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## Achieving Scaled and Sustained Use of Client-Based Projects in Business School Marketing Education: A Proposed Suprastructure

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**Achieving Scaled and Sustained Use of Client-Based Projects in Business School  
Marketing Education: A Proposed Suprastructure**

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Achieving Scaled and Sustained Use of Client-Based Projects in Business School Marketing  
Education: A Proposed Suprastructure

**Abstract**

Business scholars agree that well-constructed experiential learning and specifically client-based projects (CBP) provide an opportunity for students to apply concepts they learn to solve particular problems. As an additional outcome, they provide value for multiple stakeholders including the client, business community, university, and the instructor. However, CBP's can be inherently complex and demanding on instructors, impeding adoption and sustained use. As critical participatory action researchers, we worked collaboratively with faculty within our marketing department to examine and address the challenges of scaling capacity to support, effectively replicate, and grow use of CBPs in our business school marketing courses and subsequently other department curriculum. This paper describes a unified view of project management and business development processes as a framework for effective scaled use of CBPs and outlines a suprastructure. It additionally offers "how to" guidance that can support use of a suprastructure as a means of achieving economies of scale, including description of roles and relationships.

*Keywords:* experiential learning, industry collaboration, management education, client-based projects, marketing curriculum, suprastructure, curriculum design, graduate school business education

Many scholars contend that business education is overly focused on the science aspect of management and needs to change asserting that student *self-efficacy* (Bandura, 1977, 1993), one's confidence in their ability to tackle a given situation, is best achieved through attained experience (de los Santos & Jensen, 1985; Gosling & Mintzberg, 2004; Kolb & Kolb, 2005; Mintzberg, 2004; Oh & Polidan, 2018). A report summarizing the findings from a massive online forum of 6,000 participants (scholars, students, and practitioners) discussing the future of management education (Ayling, Price, Tucker, & Vellner, 2015), similarly explicitly called out the need to increase co-construction of learning experiences between industry leaders and academics to address the expanding gap between theory and practice. Internships, simulations, case studies and practicums are typical forms of experiential learning used in business schools. In the applied discipline of marketing, client-based projects (CPBs) have been recognized as a particularly advantageous form of experiential learning (Bove & Davies, 2009; de los Santos & Jensen, 1985; Oh & Polidan, 2018; Strauss, 2011). However, while CBPs have become more commonplace in undergraduate marketing curriculum, their use in graduate business school curriculum remains sporadic (Hagan, 2012).

CPBs provide students with projects that bring together real companies, real products or services, real competitors and real decision-makers (Burns, 1990). Correctly constructed, CBPs provide the opportunity to create an interactive experience central to the learning process whereby students are able to learn what strategies are most effective in solving certain problems, and as a by-product, have the potential to provide value for multiple stakeholders including the client, business community, university, and the instructor. Further, tacit knowledge gained through business-relevant problem solving has the promise of improving student employability

(Barr & McNeilly, 2002). With so much evidence supporting their use, why are CBPs not the norm in business school marketing curriculum?

The literature describes this endeavor as one embarked upon by a few committed and determined academics. Those willing to take on increased workload: sourcing their own clients, constructing the learning experience, and preparing and motivating students to solve practical, real-world problems (Balzotti & Rawlins, 2016; Goodell & Kraft, 1991; Hillon, Cai-Hillon, & Brammer, 2012; Parsons & Lepkowska-White, 2009; Zsidisin, Hartley, & Collins, 2013). Use of CBPs can be a challenging undertaking in a time when faculty are increasingly being asked to do more with fewer resources (American Association of University Professors, 2018). This extra work impedes on time that could be used for research or service activities. Further, if teaching innovation is not valued by the school's administration to an equal degree as intellectual contributions, efforts spent developing CBPs may be viewed as a distraction rather than contribution to faculty performance. What's more, despite the positive perceived benefits for students, an instructor's course evaluation may suffer when students struggle with practical, self-directed learning (Hillon et al., 2012). This can be exacerbated when students' work meets client expectations, but fails to meet the full course requirements resulting in client-instructor evaluation conflict (Goodell & Kraft, 1991).

These impediments well describe the prevailing headwinds at our business school when we embarked on the goal of expanding the use of CBPs as a pedagogical element in all sections of our core graduate marketing course in our full and part-time MBA programs and later in all sections of three elective marketing courses. Consistent with other business schools, our use of CBPs was sporadic and undertaken by few members of the faculty. Given the size of our business school, our vision of more wide-spread consistent use of CBPs involved more than 35

graduate marketing course sections taught by a variety of marketing instructors (full-time and adjunct) each academic year. In our review of the literature, we identified several process-oriented approaches for managing a single CBP, but these processes fell short as a means for creating scale and repeatability. This paper seeks to fill that void in the literature.

The following provides a structure for our paper. We begin with a discussion highlighting merits and limitations of CBPs discussed in the literature and their associated tradeoffs. Next, we look at the various processes, approaches and guidance that have been offered by other scholars for developing and implementing CBPs. We propose that a unified view of project management and business development processes offer promise as a framework for extracting activities for scaling use of CBPs. We then outline our suprastructure, which has been continually refined over a decade through our orientation as critical participatory action researchers (McTaggart, 1994; Kemmis, McTaggart, & Nixon, 2013) and implementation of more than 500 CBPs including nearly 10,000 students, demonstrating sustained scalability. The contribution we propose is to provide “how to” guidance that might support use of a suprastructure as a means of achieving economies of scale, including description of the faculty of record (FOR) and CBP suprastructure (CBP-SS) relationship.

### **Merits and Limitations of CBPs**

Despite the aforementioned challenges encumbering faculty, overwhelmingly the literature depicts the CBP learning experience in a favorable light. For example, some scholars suggest that CBPs provide a means for enriching student’s preparation for the workforce and create relevant opportunities for alumni engagement (Zsidisin et al., 2013). Others suggest that CBPs provide an effective means for shifting the role of the instructor from “sage on the stage” to facilitator-coach, affording students an opportunity for independent learning (Strauss, 2011). Further, it has

been posited that CBPs provide the opportunity for students to develop information literacy skills (Holler, 2009). Lastly, some scholars report that students perceive improvement in concept apprehension and retention through CBPs (West, 2011). However, it is important to note that accrued learning benefits suggested in the literature are anecdotal, largely based on indirect measures and observations. As noted by Bacon (2016), there is a difference between *perceived learning*, that refers to a student's self-reported knowledge apprehension, and *actual learning*, that reflects a change in knowledge as measured by students' actual work. While student self-reported data may imply student learning, such indirect measures identify perceptions thus providing a less concrete evaluation of student learning. While not an exhaustive review, Table 1 outlines many of the perceived benefits described in the literature into four key CBP stakeholder groups: students, clients, instructors and universities. Notably, it highlights gaps in the literature regarding key areas such as assessment of actual student learning and how CBPs achieve or improve actual learning.

[Insert Table 1 here]

While student perceived learning may correlate with actual learning in some outcome areas, in others it may not. That said, a critical component of the espoused mission of our business school is to promote *transformational learning*, described by Mezirow (1997) as a process that seeks to change a student's frame of reference through reflective critique of the predispositions that shape one's interpretation of an experience. This conceptualization of transformational learning is crucial as it allows for learning to be viewed as the process of applying new information to already established routines and habits of thinking. Our belief is that the ambiguity inherent in industry-collaborative CBPs creates a type of *learning space* (Kolb & Kolb, 2005) well suited for such transformation.

Fundamentally, transformational learning theory is predicated on two types of learning: instrumental learning and communicative learning (Mezirow, 1991). The potential for instrumental learning (learning based on discovery of cause and effect relationships) is provided in the CBP experience as students experience the consequences of their actions through trial and success (or error) in problem solving. The potential for communicative learning (making sense of what others communicate) is realized through real communication with the client. The result is a growth in thinking processes that allow the student to acquire not just simple knowledge, but a deeper understanding of concepts. Moreover, through the learning journey of a CBP, students build both character and the confidence to act. As a result, student perceptions of learning remain the focus.

Merits of CBP have been contrasted with project challenges that have impeded or impacted student's learning experience, including struggles in communication (Balzotti & Rawlins, 2016; Parsons & Lepkowska-White, 2009), inadequate information and perceived ambiguity (Kennedy, Lawton, & Walker, 2001), as well as increased student work load (de los Santos & Jensen, 1985). Value created through the pedagogical use of CBPs is often viewed as trade-offs. For faculty, adoption and sustained use of CBPs must be weighed against time spent on research and institutional service obligations. For clients, resources required for participation are evaluated against the potential payoff of the students' work contribution. For institutions, real-world client-based learning for students comes at the risk of students' underperformance, which could diminish the school's reputation in the business community. Similarly, if the client is an alumnus or a referral of alumni, students' underperformance can reflect poorly on that individual within the sponsoring organization. However, when the CBP goes well, the tide is lifted for all stakeholders.



