A RECIPE FOR SUCCESS: HOW CROSS-FUNCTIONAL PROJECTS MOTIVATE MBA STUDENTS, BRING THE UNIVERSITY AND LOCAL COMMUNITY CLOSER, AND KEEP THE AACSB HAPPY

Tanja Steigner, Emporia State University
Kevin R. Coulson, Emporia State University
Bhanu Balasubramnian, Emporia State University

ABSTRACT

In recent years business programs have been using cross-functional projects to teach a multi-disciplinary curriculum. The authors provide a unique approach to implementing cross-functional projects that overcome current shortcomings. Specifically, students are required to integrate their knowledge across disciplines, provide solutions based on client needs, work effectively with teammates to accomplish set goals, build trust-based business relationships with the business community, and strengthen ethical behavior. Adaptable instructional methods that benefit students, faculty, the institution, the client, and exceed AACSB requirements are provided.

ISSUES IN THE MULTI-DISCIPLINARY BUSINESS CURRICULUM

In today’s increasingly competitive business environment, business programs must meet student and industry demand for holistic skill sets. State-of-the-art business programs must overcome the tendency of teaching disciplines in silos (McNeilly and Barr 2001). The additional challenge is to teach a multi-disciplinary curriculum to students with a diverse background, where many students have no prior business experience or business education at the undergraduate level. Porter and McKibbin (1988) argue that “what universities do with- and to-students is in large measure a function of the curriculum.”

Navarro (2008) highlights six elements that should be the focus in an ideal MBA core curriculum. Chief among them is multi-disciplinary integration of the functional silos, followed by experiential learning, soft-skill learning, global perspective and information technology, as well as a background in ethics and corporate social responsibility. It becomes paramount for MBA programs to help students embrace the idea of multi-disciplinary integration because lack of a broader understanding of business impedes students’ success post-graduation. Graduates who understand how their field of specialization interfaces with other functional areas make better managers and business leaders. Arain and Tipu (2007) and Navarro (2008) criticize the use of traditional curriculum based on functional silos, including those of several top-ranked MBA programs.

This paper describes a unique cross functional approach, using experiential learning from a “real-world” consulting project. This approach not only facilitates a multi-disciplinary curriculum but also promotes soft-skill development such as communication, leadership, negotiation, and team building. Besides using technology for information gathering and data analysis, this approach makes students aware of the ethical and legal responsibilities. Any business program can implement this course design.

The cross functional approach also enhances the multi-disciplinary expertise of faculty involved in overseeing integrated projects, as their skill set naturally remains up-to-date due to their interaction with real-world businesses. Faculty members become much more effective instructors when they “have extensive knowledge about re engineered organizations” (Walker and Black 2000).

TRADITIONAL CROSS-FUNCTIONAL PROJECTS IN AN MBA CURRICULUM – SHORTCOMINGS

In the past, cross-functional projects have been employed to prepare MBA students to become an integral part of local, national, and international business development while perfecting their leadership skills and entrepreneurial expertise (Ammons and Mills 2005; Crittenden and Wilson 2006; McNeilly and Barr 2001; Walker and Black 2000). As Bovinet (2000) points out, students...
might initially not possess the ability to connect theoretical knowledge to real-world situations. While the traditional, oftentimes case-based (Evans 2008; Weinstein and Barrett 2007), cross-functional projects increase multidisciplinary integration, it is inadequate in providing true experiential learning and limits soft-skills development.

**CROSS-FUNCTIONAL CONSULTING PROJECTS IN AN MBA CURRICULUM – A SOLUTION**

The proposed cross-functional project goes beyond typical core courses of MBA programs and cross-disciplinary capstone courses that include paper-based case studies and analyses for companies where information is publicly available (Evans 2008; Weinstein and Barrett 2007). Although case studies on publicly traded companies provide important evaluation opportunities for students, the direct personal contact with a real company’s leadership and the students’ felt responsibility toward the client are missing. Finney and Pyke (2008) show that student interest in case studies increases if students are familiar with the business. To nurture the students’ interest, the cross-functional project accommodates a client-consultant relationship between MBA students and the leadership of a regional business.

