**ADVANCED ORGANIZATIONAL CHANGE**

**BLOCKWEEK:**

**JAN 20-23 AND JAN 26, 2015**

**FOR BIDDING PURPOSE ONLY**

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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, which is the PRE-REQ. It is designed for students who want to learn more about a variety of “how to’s”—e.g. how to make corporate culture change, how to address cross cultural (national) differences in change management, how to manage a post-merger integration process, and how to lead large transformations. It will also examine the personal characteristics needed to be a change agent. Finally, it will look at how to come back from traumatic loss and change. Guest speakers and field visits will expose students to a variety of” live” real world cases.

The course will include cases, a cross cultural self-assessment, a computer simulation, lectures, and a number of special class guests from different industries (e.g. Consumer products, B to B, tech services, and military). There will also be a half day field trip to one of five local, iconic NYC organizations confronting change (including the New York Public Library, Lincoln Center, Union Square Hospitality Group, Verizon, 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 20, 2015) (Note: Written Assignment Due)**

**Topic 1: Refresher—What is the field of Org Change all about? Reading some recent articles below, How should 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 from your experience?**

**Readings for Topic 1 --Org Change “Refresh”:**

1. Please review and skim the Org Change website (professorjickblog.com), and in so doing, remind yourself of our subject matter, and the questions/issues that intrigue you most (use the Archives button on the left side for a quick scan of titles from Spring’14, and click down on the titles that interest you….).
2. In addition, here are some recent articles and studies to bring you right up to date. Pls read/skim as many as you can but AT LEAST TWO, one from a) or b) and one from c), d) or e)…
3. “Moonshots for Management,” Gary Hamel, HBR, Feb 2009, pp. 91-98. (A provocative challenge to all management practices arguing they are in grave need for CHANGE)
4. “Making Change Work…While the Work Keeps Changing” IBM Institute for Business Value, 2014, 20 pps. (The very latest study of major companies going through change and WHAT IT TAKES TO SUCCEED!)
5. “Ten Ways to Get People to Change” Morten Hansen, HBR Blog, Sept 21, 2012, 2pps. (Short and sweet primer on techniques to get people to change)
6. “So You Say You Want a Revolution” Chap 1 in Leading Successful Change, Gregory Shea and Cassie Solomon, pp. 7-17, 2013. (The reasons change efforts fail and how that can be avoided)
7. “Choreographing a Full Potential Transformation,” Manny Maceda, Michael Gartska, and Charles Ormiston, Leaders of the Firm’s Global Transformation Group, 2014, 8pps. (An all encompassing “model” of transformation from Bain, or substitute your favorite from another consulting firm!)

**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 for Topic 2 Including Today’s Case:**

General Readings on the Role of Corporate Values and Culture Change

1. “The Value of Values” in Rapid Retooling, Antoine Gerschel and Lawrence Polsky, ASTD Press, 2013, pp. 29-36.
2. “Transforming Giants,” Rosabeth Moss Kanter, HBR, January 2008, pp. 3-12
3. “Culture Change That Sticks” J. Katzenbach, I. Steffen and C. Kronley, Harvard Business Review, July-Aug, 2012, pp. 110-117

Our Case for Analysis:

1. **Case (read carefully):** “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. Why did they put “values” right in the center of this initiative?
   3. How would you evaluate the change process itself? What would you have done differently to change the culture and the results?
   4. What would you recommend doing on each of the issues at the end of the case?

