Organizational Change B8507-001 and 002
Canvas Bidding Draft
July 7, 2021

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B8507-001 Tuesday/Thursday 10:20-11:50AM (Warren 310)
B8507-002 Tuesday/Thursday 2:00-3:30 PM (Warren 310)

Attendance Expectations:

1. Attendance at the first class is mandatory for all enrolled students, as well as those on the waitlist who hope to add the class during add/drop. 
   NOTE: Unexcused registered students will be removed from the roster if the first class is missed.

2. You must attend class in your registered section and be part of all team projects with your team (Classes 6 and 9).

3. Take-home Final Exam Period: Dec 10 (9:00 AM) – Dec 13 (11:00 PM)
   Exam requires up to four hours to complete.
   NOTE: Final exam period is non-changeable.

4. Class Attendance: Overall, this is a highly participatory course and therefore attending all classes is critical. If you see yourself missing two or more classes, this will be significantly detrimental to your grade, and you may want to reconsider taking the course. Missing three classes will automatically result in a failing grade, unless there is excused illness.

5. Participation Expectations: This course really benefits from class participation and if everyone contributes accordingly, the course will be better for all of us. If you are not inclined to participate in the ways outlined in the participation section of the syllabus (P.14), this is not the course for you!
INTRODUCTION

This course is focused on the nature and process of organization change, and how to be an effective leader, implementer, and recipient of change. It emphasizes the forces for change, the change implementation process, the qualities and skills of successful change leaders, and the behavioral theories and management practices of how individuals and organizations change.

Finally, it will help you to better diagnose the change agendas of organizations you will be joining to help prepare for your experience as leaders, implementers, and/or recipients of change.

COURSE LOGIC

The course has three modules:

Module I (Classes 1-5):

Module I highlights the Leadership of Change from the top, the major types and drivers of large-scale organizational change—e.g. strategic, leadership, cultural, structural, ownership—and the commonalities and differences among these transformations. Some of these are “long marches” in which there are gradual, incremental changes through multi step change processes; others are “bold strokes” in which major, short changes are instituted and their impact immediately felt. Some are changes to stimulate growth, and some are downsizing and cost-cutting oriented.

The goal here is for you to get a good “feel” for how these major types of transformations unfold across many different industries (e.g. Tech, Fin Services, Education, Consumer Goods), how well the changes were instituted, sources of resistance encountered, and how leaders are involved in the whole endeavor. And we will focus on the impact of change on employees as it typically ripples from the top of an organization.

Module II (Classes 6-9):

Module II gives you a chance to practice with implementation tools and techniques and the ingredients for successful change management. We will start with a Merger Integration implementation role play. We will then work on the topical question of how to implement a hybrid workforce. We will next ask you to make a series of decisions to manage downsizing in a media firm, called Sterling. You will then test your implementation acumen in a real-world-based computer simulation of being change agents in a tech organization, introducing change in a planful way to a Business unit.

Module III (Classes 10-12):

The course concludes with success models for young change agents like you and examines what it is like to influence and implement change from “below” or the “middle” of an organization. Next, since
many of you we will be working in a global context, we will focus on how to introduce change as a junior person under cross cultural conditions and add this dimension to applying change management.

Then, the final class examines how to sustain excellence in change management in an organization and how to develop the underlying organizational capacity to change—to build a change friendly, continuously improving organization.
COURSE SYLLABUS AND SCHEDULE
Module I: Leading Change I

| Session 1 | The World of Organizational Change: Leading, Implementing, and Experiencing Change | Tuesday, October 26 |

**Topic:** How well do organizations (in this case, Apple) handle changes they want to make? How can individuals (in this case, Donna Dubinsky) handle changes that are suddenly thrust upon them?

**Assignment:** Read case (Donna Dubinsky and Apple Computer (A)), as well as the readings, and prepare for our class discussion with the following questions (no need to hand in).

**Assignment Questions:**

1. Why was Donna initially so successful?
2. How and why did things unravel for her?
3. How would you have handled the situation differently?
4. What is “typical” of organizational change issues in the Apple based on the accompanying articles and the key obstacles to change?

**Required Readings:**

a) **Case:** Donna Dubinsky and Apple Computer (A) (Jick)


f) (optional) Today’s Issues: “Pandemic Accentuates Two Problems with Change Management: One is Change, the Other is Management,” Grant Freeland, *Forbes*, June 29, 2020
Assignment: Read the Case and accompanying readings and be prepared to discuss the following.