The authors expand the traditional cross-functional approach to a student consulting project for a real life company (Ammons and Mills 2005; Crittenden and Wilson 2006) and experiential learning (Razzouk, Seitz, and Rizhallah 2003). By drawing students, faculty, and regional employers together to solve real business problems, student skill sets are improved, faculty skill sets are polished, and employers are more likely to hire graduates of the MBA program. The authors implement additional innovations in the cross-functional approach.

Careful integration of materials taught in functional silos, e.g., finance and marketing, utilizing a team-based consulting project for an outside client can address each issue by “engage(ing)…students in meaningful learning activity” (Tomkovick 2004). The possible exception would be the global aspect, which can be more challenging to address completely in some instances. However, given the increasing number of international students, a level of cultural interaction will occur if teams are selected for this. Additionally, the true experiential learning and soft-skills improvement provided are readily adaptable to the global environment.

**BENEFITS OF THE CROSS-FUNCTIONAL CONSULTING PROJECT**

The cross-functional consulting project has wide-ranging benefits for students, the institution, faculty, and the community.

**For the Students**

Students are demonstrably more enthusiastically involved in this project format and exhibit greater initiative for self-directed learning. This is because they consult for a real-world business and face real consequences and rewards. Among these consequences are the potential for bad grades (pay-for-performance) and because the individuals are (can be) ranked, the loss of stature afforded to the poorer players. Invariably, the teams work harder and achieve rewards instead of negative consequences.

The mastering of fast-changing group dynamics and the satisfaction of gaining new insight into the business world are key benefits that enhance the students’ learning experience and outcome. The more deeply involved students are more confident in presenting their findings and are more successful in convincing the client, faculty, and any outside jurors who assess students. The ill-prepared peers become aware of the consequences of lack of involvement and often alter their approach in future classes.

The interaction between text-based knowledge and the clients’ personally held beliefs and practices (true or not), forces a more rapid, more complete, and more beneficial change in student learning. This improved interpersonal behavior is validated in the transition to business upon graduation. Students also learn to develop a trust-based business relationship with the client in part by appropriately handling their confidential information and in part by learning to address sensitive issues with the client in a non-aggressive, sensitive manner.

In reality, an MBA program is often the first instance where students really have to deal with people who are as bright (or brighter) than they are. Some find that they were not as prepared (or as bright) as they believed. The cross-functional project provides students with ample opportunities to polish their leadership skills, entrepreneurial skills, team negotiation tactics, and cross-gender/cross-cultural tolerance levels. Students aspire to produce the best consulting results. Therefore, teams develop successful working relationships. In the process, students establish pecking orders and learn to work with national and international teammates by rising above the cultural, gender and language barriers. To actively promote awareness and acceptance of team members with different backgrounds, faculty construct each team with both genders, as well as a balance of ethnic and cultural backgrounds and to the degree possible, include diverse work experience. Because of project complexity, individual team members take leadership of various focal points in the project.

Students obtain access to and work closely with the School’s Small Business Development Center, local banks, and other professional institutions, depending on the specifics of the project. These interactions, along with the
client business and with the jury panel, provide priceless networking opportunities for students. The cross-functional project allows students to impress potential future employers, to prepare items for their portfolio, and to secure invaluable career advice and job recommendations.

For the Institution

The depth and breadth of the cross-functional project allows the institution to incorporate previously identified assessment goals into the syllabi of the participating courses. The written report, oral presentation, and team experience offer multiple avenues to directly assess these program goals such as expanding comprehensive understanding of business, applying critical thinking skills and social responsibility, excelling in a team environment, using technology, and depending upon the nature of client’s business, acting on global issues.