Other potential challenges facing instructors include the extent of the student work experience, the percentage of international students (often studying in a second language), and varying academic interests embodied in a business school's student population. Though our business school offers a variety of MS degree programs, our use of CBPs in marketing is focused on our full-time and part-time MBA programs. Still, the population of our full-time and part-time MBA students are quite different. While on average our part-time students have about seven years of work experience, nearly 40 percent have between 2 and 5 years of work experience. Conversely, the majority of our full-time MBA students have less than 5 years of work experience, with one-fifth having less than 1 year of work experience. Similarly, the percentage of international students differs significantly in these two student populations. In our part-time MBA program, over 90 percent of the students are from the US. In contrast, nearly half of our full-time MBA students are international students (largely from China and India).

Advancing the knowledge and skills for students who aspire to have careers in marketing is an essential part of the teaching role of marketing faculty in higher education. However, aspiring marketers are generally the minority of the student population in graduate business schools (Graduate Management Admission Council, 2018). In our business school, only about one quarter of MBA students plan to pursue a marketing concentration. Most of the students enter the core MBA Marketing Management course to fulfill a curriculum requirement. Still, every student who earns an MBA degree needs to demonstrate mastery in marketing management. Our CBPs in marketing need to meet the learning needs of all students, including those with an interest in marketing, as well as those with no prior marketing coursework. A formidable aim given that the vast majority of MBA students have minimal practical work experience nor applied experience in the field of marketing (Graduate Management Admission

Council, 2018). For these reasons, CBPs in these courses are inherently complex and demanding for both students and faculty.

### **CBP Processes and Task Structure**

Many thought leaders over the past four decades, have contributed to the advancement of process-oriented approaches for facilitating experiential learning (Gentry, 1990; Hoover & Whitehead, 1975; Wolfe & Byrne, 1975). Moore (2010) suggested that the transformative effects of experiential learning require it be “structured effectively and processed rigorously” (p. 11). Many scholars have proposed processes and guidance for constructing and managing CBPs (Bove & Davis, 2009; Clark, King, & Jurn, 2012; de los Santos & Jensen, 1985; Lopez & Lee, 2005; Muir, 1996; Strauss, 2011; West, 2011). These approaches generally align to the traditional view of project management as groups of sequential processes: (1) project initiation, (2) project planning, (3) project execution, (4) project monitoring and control, and (5) project closure (Project Management Institute, 2008).

After reflecting on the approaches put forward by scholars, and taking into consideration the aforementioned CBP challenges identified in the literature, we constructed a process to guide our CPB project management efforts. We established further aspects of task structure to guide our approach largely building on the Wolfe and Byrne (1975) model. As is typical in project management, our step-wise process for CBP task structure had a definitive beginning and end. However, missing from the process were aspects meant to create scale and repeatability, aims aligned with the process of business development. Hartlieb and Silvius (2016) suggested that success in project management is moreover measured on the deliverable (output), while success of business development places higher priority on the benefits realized (outcome). In our experience, the outcome benefits realized by company clients— when recognized— created

additional value, including repeat clients, new clients, student jobs and internships, guest speakers, and funding. Unfortunately, this value was not always well harvested.

We also found that unlike previous work that focused on how individual faculty may best incorporate CBPs into their teaching tool kits (Gremier, Hoffman, Keaveney, & Wright 2000; Razzouk, Seitz, & Rizkallah, 2003; Lopez & Lee 2005), scaled use of CBPs necessitated the efficient creation of industry demand. This entails processes that marketing faculty are keenly capable of doing which include, but not limited to: understanding market need, segmentation, targeting, positioning, defining communication channels, creating awareness, building business partnerships, creating relationships with allies. Regrettably, these are activities perceived to be unsustainable by any individual instructor on a consistent basis (Lopez & Lee, 2005), let alone consistently sustained by adjunct faculty who are often managing a second career. It is not surprising that these types of business development activities, on top of CBP project management activities, can drain individual faculty and impede more widespread and repeated use of CBPs. Since CBPs as an individual instructor-supported process do not provide the accrued benefits from business development, such as expansion and decreasing acquisition cost, a more holistic view of project management and business development processes is required.

The proposed suprastructure offers promise for extracting activities for scaling use of CBPs and emancipating individual instructors from trade-off costs that are unsustainable and serve as impediments to execution. It necessitates creation of a new role to undertake centralized activities in the CBP management process, that of a faculty administrator (FA). Key areas defined for centralization in a suprastructure (which would be undertaken by the FA) include: creating a pipeline of qualified clients, client selection and participation confirmation, determining presenting problem, development of project criterion, case development,

administration of client and student project evaluations, and value-harvesting. Through centralization of these CBP process activities, we have realized multiple benefits including:

- decreased aggregate demand on faculty time in obtaining qualified clients
- reduced time requirement in CBP development during course preparation
- decreased discontinuance in using CBPs
- increased value-harvesting for future benefit
- increasing quality of CBPs deliverables

A description of our resulting CBP suprastructure (CBP-SS) (Figure 1) is offered below, along with a discussion of considerations, scholarly perspectives, reflections and decisions that guided its development. Of note, while there is a division of responsibilities between the instructor (faculty of record, “FOR”) role and FA role, success is determined by the ongoing communication and collaboration between the roles.

[Insert Figure 1 here]

### **Creating a CBP Suprastructure**

Our CBP-SS begins in the design stage. In the design of a CBP, four key questions need to be addressed: What student learning objectives does the CBP intend to achieve? What is the purpose of the CBP? How will the CBP be structured? And how will the CBP be produced?

The first three of these questions anchor the CBP task structure (see Figure 1, Step 1) and enable the FA to produce the CBP autonomously from the FOR. As our aim was to use CBPs as a pedagogical element to achieve defined learning objectives in specific courses (see Table 2), the question of what the CBP is designed to achieve becomes a “given” between the FOR and FA.

[Insert Table 2 here]

However, autonomy for the FA necessitates that the FA has a high level of discipline expertise and adept understanding of the learning objectives to be achieved. That is not to say that aspects of the CBP production, such as client sourcing, can't be undertaken or augmented by a staff resource within the institution, such as Corporate or Alumni Relations. However, absent the FA role, decreased time demands on the FOR are not fully realized and discontinuance is more likely. This assertion will be illustrated further in the sections that follow.

Expanded use of CBPs need to be accomplished in a means that efficiently supports adoption and sustainability across a variety of marketing instructors (full-time and adjunct). In the design stage, we made a conscious decision to standardize a practice for generalized use. This included decisions on purpose, timing, group structure, and communication flow, as well as aspects of project production. That is not to say that variation or intentional ambiguity in CBP design isn't useful. We recognize that overly detailed instruction runs the risk of reducing the problem-solving challenge to the performance of a set of tasks. As suggested by Titus (2007) for creative problem solving "the creative process occurs within an environment of uncertainty" (p. 264). Thus, careful consideration was given to identify efficiencies and avoid overproduction. This also allows the FOR to structure the course within the parameters of our suprastructure so that we have the best of both worlds: a course structure that facilitates CBPs and course flexibility so individual FOR can customize their course to best suit their needs, expertise, and teaching philosophy.

### **Uniformity in Design**

Relative to purpose, CBPs provide consulting services to businesses that serve as a means to attaining educational outcomes (Dallimore & Souza, 2002). Students can provide consulting services to organizations in two ways: process consulting or technical consulting. For process

consulting, the CBP would be designed where the client continues to own the problem and the student consultants provide an effective process to reach a solution (West, 2011). This approach differs from technical consulting where the student consultants take the problem and resolve it for a client (Schein, 1999). Given our largely novice student population and their need for applied experience, we selected technical consulting as a uniform design providing students opportunities for direct learning and decision making.

Relative to timing, the application of studied theory in a CBP can occur either concurrent with the studied theory (Clark et al., 2012; West, 2011) or succedent, applying previously studied theory such as a capstone model (Gorman, 2011; Strauss, 2011). As the principle course we identified for consistent use of CBPs was the core MBA Marketing Management course, concurrent timing was deemed most appropriate. Purpose and timing decisions influenced our collective perspective on adopting uniformity in other aspects, such as group structure and communication flow.

Through our examination of the literature, we observed group work was the prevalent instructor method for conducting CBPs. Typically, the class was divided into multiple groups whereby one of three scenarios occurred: (1) the class worked as multiple groups, each group having their own individual client, (2) the class worked collaboratively on a project for a single client with groups focused on different aspects of the project, or (3) the class worked as multiple groups on a project for a single client with all focused on the same scope of work. After trial and reflection, we adopted use of multiple groups as our CBP-SS standard, where all groups in the class worked on the same client project; independent of each other —as “the use of friendly competition” (Burguillo, 2010, p. 566) can be a strong student motivator.

