



## Information Sheet 5: Running Field Based Learning Programs

### A. *Student Team Role*

First impressions can last an entire engagement, thus maintaining a high level of professionalism in appearance and communications is essential for the student team in all points of contact with the partnering company. This pertains to all forms of communication, whether it is face to face, telephone, email, or fax. Students must always be punctual and the level of commitment must be constant throughout the project from all students involved. Acting with professionalism provides many benefits for the working relationship between the student team and company. Professor Lassaga's comments "professionalism and expertise allowed us to build confidence; one of the first necessary results for advancing the conversations that led to a successful mentoring process."

Once the project is underway, it is valuable for the team to understand their role and focus on accomplishing the goals outlined in the Letter of Engagement. In order to provide added value to the company it is important for the student team to be flexible through the engagement. Change is inevitable in business, therefore the team must be flexible enough to adapt at any given time. The team must also be flexible in order to leverage the companies subject matter experts while at the same time bring a new perspective to the situation. This can be accomplished through approaching each task with an open mind, brainstorming, challenge assumptions and question whenever appropriate. Particularly in regard to sustainability, the student team must be careful not to overstep bounds but attempt to inject creativity and innovative ideas into the company.

In order to keep the project on task and maintain focus, it is useful for the team to break work assignments into manageable tasks in order to "divide and conquer" while still functioning as a team. There are many ways to break down a business need into tasks, one method is to look at the Situation > Problem > Major Issues > Sub-Issues > Necessary Analysis<sup>1</sup>. It will also be important for the team to understand their deliverables and stick to a plan that will produce high quality outputs. Placing deliverables early into the assignment can be beneficial to maintaining a high level of engagement in the early going. Student teams must also be realistic about timing and identify all potential conflicts within their student schedule. Time management and being realistic about the student team's bandwidth will be important to the success of the project. **Figure 1** is an example of a deliverables checklist that can help keep track of task status and completion.

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<sup>1</sup> Allen, Randy, The Consulting Process Class, The Johnson School at Cornell University, Spring 2004



**Figure 1: Deliverables Checklist**

DELIVERABLE	STATUS	COMPLETION DATE
1. Team Work Rules & Evaluation Criteria		
2. Letter of Engagement		
3. Scope Statement		
4. Work Plan/ Schedule		
5. Interim Presentation(s)		
6. Initial Final Written Report Outline		
7. Final Report Outline		
8. Final Presentation		
9. Final Written Report		

Throughout the field-based study engagement, it is essential to continually redefine the problem statement. Factors in business are constantly changing, therefore the student team must ensure their view of the projects purpose and goals are aligned with the companies understanding. This can be accomplished by using people within the company to gauge if recommendations and approach will meet the businesses approval. Through weekly or bi-weekly status checks in addition to an interim report, student teams will be able to validate that actual needs of the company are being met, not a view based around student interest. Maintaining regular and consistent contact also helps to track progress, understand any problems or opportunities, solicit on-going feedback, and maintain a high interest level and engagement with the company employees.

While redefining the problem is an on going process, there is a fine line between taking on a logical extension to the project and tackling completely different problems. If there is any question about additional work or redefinition, the project scope statement and Letter of Engagement should be referred to immediately. While it is tempting to take on more work than can be handled to impress company managers or executives, leaving a positive lasting mark creates the best legacy, thus ensure any additional work is within scope and will not result in any aspect of your delivery being sub-par. Quality is much more important than quantity with field-based learning programs.

**B. Faculty Role**

Faculty advisors are responsible for instilling a commitment to learning at the individual, team and partnership levels. Faculty advisors wear many hats throughout a field-based learning project such as chief communicator, resource, mentor, advisor, educator and damage controller.

The faculty advisor can provide resources to student teams by supplying useful resources at the outset of the project. A faculty advisor might supply articles, tools, templates, summaries and best practices in the areas of: sustainability, business planning, communications, marketing resources, scenario planning, strategic planning, and presentation giving. These types of resources can be provided in numerous ways. Team websites may be useful to facilitate communications and share project materials if the website is well-maintained, secure, and accessible to all project participants.



At the beginning of the project, the faculty advisor should lead communication between the student team and the company. The faculty advisor should clarify goals, expectations, content and process with both the company and the student team to ensure the project is fully understood by all parties.

A faculty advisor's job is to educate; this principle remains intact with a field-based learning project. The advisor must act as a mentor, coach and boss in order to make the course a success. Feedback to the student team after each deliverable and presentation is highly valuable. The advisor can even plan the delivery of formal feedback based on the project plan. Continual contact and communication can also assist the team to stay on track. The advisor will not have all the answers for the student team, however their experience is invaluable in assisting the team to identify potential solutions. Professor Morales was able to add value with his field based learning course by leveraging his "knowledge of the realities of businesses working with sustainable development to find the best match between the needs of that business and the actual potential of the team". The faculty advisor can also facilitate the learning process by presenting the whole picture, thus helping put students in the position to breakdown complex issues and solve problems. The advisor is well suited to provide perspective and ideas, not positions and ideology. Faculty advisors must act as field-learning coaches who focus on and ensure that time and energy are dedicated to reflective learning and to improving the overall skill level of the group. This is particularly important at the completion of the project to bring closure to the experience and reinforce important aspects of the course through highlighting lessons learned.