For the Faculty

The regular interaction between institution and client keeps faculty up to date on the most current business developments and local needs. This also serves, through client word-of-mouth, to generate continuing desire within the community for this service from the institution. The ongoing community service improves an already favorable public opinion and increases positive relations with the community. In those instances where the confidentiality of the client would not be violated, there is opportunity for increased publicity for the MBA program and its benefits to the state. Because the institution’s graduates exit well-prepared for the business world and receive attractive placement offers, this reflects positively on the institution’s reputation.

For the Community

The cross-functional project offers, particularly in a small-to-medium sized town, professional consulting service free of charge to small businesses as well as to nationally and internationally oriented local and regional companies. This service, which is often too expensive for smaller businesses to afford, can increase the success of users thus increasing local tax revenues and providing new jobs. Further, the client can pick and choose among individual components of several alternative business plans from the competing teams rather than having the often canned opinion of a single consulting firm. Since businesses interact with a group of students for an entire semester, they can pick from the cream of the crop and thereby obtain early access to graduating students before the students officially enter the job market.

CROSS-FUNCTIONAL EXPERIENTIAL CONSULTING: PROCESS OVERVIEW

Project Identification

Faculty who are assigned to a cross-functional project must meet prior to the start of the semester and plan the details so as to provide a relatively seamless process for the class. Often the program’s reputation for results provides one or more ready clients from which to select a consulting project. When clients are not readily available, faculty use their network of business connections to seek a viable project for the semester.

Team Formation

Oftentimes students are allowed to choose their teammates themselves (Marshall, Bolton, and Solomon 2000). This process of team formation is convenient for the students, but it is far removed from real-world business settings where employees cannot simply pick and choose the colleagues they want to work with. To maximize the benefits from the team experience, faculty must exercise great care in the formation of student consulting teams. Teams are balanced for ethnicity, gender, undergraduate background, and work experience. It is extremely worthwhile to match American women with men from those international cultures which have strong viewpoints on gender issues. Of greater difficulty is dealing with team membership for women from cultures which have less aggressive lifestyles. To the extent possible, no team should have more than two members from any particular culture.

Initial Client Meeting

The owners/managers of the business share their general business concerns, needs, and prospects with the combined classes in a joint session at the beginning of the semester. Student teams must then visit the business site and meet with management and establish a working relationship with the client. Throughout the course of the project teams also meet with local bankers, representatives of the Small Business Development Center, current and potential customers and suppliers, and regional development officials, all the while maintaining discrete control of confidential information.

Problem Assessment

After the initial client meeting, student teams begin their independent analyses and assessments of the company’s needs. While researching the economy, industry, and business, teams conduct in-depth analyses using tech-
niques learned in class and in other aspects of the program or from their own experience(s). They apply critical thinking to formulate alternative strategies and develop arguments within teams to produce the most desirable solution. Teams receive confidential feedback from the faculty in an on-going basis during this phase.

Project Deliverables

The final product of the cross-functional project is a written business plan for the client business, with specific questions focusing on the client’s need and the expertise of the supervising faculty discipline. The progress of each team’s business plan is monitored by the involved faculty throughout the semester. Faculty assign a series of due dates for the project, staggering key components particular to each class so that they do not fall on the same date. Shared components are due for both classes on the same dates. Assignments are spread across the entire semester to ensure an even work pace. Table 1 shows a sample schedule of deliverables and Table 2 offers writing guidelines for the client report to the students.

