**ADVANCED ORGANIZATIONAL CHANGE**

**BLOCKWEEK:**

**JAN 21-24 AND JAN 27, 2014**

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**COURSE DESCRIPTION**

This blockweek course will examine a variety of change management topics that both deepen and widen the Org Change course. It is designed for students who want to learn more about a variety of “how to’s”—e.g. how to make cultural (organizational) and personal change stick, how to address cross cultural (national) differences in change management, how to manage a merger integration process, how to go about firing individuals (tactics) and managing the survivors, and how to be an effective change leader or consultant in a variety of” live” real world cases.

The course will include cases, a cross cultural self-assessment, a computer simulation, role plays, and a number of special class guests from different industries (e.g. Consumer products, B to B, digital media, private equity, and military) who have experienced the up’s and the downs of driving change. There will also be a half day field trip to local, iconic NYC organizations confronting change (including the New York Public Library, Lincoln Center, United Nations, and the New York Times). And finally there will be a special visit to the 9-11 Memorial which will help us appreciate the ultimate challenge of traumatic change, loss, healing, and resilience.

Overall, it will be a very interactive course with applications, techniques, and personal exposure to change leaders and change situations. Key lessons from experience will be conceptualized as well as learning best practices.

**Materials: Advanced Org Change Coursebook**

**COURSE SYLLABUS AND SCHEDULE**

**Session 1: Organizational Culture Change and Values Based Management (Jan 21, 2014) (Note: Written Assignment Due)**

**Topic 1: Refresher—What is the field of Org Change all about? How do we go wider and deeper in Advanced Org Change? For those who had summer internships, what did you see and learn more about the topic?**

**Readings 1 (Org Change “Refresh”):**

1. Please review the Org Change website, skim a few articles, and remind yourself of our subject matter, and the questions/issues that intrigue you most (professorjickblog.com) (use the Archives button on the left side for a quick scan of titles from Spring and Summer ’13, and click on the titles that interest you….)
2. “Highlights of Best Practices” Change Management: The People Side of Change” Jeff Hiatt and Tim Creasey, 2012, Appendix C, 123-136.

**Topic 2: What does it take to change an organizational culture? How do organizations use corporate values to guide and change behavior? How easy or difficult is it to do so? What are best practices for creating and implementing a set of corporate values to help enable change?**

**Readings 2 and Today’s Case:**

1. “Leading Change When Business is Good: An Interview with Samuel J. Palmisano,” HBR, December 2004, pp. 60 – 70.
2. “Transforming Giants,” Rosabeth Moss Kanter, HBR, January 2008, pp. 3-12.
3. Case: “Leading Culture Change at Seagram”, Managing Change, Todd Jick, pp. 220 - 229:
   1. What drove the need to change Seagram and what kind of change was desired?
   2. How would you evaluate the change process itself? What would you have done differently to change the culture and the results?
   3. What would you recommend doing on each of the issues at the end of the case?
4. “Culture Change That Sticks” J. Katzenbach, I. Steffen and C. Kronley, Harvard Business Review, July-Aug, 2012, pp. 110-117
5. “Aegis Media: A Guide to Our Values”

**Guests:**

* **Nick Levi-Gardes ’08 CBS (Launching Corporate Values in Private Equity firm : Applying the Seagram approach)**
* **Rose Zory, EVP Chief Talent Officer, Americas, Aegis Media (Roll out of Corporate Values)**

**Short Written Individual Assignment (10% of Final Grade) (**2 double spaced pages, **due in FIRST class):**

**Pick ONE of the following:**

1. Think about an organization you are familiar with in which there was some form of Corporate Values statement intended to guide people’s attitudes and behaviors. Write up as best you can recall some observations about some or all of the following: e.g. When and how were the values created? How effectively or ineffectively did they guide behavior and corporate culture? How and why? To what extent were the values used to “change” behaviors? What can be learned from this example about embedding practices, behaviors and thinking into an organization….and about changing or reinforcing a corporate culture?
2. Think about your summer internship. What did you see and learn about Org Change? What surprised you? What issues would you like to learn more about in Advanced Org Change as a result of your experience?
3. Review the Org Change website (Professorjickblog.com) and sample some of the articles. What themes appear to be common? What questions/issues should we examine in Advanced Org Change to get a better understanding of the “do’s and don’ts” and of the insights needed to be effective at leading and managing change?
4. Review the readings (a, b, and d above) about the creation and implementation of corporate values/guiding principles/culture: What are the lessons learned—e.g. What are the key lessons learned about the use of values in an organization today to help drive change and behavior? What are the key success ingredients to make such an investment of time and effort “worthwhile” and to create or change a culture? How likely are these efforts to be sustainable? Are you personally a “believer” in this or a skeptic—why?