Groups allow students to help each other as they work together to solve a common problem but we also recognize that not all students view group projects enthusiastically. As noted by Razzouk et al. (2003), an imbalance in member skills and contributions can tax pedagogical benefits. However, the purpose of this article is not to argue the merits and limitation of group work or how to manage groups within a class. There is a large growing body literature on this topic [see Bacon (2005) and more recently, Harding (2018)]. Rather, our decision to adopt a multi-group approach as a standard of practice in our CBP-SS was supported by several key factors.

First, the use of multiple groups on a single project, versus a single group on multiple projects, simplifies client communication and reduces time demands on the FOR. And as only one CBP is needed for a class, costs for the FA are also reduced. To be clear, however, the reduction in costs comes with increased risk —as a bad client can impact multiple groups. Second, multiple groups provide the FOR and client, as well as students, a common baseline for comparison. Thus, enhancing the opportunity for students learning and reflection within-group, as well as, cross-group. Finally, the use of multiple groups on a single project increases the probability that at least one exceptional recommendation will emerge. In essence, quality control through variance. Most certainly, CBPs are foremost a pedagogy for students to learn. However, if clients fail to receive at least one useful idea, future value harvesting is compromised and the school's brand reputation is put at potential risk. As mentioned above, we arrived at this standard of practice for the CBP-SS through trial and error. We are not suggesting that a multiple group approach is a superior design to a single group approach or even other designs for maximizing student learning. In fact, individual instructors in other degree programs within our business school have been quite successful in employing a single group approach. However,

those CBPs are designed for very different student learning outcomes and do not have the scale requirement of our MBA program.

### *Communication Flow*

As CBP-SS engagements involve multiple stakeholder interactions, which may include FOR/student, student/student, student/client, student/environment, FOR/client, FOR/FA, and FA/client, they are by nature more dynamic. This being said, one of the principal challenges is managing communication flow. At the onset, the communication is primarily between the FA and the client, as client sourcing and project scoping in our CBP-SS is the responsibility of the FA. This will be elaborated on further in the sections below. However, once the project is assigned to a class, the FOR takes the lead in client communication with the FA role acting as support to the FOR. As similarly suggested by West (2011), our CBPs requires client participation in three formal prearranged in-class project milestone meetings: (1) presentation of the project to the class at the start of the term, (2) individual team mid-point meetings, and (3) final team project presentations at term end. Generally, the FA responsibility for communication during the class is limited to administrative support (e.g., reminder emails for client in-class participation dates/times/location and administration of the project evaluation survey). Importantly, this signals to the client the division of responsibility between the FA and FOR. The FA takes the lead in the CBP design and evaluation stages of the CBP-SS and the FOR takes the lead in conducting the CBP and managing student-client feedback.

As students are often unsure as to the appropriate frequency and means for best engaging with their client, we found it helpful to provide students with protocol for client communication and engagement. An example is encouraging students to proactively reach out to clients to impart knowledge, ask questions, and float trial balloons (see Table 3). However, if clients fail to



respond, this can be a source of frustration for students (Clark et al., 2012). As such, students are asked to include the FOR on their client communication so the FOR can monitor client engagement and intervene, if needed.

[Insert Table 3 here]

Despite best efforts in qualifying clients, we still find that sometimes clients fall short in meeting their obligations (e.g., failing to provide timely response to students or requesting a change to pre-arranged in-class meetings). While the FOR assumes the lead role in client communication at the onset of the class, the FA is always available to assist the FOR in resolving client issues. The distinct differences in the roles allows the FA to apply a heavier hand in reminding clients of their agreed upon participation commitments—which most often resolves the issue, and provides the FOR with needed support during critical periods helping to perpetuate the use of CBPs.

Constructive feedback provided by the client directly to the student groups is a critical part of the learning process. However, we observed that clients varied in their ability to provide direct constructive feedback. In some cases, clients were overly complementary to the student groups but in private discussed gaps in the work with the FOR. This lack of transparency overburdened the FOR in the evaluation process. Moreover, this created the potential for students to view subsequent negative feedback from the FOR as unfair or unwarranted. In a few cases, gaps in student group work was not shared with the FOR but brought to the attention of the FA by the client, resulting in unproductive triangulation between the client, FA and FOR. To address this issue and improve the communication flow, we now prompt clients with a “likes, concerns, suggestions” feedback model at the onset of the CBP and reinforce its use during the midpoint and final student presentations. This is not to say that client communication isn’t

sometimes perceived by students as insulting or overly abrupt. However, in our experience as long as all parties are active concurrently, even when things go wrong—it's right. The quality of learning experience is shaped by not just the situation, but also the interaction (Dewey, 1938).

## **Sourcing and Producing a CBP**

### *Client Sourcing*

The literature suggests that CBP client sourcing is predominantly done by the faculty member teaching the course. While most faculty have professional networks to tap into, their networks can range in terms of relevance and depth for sourcing CBPs. We observed that faculty with limited industry contacts tended to overuse the same network contacts. And if unable to secure a client, the CBP was either pulled from the syllabus or the instructor required students to arrange for their own client. As discussed above, few of the students in our targeted set of courses have much if any practical experience in marketing. As such, asking students to self-source and scope a technical consulting project in knowledge and skills areas the students had yet to acquire was inherently problematic. Given the required volume of clients needed to meet the needs of our targeted courses, the task of client sourcing was quickly identified as a means for emancipating the FOR and gaining efficiency. Thus, client sourcing was assigned to the FA role (Figure 1, Step 2).

Early on, an attempt was made by the FA to tap into sources defined in the literature for sourcing clients, such as government institutions, local chambers of commerce, and the non-profit community. However, much time and effort were expended in meetings and quid-pro-quo activities (such as free seminars or workshops conducted by faculty) and insufficient qualified clients resulted. So more concerted lead generation activities were undertaken by the FA tapping into existing resources within the business school. As the positioning of our business school

conveyed the importance of application and industry collaboration in the learning experience to prospective students, CBPs were viewed as a substantiator or “reason to believe” (Kotler & Keller, 2016, p. 287). As such, the FA was able to work with our business school marketing team to weave information about our CBP offering into the broader school marketing communication across a range of marketing channels: advertising (e.g., brochures, posters, print ads), public relations (e.g., media outreach, alumni publications, University magazine, executive leadership speeches), direct marketing (e.g. alumni *call for project* email campaigns), personal selling (e.g., integration in Recruitment and Corporate Relations staff sales message and CBP content pass-through materials), and internet (e.g., web sites, SEO/SEM, social media). Collaboration with internal staff departments was aided by the CBP design standardization, discussed above, which provided a consistent CBP offering to potential clients (and students).

While numerous sources may be used to identify potential CBPs, sourcing efforts broadly fall into two categories: unsolicited or solicited. Unsolicited clients are defined as those clients that directly approach university administration, staff or faculty with a specific project request or come through a referral source (such as a prior client, student, faculty or alumni). Solicited clients result from targeted outreach and marketing activities. Our experience shows no significant difference in perceived outcomes between solicited and unsolicited clients. Rather good clients develop from alignment in scope and agreement on project criterion, as well as, importance, novelty and clarity of the problem being addressed for the organization. Moreover, perceived successful client and student outcomes can result in future client projects as well as a strong referral base. Over 75 percent of our potential clients are referral-based—coming from prior clients, current fully-employed students, and alumni, as well as staff and faculty. As client sourcing efforts are a year-round activity for the FA, a database is used to house and track client

applications. An important responsibility of the FA is overseeing and moderating demand generation activity to meet fluctuations in class scheduling. Optimally, we seek to maintain a CBP-SS “waitlist” of three to six months (one to two terms) using a rolling application process.

