2019

Instructor Information

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Course Description

This is an action-based course for students in the Specialized Masters – Finance (SMF) program. The objective of the course is to give SMF students an opportunity to practice their analytical and soft skills by working in teams on real finance related projects with clients.

Student teams offer consulting services to their client. In consultation with the client, teams define the project's scope, nature of deliverables, and manage the project, as well as the relationship with their client, throughout the semester. Teams are expected to submit all deliverables according to client expectations and make a presentation to the client **NO LATER THAN APRIL 26.**

Expectations

All SMF students are expected to conduct themselves in a professional manner throughout the duration of the project. Each team has a designated leader. Team leaders are expected to act as liaisons between the team, the client, and the instructors of the workshop, Professors Pinteris and Fuller.

Team members are expected to:

- Produce a project management plan with specific milestones after having a first meeting with their client and present it to their client and instructor supervisor for approval.
- Coordinate their schedules to arrange for meetings with the client and for spending time at the client's location to work on the project (if needed).

- Meet every two to three weeks with the course instructor supervising their project to review progress in reaching the plan's milestones.
- Manage the project in such way that they reach the project's milestones.
- Resolve any problems that arise as soon as possible by reaching out to their client and/or their instructor supervisor.
- Ensure that all team members accomplish their assigned tasks in a timely manner according to the project management plan's milestones.
- Address issues of any team member's lack of performance by reaching out to their faculty supervisor as soon as a pattern emerges.
- Submit all project deliverables and make a presentation to the client by APRIL 27.

Grading Procedures

Course grades will be assigned based on the following criteria:

- Quality of final deliverables according to client expectations as described in the project management plan.
- Quality of final presentation to the client.
- Progress with reaching milestones as outlined in the project management plan.

The above criteria will weigh heavily in the determination of the final grade. However, additional criteria will also play a crucial role in the evaluation of each team and individual team members in particular, such as:

- Professional conduct by all team members.
- Client evaluation of team's performance.
- Teammate evaluation of each member's performance.

All teams must strive to meet the above stated expectations. Teams must place first and foremost the client's interests to ensure satisfaction with the management of the relationship with their client and the quality and timely submission of the project's deliverables. All SMF students represent the Fisher College of Business and the SMF program as they work with their clients.

Teamwork

This is a team effort so each team member should place the client's interests, and thus the team's performance, above their personal motives. To ensure team success the following suggestions should be followed:

- Communicate effectively, meaning in a timely and professional manner, with each other, your client, and your instructor supervisor.
- Maintain a record (meaning e-mails) of all communications between your teammates, the client, and your instructor supervisor.
- Team leaders should be the main contact point between the team, client and instructor supervisor.
- Team leaders must ensure that all team members are copied in all forms of communication.
- Team members commit to their client and thus the success of the team.
- The team plans ahead, leaving time for contingencies.

- Team members, and primarily the team leader, ensure that tasks have been allocated fairly among the team's members and that project milestones are reached. They also reach out to the client and/or instructor supervisor to ensure that difficulties with managing the project are addressed in an expedited manner.
- Team leaders as well as individual members should discuss concerns about underperformance or lack of collaboration among teammates with their instructor supervisor at the first sign that such problems cannot be adequately resolved within the team.
- Team members show up for meetings, have completed their assigned tasks according to the project management plan, and are prepared to contribute.

Failure to adhere to the above expectations could result in a lower course grade, including failing the course.

Meeting Schedule

Teams will be assigned an advisor/supervisor. Professors Fuller and Pinteris will each supervise approximately half of the teams. Teams will make arrangements with their supervisor to hold regular meetings, most likely every two to three weeks. During these meetings, teams will report on their progress. Supervisors will ensure that teams are on track according to their project management plan. The schedule of meetings will most likely coincide with the timeline of milestones on the team's project management plan. Each team leader is expected to make arrangements with the team's supervisor to determine the meeting schedule and location.

In some projects, a third faculty member can act as a faculty advisor. The faculty advisor contributes their expertise in a subject matter to assist with the technical aspect of a project. Depending on the nature of a project, a team may have more or less frequent contact with a faculty advisor.

Please note that faculty advisors are meant to supplement NOT substitute the role of the faculty supervisor. Therefore, it is crucial that teams that work with a faculty advisor to address technical aspects of their project ALSO report to their faculty supervisor on a regular basis according to the project's milestones.

Academic Integrity

From the Fisher College statement on your obligation to maintain academic integrity:

"As a member of the Fisher College of Business community, I am personally committed to the highest standards of ethical behavior. Honesty and integrity are the foundation from which I will measure my actions. I will hold myself accountable to adhere to these standards. As a leader in the community and business environment, I will pledge to live by these principles and celebrate those who share these beliefs."

Students are responsible for knowing and abiding by these standards.