



**MBA 645:
CUSTOMER ENGAGEMENT &
CLIENT COACHING
PROFESSOR CARLTON
GALBREATH**

COURSE SYLLABUS

<i>Professor:</i>	Carlton Galbreath carlton.galbreath@umontana.edu MC 409 406-243-7873
<i>Office Hours:</i>	Mon/Wed/Fri: 11:00am to 1:00pm; or by appointment
<i>Course Details:</i>	GBB 119 or Zoom (https://zoom.us/j/5033192008) Friday: 6pm-9pm Saturday: 8am-5pm Sunday: 8am-12pm

COURSE OBJECTIVES

Why should you take this course? Because our customers are at the center of everything we do, and the more effective we are at creating an environment for them to explore and express what's important to them, the better we will be able we will be to meet those needs with our offerings. This may seem like it's specifically designed for coaches and consultants, but these skills are highly applicable to any situation in which you would want information from another person. Such contexts might include management and leadership settings, funding conversations, product design/feedback interviews, and many more.

Upon completion of this course, you will be able to:

- Conduct an exceptional discovery call
- Induce a state of openness and information sharing in your counterpart
- Employ tactical listening to gather key information
- Ask impactful questions that enable the client to further explore and express what's most important to them
- Make statements that will keep a conversation going productively and avoid it feeling like an interrogation

COURSE ORGANIZATION

The course is structured in four modules according to the following schedule:

Friday Evening: “Communications 201”

Friday evening will focus on leveling up your communications skills and establishing the foundational concepts that we will lean upon throughout the rest of the course

Saturday Morning: The Discovery Call

Saturday morning will consist of teaching and practicing the “discovery call.” This conversation is the core of customer engagement and is the place from which all else stems, so it will also be the final assessment for this class on Sunday.

Saturday Afternoon: 2 Ears & 1 Mouth, Use Them Proportionally

Saturday afternoon will be primarily about listening and learning how to listen better. We will also cover how to ask impactful questions, when you should actually make statements, and how to use the power of silence

Sunday Morning: Team Discovery Calls

Sunday morning will be your final. You will all break up into groups of 5-6, in which every member will take an equally timed turn running a discovery call with the instructor as the client. After the finals are over, the professor will remain for open Q&A.

COURSE ASSIGNMENTS AND GRADING

Course Assignments

- Pre-Work: 5%
- Participation: 30%
- Group Final: 50%
- Post-Class Reflection Paper: 15%

Pre-Work (5%)

There will be pre-work assigned via Moodle that should take no more than a couple of hours. It is essential, however, for our productivity in class that you have this completed before Friday.

Participation (30%)

You must participate in class in order to make the discussions and exercises interesting, insightful, and fun. However, there is no need to contribute to each and every topic. Some of the best contributors are those who participate in a subset of the conversations, but whose comments are always insightful and compelling. The key issue is one of quality, not quantity.

We should work together to make each session a lively, stimulating, and intellectually rewarding venture in group learning. The course depends on this, and you are individually and collectively responsible to that end.

Below is a description of how your class contributions will be calibrated:

Outstanding Contributor: Contributions in class reflect exceptional preparation and thoughtfulness. Ideas offered are always substantive, and provide one or more major insights as well as providing a fruitful direction for the class. Arguments are well substantiated and persuasively presented. If this person were not a member of the class, the quality of the discussions would be diminished significantly.

Good Contributor: Contributions in class reflect thorough preparation. Ideas offered are usually substantive; provide good insights and sometimes a fruitful direction for class discussion. Arguments, when presented, are generally well substantiated and are often persuasive. If this person were not a member of the class, the quality of discussions would be diminished considerably.

Satisfactory Contributor: Contributions in class reflect adequate preparation. Ideas offered are sometimes substantive, provide generally useful insights, but seldom offer a major new direction for the class. Arguments are sometimes presented, and are fairly well substantiated and sometimes persuasive. If this person were not a member of the class, the quality of discussions would be diminished somewhat.

Unsatisfactory Contributor: Contributions in class reflect inadequate preparation. Ideas offered are seldom substantive, provide few useful insights, and rarely offer a constructive direction for the class. Class contributions are few and far between. Many contributions are “cherry picking” efforts making isolated, obvious or confusing points. If this person were not a member of the class, the quality of discussions would not be changed or perhaps even improved. In addition to these global evaluations, I will also collect peer evaluations of each student’s contribution to team projects at the end of the semester. Be sure to refer to the Peer Evaluation System explanatory document on Moodle for a complete breakdown.