<table>
<thead>
<tr>
<th>TABLE 1</th>
<th>SAMPLE SCHEDULE OF DELIVERABLES</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Marketing Deliverables</strong></td>
<td></td>
</tr>
<tr>
<td>♦ Situation Analysis – visit the business, examine operations for current factors which contribute to and/or reduce success. Due: Week 4</td>
<td></td>
</tr>
<tr>
<td>♦ SWOT Analysis – pay attention to the differences between factors which are firm specific vs. those which affect the industry. Due: Week 6</td>
<td></td>
</tr>
<tr>
<td>♦ Suggested alterations in Marketing/Promotional mix – what will the new potential owner need to do to make this a going concern? Due: Week 7</td>
<td></td>
</tr>
<tr>
<td>♦ Sales Forecast – provide sales estimates for the firm with and without suggested marketing changes (3 years, by month). Due: Week 8</td>
<td></td>
</tr>
<tr>
<td>♦ Bibliography – cite all sources, including conversations. Due with the written report</td>
<td></td>
</tr>
<tr>
<td><strong>Finance Deliverables</strong></td>
<td></td>
</tr>
<tr>
<td>♦ Profit &amp; Loss Statement (Income Statement) – establish monthly projections for first 36 months of operations. Due: Week 10</td>
<td></td>
</tr>
<tr>
<td>♦ Cash Flow Statement – develop monthly projections for first 36 months of operations. Due: Week 12</td>
<td></td>
</tr>
<tr>
<td>♦ Balance Sheet – annually; begin at the starting date of the business and update on an annual basis. Due: Week 12</td>
<td></td>
</tr>
<tr>
<td>♦ Three sets of financial projections: pessimistic, expected, and optimistic. Sales forecasts have to be substantiated. Due: Week 12</td>
<td></td>
</tr>
<tr>
<td>♦ Business valuation – what is the appropriate purchase price for the business? Due: Week 13</td>
<td></td>
</tr>
</tbody>
</table>

Note: The focus of the students’ attention can be adjusted for any functional area and business need. A business plan however is the core deliverable. This sample schedule of deliverables shows sequential due dates for the individual deliverables. It is important to point out, though, that this is a dynamic process. Students must input their marketing results into the financial analysis, and then re-evaluate and possibly adjust the marketing plan based on the financial results.
TABLE 2
SAMPLE WRITING GUIDELINES

1. There is no page limit. Your topic should be selected so as to be easily and completely addressable. What is the topic, why is it important to marketing (and to you), what is the current state of affairs, what are the major problems, how will the topic evolve, what are some of the solutions to the problems, how can marketers make use of this information, what future research is needed?

2. Format: (20 pts)
   a. Cover page with paper title, your name, the school, class, instructor, date (2)
   b. Table of contents (2)
   c. Executive summary (5)
   d. Text of the paper
      i. Headings (2) (If you are submitting a marketing plan, you should use the appropriate marketing plan headings and subheads!)
      ii. Subheads as appropriate (2)
      iii. Citations as per American Marketing Association (AMA) (2)
   e. Tables and appendices
   f. References (use AMA format) (3)
   g. Index of major topics/key words/important elements of the paper (2)

3. Spelling and Grammar (5 pts)

4. Sources
   a. Internet (ALL below, cited properly)
      i. Wikipedia is NOT to be used
      ii. Wikipedia should not be cited
   b. Major Journals
   c. Trade magazines
   d. Personal experience (Do not use just the internet, do not rely upon less than 6 sources [more is better])

5. Content (75 pts)

6. Caveats:
   a. Deadlines are crucial . . . SEE THE CALENDAR FOR THE CLASS!
   b. Plagiarism will result in an F for the course and appropriate academic sanctions
      i. Cite properly
      ii. Rephrase rather than quote and then cite the source
      iii. Avoid long quotations (cite any quotations you do use)
      iv. If you lift something and don’t cite it that is plagiarism
      v. If you have ANY questions as to what plagiarism is, clear them up before you e-mail your paper to me. When it hits my e-mail you’ve claimed each and every word that is not cited as your own and you’ve cited every idea that isn’t yours. If it’s not cited and it’s not yours . . .

Approximately one week after delivery of the written business plan to the client and the faculty members, each team presents their recommendations to a panel consisting of the faculty, the client, and other, outside, business professionals. While one team presents, the other teams wait in a separate area. Physical separation simulates the real-world environment, where one consultant does not know what strategies their competitor(s) are advising. In addition, physical separation during the presentations avoids the unfair advantage of learning from the mistakes of earlier presentations.