#### *Client Qualification and Selection*

Each CBP applicant is phone screened by the FA to assess mutual fit (typically 30 minutes), during which participation requirements and expectations are communicated. To guide our effort in client qualification (Figure 1, Step 3), we established three conditions:

- *Alignment*: requested project must be challenging, align with course student learning objectives, and able to be completed within the percentage of time allocated by the instructor within the course for the project
- *Engagement*: client must exhibit a strong degree of commitment underpinned by a business issue or opportunity of pressing importance to the firm’s leadership
- *Access*: client must be able to provide access to project-relevant internal data, as well as, access to company executives and staff that can provide as-needed expertise or information during the project

Qualified clients are sent an email by the FA detailing participation requirements (including time commitments, response times, applicable costs, and evaluation). As well, the potential client is provided a sample copy of a restricted use agreement (“RUA”) that would be signed by each student participating in the CBP. We adopted the practice of providing suggested terms after finding that clients either did not have inside legal counsel to develop a suitable document, or put forward a lengthy contract typically used by their organizations for outside paid professional consultants or contracted resources. These documents often contained onerous terms for students. Moreover, the scope of work undertaken in the CBPs through our CBP-SS do

not typically extend to IP creation (e.g., patents, trademarks, trade secrets, or copyrights). This is not to say, that our student groups have not created novel ideas, generated highly valuable survey insights, or developed strategies/tactics/programs that the client subsequently converted into IP. An area of concern raised at our school was liability (for the university and its students) and the requirement to emphasize that the CBP is conducted in a learning environment. This is expressed in a key statement in our RUA: “No representation and no warranties of any kind, either express or implied, or as to the usefulness of the final project are being made. Should Company choose to commercially develop any of the products, ideas, strategies, inventions, discoveries and improvements, the Company does so at its own risk.” While examples of student project confidentiality agreements can be easily found on school websites, we suggest gaining any necessary internal school approvals before considering adoption of a standard CBP-SS document.

Included in the email sent to qualified clients is a requirement that the client reply to the email indicating they (1) understand and agree to the terms of participation, and (2) want their application to be advanced to the wait list for an upcoming term. This serves to emphasize the importance of the participation requirements (and seems to work well in mitigating the issue of client non-response). For CBP applicants that are not deemed a fit, best efforts are made by the FA to either connect the applicant to other internal resources (e.g., interns, job-postings, directed-study) or external resources (e.g., SBA, SCORE, or local business organizations).

Selected clients are contacted three months in advance of the start of the term and receive a confirmation letter via email restating the participation requirements and specifying in-class participation dates (Figure 1, Step 4). Included is a timeline, which outlines the key CBP milestones (see Figure 2). While the FA is provided a schedule at the start of the academic year

by the department chair defining the number of sections and respective FOR for each course that would include a CBP, these schedules and FOR designations frequently change. Best efforts are made to align projects to FOR's industry area of expertise or interest, however, this is not always feasible as our business school is dispersed over multiple geographic campus locations. Students enrolled in many of these courses are fully-employed so advance efforts to screen lists of enrolled students are needed to prevent student-employer and client conflict of interest. Thus, a benefit of aligning client selection to the FA role is that it allows for swapping of projects before term start, when needed. This said the FA role needs to exhibit flexibility.

[Insert Figure 2 here]

### *Project Scope*

Gorman (2010) notes, "clients often brim with ideas" (p. 437). However, clients are frequently unsure at the onset of a project as to what students are able to deliver (Clark et al., 2012).

Underscoring this point, Wedell-Wedellsborg (2017) found in a survey of C-suite executives that 85% felt their organizations were poor at diagnosing the problem that needed to be solved. As suggested by Drucker (2011), getting the right answer isn't as important as getting the question right. Simply said, answer the wrong question and you still have the same problem.

We often find that the project request initially advanced by a client is a symptom of a larger problem. As example, a client requested assistance in developing a promotional plan to address declining sales. After further investigation, issues in product quality and customer retention were uncovered shifting the project scope. Similar to Gorman (2010), we too found that faculty influence in defining the project scope was critical to optimizing the benefits of learning that occurs in a real-world context, *situated learning* (Lave & Wenger, 1991). However, as long as the course learning objectives and CBP purpose are well understood by the FA, this

task is not necessarily a required activity for the FOR. Indeed, defining and negotiating the project scope with a prospective client can be a time intensive course preparation activity for the FOR and typically iterative in nature. Moreover, this activity is more proficiently tackled with repeated experience. Being that and given the range of FORs (full-time and adjunct) teaching in our business school, as well the condition for project swapping, project scoping was found to be best suited as a CBP-SS activity for the FA (Figure 1, Step 5).

While discussion of scope here is focused on matching the client aims to the course aims, an important learning is the necessity to match the project to the students in the class. As mentioned earlier, our use of CBPs is with both full-time and part-time students. These student populations vary in terms of experience, which creates a very different playing field when working with a client. Through trial and mishap, we came to realize that projects suited for one type of student are not always well suited for another type of student. As example, a CBP with a large industrial manufacturer conducted in a full-time MBA class was found to be particularly challenging for our full-time students, given the complexity of the company's market offering and the students' lack of familiarity with the industry. In this instance the FOR, as well, lacked familiarity with the industry. Thus, requiring students to manage two steep learning curves (course material and industry knowledge). This is not to say that related industry experience is a success criterion. To the contrary, some of the more creative recommendation for our CBPs have come from student work groups not biased by subjective industry knowledge. However, more often the case, when students are less experienced, the market offering is complex, and the FOR is unfamiliar with the industry, the ambiguity can result in student frustration and be more taxing for the FOR. As such, in assigning the CBP the FA needs to be aware of not only who is teaching the course, but also who is taking the course.

### *CBP Case Development*

We have found an ample supply of clients eager to engage the time and talent of students. However, this matching process requires that the clients' problems are addressable by the students and the process by which the problems are addressed is explicitly clarified to ensure the proper level of client engagement. As such, the fuzzy front end of the process needs to be clarified for clients and codified in documentation so it is sharable and easy to understand, to help gain inter-organizational buy-in.

To ensure clarity, mitigate scope creep, and increase client reliability for participation, we adopted the practice of formally writing up the CBP in the style of a teaching case (Figure 1, Step 6). The case begins by introducing the client as the protagonist, typically pondering the presenting problem. Next, a description of the company, industry, and situation is written in relevant detail. As it is often the case that students have little familiarity with the client's industry, sufficient context needs to be provided. Then, the project scope is fully defined. As was defined above, clients are required to participate in three pre-arranged class sessions. These meeting dates are defined in the case document along with expectations for the associated client deliverables. Last, client contact information, project communication protocols, terms of confidentiality, list of available project resource, and detailed exhibits, as needed, are provided. See Exhibit 1 for sample CBP case outline.

Development of the CBP case document typically begins two months prior to the start of the term with a client interview conducted by the FA (in-person or via video conference, as is practical). During this meeting all relevant internal client data for the project is identified and subsequently obtained. The FA is responsible for writing the case and working with the client on subsequent review and editing. This step strengthens alignment and client project commitment.



Final approval of the CBP case includes the FOR and takes place during the “professor introduction” meeting about two weeks prior to term start. Efforts to provide the FOR with more advanced access to the CBP client and case were initially attempted, however, these meetings needed to be repeated when a project needed to be swapped with another class or the department chair made a FOR change. Initially there was concern that the FOR may object to the short timeline for input. In fact, this has never been the case. We attribute this to two factors: benefit of reduced course preparation and peer credibility. As the FA is a member of the marketing faculty, the FA is also an experienced FOR. While initially, case writing was time consuming for the FA, like most forms of writing, efficiency was gained with practice.

Lead on the client officially transitions from the FA to the FOR during the professor introduction meeting (Figure 1, step 7). Following this meeting, the FA populates a CBP folder in the learning management system course site for the FOR. The folder contains the CBP case document, client provided information and data, library database resource guide, links to VoiceThread explainer videos (e.g., how CBPs work and what to expect), marketing plan outline, citation style guide, as well as instructions to students for citing CBPs on their resume. Importantly, these types of communications seek to support the student learning experience. While the FA is available to support the FOR upon request during the term, conducting the CBP and managing feedback is the responsibility of the FOR (Figure 1, Step 7). In circumstances where the FOR is new to teaching, the FA attends the in-class client meetings for the FORs first CBP as a support resource.

### **Evaluation**

While formative and summative assessments are used by the FOR to assess student learning and progress during the CBP, the FA administers the client project evaluation to assess the client’s

perceived value of each of the student group's work contribution (Figure 1, Step 9). At the conclusion of each project, the FA sends the client a link to an online evaluation survey. Clients are asked to rate their level of satisfaction with the final work products (report and oral presentation) of each group based on 12 criteria using a 6-point Likert scale (1=Very Satisfied; 6=Very Dissatisfied). The criteria included depth, substance, pertinence, insightfulness, conclusions, support, recommendations, written report (clarity, coherence), oral presentation (content, delivery), and overall satisfaction. The FOR is provided the results of the client survey. While many FOR weight the client's evaluation in the student group's final grade, this is not a CBP-SS requirement. As noted early in the paper, client expectations of students' work don't always align with instructor expectations (Goodell & Kraft, 1991).

To understand client perception of students' work under the CBP-SS, data was analyzed from 135 client evaluations collected over a four-year period assessing the work of 545 student groups. As shown in Table 4, while the distribution of scores covered the full range, clients reported being mostly satisfied or very satisfied, with the mean on all 12 criteria assessed ranging from 1.71 to 1.98. This is not to say that clients didn't perceive lower levels of satisfaction with aspects of individual student group work, or even dissatisfaction with the final deliverables produced by a particular group in whole. While not the focus of this paper, understanding moderating factors for increasing client perceived value merits further research.

