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Data Gathering Kickoff Lesson for Consulting Project

Samantha Porter  
*Babson College*

Stephanie Farne  
*Babson College*

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Data Gathering Kickoff Lesson for Consulting Project

Stephanie Farne & Samantha Porter
Horn Library, Babson College
Context

The class... ASM3300 Strategic Problem Solving

The audience... Undergraduates (upperclassmen)

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

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

What the students are doing

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

Why they need us

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

Great for...
- Finding background info
- Google News search

Be skeptical of...
- Market Research & Reports
- Financials & filings

Image Sources: ThioJoe, YouTube, EmojisWiki
Info Source Perspectives

- Industry/Client Base
- Expert Opinion
- Company
- Internal

Analyse Compare Evaluate
“A la Carte” Instruction

90 minutes

“Sphere of Research” Beach Ball Activity***
Types of Sources - discussion
Group Workshop Activity
Database overview
Accessing Resources, Q&A

15 minutes

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

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

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

Framework principles applied...

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

Learning profiles applied...

★ Auditory
★ Tactile/Kinaesthetic
★ Visual
Accessing Resources

library.babson.edu

https://libguides.babson.edu/StrategicProblemSolving
Accessing Resources

Framework principles applied...

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

Learning profiles applied...

★ Auditory
★ Visual
Most Critical Information
(Note: you must use a mix of sources!)

Project company: ____________________________
Main rival: ________________________________
Additional rivals: __________________________

Complete the following tasks:

1. Search for company and industry news. What is happening in:
   (a) the macro-environment
   (b) the industry
   (c) the company
   ___ Done ___ Not yet, but we will finish this before next class

2. Search for financial data.
   (a) Download the financial statements (most recent 5 years) of the company and rivals.
   ___ Done ___ Not yet, but we will finish this before next class
   (b) Calculate the key financial ratios (put more focus on the income statement).
   ___ Done ___ Not yet, but we will finish this before next class
   (c) Discuss any insights form the financials:
      • How is your company doing with respect to rivals?
      • What are the time trends?
      • Any discontinuities in the time trends?

Team: ____________________________
Company: ____________________________
Group “Workshopping”

Framework principles applied...

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

Learning profiles applied...

★ Tactile/Kinaesthetic
★ Reading/Writing
Lessons learned...

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

Stephanie Farne - sfarne@babson.edu
Samantha Porter - sporter1@babson.edu