Each team’s presentation is video-recorded. Video-recording of each presentation is later reviewed in a joint session with all students. In the joint session, each team receives diagnostic feedback from anyone who has comments. The ensuing discussion allows students to expand their strengths and overcome any weaknesses. It does so by allowing the individuals to “protest their innocence” or
explain their thought processes in a less defensive manner. Faculty and often student observers can then clarify why a particular strategy was or was not suited to the situation. Learning takes place! The written business plan becomes a vital artifact in the student’s portfolio. The real-life professional business experience, and a relatively pain free feedback, significantly improves the student’s marketability.

**Grade Assignment**

Grades for the project should have significant weight for each of the functional areas (e.g., Finance and Marketing) so that students give due diligence to both courses. While the weight assignment for the project grade can be modified to best meet a paired faculty’s needs, typically 20 percent of total point value in each class achieves high quality student output. Both faculty members grade the business plan according to their individual rubric. They also view the presentation with the client and jury. Table 3 provides a sample evaluation rubric to evaluate the oral presentation. Faculty may choose to average the points they assign, or to also include the evaluation by client and jurors into the grade computation.

**LEGAL DOCUMENTS**

To increase the students’ awareness for legal and fiduciary responsibilities, legal documents should be signed between the students, the client, and the University. Binding documents convey professionalism to the MBA students and the client(s), and also protect the University from potential harm. Specifically, it is recommended that all participating students sign a confidentiality agreement, which should be copied and provided to the client. A sample confidentiality agreement is presented in Table 4. The confidentiality agreement helps the client to overcome any hesitation of sharing sensitive information with

<table>
<thead>
<tr>
<th>TABLE 3</th>
<th>SAMPLE ORAL PRESENTATION EVALUATION RUBRIC</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rating Categories</td>
<td>4</td>
</tr>
<tr>
<td>1</td>
<td>Appearance of the presenters: Business Dress?</td>
</tr>
<tr>
<td>2</td>
<td>Quality of the oral presentation. Were points made clearly, concisely and in a timely fashion?</td>
</tr>
<tr>
<td>3</td>
<td>Quality of the visual aids used. Were they clear and easy to understand? (0 aids, 0 pts)</td>
</tr>
<tr>
<td>4</td>
<td>How interesting was the Presentation?</td>
</tr>
<tr>
<td>5</td>
<td>Marketing Strategies &amp; Tactics: Were they viable given firm capabilities?</td>
</tr>
<tr>
<td>6</td>
<td>Marketing Implementation: Likelihood the client can enact these tactical changes?</td>
</tr>
<tr>
<td>7</td>
<td>Quality of the financial analysis. Were financial strengths and weaknesses pointed out and appropriate recommendations offered to improve weaknesses?</td>
</tr>
<tr>
<td>8</td>
<td>Quality of the “bottom line” presentation. Is the project feasible, and why is that so?</td>
</tr>
<tr>
<td>9</td>
<td>Quality of the support for the recommendations to the Client?</td>
</tr>
<tr>
<td>10</td>
<td>Overall value to the firm’s future? How thoroughly do you think this project was researched and prepared?</td>
</tr>
</tbody>
</table>

4 = Poor
10 = Excellent
TABLE 4
SAMPLE CONFIDENTIALITY AGREEMENT

I, _______________________________________, the undersigned student currently enrolled in Course ___ and Course ___, MBA Program, School of Business, ___ (Name of University), hereby acknowledge, understand, and agree:

1. That, as a part of my participation in a Cross-Functional Project that is a part of my course curriculum, I will or may have access to information that is privileged and confidential. I will only use this information as necessary to fulfill the necessary requirements of my course work.

2. That if I use or disclose this information in any unauthorized manner, regardless of the nature of the unauthorized use or disclosure, I must immediately report any such unauthorized use or disclosure to the MBA Program, School of Business, ___ (Name of University). Further, I will comply fully with any and all instructions I receive from the MBA Program on how to handle any such unauthorized use or disclosure.

