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Data Gathering Kickoff Lesson for Consulting Project

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Data Gathering Kickoff Lesson for Consulting Project

Stephanie Farne & Samantha Porter
Horn Library, Babson College

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Context

The class… ASM3300 Strategic Problem Solving

The audience… Undergraduates (upperclassmen)

The job… One-shot instruction session for group “industry” project support

The scope… 6-8 sections taught by 4-6 different faculty members a semester

Image source: https://www.gs1.org/1/strategy/

The Assignment

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What the students are doing

- ★ Groups of 4-5 students
- ★ Choose a company (publicly traded)
- ★ Pretend you are a consulting firm and identify an issue your company is facing
- ★ Present a solution to that problem

Why they need us

- ★ Faculty frustrated by quality & lack of diversity of sources
- ★ First time many students are doing business research on their own
- ★ Individual support or recommendations → one size does not fit all with resources

To Google or not to Google?

Great for…

Finding background info

Google News search

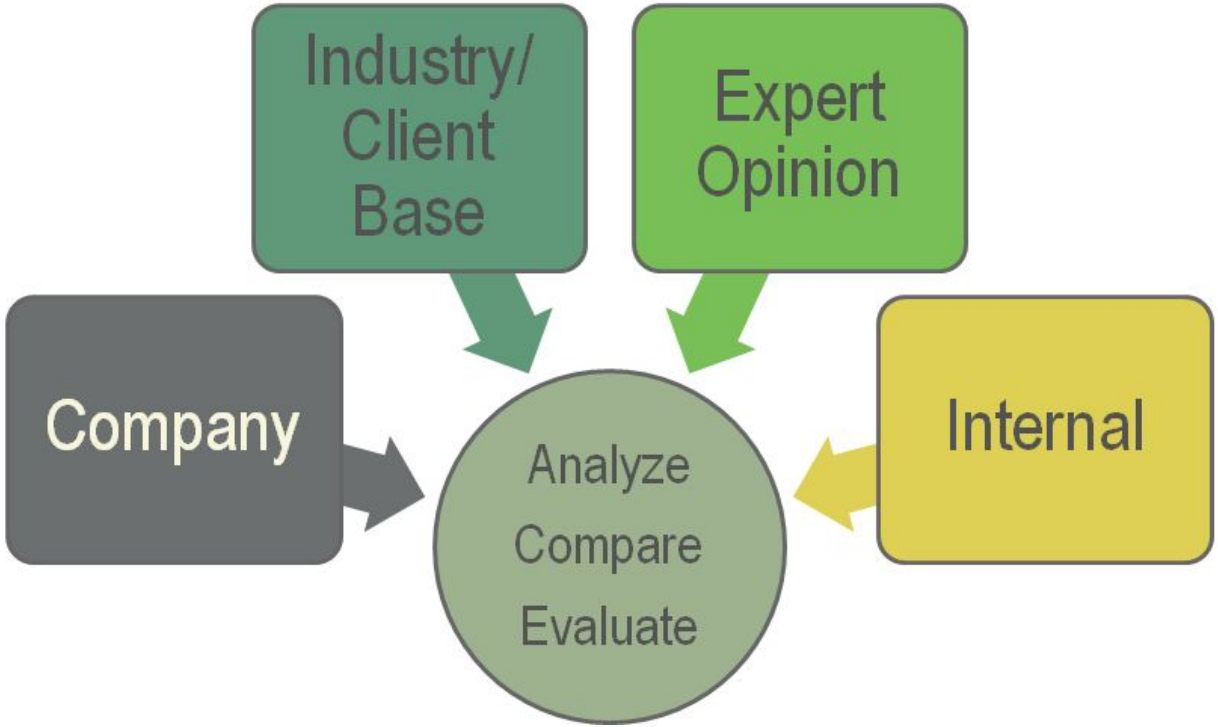
Be skeptical of…

Market Research & Reports

Financials & filings

Image Sources: ThioJoe, *YouTube*; EmojisWiki

Info Source Perspectives



“A la Carte” Instruction

“Sphere of Research” Beach Ball Activity***

Types of Sources - discussion

Group Workshop Activity

Database overview

Accessing Resources, Q&A

***Adapted from Beth Hoppe’s presentation, “Beach Balls, Play-Doh and Plato: play as critical pedagogy”, at the ARCL-NEC Annual Conference 2018

Learning Outcomes

1) Move beyond “Googling”
2) Need more than one tool/perspective to answer their research questions
3) How to select the most appropriate resource for the info they’re seeking
4) Familiarity with library databases

Image source: https://www.kissclipart.com/

Sphere of Research

- What is this info source?
- Who makes/creates it?
- Why are they collecting this information?
- Who is making money on this information?
- How would you find it? What resource would you use?
- When would you use it?
- Thoughts?

