A SMALL BUSINESS INSTITUTE (SBI) PROJECT: MULTIPLE VIEWS: CLIENT, STUDENTS, JUDGES: GUIDELINES FOR CONDUCTING AN SBI COURSE

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ABSTRACT

This paper examines a Small Business Institute (SBI) project from the perspective of the, client, students, and final examination judges. The same client was the subject of two different team projects. One team split into two factions and presented two separate reports, for a total of three projects. Students liked the real world experiences and lack of structure, although they felt not all students could handle the lack of structure. The wide background of the judges was an advantage although the scoring system needed to be improved. A clear definition of the scope of work was important. The recommendations of two of the reports were used by the client as they were practical in nature. The student-client interaction was found to be important in one case as the student’s enthusiasm and work ethic energized the client about the project. The selection of the client and student teams is critical to a successful SBI project. We had the best of both worlds a good client and good student teams at least in two of the three cases. The article concludes with guidelines to use in teaching an SBI course, before, during, and after the project.

Introduction

The Small Business Institute© (SBI) program began as a pilot program of the United States Small Business Administration (SBA) in 1972. The mission was to use faculty expertise, expand SBA resources, and develop student competencies, all founded on helping small business owners (Elbert, Harmeson & Dougan, 2001).

At its peak, SBI programs across the U.S. included about 475 colleges and universities. “Official” SBI programs numbered fewer than 125 in 2003 (Osborne, 2003). One reason for the decline was the loss of federal funding in 1996 (Osborne, 2003; Jackson, Gaulden, & Gaston, 2003).
Today, several hundred universities and colleges conduct both SBI and similar programs to provide consulting services by both graduate and undergraduate students (Cook & Belliveau, 2006).

**Literature Review**

There has been an extensive stream of research concerning the SBI program published over the past three decades (Osborne, 2003, Jackson, Gaulden, & Gaster, W., 2003). The literature can be categorized according to studies regarding the client, the student, and topics related to the SBI program.

Studies related to the client tend to be concerned with client satisfaction with student projects. A major review of the SBI program by Weaver and Solomon (1985) found that client perceptions were exceptionally positive. There have been many studies conducted related to the client. A selected list of research studies is listed in the bibliography.

Student-related studies have been concerned with student views concerning their overall SBI experience. Other studies have been related to developing student skill sets such as oral presentation skills. A selected list of these studies is found in the bibliography.

Other studies related to the SBI program include those concerning SBI-SBDC relationships, Fry (1987) and Hulpke, Harvey & Metghalchi (1993); and economic development and community outreach, Cours, Williams, & Schramm (2001), Osborne (2003), Bradley (2003), Beguin (2003), and Young (2004).
The SBI at The University of New Orleans (UNO)

The SBI approach has been used at UNO since 1975. During the course of some 33 years, over 300 field projects have been carried out in a variety of courses including retailing, undergraduate and graduate business strategy, and independent study. A student team in a graduate business strategy course was the 1991 Region VI recipient of the Small Business Institute Graduate Case Study of the Year Award.

A small business consulting course (BA 4076) was designed and introduced in 2000 as part of the B.S. in Entrepreneurship curriculum. The course is required of all entrepreneurship majors and is open to graduate students. BA 4076 was not held during the period Fall 2005-Spring 2007 because of Hurricane Katrina and the plans of the new dean of the UNO College of Business to have business school faculty go into the New Orleans Metropolitan Area and work with teams of students from their classes to assist small businesses, especially in the aftermath of Hurricane Katrina. The dean was replaced in 2006 and BA 4076 was offered again in the Fall semester of 2007.

The author has been the SBI director since the inception of the program and has been the primary instructor. One other management professor has taught in the SBI program primarily in the undergraduate business strategy course.

In the early days of the SBI at UNO, clients were procured from the U.S. Small Business Administration. A Small Business Development Center (SBDC) was established at UNO in 1985. Since 1985, clients have been obtained from a variety of sources including the SBA, UNO-Small Business Development Center (UNO-SBDC), graduates of ExcEL, a UNO-based program.
which helps persons with disabilities start a business, local contacts of the SBI director, and small businesses assisted in a HUD grant.