[Insert Table 4 here]

As part of the survey, clients were asked to rate the likelihood of the company using any part of the student group recommendations using a 7-point Likert scale. Nearly 90 percent of clients report they are either likely or very likely to implement some part of the work of the student groups. Clients indicating favorable likelihood were asked to list perceived usable

outcomes. Useful outcomes listed by clients ranged from novel research insights to strategic and tactical recommendations.

Certainly, it could be argued that social desirability bias, the tendency for survey respondents to answer questions in a manner that is perceived favorably, might be inflating these results. However, anecdotal evidence based on the high level of repeat clients and client (as well as student and alumni) referrals might indicate otherwise. Nearly 82 percent of the clients surveyed indicated interest in participating again. More recently, a question to measure advocacy was added to the survey asking clients (N=75) to rate their likelihood of recommending participation in a CBP to a business colleague (Net Promoter Score). Over 81 percent of clients surveyed indicate they are likely to be a promoter (17 percent passive and 1 percent detractor).

We suggest that assigning responsibility for the client evaluation to the FA versus the FOR may serve to mitigate the potential for social desirability bias. Admittedly, further research is needed to evaluate CBP outcomes.

### **Value-Harvesting**

A key impetus for the CBP-SS was the desire to improve the creation and extraction of value beyond the CBP transaction. As example, favorable client experiences offer the potential for additional CBPs, student jobs, internships, executive guest speakers, alumni engagement, sponsorships, gifts/funding, as well as opportunities for faculty research. However, value was not always well harvested by the FOR whose course the project was conducted in. In some instances, client future project needs extended into other curriculum. For example, in one CBP students uncovered an under-utilized warehouse where client products were stored, sorted, and distributed. One of the final recommendations put forward by the student group to their client

was to consider if this process could be better outsourced to a logistics partner, which would allow the client to serve new market segments and to better leverage the asset through other means, repurposing or selling it. This led to a CBP for a real estate finance course where students were tasked with valuating the asset.

In other instances, the opportunity for value extraction was longer range or the faculty member lacked internal relationships or incentive to facilitate value-harvest. As example, a year following the completion of CBP with a mid-size services firm in the region, the client reached out to the FA with a request for a CBP to identify ways the business could leverage technology to effectively scale their new service offering. The project was scoped by the FA working with a FOR in another discipline area under the CBP-SS. Two years later, the same client reached out again to the FA with another project request for the growing business in yet another discipline area. The project was scoped by the FA working with a FOR in that discipline area under the CBP-SS. The cultivated relationship, later afforded opportunity for a meaningful gift. As such, a key responsibility of the FA is value-harvesting by means of client advocacy (Figure 1, Step 10). As suggested by Urban (2005), through advocacy an organization can realize reduced cost of acquisition and growth in customer preference. The FA value-harvesting role includes management of a range of activities that foster mutual and reciprocal relationships, such as: advocating client interest (e.g., student interns, job postings, future CBPs), fueling client sourcing (e.g., through testimonials, social media, LinkedIn networking, and referrals) and supporting school interests (e.g., faculty research, alumni engagement, and donations).

Early on in our development of the CBP-SS, we identified another important opportunity for internal value creation — collecting and sharing learnings and best practices, as well as developing shared FOR resources. While academic scholarship in higher education is engaged

in a community of practice, teaching is done in “pedagogical solitude” (Shulman, 2000, p. 24). This pedagogical solitude is amplified by our business school’s distributed model for degree program delivery, whereby faculty largely work in off-campus offices. Thus, collegial sharing requires more deliberate orchestration. To this end, the FA serves as a central faculty touchpoint for transferring explicit and tacit knowledge in our CBP efforts. As example, to support FORs new to teaching courses the FA was tasked with creating a CBP resource guide. The guide includes the CBP-SS (Figure 1), as well as provides tools to support use of CBPs as a teaching approach (e.g., sample rubrics [presentation and report], description for syllabus, description of germane library databases and web resources, marketing plan outline, CBP class timeline [see Figure 2], etc.).

#### *Pay it Forward*

While we do require clients to pay for any out of pocket expenses that are pre-defined in the scope of the project (e.g., for our global market entry projects clients are required to provide a travel stipend of \$15,000 to subsidize travel expenses for elected members from each team), clients are not charged administrative fees for program participation. Funding for our suprastructure is supported with donations ensued through our "pay it forward" approach, which is executed with our business school’s advancement team. As example, following successful implementation of two CBPs with a large US insurance company, we secured a \$100,000 gift to support CBPs in minority owned businesses in the region. This precarious method of funding is dependent on forward looking business executives and continued support from school leadership.

This is not to say that some universities haven’t been successful in supplementing department budgets through fees garnered from clients (Clark et al., 2012; Razzouk et al., 2003). While a fee-based approach was alluring, this practice was deemed problematic for our use for

several reasons. As example, given the global reach of our business school, we believed it was important to extend geographic coverage of our served client base outside of the state or country. This decision necessitated that clients expend additional resources (time and money) to meet in-class participation requirements. While certainly virtual communication technology can be used in place of physical visits to campus, for our face-to-face courses in-person interaction with the client was deemed germane to the learning process. We found that additional upfront administrative fees often created an unnecessary impediment in the client's decision to participate in the program. Over the past decade, we have received nearly a million dollars in gifts, supporting the continuance of our CBP-SS.

### **Balancing Teaching and Service**

The FA role is considered a faculty service assignment. The role is aligned to the dean of academic affairs, but works closely with the department chair. In recognition for this service, teaching relief is awarded. When initially created, the CBP-SS produced and supported between 15 to 20 CBPs annually and was managed with 50 percent release of the FA's teaching load. As the required number of CBPs grew, additional releases were provided. Given the size of the CBP-SS, which now produces and support over 50 CBPs annually, teaching release is equivalent to a full teaching load. However, rather than provide more releases to just one FA, a FOR was tapped and provided releases to support the case development activities of the CBP-SS. This arrangement allowed both faculty members to continue as FORs, which was not only the preference of the FAs but deemed important for ensuring the continuance of the CBP-SS (as either FA is now fully capable of taking lead on the CBP-SS). In addition, we have found that expanded capacity can be garnered by tapping into existing administrative personnel and their work activities within the school.

Needless to say, we have a lean operation, which relies heavily on effective scaling processes and time-savers. While perhaps a bit old school, an extremely value resource developed by the FAs is a *portfolio of letters* using a table of contents for easy navigation. This resource includes a variety of letter templates to help streamline the myriad of communication tasks undertaken by the FA such as, qualification/waitlist emails, client in-class meeting reminder emails, request for use of client logo for marketing purposes, advancement letters, thank you letters, etc. The resource was easily constructed by simply copying each type of communication into a Word file after it was initially written.

### **Conclusions**

Through our use of critical participatory action research, we identified specific aspects of CBP task structure from which the FOR might be liberated to support adoption and sustained use of CBP's in targeted curriculum across a range of faculty, full-time as well as adjunct, leading to the development of a CBP-SS. Importantly, this CBP-SS has allowed us to create efficiencies in generating awareness, interest and qualified demand for client-sponsored projects in the alumni and business community—easing a key issue defined by FORs: client sourcing. While individual faculty are capable of doing this work, few have the capacity.

Additionally, centralization of some of the CBP tasks has afforded a common repository for tacit knowledge. The CBP-SS approach has been used by the authors and their marketing colleagues to facilitate hundreds of CBP projects within the last decade, making it a standard of practice in the marketing discipline. These efforts have ensured that all our students have at minimum one client experience when graduating from our MBA programs. While generally this approach has resulted in high client, student, and instructor satisfaction, we would be remiss in not communicating that it has also turned out a few less than perfect projects. However, in our

experience these instances, which make students more vulnerable, can lead to instructor or client mentoring situations that result in impactful student learning.

Business scholars believe that experiential learning, and more specifically CBPs, may improve the hard and soft skills students need to excel in today's business environment. However, successful CBPs require a strong partnership between universities and the business community. And likewise, resources and recognition of faculty who endeavor in this area is required to support pedagogical adoption and sustained use. While our CBP-SS was constructed and refined over a decade, we see its path for replication as more parsimonious. In our experience, four factors are critical for success:

1. development of advocates within the school's leadership (our business school's deans and department chair were all public supporter of the CBP-SS),
2. identifying a FOR willing and capable (competent administrator and change agent) of undertaking the FA service role
3. securing initial funding (we secured a two-year seed grant of \$150,000, to support FA release time and implementation activities, although a lesser amount might be sufficient to support scaling at a smaller school),
4. persistence and celebration of the progress of this meaningful work.