Group Final (50%)

Teams will work together to conduct a mock discovery call, with the professor playing the role of their client. It is up to the team to decide what business they are in, what topic the client is there to discuss, and to provide any other details that they feel would be helpful to the exercise. These details, however, must be shared with the professor before the role play commences. A rubric for performance will be provided in class, and your classmates will all assess team performances during the role play according to said rubric.

Post-Class Reflection Paper (15%)

There will be a post-class reflection paper assigned after the final to (a) assess your level of improvement and growth over the course of the class and (b) provide an opportunity for you to conduct a follow-up to the discovery call, as you would in any professional setting. Given the

assignment's relationship to the final, its details will be provided after you've already completed the class so as not to change your approach to the discovery call itself.

Class Text(s)

There is no required reading or text for this course. There are, however, some supplemental follow-up readings that you can pursue on your own if you'd like to deepen your knowledge of the subject matter:

- *Listening Well: The Art of Empathic Understanding* by William R Miller
- *To Sell Is Human* by Dan Pink
- *The Challenger Sale: Taking Control of the Customer Conversation* by Matthew Dixon & Brent Adamson
- *How to Win Friends & Influence People* by Dale Carnegie

THE FINE PRINT - PLEASE READ THIS!

Academic Integrity

Academic misconduct is any activity that may compromise the academic integrity of the University of Montana. Academic misconduct includes, but is not limited to, deceptive acts such as cheating and plagiarism. Please note that it is a form of academic misconduct to submit work that was previously used in another course. If cheating of any form is detected, you could be given a failing grade the assignment in question.

The following message about academic integrity comes from the Provost's office:

All students must practice academic honesty. Academic misconduct is subject to an academic penalty by the course instructor and/or a disciplinary sanction by the University. The University of Montana Student Conduct Code specifies definitions and adjudication processes for academic misconduct and states, "Students at the University of Montana are expected to practice academic honesty at all times." (Section V.A., available at http://www.umt.edu/vpsa/policies/student_conduct.php). All students need to be familiar with the Student Conduct Code. It is the student's responsibility to be familiar the Student Conduct Code.

In addition, please references the COB [Code of Professional Conduct](#).

Classroom Etiquette

This class will provide you an opportunity to develop skills necessary for success in the workplace. For example, **regular attendance** is required in both this class and in your future job. Respect for your classmates is also required in order to provide the best learning environment. Classroom etiquette refers to **no sidebar discussions during lecture or class discussion, no newspapers or crossword puzzles, no cellular phone use during class (this includes text messaging), no surfing the web, and no other disruptive actions** (i.e. leaving abruptly during class without prior notification – not including restroom breaks). If you are disruptive in class (talking, text messaging, etc.), you will be asked to leave class and any points awarded that day will be forfeited (attendance, participation, extra credit).

Students with Disabilities

Students with disabilities may request reasonable modifications by contacting me. The University of Montana assures equal access to instruction through collaboration between students with disabilities, instructors, and Disability Services for Students (DSS). “Reasonable” means the University permits no fundamental alterations of academic standards or retroactive modifications. For more information, please consult <http://www.umt.edu/disability>.

Email

According to University policy, faculty may only communicate with students regarding academic issues via official UM email accounts. Accordingly, students must use their UM email accounts (netid@umconnect.umt.edu or fname.lname@umontana.edu). Email from non-UM accounts will likely be flagged as spam and deleted without further response. To avoid violating the Family Educational Rights and Privacy Act, confidential information (including grades and course performance) will not be discussed via phone or email.

Mission Statements and Assurance of Learning

The University of Montana’s College of Business enhances lives and benefits society by providing a world-class business education in a supportive, collegial environment.

We accomplish this mission by acting on our shared core values of creating significant experiences, building relationships, teaching and researching relevant topics, behaving ethically, and inspiring individuals to thrive.

As part of our assessment process and assurance-of-learning standards, the College of Business has adopted the following learning goals for our MBA students:

Learning Goal 1: Integrated and functional business knowledge

Learning Goal 2: Communication skills and teamwork ability

Learning Goal 3: Ethical conduct, social responsibility, and professional leadership

Learning Goal 4: Analytical and innovative thinking in business problem solving

Learning Goal 5: Knowledge and application of current trends in information technology

Learning Goal 6: Ability to evaluate implications of operating in the global business environment