Assignment Questions:

1. How and why did Komansky change Merrill Lynch? Was he successful and effective overall?

2. How and why did O'Neal change ML? Was he successful and effective overall? How did his status as one of the first Black CEOs on Wall Street work for or against him?

3. How well did Thain lead change for ML?

4. What lessons do you take from the decade-long Merrill Lynch story about how to manage change?

Required Readings:


Optional Readings:


b) (Today’s Issues) “A $9 Billion Wall Street Heavyweight Talks Racism and How to Build a Better Society,” Antoine Gara, Forbes, June 4, 2020
Assignment: Read the Brandeis case and the readings and be prepared to discuss the following.

Assignment Questions:

1. What was at issue in this situation overall? Who were the key stakeholders, and their relative importance?

2. How effective was Reinharz in his tenure at Brandeis? In his handling of the Rose Art Museum issue?

3. YOUR PLAN: Come prepared with your recommended plan—step by step—for how you would have done things differently and be specific.

4. How well have we at CBS managed buy in around key changes? Other universities you experienced?

Required Readings:

a) **Case**: “Brandeis University: Selling Art or the Art of Selling,” CBS, Jick

b) **Concept**: “Implementing Change”, Todd Jick (HBS Note, No. 9-491-114).

c) **Application**: “Leadership Tips for College Presidents and CEO’s,” Glassner and Schapiro, WSJ, April 29, 2014.

d) **Concept and Application**: “Why It’s So Hard to Be Fair,” Joel Brockner, HBR, March 2006.

Optional Readings:


b) **Application**: “Rutgers—How NOT To Manage Organizational Change”, WSJ, J. Baldoni, April 2013

c) **Application**: “Learn from CUNY: Lessons of Goldstein’s Success” Roger Hertog, NY Post, Aug 3, 2013
Assignment: Read the Cadbury (C) and (D) cases and accompanying readings about merger integration.

Assignment Questions:

1. What were the change integration challenges to implement the Cadbury-Adams merger?

2. What did Matt Shattock specifically do to manage the integration and people issues (Read the D case carefully for this detail)

3. How is this an example of successful long march change? Key success ingredients?

Required Readings:

a) Case: “Cadbury Schweppes: Capturing Confectionary, (C),” Collis, Stuart and Smith, 2008

b) Case: “Cadbury Schweppes: Capturing Confectionary, (D),” Collis, Stuart and Smith, 2008


Optional Readings:


Video: Matt Shattock, formerly Cadbury Head of Americas Confectionery and CEO, Beam Global
Assignment Questions:

1. What differentiated Michelle Rhee from past superintendents—Her strategy? Her style? Her actions? Other factors?

2. How would you evaluate the priorities she set out and her bold stroke style?

3. What should she do next? How? Cautions?

4. How is the Rhee approach similar and different from the PE approach taken by 3G in the Heinz example?

5. Do you agree with the observations in the article, “How Can PE Lessons Apply to You” that the approach should be used by all companies?

Required Readings:

a) Case: Michelle Rhee—Radical Reformer of Schools (A) (CBS, 2019, Todd Jick)


d) Application: “Do Private Equity Buy-Outs Get a Bad Rap?” Michael Blanding, HBR Working Knowledge, Jan 13, 2020

Optional Readings:

a) Today’s Issues: “How Private Equity Is Shifting from Cost Cutting to Growth,” M. Kovac, D. Burns, and J. McLinn, Bain Insights, April 9, 2018 (4pp.)

Module 2: Implementing Change: Tools, Techniques, Applications

Session 6
Implementing Change I: Managing a Merger—What, When, How, and Who to Change
Tuesday, Nov 16

Assignment: Please read “AlphaNet and OmegaCom” case, and the assigned readings below, and have your TEAM submit the following:

1. You are the AlphaNet CEO and you have decided to convene a first meeting of the top management of both companies shortly after the merger. You have decided to use up to the first 10 minutes to introduce yourself and your thinking about change ahead. Please write your speech in no more than 3 double-spaced pages. (Assign one person in your group to be prepared to deliver it).