**Topic 3: Culture Change at IBM**

**Readings for Topic 3 (for Discussion with our IBM guest)**:

1. “IBM: The Culture Change Company” CBS Research Note by Todd Jick, 2015 (to be provided on Canvas: Not in the Course Book)
2. “From IBM to Google, The Birth of Company Culture” Sean Braswell, Ozy.com, 2014.
3. “Leading Change When Business is Good: An Interview with Samuel J. Palmisano,” HBR, December 2004, pp. 60 – 70.
4. “Becoming a Globally Integrated Enterprise: Lessons on Enabling Organizational and Cultural Change, “ N. Devinney, K. Sturtevant, et al, IBM Journal of Research and Development, Nov/Dec 2012 (7pps.)
5. (Optional) “Can IBM Ever Be Cool? Getting Past the Blues”” Michael Lev-Ram, Fortune, Oct 6, 2014, pp. 92-100.
6. (Optional) “Rometty accelerates her efforts to rejuvenate Big Blue”, Financial Times, Oct 25/26, 2014, 1pg.
7. (Optional) “Practically Radical Workbook—Exercises to Reshape Your Company and Recharge Yourself” Appendix in Practically Radical by William Taylor, 2011, pp. 255-264.

**Guest:**

* Kinthi Sturtevant, IBM, Vice President Strategy & Innovation, Organizational Change Management, Enterprise Transformation

**Short Written Individual Assignment (Pass-Fail, 10% of Final Grade) (**2 double spaced pages, **due before FIRST class: SEE TA instructions about how to submit):**

**Pick ONE of the following to write up in no more than 2 pages, and 500 words:**

1. Think about an organization you are familiar with that has 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? 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. For those who had 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 the readings for Topic 1. What themes appear to be common? What questions/issues should we examine in Advanced Org Change to get a better understanding of Organizational Change, and the “do’s and don’ts” to be effective at leading and managing change?
4. Review the readings for Topic 2 (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 21, 2015)**

**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?**

**Assignment to do Self Assessment using Intercultural Awareness Profiler:**

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

(Password to 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. “Dilemmas of Multicultural Leaders,” F. Trompenaars and P. Wooliams, in Partnering, edited by L. Segil, M. Goldsmith, J. Belasco, AMACOM, 2003, Chap 20, pp. 207-216.
  3. “Navigating the Cultural Minefield” Erin Meyer, HBR, May 2014, pp. 119-123.

Optional Readings:

1. “L’Oreal Masters Multiculturalism” H. Hong and Y.Doz, HBR, June 2013, Pp. 2-6.
2. “A Foreign Company’s Entry to India”, M. Witzel and T. Goswanni, Financial Times, Sept 18, 2012, p. 12.
3. “Do CEO’s Need to Know A Company’s Home Language”, Financial Times, July 13, 2011.
4. “The Multilingual Dividend,” Andrew Hill, Financial Times, March 13, 2013, p. 10.
5. “Global BusinessSpeaks English,” Tsedal Neeley, HBR, May 2012, pp.117-124
6. “Skills for Global Business,” Peter Vanham, Financial Times, March 12, 2013, p. 10.

**Topic 2: What are the challenging change management issues trying to roll out a corporate program globally?**

**Guests:**

* **Sheila Chavda, Change Management, McDonald’s, formerly at Colgate – Palmolive and Pfizer**
* **Han-Ron Siah, Starwood, Vice President for Global Initiatives, Agility Center of Excellence and Monika Means**

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

**(Jan 22, 2015)**

**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, 2012

**Topic 2— Leading 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).**

**Readings:**

* 1. “Insights for Leaders” (excerpts from this Chapter) in Strategic Reflections, George W. Casey, Jr., 153-165, 2012, Indiana University Press.
  2. “Leading in a VUCA World” George Casey, Fortune Magazine, March 20, 2104.
  3. Dennis James email with background issues regarding General Casey.

