




Business Administration

Course Number:	BUAD 306
Course Title:	MANAGING PROFESSIONAL SERVICE FIRMS
Credits:	3
Calendar Description:	This course explores the challenges of leading professional service firms by exploring the unique characteristics of professional service firms and their implications for strategy, leadership, management, governance and organization. The course will also introduce frameworks and methods for analyzing professional service firms as well as provide an overview of the skills required to succeed in such firms.
Semester and Year:	WINTER 2024
Prerequisite(s):	Minimum third-year standing
Corequisite(s):	BUAD 340
Prerequisite to:	No
Final Exam:	Yes
Hours per week:	3
Graduation Requirement:	Elective for BBA degree
Substitutable Courses:	No
Transfer Credit:	
Special Notes:	
Originally Developed:	September 2007
EDCO Approval:	September 2010
Chair's Approval:	

Professor

Name	Phone number	Office	Email
Todd Gillick <i>Course Captain</i>	Prefer Email	K:C127	tgillick@okanagan.bc.ca

Learning Outcomes

<p>Upon completion of this course students will be able to:</p> <ul style="list-style-type: none"> • identify and explain the unique characteristics of professional service firms (PSF’s) that differentiate them from other firms. • demonstrate and apply the skills required required to be part of a successful PSF. • formulate the implications for strategy development and implementation, ownership, governance, organization, people development, leadership, and management within a PSF. • analyze the critical management issues faced by PSF’s. • construct and present a personal career plan to become a professional.

Course Objectives

<p>This course will cover the following content: See course schedule below.</p>

Evaluation Procedure

Team Case Study Lockdown & Presentation	10%
Team Mini Case Presentations	10%
Team Interview Exercise	10%
Career Plan Part I – Industry, Key Trends, Jobs, KPR’s, and Skill Set	15%
Career Plan Part II - Vision, Strategy, 13 C Model Application	15%
Career Plan Part III - Resume, Cover letter; Approach to Seek interviews	15%
Career Plan Part IV - Career Plan Presentation	10%
Individual Course Learning Interview via Zoom	15%
Total	100%

<p>Team Formation: You will form pseudo management consulting teams in the first week of class. Teams will be generally 2-3 people with one person acting as the Managing Partner and the others as partners. The Managing Partner for each team will determine how the team wishes to carry out the work assignments and each team will create a Team Charter at the start of the course which shall be used to conduct peer evaluations at the end of the course.</p>

Team Case Lockdown and Presentation (10 marks)

At the start of the course, students will be assigned a real case in class time where you will have three hours to analyze and create a presentation for the case. In a subsequent class, each team shall present their case solutions. The case template shall be presented to students to learn in advance and to use the tools offered during the lockdown.

Team Mini Case Presentations (10 marks)

Each team will be given an original mini case written by your professor with the condition that the team will only be assigned the mini case with 24 hours' notice. The team will need to form their own lockdown and solve the case according to the format below. They will then present the case analysis in class to the professor and classmates. For each mini case, the job of each team is to:

- Determine the decision or problem statement.
- Conduct a proper situation analysis with the goal of determining the main strategic issues that must be addressed to answer the decision facing the PSF in each case. The external analysis may include identification of dominant economic characteristics; driving forces; key success factors; and competitive forces. The internal analysis may include identifying strengths and weaknesses and mapping them against opportunities and threats. You may also use relevant worksheets from BUAD 340 Strategic Management.
- Every analysis must draw implications from the external and internal analysis relating to the case decision statement. By conducting your analysis in this manner, you will logically identify causes of the problem facing the PSF and these implications will lead you to identify the main strategic issues in the case.
- Once the causal analysis is complete, identify the main strategic management issues that must be resolved to address the decision statement and rank these using the main factors relating to the decision statement. These could be a form of SMUG which is defined as:
 - Seriousness - The relative impact in terms of people and/or dollars.
 - Manageability - The relative ability to mitigate or reduce the risk.
 - Urgency - The measure of how imperative or critical it is to address the issue.
 - Growth - The rate at which the risk from the issue not being addressed will increase.
- Create a solution that addresses the strategic issues and resolves the problem statement.
- You will be marked on the quality of the presentation including presentation skills communication skills, and class engagement skills.

Team Interview Exercise (10 marks)

As part of the section of the course entitled People Development in Professional Service Firms, teams of students will prepare for and conduct a mock interview for a professional job. Teams will be divided into interviewers and interviewees. Grades will be awarded for the interview process on basis to be set by the professor.

Career Plan (Part I 15 marks; Part II 15 marks; Part III 15 marks; Part IV 10 marks)

Students will prepare their own career plan comprising four sections and a final presentation and report.

Individual Course Learning Interview via Zoom (15 marks)

Students will create their own learning journals and will be interviewed at the end of term.

Student Commitment

Students must complete all course requirements. Regular class attendance is required. Written and oral communication is an integral part of this course.

Required Texts/Resources

There is no textbook for this course. Your instructor has prepared a series of proprietary power points which shall serve as the basis for each week's lecture and serve as learning tools for the course.