Lastly, in the CBP-SS offered by the authors the FA resource is used to scope projects, develop CBP cases, and intervene as needed (e.g., scope drift and difficult conversations). For schools offering consulting courses, future direction might be explored engaging students in these steps of the CBP-SS. We hope that this article will help faculty and administrators consider wider adoption of CBPs by offering a pathway for sustained and scaled use, as well potentially spark internal discussions that extend support to the scholarship of teaching (Boyer, 1996).



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## Tables

Table 1

### Perceived Accrued CBP Stakeholder Benefits

	Student	Client	Instructor	University	Measurement
Bove & Davies, 2009	Apply theory to real life situation	Quality reports with better insight than commercial firms.	Source for examples beyond text materials		SET student self-report, 5-point Likert scale
	Accepting a position with client firm	Recent hires ramped up faster and contribute faster than similar new hires.  Highly rewarding to interact with students and share knowledge			
Strauss, 2011	Build skills as business professionals		Instructor's role shifts from sage-on-the-stage to facilitator-coach	Helps strengthen image of University with positive PR	SET student self-report, 7-point Likert scale
	Accepting a position with client firm		Future consulting engagements		
	Become more independent learners and creative problem solvers		Higher student satisfaction and teaching evaluations		
Cooke & Williams, 2004	Develop future job skills and gain applied experience	Cost savings when compared to experienced professionals Students serve as bench from which clients can hire from	Increase faculty's professional network Keep abreast of latest business practices and trends		SET student self-report
West, 2011	Clients can serve as potential employers and network contacts for students		Quality of work is high as students are held to a higher standard (by the client)		SET student self-report, 14 open ended questions

	Help students decide what type of career they want to choose				
	Retain concepts used in CBP longer than if learned from a text book				
Kennedy et al., 2001	Develop soft skills				Case observation
Bock & Randall, 2014	Increase confidence				SET student self-report
de los Santos & Jensen, 1985	Bridge theory and practice gap		Faculty research opportunities transpire with the client, beyond the project  Wealth of examples for course principles	Good PR for university	SET student self-report & peer evaluation
Barr & McNeilly, 2002	Build resume beyond academic qualifications	Students demonstrate business-relevant skills for potential hiring			Open ended questions
Zsidisin, Hartley & Collins, 2013	Apply various tools taught in the curriculum in a realistic situation.  Hone professionalism and communications skills	Companies obtain different perspectives from students  Helps companies recruit top talent	Faculty research opportunities transpire with the client, beyond the project  Project feedback helps keep course content current and relevant	Excellent means for engaging alumni	Case observation
Goodell & Kraft, 1981	Real world experience	Low-cost or free consulting  Access to advanced marketing methods  Positive client PR	Improve professional competence  Secure data for academic research  Enhance relationships with business community	Enhanced thought leadership in business community  Means for student recruitment in client businesses  Positive PR, university perceived as thought leader	Student self-report



Oh & Polidan, 2018	Enhanced-decision and problem-solving	Contribute to future talent development		Student self-report
Annavarjula & Trifts 2012		Client executive have developed other connections to the college including guest speaking, offering plant tours and hiring faculty as consultants	Stronger ties with business community	Student self-report
Dommeyer, 1986			Higher student satisfaction and teaching evaluations	Student self-report
Parsons & Lepkowska-White, 2009			Provide exposure to current marketing practice and trends	Potential for monetary gifts Student self-report
Lopez & Lee, 2005			Learn new industry examples for class concepts	Marketing tool to enhance brand image Case observation

Table 2

MBA Student Learning Outcomes (SLO)

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Marketing Management Course Level SLOs

- Define, understand and apply key marketing concepts, e.g. segmentation, positioning, targeting, marketing mix
- Analyze the organization’s current market situation (“micro and macro”)
- Develop and evaluate alternative marketing strategies
- Formulate a marketing plan with justifiable and actionable recommendations
- Present recommendations concisely and persuasively both orally and in writing

MBA Program SLO

- Students are able to apply theory to practice cultivated through industry collaborative learning.
    - Students recognize ambiguity and complexity in applying theory in practice.
    - Students demonstrate integrative, creative, and critical thinking in solving contemporary industry issues.
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Table 3

Communication Protocol & Engagement with Client

While a large part of the work that you will be undertaking in the project is self-directed, it is imperative that your team proactively reaches out to your client to develop the relationship. Creating great marketing plans for your client, involves your client. Client engagement should include:

- ✓ *imparting knowledge* learned through your market research —to validate understanding or to identify knowledge gaps that can be addressed through your work
- ✓ *asking questions* — questions to gain new information, questions to validate data or reveal discrepancies, questions to better understand your client’s perspective (opinions, feelings, attitudes), questions to advance buy-in
- ✓ *trial balloons* —sharing strategies and/or tactics with your client before your presentation to gain their reaction, allowing your team time to solidify your proposal.

To ensure the most efficient means of communication with your client, the team communication leader should be the primary interface with your client. Request for engagement should be thought out and initiated through email. In some instances, email exchange may be the appropriate communication medium for engaging with the client. In other instances, a site-visit, video or phone call may be the more appropriate medium. Some clients are more hands-off and others expect interaction. The team should work with their client to ascertain their communication and engagement preferences.

Table 4

Client satisfaction on student group CBP work (N = 545)

Criteria area (1 = highly satisfied to 6 = very dissatisfied)	Very Satisfied (1)	Satisfied (2)	SUM (1)+(2)	Somewhat Satisfied (3)	Weak Satisfaction (4-6)	Mean
Depth of work	48%	34%	83%	14%	1%	1.73
Substance of work	48%	35%	83%	13%	1%	1.73
Pertinence of work	48%	37%	85%	12%	1%	1.71
Insight-fullness of work	44%	34%	78%	17%	1%	1.84
Quality of conclusions	41%	37%	78%	15%	1%	1.90
Support of conclusions	37%	36%	74%	19%	2%	1.98
Quality of recommendations	41%	34%	76%	18%	2%	1.92
Clarity of final written report	47%	37%	83%	12%	3%	1.78
Coherence of final written report	46%	39%	85%	10%	3%	1.77
Quality of content in final oral presentation	46%	33%	79%	16%	1%	1.82
Quality of delivery of final oral presentation	47%	33%	80%	15%	1%	1.79
Overall Satisfaction with the E2B project	48%	37%	85%	11%	1%	1.71

## Figures

Figure 1

### Client Based Project Suprastructure (CBP-SS)

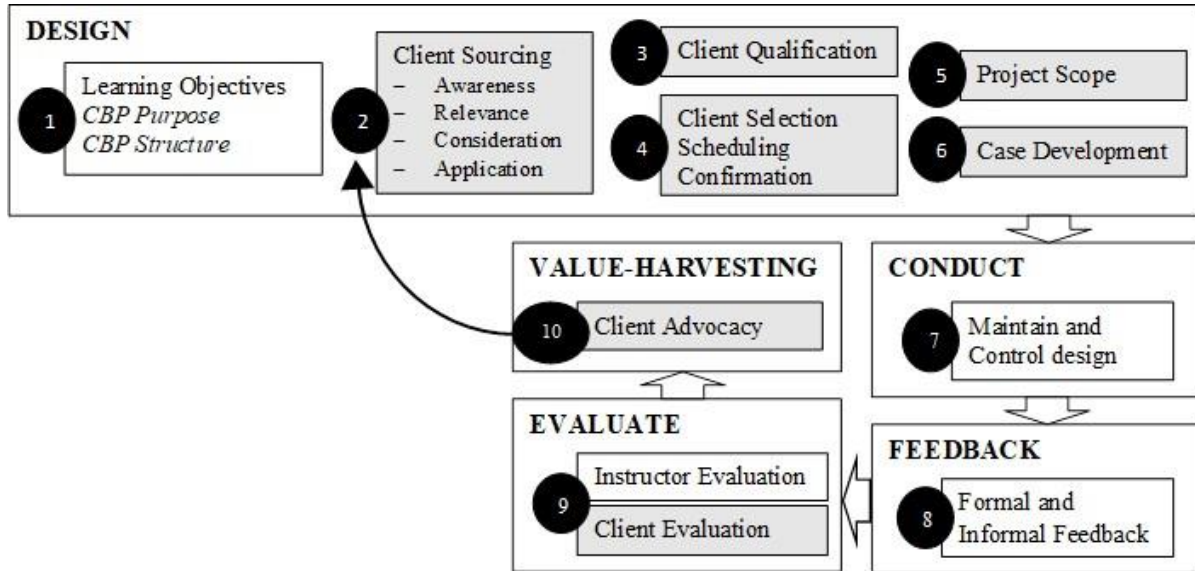
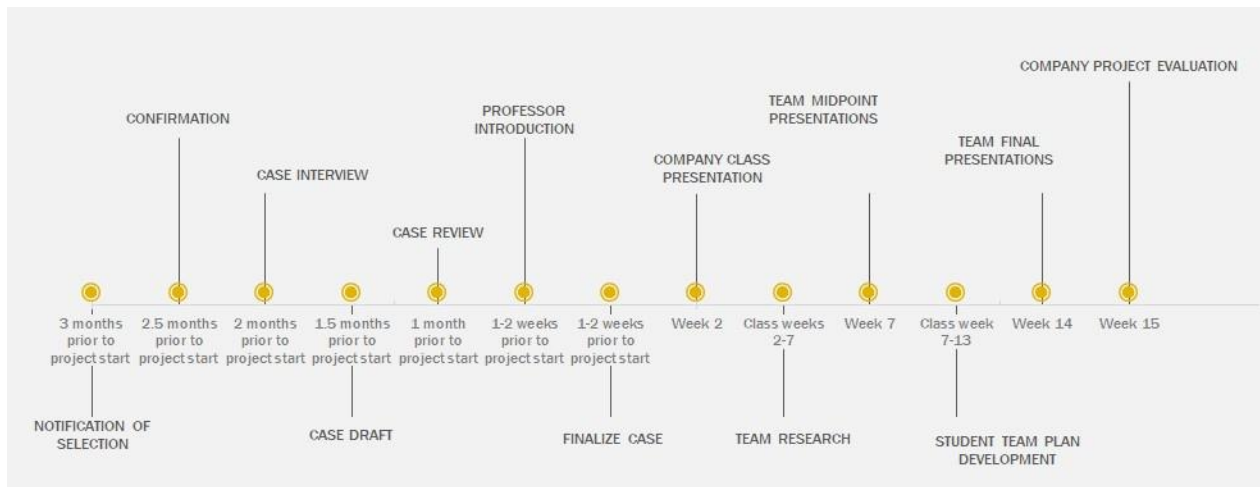


