GLOBASE Guatemala Case

Kelley School – Indiana University

Alessandro Lopwiz is a university professor working in a top-ranked Midwest-based business school (the "School"). He is in charge of leading the GLOBASE Guatemala effort offered by the MBA program at the School.

Alessandro has felt for quite some time that there is a lack of control about the information related to GLOBASE Guatemala and that it was time to create a system to manage the overall process. To accomplish that, he is bringing three consultants from GHK Partners to analyze and design this new system. This document transcribes the requirements meeting that Alessandro had with the three consultants: Diane Scarlet, Maria Olive, and Jeff Navy.

Alessandro: It is certainly nice to have some former students coming back to help us in this project.

Jeff: We are glad to be in this assignment.

Diane: I heard very good things about the GLOBASE program and I am happy to be involved.

Maria: So, how exactly does GLOBASE Guatemala work?

Alessandro: GLOBASE Guatemala is one of the GLOBASE programs offered by the MBA office. In all those programs we have a group of students which we call the "Leadership Team" (LT for short) organizing the trip and the overall experience. The LT is composed by second-year students while the participants are all first-year MBA students. Those participants are divided into teams and each team is allocated to work with a small or medium business in Guatemala in a consulting engagement.

Diane: What is your role in this process?

Alessandro: Overall, I manage the effort even though the LT is responsible for the day-to-day planning and operations. I advise both the LT and the consulting teams in the best ways to pursue their objectives and evaluate all participants, assigning them a final grade for the course.

Jeff: And what seems to be the main issue for you?

Alessandro: Essentially, my main problem is that right now all the documents related to GLOBASE Guatemala are spread over emails or in shared folders. I want to replace all of that with a system that could work as a dashboard for all the information pertaining to the project.

Maria: I see… and the stakeholders are the LT, the student teams, and the clients?

Alessandro: Yes, those are the main stakeholders, although we should also consider the MBA office as a secondary stakeholder.

Jeff: Should all stakeholders have access to the system?

Alessandro: Not really. The clients should not have any direct access, although they might get notices from the system. LT's and students in the program would need access. We also do not need to give access to the MBA office.

Diane: OK. So, only you and students are actually users of the system, although I imagine that you would not be modifying much of the information in the system. You would be mostly checking what others have entered.

Alessandro: Precisely.

Jeff: And what kind of information would you like in the system?

Alessandro: First, I would like to have a task list, organized into two levels. The top level would be a task category, while the lower level would be the actual tasks associated with that category.

Maria: Are those categories fixed or variable?

Alessandro: Fixed. They are student selection, client selection, syllabus preparation, course logistics, and in-country logistics. All I want to know is which tasks are currently done for each of these categories and how far along they are.

Diane: But you would rather not have something like Microsoft Project taking care of that.

Alessandro: Exactly. It would be another document located in another system and I want to integrate everything. Besides, this is a simple project management objective. We do not really need all the power that MS project has.

Jeff: So, who would be in charge of updating this list? The LT?

Alessandro: Yes. Throughout the process they would be adding categorized tasks to this list and updating it whenever something gets done or is in the process of being completed. For example, I would rather have a completion percentage for each task, versus a binary "yes" or "no".

Maria: You said "throughout the process". What exactly does it mean?

Alessandro: Well, the process starts in April with the selection of the LT. I will enter each LT member into the system. It then goes until the conclusion of the trip, which takes place in March of the following year.

Diane: So, students would start creating the list by May, June?

Alessandro: There is no particular time for that, but I would like to see the list created, at least with some early tasks, during the early summer months.

Jeff: And when would this list be updated? Weekly?

Alessandro: Pretty much any time something needs to be added or is completed or has gone through some progress. A member of the LT would be able to locate an existing item from the overall list and update it. The LT would also be regularly adding new tasks.

Maria: Sounds good. Is there any other reporting the LT should be doing?

Alessandro: Good point. We also have an agenda for our weekly meetings but currently this agenda is sent via email and hard to locate later. I would like to have this agenda captured and stored in the system every week. This way we could keep track of what has been discussed over time, without the need to scan through multiple emails. We don't need to make this complicated. They can just upload a Word document for the agenda.

Diane: You got it. Any other reporting you need or should we go to the categories you described before and their related tasks?

Alessandro: No, this is all I need in terms of the overall management.

Jeff: So, let's go to the first main category, student selection.

Alessandro: Sure. That starts with an application of a first-year MBA student to participate in GLOBASE Guatemala.

Maria: So, it is always restricted to first-year MBA students.

Alessandro: Actually, now that you mentioned, it is open to anyone, but usually only first-year students participate. Second-year students usually lead the next year's trips after they have participated in the previous year.

Diane: So, you want the system to capture the application?

Alessandro: Exactly *[Note: this is a simplification from the real process, since in real life a student can apply to any GLOBASE trip at the same time]*. We already have a standard application in place but it is right now captured via email. I would like the system to do that, instead.