**Purpose**

This study examines a specific SBI project from the viewpoint of several parties: (1) the student team members, (2) the client and (3) oral final examination judges. An analysis of the views of these persons, the author, and the literature provides practical guidelines for those teaching the SBI course for the first time and as a review for veteran SBI teachers.

**Research Methodology**

Two SBI field projects were studied, one in the Fall 2007 semester, the other in the Spring 2008 semester. Each project was concerned with the same client, the Creole Skillet, a New Orleans-based restaurant. Personal interviews were held with available student team members, the client, and persons who were judges in the final oral examination.

**The Creole Skillet**

The Creole Skillet is a fine dining restaurant located in the Warehouse District of New Orleans. The restaurant was conceived in April 2007 and opened January 19, 2008. Ms. Anne Kiefer is the sole owner of the Creole Skillet.

The Creole Skillet has a manager who has a degree in Hotel, Restaurant, Tourism and over 10 years of restaurant experience. The staff consists of a chef, one bartender, one preparation cook, and a dishwasher. There are six part-time wait staff.
During the Fall 2007 semester the owner of The Creole Skillet was in the process of getting the restaurant ready to open. Building permits were procured and renovations being made.

The project was carried out by students in BA 4076, Small Business Consulting. Two students were assigned to The Creole Skillet. An initial meeting was held by the project team with Ms. Anne Kiefer, the client. Confidentiality agreements were signed and a scope of work defined. The Creole Skillet was a past client of the UNO-SBDC. Paperwork required by the SBDC was completed. One student team member did have experience working in the hospitality industry in New Orleans prior to Hurricane Katrina.

The purpose (scope of work) of the project was to conduct a market analysis of the New Orleans Warehouse District. The client desired the analysis for a business plan in the event she applied for outside funding. Additional information was sought to determine if the client was eligible for tax incentives or special funding through the Hurricane Katrina Go Zone Program or through the Downtown Development District.

Weekly meetings were held by the instructor with the project team to assess their progress and to provide assistance. The project team conducted three walking tours of the area to assess restaurant competition. Personal interviews were held with an executive of the New Orleans Convention and Visitors Bureau, a commercial real estate agent, a staff member of the UNO Institute for Economic Development and Real Estate Research, and the director of the Downtown Development District. Research reports from the UNO Division of Business and Economic Research and EASI –Demographics provided demographic and economic data on the Warehouse District and the New Orleans economy.
The team presented its report to the client. The final examination consisted of a 30 minute
presentation to a panel of business persons followed by a 30 minute question and answer period.
Fifty percent of the grade was based on the judges’ ratings, 40 percent on the report, and 10
percent on a peer evaluation.

**Spring 2008**

The second SBI project conducted with the Creole Skillet was carried out by students in BA
4076 in the Spring 2008 semester. Three students A, B, and C were assigned to the client. An
initial meeting was held by the team with the client to define the scope of work. The project
objective (scope of work) was to develop a low cost promotion plan for the client. Paperwork
required of the UNO-SBDC was completed. After that, the students worked separately on the
project. A and B together, C alone. Separate projects developed despite biweekly meetings with
the instructor. There was little interaction between A, B, and C. A and B conducted five
personal/telephone interviews (four in April 2008) with industry persons. These included a
UNO-Hotel Restaurant Tourism professor, and representatives of the New Orleans Concierge
Association, New Orleans Living Magazine, and Gambit a weekly newspaper. Students A, B,
and C met together with an executive of the Louisiana Restaurant Association in late April 2008.

The teams wrote separate reports for the client. Students A and B made their oral presentation to
a panel of judges. Student C was ill and did not take part in the oral presentation. Student C was
given a special one-on-one oral examination later that summer by a consultant from the
restaurant industry.

Student C used several avenues to gather information. One was to attend with the client the
“Business After Hours” event sponsored by the New Orleans Metropolitan Convention and
Visitors Bureau (NOMCVB). She assisted the client in developing a database from persons visiting the client’s booth at the Zoo-To-Do, an event held at Audubon Zoo. Other sources of information included Visitor Publishing, New Orleans Restaurant.com, Zagat Survey, the Concierge Association, the membership chair of the NOMCVB, and the Louisiana Restaurant Association.