Figure 1: The sequence of the CBP-SS activities is defined in steps 1 – 10. Non-shaded areas denote activities which are the primary responsibility of the faculty of record (FOR). Shaded areas denote activities undertaken by the faculty administrator (FA) role. Decision in activities noted in italic are jointly made by the FOR and FA to support scaling through uniformity in design.

Figure 2

CBP Timeline



## Exhibit 1

### **CBP Case Template**

#### **Client Class Project: [Client Name]**

Introduction paragraph that identifies the central client executive(s) for the project and defines the presenting problem or decision point.

Example: “For more than four decades we have been a market leader in retail console television sales, today this product category represents less than half of our company’s retail sales,” stated [executive name and title]. With sales and prices of TV’s declining in the US, the company’s Vice President of Marketing and Merchandising, [executive name], had been working over the past few years to reshape the business by changing the company’s product assortment. However, in the minds of consumers [retail brand name] was still primarily know as TV retailer. “This entrenched positioning is hampering our ability to grow. We need to change brand perception,” asserted [executive name and title].

#### **Company Background**

Brief history and description of company. Hyperlinks are used to direct students to outside web sources, such as specific links within a company website or project relevant links. As example, for the CBP described in the introduction paragraph above, web links included videos of past and current commercials, as well as, print advertising and in-store merchandising.

#### **Competitive Landscape**

Brief narrative provided, using liberal quotes from interview with company executive(s), describing the nature of industry competition. A list of direct competitors defined by the client is provided, with hyperlinks to the competitors’ websites. Efforts are made to begin to expose students to a range of information sources through citations and hyperlinks. Charts, tables and figures provided by the company are included.

#### **Project Background**

Description of current situation and project relevant aspects of the company’s current marketing plan. As example, for the CBP described in the introduction paragraph above this section included information on company’s revenue and profit goals, financial results, merchandising mix, target consumers (e.g., segmentation profiles, personas, PRISM groups), and advertising spend by medium.

#### **Project Scope**

Begins with a statement on the client aim of the project. As example, “The focus of this project is to develop a marketing plan to support the company’s goal to reposition the brand and become the premier retail destination for [growth categories].” An outline of the report elements is provided in this section (e.g., Executive Summary, Team Member Bios, Table of Contents, Industry Analysis, Consumer Analysis, Competitive Analysis, SWOT Analysis, Marketing Strategies, Tactics, Programs, Financials, and Implementation).

### Confidentiality

A statement reinforcing confidentiality is provided. As example,

All confidential and/or proprietary information provided by the client, consisting of but not necessarily limited to business information (e.g., company name, employee contact information, product information, customer lists, pricing data, financial data, marketing data, research, and/or production, distribution, selling, merchandising systems or plans) and technical information (e.g., methods, processes, formulas, compositions, systems, techniques, inventions, machines, computer programs, and research projects), may only be disclosed and/or used as authorized by the client company for purposes of carrying out the class case project for the client company. Please refer to terms of the signed Restricted Use Agreement.

### Communication Protocol & Engagement with Client

Section shown in Table 5 is provided in this part of the case outline.

### Evaluation Criteria

- Depth ... analyze with astute insight, comprehension and intelligence
- Substance ... give specific information; ensure adequate coverage of information
- Thoroughness ... develop comprehensively
- Proportion ... achieve appropriate balance
- Pertinence ... preserve relevance throughout
- Evidence ... validate, authenticate consistently (describe your research and cite resources)
- Precision ... be exact, include specific examples and details
- Clarity ... clearly present results of analysis; effectively use tables and figures
- Coherence ... maintain connectedness, cohesion, organization

### Company Contact Information

[Address, URL]

List of key project stakeholders and subject matter experts available to answer student questions relative to the project within 48 hours.

<i>Name</i>	<i>Title</i>	<i>Email Address</i>	<b>Phone Number</b>

### Client Participation Dates

<i>Activity</i>	<i>When</i>
<b>1. Company Project Briefing to Class</b> Project client will brief the class on their organization, industry, current situation and project request: 45- to 60-minute presentation, followed by 30-minute Q& A.	[class date & time]
<b>2. MID-POINT Presentations:</b>	[class date & time]



<p>Student teams will have 20 minutes to individually present pre-defined project mid-point deliverables, followed by Q&amp;A. Only the student group presenting is in the classroom.</p>	
<p><b>3. Final Report Submission and Presentation of Recommendations:</b>  Students will submit their final reports electronically to the client for review and evaluation. Student groups will have 20 minutes to present an executive summary of their recommendation; followed by Q&amp;A. All students are present in the classroom.</p>	<p>[class date &amp; time]</p>
<p><b>4. Final Evaluation</b>  Company will complete an evaluation survey rating the quality of each group's final report and presentation.</p>	<p>[due date]</p>

## Exhibit 2

### Client Evaluation Survey

Client evaluation survey administered through Qualtrics.

1. Name of organization [text box]
2. Name of person completing evaluation [text box]
3. Course project was conducted [drop down menu]
4. Year project was conducted [drop down menu]
5. Term project was conducted [drop down menu]
6. Campus location [drop down menu]
7. Class instructor [drop down menu]
8. How many student groups worked on your project? [survey logic used to populate evaluations for number of groups entered]

In the following section of the survey you will be asked to rate each of the student groups final deliverables: report and oral presentation.

9. Student group name [text box]
10. Please rate [group name autofill] on the following criteria. [6-pt Likert scale: 1 = highly satisfied to 6 = very dissatisfied)
  - a. Depth of work
  - b. Substance of work
  - c. Pertinence of work
  - d. Insight-fullness of work
  - e. Quality of conclusions
  - f. Support of conclusions
  - g. Quality of recommendations
  - h. Clarity of final written report
  - i. Coherence of final written report
  - j. Quality of content in final oral presentation
  - k. Quality of delivery of final oral presentation
  - l. Overall Satisfaction with the E2B project
11. Please include written comments defining what you “liked” most about the student’s report, what your major “concerns” were with their work and any “suggestions” for improvement for the team you would offer from a practitioner’s perspective. [text box]
12. How likely is your organization to implement some part of the work of the student groups? [7-pt Likert scale: 1 = very likely to 7 = very unlikely)
13. Please list the project outcomes that you perceived to be most usable. [text box]
14. Would you be interested in participating in the program in the future? If, yes please indicate your topical area of interest. [Yes/text box, Don’t know/Unsure, No]
15. How likely is it that you would recommend participation in Pepperdine University's E2B program to a business colleague? [Net Promoter Score scale]

## Exhibit 3

### Sample Client Communication Templates

#### Website Contact Autoreply

This follows up on the contact request you submitted through our website. Thank you for your interest in having one of our graduate classes at [school name] work on a business project for your organization.