**Session 2: Cross Cultural Challenges of Change Management; Live Application**

**(Jan 22, 2014)**

**Topic 1: What is the nature of global, cross cultural diversity in values and management thinking? For global organizations, how can change be effectively introduced given diverse cultural understandings, values and styles?**

**Topic 2: What are the challenging change management issues trying to roll out a corporate program globally? What are the cognitive characteristics of the most successful cross-cultural managers?**

**Assignment:**

Please go to <http://www.cultureforbusiness.com/cc/index1.htm>

Password will be distributed at the first class…

You can skip or skim Sections 1 (Intro) and 2 (Concepts of Culture). Then complete the survey self-assessment is in Section 3 (Intercultural Awareness Profiler). Then print out your Profile (Section 4), and have some fun looking at yourself in comparison to others in Section 5 (Compare Yourself to Other Cultures) and Section 6 (Country Specific Data). Time permitting, do Section 7 with the Caselets and if you want to “test” yourself overall on all this, Complete Section 8.

Complete the Cross Cultural Values Self-Assessment and review your feedback on the 7 dimensions of culture:

* 1. What does yourself assessment say about where you stand on each of the 7 dimensions? Anything surprise you?
  2. How does it compare with your nationality? Surprises? Insights?
  3. How does it compare with other national profiles? Surprises? Insights?
  4. “Test” yourself on the cross cultural dilemma situations posed on the website in Section 7, time permitting.

**Required Readings:**

* 1. “Better Business Guide to International Management,” THT, Intercultural Management Consulting, 1999.
  2. “Reconciling Cultural Dilemmas,” Riding the Waves of Culture, F. Trompenaars and C. Hampden-Turner, 1997, Chap 13, pp. 195-211.
  3. “A Foreign Company’s Entry to India”, M. Witzel and T. Goswanni, Financial Times, Sept 18, 2012, p. 12
  4. “Do CEO’s Need to Know A Company’s Language”, Financial Times, July 13, 2011

**Guests:**

* **Sheila Chavda, Change Management, McDonald’s, formerly at Colgate – Palmolive and Pfizer**

**Session 3: Post Merger Integration-- Successes and Failures, Tactics and Techniques; Leading Growth and Innovation Based Change**

**(Jan 23th, 2014)**

**Topic 1: Mergers are an ideal context for learning the advanced techniques of change management. We will do an in-class computer simulation, and learn some of the do’s and don’ts of post-merger integration…with both internal and external stakeholders.**

**Required Readings:**

1. Read the merger simulation participant guide and prepare for the Mutari simulation (in Coursebook).
2. “Joining Forces—Building M&A Competency,” Joining Forces, M. Marks and P. Mirvis, 2010, Chap 13, pp. 312-328.

**Optional Readings**:

1. Org Change Website illustrations of mergers, submitted by Org Change students (6 short “cases”).
2. Pritchett Pound website materials (http://www.mergerintegration.com/post-merger-management)
3. “Be on Committees that Are Dealing with the Integration”, R. Rigby, Financial Times, Sept 26, 2011

**Topic 2: Building, Acquiring, Integrating, and Leading Innovative Businesses—ReedPOP: The Story of Comic Con!**

**Guest:**

* Lance Fensterman  
  Global Vice President  
  ReedPOP - A Quirky Offshoot of Reed Exhibitions

**Topic 3: Prep for Field Visits**

**Session 4: Field Visits to prominent NYC Organizations Facing Change (Jan 24, 2014)**

**Topic: For this session, we will have the opportunity to get direct exposure to organizations (Non Profit and Private Sector) that are challenged with real-time change issues**

**Assignment:** Read about your organization and prepare interview questions

**Field Visits: (each of you will go to one of the following sites:)**

* **New York Times: Geoffrey Isenmann, ’09,** Business Development. and several Times executives
* **NY Public Library (NYPL)**: **Anthony Marx**, President and CEO;Strategy Managers, Office of Strategic Planning; and VP HR
* **Lincoln Center**: (TBD, but likely to include: Senior Director, Strategy; **Kara Medoff Barnett**, Managing Director of Lincoln Global; **Elizabeth Scott**, Chief Digital Officer )
* **United Nations: Katja Hemmerich,** Chief, Career Support and Performance Management, and **Eva Garcia, HR)**