Jeff: Do you have more applicants than spots available?

Alessandro: Always. The LT would then interview all applicants *[Note: scheduling and conducting the student interviews are not to be modeled]* and I would like the system to capture the outcomes of each interview using a standardized form. Once all interviews are completed, the LT should mark each applicant as either accepted or denied and send them a notification.

Diane: Do you have a wait list?

Alessandro: No. We accept as many students as we can handle and the rest are denied.

Jeff: How many students do you have and how many clients?

Alessandro: Anything between 20 and 30 students working with 5 or 6 clients. It could be more in the future, but this is what it has been in recent years.

Maria: Is that all in terms of managing students?

Alessandro: The final part is that we run an event *[Note: do not include the actual event in any of your models]* to present the clients to students. After the event we send a notification to students asking them to indicate their preference in terms of clients. Students always reply indicating which client they prefer to work for, using a ranking where “1” is their top priority and either “5” or “6”, depending on the number of clients, is the least interesting client in their opinion. I would like to capture these preferences in the system.

Diane: No problem. At that point the clients would be established, right? So, if there is nothing else to talk about student selection, let’s discuss client selection.

Alessandro: Sure. Actually, client selection starts before student selection starts and ends at about the same time. Most of the process is done through AMCHAM Guatemala so I would like to capture only some aspects of it.

Jeff: Where would that start?

Alessandro: First, I would like to capture which clients have applied and some basic characteristics about each. That information would be entered by the LT based on information received from AMCHAM Guatemala *[Note: communicating with AMCHAM is outside scope]*. A couple of weeks later the LT schedules an interview with each client. *[Note: scheduling and conducting interviews is outside of the system]*.

Maria: Would you like to capture the results of these interviews as well?

Alessandro: Exactly. The interviews are done via Skype *[Note: conducting the client interviews are not to be modeled]* but I would like to have a central repository of the assessment of each client. At the end of the interviews, I also would like to have each client marked as “accepted” or “rejected”.

Maria: Good.

Alessandro: As each client is accepted or rejected, we send notifications to clients with their status.

Diane: So, once you have the clients and the students’ preferences you will be able to allocate students to each team. Do you have a fixed amount of team members?

Alessandro: No, although we try to make the teams as even as possible in terms of number of members. The LT deliberates *[Note: outside the system]* and then allocate each student to a team. The LT also decide which LT member will be responsible for each team. That step concludes both the student and client selections.

Maria: Great. So, let’s go to syllabus preparation. Which related process should be part of the system?

Alessandro: Actually, none. This is done completely outside the system and the results are posted on Canvas. The LT would just need to create this task in the task list and update it when it is done.

Jeff: That makes our lives easier. What about course logistics?

Alessandro: There are a few aspects that I would like the system to control. First, I would like to have regular progress reports.

Diane: Who would create these reports?

Alessandro: The idea here is that the team would provide the standardized report via email to the respective LT member that coordinates that team's activities. What I would like to capture, every week, is that report but with some analysis added by the LT member. So, the team would not send it to the system directly; it would do it through the LT member.

Maria: OK. What else would you need in terms of monitoring?

Alessandro: That would be all. The only other thing I would need is the indication that the team has completed its final presentation and final report.

Jeff: That would be in Canvas, right?

Alessandro: The deliverables would be but I would like the LT member responsible for the team to indicate that the team has completed those tasks.

Diane: Do they happen at the same time?

Alessandro: No. Usually the presentation is finished before the final report but they can be done at the same time as well.

Maria: Got it! So, students never access the system during the execution of the course.

Alessandro: Except for the peer evaluation, they do not.

Diane: What do you mean by peer evaluation?

Alessandro: At the end of the course, students are notified that they should submit a peer evaluation. We never have a problem with students failing to submit their evaluations. They are good about submitting them within a few days of the notice.

Jeff: Would the system be responsible for storing those peer evaluations?

Alessandro: Yes. Each student should be able to enter peer evaluations for each of his/her teammates (and only those, of course). Part of these evaluations are numeric and are used to calculate the final grade. Once all peer evaluations are in, I would like the system to issue me a report of those students whose main numeric component fell below a 90% threshold. Those students would be candidates to have their grade reduced.

Maria: No problem. Anything else in terms of course logistics?

Alessandro: Not really. At that point, most of the action is taking place in the classroom and over Canvas. I just need some specific pieces of information to see how things are going.

Diane: That leads us into our last component, in-country logistics.

Alessandro: Great, because there is nothing there that we need to be concerned about. That part is mostly a conversation between the travel agency and the LT, so I only need to know how things are progressing, which is captured in the task list.

Jeff: Really great! So, if that is all, we will be reviewing this conversation and bringing you some models for you to evaluate.

Alessandro: I am looking forward to seeing those models. Thanks, folks!

Note: Model every process you identify in this dialogue except when explicitly mentioned that you should not.