### **C. *Host Role***

One of the most critical factors to the success of field-based study is to have a project "champion" within the company. It must be clear from the start to the faculty advisor and the student team who the project champion is and understood when this person will be available for the project. The champion will be the person to address important concerns throughout the project.

If the project "champion" is unable to provide granular support to the student team, a project manager (PM) within the company must be assigned to the initiative and understands that it is an internal priority. The PM must make certain that content and information is easily retrieved by partner faculty and student team members. The PM should be available for and able to commit key people to participate in status meetings and project presentations and facilitate any introductions to key personnel not aware of the project. It is important for company stakeholders understand the project and its scope in order to minimize confusion. It is also extremely helpful to the field-based learning exercise if the PM is able to provide feedback to the faculty advisor and team throughout the engagement. In addition, while the student team is on the project site, the PM should secure access to telephones, computers, office equipment and sufficient work space for the student team.

In order to create a successful field-based learning project, a company must be vested in the project. The company must have a real need for the project and be clear, flexible and realistic with their expectations. A host company must be explicitly clear in their goals and expectations. Providing a project description with an outline of the availability of resources at the company which the student team will have access demonstrates that the company is vested in the success of the project from the beginning. Another key characteristic of the company needs to possess is flexibility. The company must understand the unique constraints of a students schedule and be willing to work with the special needs of a student calendar and priorities. The company must understand the expected workload of students depending on the number of credit hours in order to



ensure that the team will not be stretched too thin. There is a limited scope of engagement that the students can fulfill and the company must stay focused in their expectation of the end result. The company must also be flexible in assisting the student team to meet and dedicate time when necessary to ensure timely deliverables. The flexibility of the company must also extend to solutions the student team will be designing; an ideal company will be open to new ideas and approaches.

It is essential for the company to be fully vested in the field-based learning exercise. The company should expect high quality deliverables and be flexible in the timing and approach to coming up with a solution to one of their imperative needs. This will help to ensure a successful engagement and create an environment conducive to maximizing benefits to the university, students and company (see **Figure G** for a sample project).

**Figure G: Project Spotlight**

<b>Project</b>	The Ross School of Business at the University of Michigan and Rainforest Expeditions (Peru) <sup>2</sup>
<b>Description</b>	The University of Michigan Business School participated in an EEC ecotourism project in Peru. The students researched key customer markets and ways to reach them. As the entrepreneur implements recommendations, the students have the satisfaction of knowing how their research benefited not only a company, but also an ecosystem and local community.
<b>Benefits</b>	
To the Company	<ul style="list-style-type: none"> <li>• RFE established a program development plan and a marketing objective which the company could not have established itself with such quality due to lack of knowledge, time and access to information</li> <li>• The company created a competitive advantage over regional competitors within the specific consumer markets Michigan investigated</li> <li>• RFE will use Michigan’s recommendations to grow faster than the national average for tourism and to maintain this growth sustainability because they will have access to direct niche markets, increasing the customer base via word of mouth</li> </ul>
To the Students	<ul style="list-style-type: none"> <li>• Heightened awareness of environmental concerns</li> <li>• Learned how to address sustainability issues with business strategies</li> <li>• Moved beyond the theory discussed in the classroom and experienced first hand the integration of environmental and business issues</li> </ul>
To the School	<ul style="list-style-type: none"> <li>• Attract future applicants interested in issues of sustainability and hands-on training</li> <li>• Received positive public response from contributions</li> <li>• Primary research opportunity to create teaching materials</li> </ul>

**D. Presentations and Delivery**

Another important area to cover is the delivery of recommendations. Student teams must be prepared to provide client-presentations of their designed recommendations. To ensure the success of these presentations faculty advisors should review the presentation prior to the ‘live’

<sup>2</sup> M. DeYoung and A. Sprague. *Sustainability By Example: MBAs Experience the Value of an Environmental Business Plan*, Corporate Environmental Strategy, Vol. 8, No.4 (2001)



run. Moreover, content should be carefully selected to emphasize key findings and recommendations. Finally company presentations frequently include:

1. Project Overview: motivation, objectives, target opportunity, problem or process
2. Methodologies used
3. Recommendations backed by substantive quantitative and qualitative support
4. Explanation of costs, benefits, and implementation issues
5. Justification for or significance of changes recommended
6. Discussion of implementation issues or procedures

In addition to presentations, student teams will develop reports for their sponsor companies. The specific contents of these reports should be discussed with faculty advisors and company sponsors throughout the project. A typical final report might include:

1. A description of the opportunity, problem or process being studied (including a process map, if relevant).
2. An evaluation, using appropriate measure(s), of current performance.
3. A description of where and how the opportunity, problem or process fits in the organization, considering the people, task, formal and informal organization, and the customers, suppliers and process owners, if appropriate.
4. A feasible, data-driven set of recommendations based on an integrated, cross-functional analysis (including a statement of the performance improvement objective(s) supported by the appropriate quantitative and/or qualitative measure(s) and a prediction of their impact on the organization. A student team's analysis and recommendations should reflect an understanding of the relevant academic and business literature.)
5. A discussion of the recommendations, including costs, benefits, and implementation issues.