3. That I must comply fully with this statement as part of my course requirements and that any failure on my part to so comply may result in disciplinary action being taken against me.

4. That I understand my legal obligation to preserve the confidentiality of all privileged and confidential information will continue even after my education at ___ (Name of University) ends, regardless of the circumstances under which my education may end (i.e., graduation; my voluntary withdrawal without graduation; my involuntary removal; or, any other termination of education).

Student __________________________ Date ____________

a group of students. At the same time, students feel more responsibility and respect toward the business and their hands-on project.

A waiver of claims, indemnification and release of liability, which is provided in Table 5, protects the University from potential lawsuits. Similar to indemnity agreements between clients and professional consultants, waivers should be signed by the client business to fully release and forever waive any and all claims against the University. Great pains should be taken to advise the client that she/he is working with student consultants who have amateur status.

If desired, participating faculty can also require students to sign statements of ethical conduct. This statement reminds the students to act in an ethical manner in class and in connection with the class. Students should have a complete understanding of the consequences of unethical conduct (e.g., withdrawal from class, grade impact, etc.).

The signed originals of all documents must be maintained with the faculty copies of the deliverables. This serves to provide on-going protection and can be used for reference when engaging new faculty in a project.

UNIQUENESS OF THE EXPERIENTIAL CONSULTING PROJECT

The cross-functional, experiential project stands out for its unique ability to combine high quality business education, hands-on entrepreneurial experience, leadership and networking opportunities, as well as service to the community into the umbrella of the MBA curriculum. Students have the unique opportunity for experiential learning and to integrate textbook knowledge across disciplines in real-world application with lasting benefits to the community. Using this approach, students far surpass the commonly tested lower level cognitive domains of Bloom’s taxonomy such as comprehension and analysis and become equipped to succeed at the synthesis and evaluation level (Bloom 1956). Students now have the ability to transcend functional silos, a skill highly demanded by today’s employers. This value creation is “the raison d’être for business” (Weinstein and Barrett 2007) and business schools.

MBA students learn to be self-driven and motivated to obtain information even if it has not yet been taught in a classroom setting. Rather than waiting until the end of their graduate education before starting to work hands-on with businesses (Marshall, Bolton, and Solomon 2000), MBA students start this process early on. MBA students experience the cross-functional project as part of their regular course work without signing up for additional six required credit hours of application classes (Marshall, Bolton, and Solomon 2000). This allows universities with limited resources to offer an integrated course in a one-year general management MBA program. The one semester approach also provides more flexibility. In the event
TABLE 5
SAMPLE WAIVER OF CLAIMS, INDEMNIFICATION, AND RELEASE OF LIABILITY

This Agreement is entered into this ____ day of _______________, 20___ by and between The MBA Program, School of Business, ___ (Name of University), including faculty teaching in this program and students enrolled in this program; and the undersigned and identified individual, business or other organization participating in the Cross-Functional Project with ___ (Name of University). The Cross-Functional Project referred to herein is a project in the MBA Program courses: ___ and ___ in the School of Business, ___ (Name of University).

IN CONSIDERATION of their mutual agreements and obligations, set out below, and in further consideration of each parties participation with the other in the Cross-Functional Project, the Firm and ___ (Name of University) hereby agree to the following as their agreement:

The Firm and ___ (Name of University) will work together as necessary to result in the Cross Functional Project being a meaningful part of the courses identified above. Further, the Firm specifically acknowledges that all information, opinions, advice, recommendations and other communications and content it receives from ___ (Name of University) and students in said courses are the product of student efforts, and that the Firm shall have and shall exercise sole and full discretion in any decision to use all or any portion or none of the information, opinions, advice, recommendations and other communications and content it receives, at its own risk. There is no condition of this agreement that requires or suggests that the Firm must actually use any such information for any purpose.

To the extent permitted by law, the Firm does hereby fully release and forever waive any and all claims against ___ (Name of University), collectively and separately, for any loss or damage of any type or description that the Firm may suffer or incur as a result of its participation in the Cross-Functional Project.

