**ADVANCED ORGANIZATIONAL CHANGE**

**COURSE SYLLABUS**

**BLOCK WEEK : JANUARY 16 - 19 AND 22, 2018**

**Draft 1.0 (Nov 1, 2017)**

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| **Course Requirement:** | Organizational Change is a pre-requisite course for all students. |

**COURSE DESCRIPTION**

This block week course will examine a variety of change management topics that both deepen and enrich the Org Change course. It is recommended for students who want to expand their skills as they prepare to work in organizations which will be changing and becoming leaders of innovation or evolving to become millennial-friendly corporate environments.

The course begins with a focus on the nature of organizational changes in management practices and corporate cultures, entitled Management 2.0. These leading-edge practices are innovations which will be carefully examined for their effectiveness, generalizability and implementation challenges. This will include examples of bold organizational design (e.g. Holocracy), bold organizational cultures (e.g. transparency and feedback rich), and millennial-friendly employee engagement (e.g. corporate values and empowerment). Will these practices be successful? How will organizations need to change to instill them within the workplace? What kind of organization will appeal to a future CBS student, like yourself?

The course will also go deeper into the Digital Workplace: What are the leading edge and potential changes to workplace practices emerging and how are they enabled by digital advances. How will these changes be instituted? In addition, we will examine how digital tools can revolutionize change management itself, and examine specific tools which can be used by practitioners to help improve change management efficiency and effectiveness.

Other topics will include “how to’s” such as—e.g. how to address cross-cultural (national) differences in change management, how to manage a post-merger integration process, and how to lead large transformations. The course will also examine the latest advances in change management approaches and the personal characteristics needed to be a change agent such as “CQ” (Change Intelligence). Finally, it will consider how to come back from traumatic loss and change.

One significant feature and highlight of the block week course that extends beyond Org Change is the field visits to iconic NYC organizations to meet with Executives and discuss their experiences with change management. Each student will be assigned to small groups and together will experience a half day field trip to one of the following organizations: New York Public Library, ZX Ventures (Ab Inbev), Union Square Hospitality Group, and the New York Times. (and TBD, Metropolitan Museum of NY)

The course will include case examples, a computer simulation, lectures, and a series of special class guests from different industries (e.g. B to B, consumer goods, and military). 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.

**COURSE OVERVIEW AND SCHEDULE:**

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| **Session 1:** | **Leading Edge Organizations and Workplace Change I** |
| *Leading Edge Organizational Changes* *-* What changes are organizations making today that are bold, innovative, or challenging? (e.g. hierarchy busting, performance review transformations, transformations to support a Millennial workplace, transparency, etc.) What can be learned from these groundbreaking changes taking place in the laboratory of organizational change?   * 1A: *Leading Edge Management Practices - Why Change is Bursting Out….* * 1B: *Leading Edge Corporations with Bold Organizational Models - Pros and Cons* * **Guest Speaker: Rahul Varma, Accenture, Chief Learning Officer**, and Leader behind the radical rethinking of Accenture’s Performance Management System… | |
| **Session 2:** | **Leading Edge Organizations and Workplace II** |
| Topic 1: The Digital Workplace and Digital Tools for Change   * **Guest Speaker: Mimi Brooks, CEO, Logical Design Solutions** * Mimi focuses on organizational transformation through the new calculus of digital, explaining why changes in human behavior are as critical as new technology in creating the organization and workforce of the future. She explores how organizations are realizing change through digital strategy and organizational design * **Guest Speaker: Jasperina DeVries ’17, McKinsey**, Digital Tools for Change Management   Topic 2: Visualizing Change Journeys and Visions—Visual Tools for Storytelling   * **Guest Speaker: Drew Mattison, XPlane, EVP** * Drew leads the account services team for XPLANE, a global consulting firm that helps large organizations transform their businesses through strategic, culture and process change with an emphasis on visualization and creative design. His practice specialties include systems thinking, connected organizations, and customer culture. Prior to XPLANE, Drew worked as a design and engineering leader at Siemens, EDS, and Chrysler as well as in global business development roles at Autodesk and Fitch. | |
| **Session 3:** | **Creating New Organization Structures: Innovative Business Unit in a Large Organization; Post Merger Integration-- Successes and Failures, Tactics and Techniques** |
| Topic 1: *Creating an Innovative Business Inside a Large Corporation —The Story of Comic Con!*   * **Guest Speaker:** Lance Fensterman, Global Vice President, ReedPOP - A Quirky Offshoot of Reed Exhibitions   Topic 2: Simulation: Mergers are an ideal context for learning the advanced techniques of change management. We will complete an in-class computer simulation, and learn real-time some of the do’s and don’ts of post-merger integration…with both internal and external stakeholders.  Topic 3: Prep for Field Visits | |
| **Session 4:** | **Field Visits to Prominent NYC Organizations Facing Change** |
| Topic 1: Field Visits to one of the below organizations (9:00AM - 12:30PM, approx.)   * **New York Times: Will Bardeen, Senior Vice President, Strategy and Development, (CBS Alum),** and several Times executives; Mark Thompson, CEO (TBD) * **NY Public Library (NYPL)**: **Anthony Marx**, President and CEO;and others TBD such as **Sam Rubin**, Chief of Staff; **Craig Senecal**, Talent Development and Engagement * **ZX Ventures**; **A cross section of leaders from Disruption group, Corporate Group, and Partner Company** * **Union Square Hospitality Group: Chip Huffman,** Internal Communications Director**, Erin Moran,** Chief Culture Officer; **and others TBD**   Topic 2: Lunch and preparation of PowerPoints (approx. 12:30 - 3:15PM)  Topic 3: Team presentations: analysis and recommendations from company field visits (3 teams) and discussion | |
| **Session 5:** | **Transformation, Loss and Resilience** |
| Topic 1: Team Presentations (cont.).  Topic 2: *Leading Transformation—A General’s Perspective*  **Guest Speaker: General George W. Casey**, “Transformation of the US Army”, 36th Chief of Staff of the US Army (2007-11), led 1.1M soldiers and managed a $200B budget; Commander of the Multi-National Force in Iraq (2004-2007) composed of more than 30 countries, with a 40-year career 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.   * **Field Visit:** 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 Organizational Change. | |