2. What 5 questions would you most expect the audience to ask you and provide your brief answers to those questions. (One double-spaced page)

3. The speech will be followed immediately by an all-day offsite. Provide an outline of what the agenda and design would be for the remainder of the day. (One double-spaced page)

Please put all student names and class section on the cover page and submit electronically to your TA before your class. Please underline or asterisk the student name chosen by the team to deliver the speech—time permitting—in class.

NOTE: Each team member should have a copy.

Required Readings:

a) Case: AlphaNet and OmegaCom, 2010, CBS, Jick
e) Application: “How to Tell Your Team That Organizational Change is Coming,” Liz Kislick, HBR, Aug 9, 2018 (5pp.)

Optional Readings:

b) Application: “Read the Emotional Speech LinkedIn CEO Jeff Weiner gave employees after the Microsoft Deal,” Chris O’Brien, Venturebeat.com, June 17, 2016
**Session 7**

**The Post Covid-19 Workplace—Implementing The Hybrid Office**

**Thursday, Nov 18**

**Topic:** The Office will never be the same, and thus has and will be changing. The hybrid model is becoming a common practice. We will examine the implementation for roadmap for successfully instituting the new office practices and culture.

**Assignment Questions:**

1. What are the key challenges of transitioning to the hybrid office?

2. Propose a “back to work” plan in terms of HOW it would be implemented?

3. How does the hybrid model potentially impact DEI issues and what would you recommend to mitigate the downsides?

**Required Readings:**

a) **The Big Picture:** “Has the Pandemic Transformed the Office Forever,” John Seabrook, New Yorker, Feb 1,

b) **Data:** “It’s Time to Reimagine Where and How Work Will Get Done,” PWC’s Remote Work Survey, Jan 12, 2021

c) **Challenges:** “Why Employers Might Not Offer Remote Work Options to Junior Staff,” Jared Linzon, *Fast Company*, Feb. 1, 2021


Assignment:

1. Read Implementing Change at Sterling & Co, and the readings, and then: Fill in your answers to Sterling & Co Exercise and bring to class for discussion.
   NOTE: ANSWER ALL QUESTIONS before coming to class!

2. Rewrite the memo from the CEO as you would like it to say.
   NOTE: Bring your re-write to class for use, time permitting.

Assignment Questions:

1. What were the most challenging action ideas listed in Sterling case for you to weigh in on, and why?

2. What are the keys to understanding and managing “recipients of change”?

3. How do you know the difference between “good” and “bad” resistance?

Required Readings:

a) Case/Exercise: “Implementing Change at Sterling & Co.,” CBS, Jick, 2017

b) Concept: “The Recipients of Change,” HBS, Jick, 9-491-039


Optional Readings:

**Assignment:**

1. Complete Part I simulation prep with your team outside of class and bring your implementation plan to CLASS 10.

2. What are the underlying assumptions behind your Implementation Plan?

**Required Readings:**

a) **Concept:** Global Tech Simulation—Change Theory

b) **Case:** Global Tech Simulation—Players Guide

c) **Application:** “10 Great Things Leaders Do to Get People on Board,” Margie Warrell, *Forbes*, April 15, 2017

d) **Application:** “How to Tell Your Team That Organizational Change is Coming,” Liz Kisik, *HBR*, Aug 9, 2018
Module 3: Early Career Success Models and Building Capacity to Change

**Session 10**  
**Implementing Change V: Leading Change from “Below”**  
**Thursday, Dec 2**

**Assignment:** Please read the four mini cases about young change agents and one reading.

**Assignment Questions:**

1. What do you admire about the Young Change Agents’ plans and thinking? What aspects are sound in their thinking?

2. Where could they stumble? How would you have advised them to approach the change and their (future) jobs differently?

3. What is humbling and exciting about the task of driving change from below?

**Required Readings:**

a) **Case:** “Henry Silva: Aspiring Change Agent for a Start Up Company”, CBS, Jick

b) **Case:** “Susan Baskin: Aspiring Change Agent (A),” CBS, Jick

c) **Case** (Chew Lin Tan): “Change Agent in Waiting,” CBS, Jick


e) **Application:** “Leading From Below”, *Wall St. Journal*, James Kelly and Scott Nadler, March 3, 2007

**Optional Readings:**


b) **Concept:** “How to Disagree with Someone More Powerful Than You,” Amy Gallo, *HBR*, March 17, 2016

c) **Application:** “5 Mistakes Employees Make When Challenging the Status Quo” Lois Kelly and Carmen Medina, *HBR*, Nov 14, 2016.
Assignment: Read the two cases and the readings about cross-cultural change management.