Further, the Firm agrees to indemnify and hold harmless ___ (Name of University), collectively and separately, from any and all liens, claims, demands, costs, expenses, attorneys fees, court costs, losses, and/or damages at law and in equity, of every kind and nature without limitation, that arise or inure to it as a result of its participation in the Cross-Functional Project.

__________________________________________________ _____________________
For (Name of the Client) Date

__________________________________________________ _____________________
For (Name of University) Date

that a student is not able to participate, they can continue with the program at another semester and restart in a new project with minimal difficulties.

Additional differences between a programmed approach at large and resource intense AACSB programs (Marshall et al. 2000) and a more flexible approach at smaller and more resource pinched AACSB programs exist. This approach allows a real-world competitive approach wherein each team goes head-to-head with the other teams. One further difference from the Marshall et al. (2000) approach exists with respect to required student counseling by faculty. Faculty members should normally be available to the students on an as-needed-basis. While it is up to the individual teams to seek faculty advice (both within the college and across the community), this is in keeping with most corporate manager/team practices within industry. Managers and faculty examine teams’ periodic reports and intervene only if necessary. Faculty require each team member to self-rate and to rate his/her individual team members’ abilities/contributions, thereby providing grade adjustments for underperforming students. Table 6 provides a sample peer evaluation rubric.

AACSB OBJECTIVES AND LEARNING ASSESSMENT

It is also worth noting that the cross-functional project offers multiple opportunities to directly evaluate student learning, which is highly valued by the AACSB. Most learning goals of any business program can be evaluated with the cross-functional project. According to AACSB (Eligibility Procedures and Accreditation Standards for Business Accreditation 2010, p. 76), MBA students are expected to develop a:

1. Capacity to lead in organizational situations.
2. Capacity to apply knowledge in new and unfamiliar circumstances through a conceptual understanding of relevant disciplines.
3. Capacity to adapt and innovate to solve prob-
TABLE 6
SAMPLE TEAM EVALUATION FORM

STUDENT NAME______________________________

Managers have to learn how to effectively evaluate personnel including peers. A good place to start is to realistically evaluate your peers on team presentations.

Many times, less able team members will approach you and request or suggest that everyone should give equal evaluations to all team members. While this may appear on the surface to be equitable, it is not, and it violates the spirit of fair play. These members are using you as a dupe to do their work. At best, they are covering for a weak friend in a misguided attempt to bypass the competitive system.

To perform effective evaluation you must have a series of reasonable criteria that are under the control of those who are evaluated. These may include either or both objective (quantifiable) and subjective (feelings based or non-quantifiable) measures. You may treat the criteria that you choose to be equal in value or you may weight them according to your own method.

At a minimum, you must allocate 100 points among your team members, including yourself (You are #1). For example, if Jane organized the team, provided snacks, and attended all of the meetings with valuable contributions, she might earn more points than someone who just attended the meetings and had little to say. So in a 5 person group, one might consider her worth to the overall work-product to be worth 30 points (or more) while the other person might earn less than 20 pts.

Other criteria that you may wish to consider:

1. Quality of the ideas presented by each person in the group. Quantity alone is not sufficient.
2. Willingness to attend meetings at convenient times for others.
3. Willingness to take on less pleasant but still crucial tasks for the presentation (writing, presenting, prepare slides, etc.).
4. Ability to work constructively with other members, to reduce conflict.
5. Ability to effectively present and to answer questions from the floor.

You may wish to reduce the point value for those who:

a. Pressure others to adopt “standardized scores for everyone” (“Let’s all rate each of our 5 group members at 20 pts!”).

b. Fail to provide appropriate outputs that they’ve agreed to do in a timely fashion, if at all.
c. Refuse to take on any responsibility/refuse to perform work.
d. Skip meetings or refuse to agree to meet at all.
e. Hog the floor during presentations, use um, er, ahh, etc., dress poorly for the presentation.