**GRADING:** *Grading will be as follows…*

1. Class Participation (50%); Includes contributions made in class discussions, simulation completion, cross cultural survey completion, engagement with course guests, participation in the field visit and field report, debrief, discussion…
2. Individual Assignment (10%)**: Based on Course** Pre-Reading,2-3 double spaced pages

Submit on Canvas **by 11:00 p.m. on Monday, January 15th**

1. Final Case Analysis (40%)—A take-home final will be a case analysis which ties together and taps course concepts, and will be **due on Wednesday, January 31st**.

**Group Assignment:** Analysis and Recommendations of Field Site, PowerPoint

* **Due at 3:15pm, on Friday, Jan 19th (3 teams) or 9:00am on Monday, Jan 22rd (1 team)**
* Based on your site visit and additional readings/research, put together a PowerPoint presentation (20 minutes max) which might include material along the following lines:

1. Diagnosis: What change challenge is this organization facing? 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 and how much progress has been made thus far? What obstacles remain?
3. Action Plan: What recommendations do you have for this organization about making and managing change going forward?

**DRAFT READINGS (To Be Revised and Updated)**

**READING (TO BE COMPLETED BEFORE EACH CLASS SESSION):**

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| **Session 1: Tuesday, January 16, 2018**  **Leading Edge Organizational, Management and Culture Changes** | |
| **To Do Before Class:**   * Individual Assignment due at 11:00pm the night before (Monday, January 16)   \*Note: *The assignment requires that the readings below have already been completed.* | |
| **Topic 1A: Leading Edge Management Practices - Time to Change** | |
| **Required Reading:** | **Additional Reading (Pick At Least One):** |
| 1. “Moonshots for Management,” Gary Hamel, HBR, Feb 2009, pp. 91-98. 2. “More of Us are Working in Big Bureaucratic Organizations than Ever Before,” Gary Hamel and M. Zanini, HBR Blog, July 5, 2016 | 1. “Impossible and Now: How Leaders are Creating the Uncorporation” Wolff Olins Report 2015. 2. “How to Upgrade the Industrial Organization to the Age of Ideas” Marcela Bremer, Leadership and Change, Sept 22, 2015. <http://www.leadershipandchangemagazine.com/upgrade-industrial-organization/> |
| **Topic 1B: Leading Edge Corporations with Bold Organizational Models** | |
| *Organizational Design/Structural Change: Holocracy (Zappos)* | |
| **Required Reading:** | **Additional Reading (Pick At Least One):** |
| 1. “The Zappos Holocracy Experiment“ Bernstein, E. and J. Bunch, HBR Blog, July, 2016 2. “I studied the Zappos CEO’s Schedule for a Year and Here’s What I learned,” Daniel Rodic, Feb 8, 2016 3. “Making Sense of Zappos’ War on Managers” Gianpiero Petrigileri, Harvard Business Review Blog, May 19, 2015, 8pp | 1. “Holocracy, Managerless Offices, and the Future of Work” Chris Russell, Feb 1, 2016; <http://knowledge.ckgsb.edu.cn/2016/02/01/management/holacracy-managerless-offices-and-the-future-of-work/> 2. “Pushing Shoes and a Vision” David Gelles, NY Times, July 19, 2015 3. “Radical New Idea: Middle Managers,” Rachel Feintzeig, Wall St. Journal, Aug 19, 2015. |
| *Organizational Design/Structural Change: Transparency (Bridgewater)* | |
| **Required Reading:** | **Optional Reading:** |
| 1. “Company Culture and the Power of Thoughtful Disagreement” Dec 12, 2014; interview with Ray Dalio by Andrew Sorkin, You Tube, <https://www.youtube.com/watch?v=ABB1pfi3ZpE> (watch 0:00-18:00)  “At World’s Largest Hedge Fund, Sex, Fear and Video Surveillance” Alexandra Stevenson and Matthew Goldstein, NY Times, JULY 26, 2016“Bridgewater Manager Defends His Firm’s Radical Transparency” A. Stevenson and M. Goldstein, NY Times, Sept. 13, 2016 | 1. “The Smart Path to a Transparent Organization” Ethan Bernstein, WSJ, Feb 23, 2015 |