**Class Plan**

1. Field Visits—All morning (9-12, Approx)
2. Lunch and Preparation of PowerPoint’s (12-3:30)
3. CBS classroom: 3:30-6:00 Presentations of each team and discussion

**Required Readings (Read your field site materials, and skim the others. Other Materials can be found in Briefing Folders on Canvas):**

1. (NYPL) “The Library Re-Booted,” Strategy and Business, Scott Corwin, Elisabeth Hartley, and Harry Hawkes, Spring 2009, pp.78-89.
2. (NYPL) “What Big Media Can Learn from the New York Public Library” Atlantic, June 20, 2011.
3. (NYPL) “The Education of Tony Marx,” NY Times, Oct 11, 2012, E1.
4. (UN) “Flexible Work Arrangements: Pilot Evaluation Report”, Sept 2012
5. (Lincoln Center) HBS Case—Lincoln Center for the Performing Arts—Alternative Futures” (2011)
6. NYT (TBD)

**Group Assignment: Analysis and Recommendations/ PowerPoint (Due in class at 3:30pm)**

Based on the visit you made and additional readings/research, please put together a PowerPoint presentation (20 minutes max) which might include material along the following lines:

1. Diagnosis: What is the change challenge facing this organization? What are its change threats and opportunities? What trends and events have led the organization to its current state?
2. Change Progress Review: What changes has it made or does it plan to make? Who were/are the change agents? Where was/is the resistance? How has the organization dealt with the change thus far? What obstacles remain? How much progress has been made to date?
3. Action Plan: What recommendations do you have for this organization about making and managing change going forward?

**Session 5: Transformation, Loss and Resilience (Jan 27, 2014)**

**Topic 1: Managing Downsizing and Loss: Firing Best Practices**

**We will role play One on One Firing situations and examine best practices. We will learn how to conduct a notification meeting, and how this central part of change management can be handled more effectively than typically occurs.**

**Topic 2— Transformation—A General’s Perspective**

**Guest:**

* **General George W. Casey, “Transformation of the US Army”, 36th Chief of Staff of the US Army (2007-11), leading 1.1M soldiers and managing a $200B budget; also, Commander of the Multi-National Force in Iraq (2004-2007) composed of more than 30 countries, and a 40 year career overall in the US Military. Author of Strategic Reflections (2012).**

**Topic 3: Healing and Resilience**

**Perhaps the central challenge in Change Management is how to manage loss and develop resilience. In the afternoon, I will present a behind the scenes look at how the 9-11 Memorial was conceived and the role I played as the Facilitator of a series of Committees charged with determining the mission and program for the Memorial. We will then do a site visit of the 9/11 Memorial and witness and discuss the tragedy, the loss, how it has been memorialized, and the healing and recovery.**

**Topic 4: Course Summary—We will discuss the themes and takeaways from Advanced Org Change.**

**Required Readings:**

* 1. “Deactivated Passes Reflect Brutal Reality for Staff”, Financial Times, Oct 31, 2012, p. 17
  2. “The Best Ways to Fire Somebody” M. Korn, Wall St. Journal, Oct. 29, 2012, B8.
  3. (US Army) “Insights for Leaders” (excerpts from this Chapter) in Strategic Reflections, George W. Casey, Jr., 153-165, 2012, Indiana University Press
  4. Dennis James email with background issues regarding General Casey
  5. “Memorializing that Day,” Boston Globe, Todd Jick, Sept 11, 2003

In Class Handout

* 1. “Conducting a Notification Meeting” Lee Hecht Harrison (Handout in class)

**GRADING**

Grading will be as follows: 1) Class participation (50%), 2) Individual assignment (10%), and 3) Final Case Analysis (40%)

1. Class Participation (50%); Includes contributions made in class discussions, simulation, cross cultural survey completion, engagement with Course guests, participation in the Field visit and Field report/debrief/discussion…
2. Individual Assignment (10%) (due Jan 21)
3. Final Case Analysis (40%)—A take-home final will likely be a case analysis which ties together a lot of the course concepts, and will be due, Feb 5. It is planned to be distributed after last class.