Findings

Student Views

The two students who had the Creole Skillet in the Fall 2007 semester and one of the three (Student C) who worked with the Creole Skillet in the Spring 2008 semester were queried regarding their respective projects. A set of questions developed by Elbert, Harmeson & Dougan (2001) in a survey of SBI students was used. The small number of respondents did not allow for comparison. The highlights of their responses are presented next.

The best learning experiences were felt to be working with real-world contacts and not having a regular class schedule. They should have taken better notes or kept a journal during the course of the semester. This would help prepare the final reports (written and oral). In addition, a schedule or series of milestones should have been used to avoid having to rush at the last minute.

All felt they had accomplished the project objectives for the client. Any misgivings had to do with not being able to follow up with the client beyond the objectives which were achieved. Team members should be allowed to fire a team member who is not doing his/her share of the work. All were in agreement on this, or at least have both the team members and client give a grade.
The primary strength of the project as a learning experience was that it gave the student an exposure to the business world beyond the textbook. Weaknesses of the project included the necessity to have students sign confidentially agreements. Also, the lack of structure was alien to some students who are not self-starters. A two-person group has an advantage in that the schedules of only two people have to be managed. Coordination of three and four person teams is much more complex. Recommendations included screening students before they are allowed to enroll in the course. Second, establish deadlines for all requirements early in the semester.

*Judges' Views*

Three practitioner judges were used for each oral presentation. As noted above, Student C received a special one-on-one examination by a judge who is a consultant in the restaurant industry. The judges were asked to provide the strengths and weaknesses of the judging process and to make recommendations for improvement.

First, let us consider the judging for the Fall 2007 Creole Skillet presentation. Strengths of the process included a diversity of judges and good use of audio visual aids by the student team. One judge appreciated the students’ dedication and enthusiasm, professional dress, and the use of PowerPoint for the presentation, and a well-researched project. Weaknesses included that the judges were not sure of their role and the grading sheet they used. The restaurant industry judge felt that the student who had a background in the restaurant industry tended to talk too much. Recommendations included a better scoring system and even more student rehearsal for the presentation.

Next, the judging of the Creole Skillet team for the Spring 2008 semester is considered. Students A and B made the presentation. A strength of the process was that the exam was a useful
learning experience. It caused students to think, make and support their recommendations, and sought to determine if the group was helpful to the client. Weaknesses included the scoring system. Also there was an insufficient introduction as well as a comprehensive summary by Students A and B.

Recommendations included: (1) students should learn how to work the PowerPoint equipment prior to presentation, (2) an improved judging system is needed, (3) allow the panel of judges to ask questions after each section of the presentation rather than at the end only, and (4) be concise and to the point. Last, the client should not be allowed to coach the presenters during the presentation.

As noted above, Student C received a one-on-one examination by a restaurant industry consultant. The strengths as viewed by this judge are described next.

The student was prepared for the oral exam. She did a thorough job in her research. She gave several examples of her findings and people she met to gather information for the client. From this information she listed recommendations she suggested to the client. The student worked closely with client. Together, they attended some networking meetings and events to gather and learn more options for client to use in her business. The student found ways the client could use some associations that she was already a member for marketing and a web site for tourists to find the restaurant. She went to the Zoo-To-Do to conduct a survey for the client and gathered e-mail addresses for potential customers. The student showed the client how she could use e-mail to send information on specials and events the restaurant hosted.

The student was confident that the client would benefit from her findings and would like to stay in contact with the client for further assistance. Recommendations were those that the client
could use in her business. The primary weakness was that the student missed working in a group presentation.

**The Client’s View**

The client’s views concerning the project are considered next. Interview questions were based on those used by Brennan (1995) in a survey of SBI clients. Views were obtained on the Fall 2007 project and projects completed by Students A and B and Student C in the Spring 2008 semester.