Team Member........................................Pts. awarded.................Strengths/Weaknesses
TABLE 6 (CONTINUED)
SAMPLE TEAM EVALUATION FORM

(Out of 100)

1. __________________________________________________________________________
2. __________________________________________________________________________
3. __________________________________________________________________________
4. __________________________________________________________________________
5. __________________________________________________________________________
6. __________________________________________________________________________

Total Points Awarded ___________ (this must add up to 100 points!)

lems, to cope with unforeseen events, and to
manage in unpredictable environments.

4. Capacity to understand management issues from
a global perspective.

Written exams, team work projects, written business
reports, recommendations for a local business and the
impact on its community, and oral presentations are prime
opportunities to evaluate all stated program goals with one
cross-functional course setup. In short, Navarro’s (2008)
goals are well achieved by this pedagogical endeavor.

TRANSFERABILITY TO OTHER INSTITUTIONS

The cross-functional project can be transferred across
institutional boundaries. Schools which desire successful
implementation must be willing to catalog and consistently
offer paired classes so that students become aware of the
added value to the program and their career potential.
Faculty who enjoy the interaction with local businesses
and who are open to minor adjustment of their course
content to address the current demands of business in
today’s economy provide the most successful models for
students in the program. In this professional environment,
students eagerly distinguish themselves by stepping outside
the traditional classroom experience into the real world
and make a lasting impact on their local community.
General guidelines for presentation evaluation are included
in Table 3.

STUDENT FEEDBACK

Students who have previously participated in the
cross-functional project at the authors’ university have
provided positive feedback on the process. Sample com-
ments include:

“I was very motivated to provide a quality report
for our real life investors. A text book case would
have not provided me with the same motivation.”

“The greatest thing was the reality of the situa-
tion; the investors are going to rely on our report to
make a decision.”

“I really liked the fact that the project was deal-
with an actual business and clients.”

“Since we were presenting to our actual clients,
I think it made people work harder.”

“The videotaping was helpful because students
don’t often get to go back and see themselves present-
ing. We all noticed bad habits we may have during
presenting (i.e., posture, twitches, and fillers) and
learned what we each do well. I would try not to use
as many fillers in my next speech.”

“Real World Applications make the class!”

“I really learned a lot from the project.”

“Groups were difficult due to culture and lan-
guage differences. Feel like knowing English (sic)
put me at a disadvantage as far as workload. Possibly
my fault for allowing this to happen.” (From one of
the US students who struggled.)

CONCLUSION

Several MBA programs offer cross-functional
projects. However, the cross-functional project described
in this paper is unique in several ways. It brings together
faculty, students, regional businesses, and resources pro-
viders in a way that provides benefits to all. Local busi-
nesses that need professional consultations to improve, or
sometimes to survive, benefit the most. This preserves and improves the local economy and employment opportunities. The process creates a competitive environment for the student consulting teams because multiple teams consult for the same client confidentially. In turn, this motivates the teams to develop the most beneficial solutions for the clients’ business. Faculty and students can potentially involve financiers, such as local banks and the Small Business Development Center in the process by seeking information. Doing so will assist the client in obtaining financing more rapidly should (s)he reveal the project.

In addition to offering new business strategies, student teams help the client to identify new sources of suppliers and potential new customers. Students not only transcend the functional silos to offer business solutions to an existing business, but they also improve their enterprising skills and leadership skills because they offer holistic solutions to the client. The team composition enables students to overcome cultural and gender biases. The six criteria for successful MBA programs noted by Navarro (2008) are satisfied.

The subsequent screening of the video recording of the confidential presentation by individual teams to the whole class and the following discussions provide an excellent opportunity to learn from peers and competitors. Students learn firsthand about ethical behavior, trust-based business relationships, and how to handle the client’s confidential information. The authors believe that the cross-functional experiential consulting project goes beyond the requirements of AACSB standards to create a win-win situation for everyone involved including the community at large.

REFERENCES

AACSB, Eligibility Procedures and Accreditation Standards for Business Accreditation (2010).