**Topic 3: Prep for Field Visits**

**Session 4: Field Visits to prominent NYC Organizations Facing Change (Jan 23, 2015)**

**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; Mark Thompson, CEO (TBD)
* **NY Public Library (NYPL)**: **Anthony Marx**, President and CEO; **Micah May,** Strategy; Others TBD
* **Lincoln Center**: (TBD) but likely to include: **Wesley Royce**, Special Assistant to the President; **Jed Bernstein**, President (TBD); **Dan Rubin**, CFO; **Kara Medoff Barnett**, Managing Director of Lincoln Center Global; **Peter Geffen**, Digital;
* **Union Square Hospitality Group: (TBD) Lauren Hobbs ‘11, Director of Marketing; Erin Moran,** Chief Cultural Officer, **Jeff Flug**, President, and others TBD
* **Verizon: Lauren Chesley, Director, Change Execution; Jeff Mango, VP Customer and Business Intelligence (in Operational Excellence and Process Transformation); Others TBD**

**Class Plan**

1. Field Visits—All morning (9-12, Approx)
2. Lunch and Preparation of PowerPoint’s (12-3:15)
3. CBS classroom: 3:15-6:00 Team Presentations X 3, and Discussion

**Required Readings By Site (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. (NYPL) “Firestorm on Fifth Avenue” Paul Goldberger, Vanity Fair, Dec, 2012.
5. (Union Square Hospitality Group) “Redefining an Industry: Danny Meyer on the Business and Culture of Hospitality” Charles Shoener
6. (USHG) “Danny Meyer’s Rule for Success: Slow Down,” Inc, Jan 2013.
7. (Lincoln Center) HBS Case—Lincoln Center for the Performing Arts—Alternative Futures” (2011).
8. (NYT) “A Leaner Times Aims for Global Growth,” NY Times, Christine Haughney, Oct 7, 2013.
9. (NYT) “Why Would Anyone Buy a Newspaper?” Rem Rieder, USA Today, 5B, Oct 29, 2013.
10. (NYT) “Are Newspapers Getting a Second Wind?” Rem Rieder, USA Today, 3B, Sept 19, 2013.
11. (Verizon): HBS case-- “Transforming Verizon: A Platform for Change”, 2012.
12. (Verizon) “Change Management Lead Trainer” (Job Posting at Verizon) (http://www.verizon.com/about/work/jobs/2586002-change-management-lead-trainer)

**Group Assignment: Analysis and Recommendations/ PowerPoint (Due in class at 3:15pm, Friday, for 3 teams, and for 2 teams TBD at 9am on Monday, Jan 26)**

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 26, 2015)**

**Topic 1: Team Presentations (Con’t) X 2**

**Topic 2: Leading Change and Innovative Businesses —The Story of Comic Con!**

1. “How Pax Became The Biggest, Greatest Fellowship Of Gamers, Geeks And Civility In The World” Forbes, September. 2013.
2. “New York Comic Con Gets Into Gear” Merissa Marr, Wall Street Journal, p. B2, Oct 7, 2013.
3. “Growing Pains at Popular New York Comic Con” NY Times, Oct 10, 2014
4. “Six Ways to Sink a Growth Initiative” D. Laurie and J. B. Harreld, HBR, July-Aug 2013.

**Guest:**

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

**Topic 3: Personal Characteristics of Change Leaders— What does it Take Personally?— The Right Stuff!**

**Readings:**

* + - 1. “Change leader, change thyself” Nate Boaz and Erica Ariel Fox, McKinsey Quarterly, March 2014.
      2. “CQ: An Idea Whose Time Has Come” in Change Intelligence: Use the Power of CQ to Lead Change That Sticks” Barbara Trautlein, 2013, pp.7-20
      3. “Hard Choices”, John Chambers, CEO of Cisco, Business Week, Sept 2, 2012, p.76.

**Topic 4: 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.**

Readings:

1. “Memorializing that Day,” Boston Globe, Todd Jick, Sept 11, 2003.
2. “Alice Greenwald: The Woman Writing the History of 9/11” Pooja Bhatia, Ozy.com, 2014.

**Topic 5: Course Summary—We will discuss the themes and takeaways from Advanced Org Change.**

**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 20)
3. Final Case Analysis (40%)—A take-home final will be a case analysis which ties together a lot of the course concepts, and will be due, Feb 6. It is planned to be distributed after last class.