**Fall 2007**

According to the client, the project results were most beneficial. The project results described what the target market area was like and that customers would be primarily tourists and conventioneers rather than people living in nearby condos. The benefit was that the Creole Skillet could correctly target potential customers. The major impact was that the project helped the client prepare for busy and slow periods (e.g., by knowing what conventions would be held in New Orleans during the upcoming year). The client had no negative comments and was very satisfied with the project. She had no recommendations for improvement.

**Spring 2008, Students A and B**

The scope of work on the project was to develop a low-cost promotion plan for the Creole Skillet. In the view of the client, the one benefit was that the team visited the Louisiana Restaurant Association. The project results were not useful, reflecting a lack of work on the students’ part. The client was not satisfied with the project report. There was no impact on sales. The oral presentation by A and B was poorly done in the client’s view.
**Spring 2008, Student C**

Student C worked separately from Students A and B. The project purpose was the same, as for Students A and B, to develop a low-cost promotion plan for the Creole Skillet. The client felt the project by Student C was most beneficial. The client got more motivated and involved in the project and took a greater interest in it. A major benefit was the development of a mailing list by Student C from the visitors to her booth at the Zoo-To-Do event. This was most useful as it gave a database of potential customers. As for the impact of the names collected, it drew in customers but no count was made of them. A major strength of the project was Student C’s interpersonal skills. She cared about the project. The client was very satisfied and had no negative comments.

**Discussion**

A major benefit of the SBI project as experienced by the students queried was the real-world experience, i.e., working with a real business as compared to a case in a textbook. Studies by Hedberg and Brennan (1996) and Brennan (1995) of students’ views also found that the real world experience was the most liked aspect of the SBI project. Students queried in the Creole Skillet project liked the lack of structure as well. However, they felt that some students (other teams in the class) could not handle the lack of structure. This was particularly true of Students A and B. The students on the Fall 2007 team had some degree of work experience behind them. Student C had a natural characteristic of self-motivation and initiative which rubbed off on the client.

The lack of structure is both an advantage and disadvantage. This was not mentioned in the Brennan (1995) and Hedberg and Brennan (1996) studies. For students needing structure, more specific guidelines, deadlines, and instructor-student meetings are needed. Rainsford (1992)
suggested several ways to get maximum results out of student efforts. These methods include a final report outline, requiring the students to meet at least three times with the client, and requiring the students to write a report after each meeting with the client. In both the Fall 2007 and Spring 2008 projects, these requirements were required and generally followed. Students A and B did not meet three times with the client. Biweekly e-mail reports were required of all teams.

Student teamwork is critical to conducting a good project. Sometimes there is team disagreement or a slacker on the team. All three student respondents were in favor of firing a team member who is not pulling his/her share of the load. In the Fall 2007 project there were no team problems as the two students worked quite well together. In both classes the instructor selected the team members. There were four additional teams in each class. Students A and B requested that they be put on the same team as they were close friends. In retrospect, this was a mistake as we had two weak or disinterested students and one strong one (C). Student C started out as the team leader but A and B didn’t have the same interest. In the peer evaluations each claimed the other (A and B versus C) did not communicate, e.g., answer e-mails. A and B did not desire to put in the off-campus effort of working the Zoo-To-Do or attending networking functions with the client, the reason being that attendance was not required by the instructor. Eventually Student C went on her own and did her own project.

Hedberg and Brennan (1996) found that students liked the real-world experience the best about the SBI project; however, working with team members was either liked or disliked. Working with team members was not mentioned by the Fall 2007 group. Student C, however, had strong negative feelings about her teammates.
One common view of the judges for both the Fall 2007 and Spring 2008 presentations was that a better system of scoring was needed as well as questioning the students. Student C was examined on an individual basis as noted above. The judge was most inspired by her preparation, research and presentation. Essentially, a new judging system and score sheet will have to be developed. One problem was that in the examination of Students A and B, the client interjected herself and tried coaching them on their presentation.

One of Hedberg and Brennan’s (1996) findings was that the selection of the client was critical. This was true in the case in the selection of the Creole Skillet. The client was very cooperative with the Fall 2007 team and Student C. Students A and B seldom contacted her. Interesting enough, Student C’s energy and enthusiasm energized the client to work with her.