Date		Topic
2024 Week Starting Monday:		Monday, January 8th - Classes Start Monday, February 19th - Statutory Holiday (no classes) Tuesday, February 20st – Friday February 23th mid-semester study break Friday, March 29th – Monday, April 1st – Statutory Holidays (no classes) Friday, April 12 th , Last day of classes
Jan	8	Class Introductions and Teams Chosen/ Course Review Introduction, Characteristics of Professional Service Firms The Five “I” Model for a PSF; Personal Career Plan Ice Breaker <i>Professional Service Firm case hand out</i>
Jan	15	Business Strategy in PSFs Case Analysis Methods Review of Approach for PSF’s – Review of Business case solutions template. <i>Case breakout session</i>
Jan	22	The Professional as Manager <i>Case lockdown in class</i>
Jan	29	Critical Thinking & Decision Making Performance Measures in PSF’s <i>Case lockdown presentations</i>
Feb	5	Critical Thinking & Decision Making Economics of Professional Service Firms <i>Mini Case presentations</i>
Feb	12	Aligning Strategy and Organization in Professional Service Firms <i>Career Plan Part I due</i>
Feb	19	Mid-semester break – no classes
Feb	26	Dimensions of Client Service <i>The Art of a Conversation with a Professional</i> <i>Career Plan Part II due</i>
Mar	4	Leading Professional Service Firms <i>Guest Speaker on PSF Leadership</i>
Mar	11	Knowledge Management in Professional Service Firms <i>Career Plan Part III due</i> <i>People Development Challenge Handed Out</i>
Mar	18	People Development in Professional Service Firms <i>Applied Exercise in Recruitment and Interviews</i>
Mar	25	Personal Branding of a Young Professional Guest Panel
Apr	1	Importance of Culture in Professional Service Firms
Apr	8	<i>Career Plan Part IV Presentations and Final Plan due</i>
Apr	16 -25	<i>Final Exam Period</i>

SKILLS ACROSS THE BUSINESS CURRICULUM

The Okanagan School of Business promotes core skills across the curriculum. These skills include reading, written and oral communications, computers, small business, and academic standards of ethics, honesty and integrity.

STUDENT CONDUCT AND ACADEMIC HONESTY

What is the Disruption of Instructional Activities?

At Okanagan College (OC), disruption of instructional activities includes student “conduct which interferes with examinations, lectures, seminars, tutorials, group meetings, other related activities, and with students using the study facilities of OC”, as well as conduct that leads to property damage, assault, discrimination, harassment and fraud. Penalties for disruption of instructional activities include a range of sanctions from a warning and/or a failing grade on an assignment, examination or course to suspension from OC.

What is Cheating?

“Cheating includes but is not limited to dishonest or attempted dishonest conduct during tests or examinations in which the use is made of books, notes, diagrams or other aids excluding those authorized by the examiner. It includes communicating with others for the purpose of obtaining information, copying from the work of others and purposely exposing or conveying information to other students who are taking the test or examination.”

Students must submit independently written work. Students may not write joint or collaborative assignments with other students unless the instructor approves it in advance as a group/team project. Students who share their work with other students are equally involved in cheating.

What is Plagiarism?

Plagiarism is defined as “the presentation of another person’s work or ideas without proper or complete acknowledgement.” It is the serious academic offence of reproducing someone else’s work, including words, ideas and media, without permission for course credit towards a certificate, diploma, degree and/or professional designation. The defining characteristic is that the work is not yours.

“Intentional plagiarism is the deliberate presentation of another’s work or ideas as one’s own.” Intentional plagiarism can be a copy of material from a journal article, a book chapter, data from the Internet, another student, work submitted for credit in another course or from other sources.

“Unintentional plagiarism is the inadvertent presentation of another’s work or ideas without proper acknowledgement because of poor or inadequate practices. Unintentional plagiarism is a failure of scholarship; intentional plagiarism is an act of deceit.”

What are the Students’ Responsibilities to Avoid Plagiarism?

Students have a responsibility to read the OC Plagiarism Policy and Procedures outlined in the OC calendar, which is available in online format www.okanagan.bc.ca. Students must acknowledge the sources of information used on all their assignments. This usually involves putting the authors’ name and the year of publication in parentheses after the sentence in which you used the material, then at the end of your paper, writing out the complete references in a Reference section.

“Students are responsible for learning and applying the proper scholarly practices for acknowledging the work and ideas of others. Students who are unsure of what constitutes plagiarism should refer to the UBC publication “*Plagiarism Avoided; Taking Responsibility for your Work*”. This guide is available in OC bookstores and libraries.

Students are expected to understand research and writing techniques and documentation styles. The Okanagan School of Business requires the use of the APA or MLA style, but suggests that students cite references using the APA guidelines (see Publication Manual of the American Psychological Association, 7th edition (2019)). A copy of the APA manual is available in the reference section and also available for circulation from OC libraries. The library website has access to these two major citing styles.

What are the Penalties for Plagiarism and Cheating?

The Okanagan School of Business does not tolerate plagiarism or cheating. All professors actively check for plagiarism and cheating and the Okanagan School of Business subscribes to an electronic plagiarism detection service. All incidents of plagiarism or cheating are reported and result in a formal letter of reprimand outlining the nature of the infraction, the evidence and the penalty. The Dean of the Okanagan School of Business and the Registrar record and monitor all instances of plagiarism and cheating. Penalties for plagiarism and cheating reflect the seriousness and circumstances of the offence and the range of penalties includes suspension from OC.