Required Readings:

   Discussion Questions:
   1. Why were things at an impasse? In what ways was this a cross cultural issue?
   2. What would you have done differently if you were Darlene?
   3. What would you do now?

   Discussion Questions:
   1. What challenges did Molly encounter?
   2. How well did she address them?
   3. What can you learn from her approach for handling change in a cross cultural context?


d) Application: “How to Recover From a Cultural Faux Pas” M. Hahn and A. Molinsky, HBR, April 12, 2018.

Assignment Questions:

1. What can Singapore Air teach us about making continuous change? And where might it be at risk for stagnating?

2. As Mr. Tan, what would you say to ground agents in Manila? In Bali?

3. What are the key ingredients to having an organizational “capacity for change?”

Course Review: What were your favorite classes, cases, and readings? Why? Key takeaways and lessons from Org Change?

Required Readings:

a) Case: “Singapore Air—Continuing Service Improvement”, CBS, Jick


SUMMARY OF KEY DATES AND MILESTONES

✔  INDIVIDUAL: Join YellowDig through canvas and do a FIRST POST— an introduction of yourself and your background (and a photograph of yourself) by the first week (Oct 26th)

✔  TEAM FORMATION: You will be randomly assigned to teams of 3 students

✔  TEAM ASSIGNMENT #1: (Between Classes 5 and 6), work with your team on Alpha and Omega role-play assignment, due by Class 6. Submit on Canvas and send electronically to your CA!

✔  INDIVIDUAL: Contribute to YellowDig articles/links, your opinion on classroom topics, and class discussions.

✔  INDIVIDUAL: Fill in Sterling & Co. exercise answers BEFORE you arrive to Class 8.

✔  TEAM ASSIGNMENT #2: Prepare Global Tech Implementation plan and bring to class 9.

✔  INDIVIDUAL (FINAL EXAM): Take-home, Dec 10 (9AM) - Dec 13 (11 PM); 4 hours uninterrupted time required; open book.

✔  EVERY CLASS: Come ready to contribute; come prepared with all the assigned materials
OVERALL RHYTHM OF THE COURSE

Classes 1 - 5: Built around Case Discussions, and supplementary readings (Focus on Individual Prep); lots of opportunities to contribute to class discussions.

Classes 6 – 9: Exercises and Applications, two of which are in teams (Alpha and Omega; Global Tech). You will work as a team outside class for the two group exercises, so please plan accordingly. Make time for groupwork in this period!

Classes 10 – 12: Classes 10 and 11 discussions are built around YOU and your future experiences in Change Management. Class 12 will look at change management best practices and review course themes and topics.

METHOD OF INSTRUCTION

The course will be taught through a mixture of case discussions, role plays, computer simulation, videos, and short lectures. A number of sessions will have videotaped guests bringing a wealth of real-world experience to our discussions.

GRADING

Class participation (25%)
Group assignment (25%)
Final Exam (50%)

Individual Class Participation and “YellowDig Engage” Contributions (25%): The whole class benefits if everyone comes to “play” and engage. Participation is a very important part of the learning process in this course, so it is accordingly an important part of your grade. Enough said — come each session ready to engage, and the more you put in, the more you will get out!

Your participation will be evaluated on your constructive contributions to discussion and learning in the class. Participation requires listening attentively and building on what peers have already shared. A positive contribution to class or team discussion exhibits one or more of the following properties:

1. Responds to the discussion topic with novel and relevant insights
2. Moves the discussion and analysis forward to inspire new insights among peers
3. Shares a personal experience in a way that illuminates the ideas being discussed
4. Uses logic, creativity, and evidence; more than merely an opinion or feeling
5. Your contributions will be evaluated on quality as well as quantity.
YellowDig access instructions are detailed at the end of the syllabus. In short, YellowDig is a blog-like platform that helps you engage more deeply with the course material and with one another. Our expectation is that you **consistently create posts or make comments** and interact virtually with your classmates. YellowDig posts count towards your participation grade but does NOT **substitute** your in-class participation.