The client felt that the results of the Fall 2007 and Student C projects were helpful and beneficial. The client carried out the recommendations. Rocha and Khan (1985) reported that risk, cost and lack of specificity were the primary reasons the client failed to implement recommendations. In the cases of both the Fall 2007 and Student C projects, the projects presented clear, specific answers to the scope of work. In summary, the client played a pivotal role in all three projects. Only two of them rewarded her. Next, let us consider guidelines for conducting an SBI course.

**Guidelines for Conducting an SBI Course**

The following sections provide a number of suggestions for the SBI instructor in conducting an SBI course. Implementing them may depend, in part, upon the instructor’s situation, e.g., the size of the school, rural versus urban location, available external and internal sources of assistance, and the support of the university administration at all levels. The success of an SBI project...
depends quite a bit on the client, student team, and communication among all involved (Brennan, 1995).

**Planting the Seed**

Instructor involvement in the local business community is a must. One should consider joining, taking part in, or keeping in contact with organizations such as the local chamber of commerce, tourist commission, area economic development agencies and trade associations. Also, get to know personnel at the nearest Small Business Development Center (SBDC), chapter of the Service Corps of Retired Executives (SCORE), and the U.S. Small Business Administration office (SBA). Networking is the key to developing these professor-community relationships.

There are benefits to these relationships. For one, students can be directed to such organizations for information or assistance. An economic development agency can be the source of up-to-date quantitative information, (e.g., demographics), business activity, and future economic development. Persons from such organizations can be invited to lecture to students. This writer has two business consultants, an economic development agency person and a turn-a-round specialist talk to the class in the early part of the semester. Individual business contacts can serve as sources of help or information on specific topics or as judges in the oral final examination.

The downside of developing such contacts is that it takes time to develop them and time is taken away from one’s research and university duties. The cost of association dues and attending events most likely will not be reimbursed by the university, especially in these current times. On the other hand, involvement in the real world of business people provides the instructor the opportunity to find research projects which may end up as conference papers or journal articles.
Internal sources of help need to be developed. Certain faculty members may be of assistance to students. For example, at UNO, the Division of Business and Economic Research is a source for information about the local economy. The Hotel, Restaurant, Tourism Department faculty members are a source of help for students who have clients in those industries. Faculty members in other disciplines such as Fine Arts and Music have been of help to students in this course.

**Before the Project-Selecting the Client**

Client selection is an important process in any SBI project (Stockstill & Schindler, 1985). In the early days of the SBI program the U.S. Small Business Administration was the main source of clients. Although no formal guideline directives existed, the general guideline was that greater than 50 percent of the SBI projects had to be SBA clients (Stockstill & Schindler, 1985). Small Business Development Centers (SBDC) can be excellent sources of clients. The SBDC counselor essentially does the screening.

What specific criteria should be used in selecting SBI clients? Jackson, Gaulden and Gaster (2003) suggest several criteria. Clients should be willing participants. They should understand the requirements put upon them and the time needed to work with the students. Secondly, choose clients that are sufficiently established. In our experience, the SBDC provided several clients which were start-ups, however, then did not work out very well. Often, the client kept changing his/her mind. Consequently, the student teams wanted to go beyond the Scope of Work. Last, clients should be selected that are not faced with such obstacles that carrying out the recommendations are impossible to accomplish.

Wallace and Belville (2002) suggest that fast-growing firms should be targeted though they are more difficult to locate. Essentially it is suggested that the student consultants work with clients
who can help the local economy grow. In doing so, the instructor may wish to analyze those local industries which are keys to economic growth. Area economic development agencies may be of help here.

Our selection criteria in the past have reflected those suggested by Jackson Gaulden and Gaster (2003). Also, we have selected clients who were in need of help, especially in surviving Hurricane Katrina and clients along the Oak Street corridor in New Orleans that were faced with major street construction. Other clients selected were in major local industries such as tourism, restaurants, and services. Currently, we are selecting firms involved in the Buy Local movement which is a nationwide phenomenon and the Hispanic business community which is growing in New Orleans. Hispanic speaking students in the class are a great help here.