We work on a trimester basis. At present we are in the process of identifying companies for our upcoming [term] classes. The initial step in qualifying for participation is a phone meeting to discuss the nature of your project and the benefits and requirements of the program to determine if this is a fit for your organizational needs. Class space is limited and qualified projects are prioritized based on application date as well as our industry/company mix requirements (we work to ensure a broad representation of industries and company sizes each term).

I will follow this email with a calendar invite for a phone meeting on [date @ time]. If that date or time does not work for your schedule, please reply to the invite with a later alternative.

I look forward to speaking with you.

#### Redirecting Referrals to Contact Form [linked to program database]

Thank you for your advocacy of our [name of CBP program]. Many of our best projects come through [student, alumni, former client, etc.] recommendations. At present our classes for client projects are booked out through the [term].

To begin the inquiry process, please complete the contact request form on our [name of CBP program] website. The initial step is a phone meeting to discuss the nature of your project. As well, to discuss the benefits and requirements for participation to determine if this is a fit for your organizational needs. The contact request form automatically opens up an application for your company, triggers me to schedule a phone meeting, and establishes your place in the queue.

More information on our [name of CBP program] can be found on this link [hyperlink]. I look forward to speaking with you in the coming weeks to learn more about your organization and project needs.

#### Advancement to Waitlist

It was a pleasure to speak with you and learn about your organization. Thank you for your interest in having one of our graduate classes work on a project for your organization. Please review the information below and reply back via email to confirm

that you can undertake the participation requirements and want to advance your application for a class case project.

### **Time Commitment**

Attached is a document that outlines the process we use for developing and hosting a class case project. Once your company has been identified for a class, a faculty member will be assigned to work with you to develop your project request and write it up in our case format. Prior to the start of the trimester, we will set up and facilitate an introduction meeting between you and the professor who will be teaching the class your project has been assigned.

There are three times during the term you will be required to attend class. We work on a trimester schedule (classes meet once a week for fourteen weeks).

- Project Introduction (Session Two). To ensure that the class is properly briefed to undertake your project, you and/or the appropriate associate(s) in your organization will be asked to attend class to present information on your organization and your project.
- Mid-point Student Group Meetings (Session Seven). At this class each of the student groups will present to you their key findings and analysis from which they will be building their recommendations. You will be asked to provide verbal feedback to each of the student groups.
- Final Student Presentations (Session Fourteen). At this final class the student groups will present to you an executive summary of their recommendations and submit to you a comprehensive report. You will be asked to provide verbal feedback AND submit an evaluation form for each of the groups (link to evaluation form will be emailed to you).

Your engagement and prompt follow-up over the duration of the project has a direct impact on the quality of the project outcomes — for both you and the students. As such, you will be asked to identify a key project liaison that can respond to student questions and requests for information within a 48-hour time frame.

### **Confidentiality**

As your project will be conducted in a learning environment, the student's work should be considered by your organization as directional insight for internal use only. It is our practice to require the students in the class to sign a Restricted Use Agreement. Attached is a sample copy of the document. Please let me know if your organization will require any edits. We ask that edits be kept to a minimum and that the scope of the document stay in context with the nature of the work – “student class case project”.

### **Evaluation**

At the end of the project you will be asked to evaluate the student groups' work. We will provide you with a link to our evaluation form and ask you to complete

one evaluation for each team rating their performance (on a Likert scale) in various areas including – depth of work, insight-fullness of work, quality of conclusions, quality of recommendations, coherence of written report, quality of final presentation (content and delivery).

Upon your reply to this email confirming your agreement to the participation requirements outlined above your application will be advanced for consideration in your indicated area of interest. We will be confirming our [term] project companies in [month]. If your company is not selected for this term, your application will remain active for consideration in a subsequent term.

Please feel free to call me if you have any questions.

### Confirmation Email

I am pleased to inform you that your company has been selected as an [name of CBP program] class client project for our upcoming term. Your project has been placed in [instructor name and class name]. This class meets on [day] from [time] at our [campus location and hyperlink]. As we had discussed, there are three times during the trimester you will be required to attend class. **Please confirm that you can commit to the dates below.**

1. Project Introduction: [date]
2. Mid-point Student Group Meetings: [date]
3. Final Student Presentations: [date]

Next step and timing:

- Meeting to gather additional background information for the project case and outline the project objectives and deliverables. Suggested date/time:
- Review project case write-up [due date]
- Professor introduction (early [month]) @ [location].

We look forward to working with you in the upcoming term. Please feel free to call me if you have any questions.

### Reminder Email: Project Introduction [sent week prior to scheduled date, cc: instructor]

We are looking forward to your presentation to the class on [date]. Please plan on about 45- to 60- minutes for your presentation. Following your presentation, the students will have up to 30 minutes for Q&A.

Our classrooms are equipped with overhead projectors and wireless access. We can plug your laptop directly into our system or accommodate a USB drive. Please plan to arrive 15 minutes early so we can get you set up.

As a reminder, [instructor name] will have each student in the class sign a Restricted Use Agreement. You will be provided a copy of the signed documents before the start of your presentation.

Directions to the campus and parking instructions can be found on this link [hyperlink]. [Instructor] classroom is located [building and room number].

Please feel free to call if you have any questions.

Reminder Email: Midpoint Group Meetings [sent week prior to scheduled date, cc: instructor]

Just a quick reminder for next week's "mid-point" student group presentations on [day/time].

At this class, each of the student groups will individually present to you their initial key findings and analysis from which they will be building their recommendations. You will be asked to provide verbal feedback to the group at the conclusion of each "mid-point" presentation. There is no preparation required on your part.

Please remember the students are managing two steep learning curves coming into this meeting— understanding the class concepts and understanding your industry. This in-class meeting provides us with an opportunity to provide constructive feedback, direction and encouragement.

Please plan to arrive 15 minutes early so you can get settled and seated for a prompt class start. Directions to the campus and parking instructions can be found on this link [hyperlink]. [Instructor] classroom is located [building and room number].

Please feel free to call if you have any questions.

Reminder Email: Final Group Meetings [sent week prior to scheduled date, cc: instructor]

Just a quick reminder for next week's "final" student group presentations on [day/time].

At this class, each of the student groups will submit their final reports to you and present a 20-minute executive summary of their analysis and recommendations.

As we discussed at the onset of the project, we do require that participating companies complete a project evaluation form. After you have read each of the student teams final reports, please click on this link below to complete the evaluation. The form needs to be completed within 3 days of the final project presentations.

[link to online evaluation survey]

As your project was conducted in a learning environment, the primary objective of this class was to develop student knowledge and applied skills at a graduate level. While all students were given access to the same instruction and resources, each of the groups' final deliverable may vary in level of usefulness for your organization. The benefit of our "competing" model for [name of CBP program] is that it allows you multiple recommendations from which to extract value.

Please plan to arrive 15 minutes early so you can get settled and seated for a prompt class start. Directions to the campus and parking instructions can be found on this link [hyperlink]. [Instructor] classroom is located [building and room number].

Thank you for your support throughout the trimester. Feel free to call if you have any questions.

#### Waitlist Notification

I am reaching out to let you know that we have confirmed our client project partners for the upcoming term. While we were not able to place your project in this term, your application will remain active on file for consideration in an upcoming term.

Near term, if you are interested in hiring one of our graduate students as an intern, please contact [name] and [she/he] can assist you in identifying potential candidates.  
[provide contact information]

Thank you for your interest in working with our students.

#### Advancement Introduction

We are very proud of the work our students produce for their client organizations. I am pleased to hear that you feel their work will advance your organization's effort in the market.

Our [name of CBP program] is made possible through the generous support of prior company participants, forward-looking companies and private foundations. I have copied my colleague, [name of advancement officer] on this email so that [she/he] may follow up with you directly to see if your organization might consider providing a program donation in the near future.

#### Request for Use of Company Logo & Testimonial

Thank you for completing the evaluation form. It was a pleasure to conduct a class case project for your company through our [name of CBP program]. We are committed to providing education that is relevant, experiential and results-oriented. Your project provided students with real-world application that both challenged and inspired their professional development.

I would like to include your company's logo on our [name of CBP program] webpage and marketing materials. Would your organization approve this recognition? If so, can you provide me with your company logo (TIF file)? Would you be willing to provide me with a quote that we could use in our program marketing materials? Examples of quotes from other participating companies can be found on this link [hyperlink].

We hope that you will continue to consider our [name of CBP program] for your future project needs. And when intern or employment opportunities arise, you will remember the exceptional blend of diverse skills and talent encompassed in our MBA candidates and alumni and look to [school] as a preferred recruitment partner.