**Team Assignment (25%): Alpha and Omega:** You will be formed into a team of 3 students by the second week of classes. See the assignment questions for Class 6, AlphaNet and OmegaCom. This assignment will allow you to consolidate your learnings from the first half of the course.

**Final Exam (50%):** Take-home, Dec 10th (9:00 AM) – Dec 13 (11:00 PM). Four hours uninterrupted time required. The final exam will include the following components:

a) Case Analysis

b) Topical Application drawn from YellowDig website, or contemporary items in the news

**Class Attendance:** If you are not in the class, you obviously cannot participate. You must notify Prof. Jick and your CA by email of these circumstances and reasons before missing any class. Excusing absences will be at the professor’s discretion, and more than two (2) unexcused absences expose you to failing the course. Finally, you are registered in a given section and class time and it is required that you will attend ONLY in that section timeslot.

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**YellowDig Engage Guide**

### WHAT IS YELLOWDIG?

YellowDig is a blog-like platform that allows you to create discussion threads through posts and give/receive comments on posts. Posts can be filtered by different topics (e.g. Long March, Bold Stroke, Change Success Story, M&A, Buy-In, Industry etc.) and are shown chronologically from newest to oldest.

### WHAT IS THE PURPOSE OF YELLOWDIG?

YellowDig offers an additional way for you to engage with the substantial amount of course material we will cover. As you go about your daily life, our hope is that you will think about the world around you using the lessons you take from class and the readings each week. Organizational change happens to and around us every day, and YellowDig gives you space to apply frameworks from this class to identify when change is done well and when it can be improved.
Moreover, giving/receiving comments on YellowDig is another way to get to know your classmates. Your introductory posts give your peers some insight into your past experiences and interests, while subsequent posts allow you to see the kinds of industries and news your classmates are interested in.

**WHAT IS AN EXAMPLE OF A “GOOD” YELLLOWDIG CONTRIBUTION?**

A good YellowDig post amplifies, enhances, and/or synthesizes the material from the course, readings, and discussion such as:

- Continuing class discussion asynchronously with further opinions, information or perspectives
- Sharing a personal experiences (e.g. How is your former company handling change through the pandemic? What are some concerns for a merger you’ve been following closely? How should your favorite startup have gone about prepping employees for a round of layoffs?)
- Sharing a A conceptual model or framework from an article which you think would be useful to your classmates
- Media recommendations relevant to the material (includes book, article, podcast, video)
- Questions or issues you would like to hear opinions from classmates (or do a Poll)
- Updates of the case protagonist, company, or relevant topical examples

A good YellowDig comment is:

- Additive to the post (via experiences or observations)
- Reactions (agreement/disagreement)
- Brings another layer of depth and perspective to the conversation

**YELLOWDIG BEST PRACTICES**

Please also tag/label each post according to the topic you are discussing so all of us can “search” and code the materials.

Also, be careful when linking to sites or articles that require logins! Make sure to make use of the “Preview” feature to ensure YellowDig can display your post effectively. Articles from websites like the New York Times, Wall Street Journal, the Financial Times, etc., will require logins – submitting these traditionally may create a barrier for your classmates. **Instead, you should make a PDF of the article you wish to share, which you can attach to your post.**

**HOW IS PARTICIPATION TRACKED?**

Activity on YellowDig bolsters your participation grade, but does NOT replace in-class participation. We expect that you will post/comment enough to reach **600 YellowDig points by the end of the course.** This is the minimum goal, but the sky is the limit for value adding posts and comments, and there will be a “leaderboard” displayed of how each student is scoring.

Points are tracked in YellowDig and are achieved in the following ways:
Each post (“pin”) is worth 50 points (40 word minimum)
Each comment on another’s post is worth 30 points (20 word minimum)
Each comment received on your post earns you 20 points
Each “reaction” to your post from fellow students earns 10 points

You should **regularly be contributing** to the class “inventory” of ideas, comments, updates, analysis, news items, etc. which will give us an asynchronous deepening of class materials. We suggest roughly targeting 100 points per week to keep you on a consistent cadence. **DO NOT WAIT UNTIL THE END OF THE COURSE TO CONTRIBUTE AS THE PURPOSE IS TO STIMULATE CONVERSATIONS AND ENHANCING THE COURSE MATERIAL AS WE GO ALONG!**