The initial interview with the prospective client by the professor and students is critical (Stockstill & Schindler, 1985). It should be an on-site interview. The client must be educated about the purpose and procedures of the SBI project; his/her time commitment, and the need for communication with the student team and the instructor. If this is an SBDC client the SBDC counselor must be included in all communications. The advent of email and cell phones makes communication a lot easier.

Benefits to the client need to be stressed because one has to sell the client on the project. These benefits include: (1) getting insights and perspectives of outsiders, (2) access to low-cost consulting or research, and (3) having a project done by the student team that the client doesn’t have time to do (Brennan & Hedberg, 1996). Also, the student team may have the latest in hi-tech knowledge that the client may not have. For example, one of our recent student teams was
able to establish a computerized system for recording sales for a dry cleaner. The difficulty was getting the client to give up his pencil and paper way of recording sales.

**Before the Project-Student Selection**

Students may take an SBI course as a required course or as an elective. Some schools may take anyone who enrolls and meets course prerequisites Others may require a transcript, resume’, an application, or even an interview (Hunt, et.al. 1996-97). As a minimum, an information sheet showing the past work experience of the student should be procured. This allows for matching a student with certain industry experience with a client in that industry.

Selection criteria as noted by Jackson, Gaulden and Gaster (2003) include the following: (1) recruit a wide variety of business majors, seniors preferably, (2) make the course an honor to be selected, and (3) require students to provide faculty recommendations. Good writing and speaking skills are a must as well.

The objectives of the course, the project and the workload need to be clearly spelled out. Specifically, what is expected of the student? In our case, the team meets with the instructor every other week. They are on their own and must plan their time to get the project done. Often, the workload required will eliminate the weak or non-motivated student.

The benefits of the course need to be stressed to the student. A major value of the course is to gain real world experience. (Brennan, 1995; Harris, Gibson & Taylor, 2007). This experience may even lead to a job. The student also learns how to work in a team under a pressure situation and to deal with difficult team mates. The management of one’s time becomes very important in a relatively unstructured situation (Brennan, 1995; Hedberg & Brennan, 1996). An important
educational value to the student is that he/she learns about the existence of many local business, economic and trade associations.

Bring in one of more consultants to speak to the students about how to consult. An SBDC counselor is one possibility. Also, have an expert on the local economy describe the local economic situation. Another option is to have an exceptional past SBI student talk to the class about how to do a good SBI project.

During the Project
The role of the instructor during the course of the project is that of coach, facilitator and coordinator. He/she does not play the traditional teacher classroom role (Brennan, 1995). Given the nature of the class, meetings may be held off-campus and at non-class times, even weekends.

Initial classes should be devoted to class organization and procedures. Paperwork requirements need to be discussed and clarified. These include confidentiality agreements, student time logs, the semester schedule, especially e-mail progress reports and meetings with the instructor, final report outline, grading, and peer evaluations. The team and client assignments are made.

Student’s assignments to teams are almost like a roll of the dice. Don’t agree to the request of students who want to be on the same team. Try to match the student’s work experience and degree course background with the client’s business and industry. This writer appoints team leaders. Those with past military experience tend to exhibit leadership qualities and are appointed team leaders. The teams may be made up of two or three members. Any more than that leads to problems in coordination and communication.
Students need to understand that they need to become very familiar with and thoroughly understand the client’s industry and the local economy. This may be done by requiring a SWOT analysis (Rainsford, 1992).

An SBI project is a relatively unstructured learning situation. Some students handle this better than others. Structure can be brought to the table. Rainsford (1992) suggests several ways to structure an SBI project. These methods include providing the students with a suggested outline for the final report and to meet frequently with the instructor. The instructor should be prepared to provide suggestions for future actions by the team. Also, the team should meet as least three times with the client and provide a report of each meeting with the client (Rainsford, 1993; Madison & Chawla, 1998).