Sphere of Research

Framework principles applied…

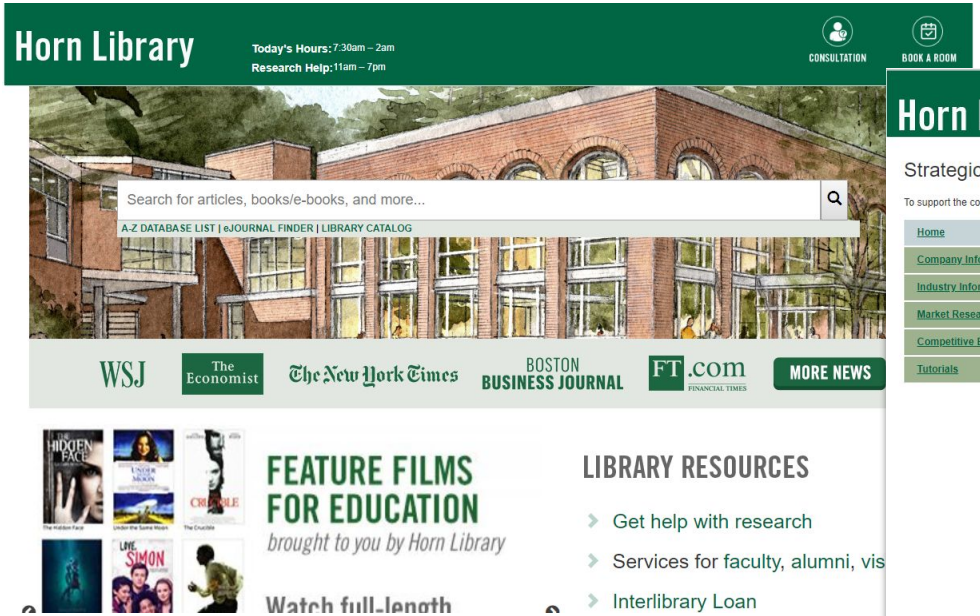
- ➔ Authority Is Constructed and Contextual
- ➔ Information Creation as a Process
- ➔ Research as Inquiry

Learning profiles applied…

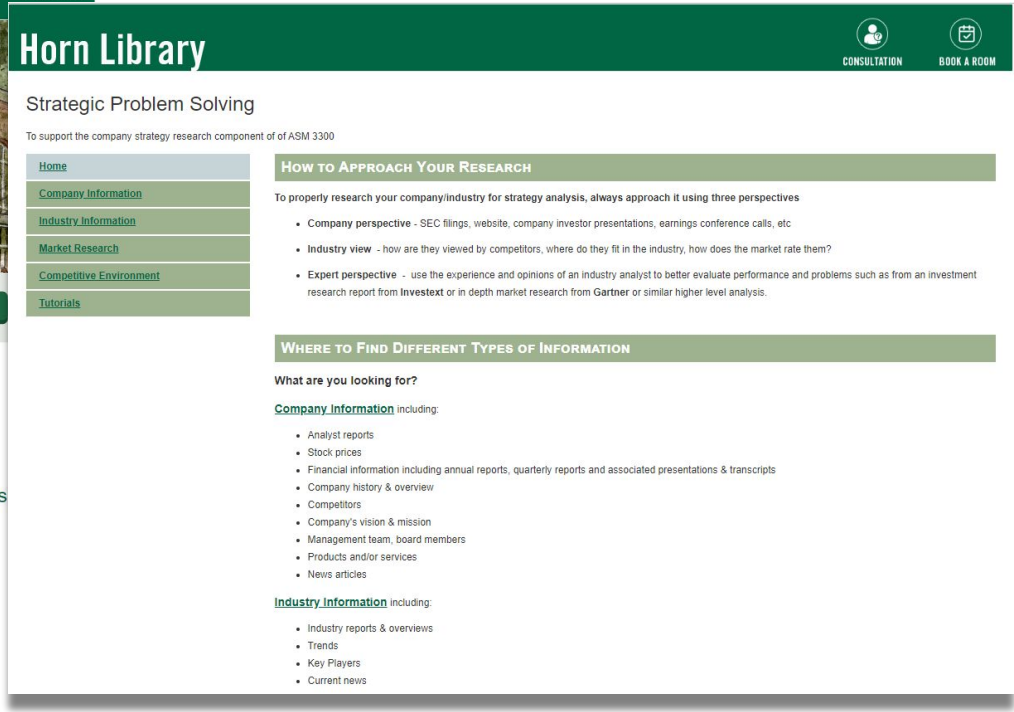
- ★ Auditory
- ★ Tactile/Kinaesthetic
- ★ Visual

Accessing Resources

library.babson.edu



https://libguides.babson.edu/StrategicProblemSolving



Accessing Resources

Framework principles applied…

- ➔ Searching as Strategic Exploration
- ➔ Authority is Constructed and Contextual
- ➔ Information has Value

Learning profiles applied…

- ★ Auditory
- ★ Visual

Worksheets

Project company: _____

Main rival: _____

Additional rivals: _____

_____

Complete the following tasks:

1. Search for company and industry news. What is happening in:
   (a) the macro-environment
   (b) the industry
   (c) the company

   ___Done ____ Not yet, but we will finish this before next class

2. Search for financial data.
   (a) Download the financial statements (most recent 5 years) of the company and rivals.

   ___Done ____ Not yet, but we will finish this before next class

   (b) Calculate the key financial ratios (put more focus on the income statement).

   ___Done ____ Not yet, but we will finish this before next class

   (c) Discuss any insights form the financials:
   - How is your company doing with respect to rivals?
   - What are the time trends?
   - Any discontinuities in the time trends?

Most Critical Information

(Note: you must use a mix of sources!)

Team: _____
Company: _____

Business Issue	Information Needed	Potential Sources
#1		
#2		
#3		
#4		
#5		

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Group “Workshopping”

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Framework principles applied…

- ➔ Research as Inquiry
- ➔ Searching as Strategic Exploration
- ➔ Authority is Constructed and Contextual
- ➔ Information has Value

Learning profiles applied…

- ★ Tactile/Kinaesthetic
- ★ Reading/Writing

Lessons learned…

- Timing is everything
  - At “point of need” during the semester
  - Time class during the day (early v. afternoon)
- Faculty engagement is key
- Deliverables help learning accountability & retention

Q&A

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