Students must be educated on good SBI consulting practices. A sample of these practices include: (1) a clear Statement of Work, (2) keep information about the client confidential, (3) be on time for meetings with the client, (4) the students are consultants, not employees, (5) plan out the project, (6) write a clearly written final report addressing the Statement of Work issues, and (7) plan for a post-report visit to the client (Hunt et. Al., 1996-1997; College of Business Administration and Economics, New Mexico).

One issue is what to do about the non-performing team member or team members who can’t get along. One possibility is for the students to fire the non-performer. As with students A, B, C, described above, they went their separate ways or their own. Another approach is for a teacher led discussion to try to iron out the sources of disagreement. Unfortunately, the non-performance issues tend to come up near the end of the semester when the report and oral presentations are
fast approaching. Student peer evaluations may point out the shirker. Documentation and examples of student performance are required, especially of the team leader.

Grading procedures need to be made clear to the student in the very beginning. Broida (1988) found that the written report was the most important grading factor used by instructors (49 percent of them). Oral reports were the most important grade factor to 15 percent of the instructor respondents. No matter what factors are used they are to be made clear to the student at the outset. In the student consulting course at UNO the oral presentation before a panel of business persons is weighed the most. Thirty minutes are allowed for a formal presentation followed by 30 minutes of questions and answers. Students are graded individually by the judges. The presentations are formal (e.g. PowerPoint) and business dress is required of the students. The oral presentation is 50 percent of the grade, the written report 40 percent, and peer evaluation 10 percent.

The End Game

Students should conduct an exit interview with the client. A copy of the report is given to the client and discussed in depth. The interview should be carried out prior to any final examination or oral presentation. The client may be invited to observe the oral presentation.

After the report has been presented to and discussed with the client, a “client acknowledgement” form should be signed. This form affirms that the final report has been received and discussed.

Both students and the instructor should make a follow-up visit to the client to express thanks for the opportunity to work with the client. Even better, send the business some customers.
Conclusion

This paper examines an SBI project from the perspective of three student team members, the client, and final examination judges. Students liked the real world experience and lack of structure. They felt some students in projects such as the SBI experience needed structure. There is a need to plan out what is to be done and to set deadlines.

A diversity of background of practitioners judging the oral final examination was a plus, however, a better scoring system was desired. When the client is present at the final exam he/she should not enter into the discussion.

Client selection and cooperation were beneficial. In two of the three team projects, the student teams presented specific recommendations which the client put to use. The student-client relationship is important. The enthusiasm of Student C actually got the client more enthusiastic about and involved in the project.

The client selection was lucky, perhaps’ due to her business relationship with the SBI instructor, and being a startup really needed the help. As noted in research by others, student teams and client selection are critical to a successful SBI project. We had the best of all worlds in two of the three projects, good students and a good client.

Recommendations for conducting a successful SBI project based on our experience and the literature are presented. The SBI instructor is urged to develop working relationships in the external and internal environments. Personal networking is the key to developing these relationships. Client selection is important. Sources of selection range from the SBDC to personal contacts in the business community. Selection criteria may include the client’s
contribution to local economic growth and willingness to spend time with the student team.

Requirements of the course must be made clear to the client.

The project must be started early in the semester. Course requirements, grading procedures, demands, and best practices of consulting must be made clear to the students in the beginning. The Statement of Work needs to be determined by the student team and client and project milestones need to be established. Periodic e-mail reports and meetings with the instructor need to be carried out. The team needs to meet periodically with the client. Rainsford (1992) recommends at least three meetings. We recommend five including the initial meeting and the exit interview. The instructor plays the role of coach, coordinator, and facilitator. An important role is directing students to external or internal sources of assistance, as the students may not be familiar with them.

The final report is to be given to and discussed with the client in the exit interview. An oral presentation using practitioner judges is suggested if possible. This practice provides further realism to the course. An after-semester visit or follow up should be conducted by the teacher and the student team. In some cases the client may be in need of a second SBI project.

The SBI program has been around some 30 years. It is a most valuable teaching tool and can benefit student and client, the two most critical factors in a project’s success. Hopefully it will be around for years to come.
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