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| **Session 1: Topic 1B contd.** | |
| **Required Reading:** |  |
| *Systems Change: Performance Management (GE & Accenture)* | |
| 1. “Why GE had to Kill Its Performance Reviews After More Than Three Decades” Max Nisen, Quartz, Aug, 2015: <http://qz.com/428813/ge-performance-review-strategy-shift/> 2. “When you do what you love….” Rahul Varma, Linkedin, Aug 11, 2016 <https://www.linkedin.com/pulse/when-you-do-what-love-great-every-single-day-rahul-varma?trk=prof-post> 3. [Firing Line with Bill Kutik: Interview with Rahul Varma (You Tube video)](https://www.youtube.com/watch?v=qcwL0LxknIs) 4. “Don’t Kill Performance Evaluations Yet”, Lori Goler, Janelle Gale, and Adam Grant, HBR, Nov 2016. |  |
| *Millennial Generation Impact* | |
| **Required Reading:** | **Additional Reading (Pick At Least One):** |
| 1. “Millennials: Burden, Blessing or Both” Joanna Barsh, Lauren Brown, and Kayvan Kian, McKinsey Quarterly, Feb 2016 2. “Millennials are not Monolithic” Geoff Colvin, Fortune, Nov 1, 2016. | 1. “Three Workplace Trends Millennials are Eliminating in 2017” Elizabeth Dukes, Nov 7, 2016 (2pp) 2. “Estee Lauder Applies Millennial Makeover” Sujeet Indap, Financial Times, Nov 17, 2016. <https://www.ft.com/content/e98d3ada-9acd-11e6-8f9b-70e3cabccfae?curator=MediaREDEF> |

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| **Session 2: Wednesday, January 17, 2018**  **The Digital Workplace** | |
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| **Required Reading:** |  |
| 1. “Digital Hives: Creating a Surge around Change” Arne Gast and R. Lansink, April 2015. 2. “Change Management Meets Social Media” Sarah Clayton, HBR Blog, Nov. 10, 2015. 3. “Digital –Era Change Runs on People Power” BCG, 2017 4. “Change Management is Becoming Increasingly Data-Driven. Companies Aren’t Ready” Tushman, Kahn, Porray and Binns, HBR, Oct 23, 2017. |  |

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| **Session 3: Thursday, January 18, 2018**  **Post Merger Integration-- Successes and Failures, Tactics and Techniques; Leading Transformational Change** | |
| **To Do Before Class:**   * Prepare for the Mutari simulation, download on two computers in your group (*instructions and information for the simulation to be handed out on Day 2 of class)* | |
| **Required Reading:** | **Additional Reading** |
| *Post-Merger Integration Intrapreneurial Change* | |
| 1. Merger simulation participant guide: Read the merger simulation participant guide and prepare for the Mutari simulation 2. Org Change Website illustrations of mergers, submitted by Org Change students (6 short “cases”). | 1. “How Pax Became the Biggest, Greatest Fellowship of Gamers, Geeks, and Civility in the World,” Forbes, Sept 9, 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 |
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| **Session 4: Friday, January 19, 2018**  **Field Visits to Prominent NYC Organizations Facing Change** |
| **To Do Before Class:**   * Read about your organization and prepare interview questions |
| **Required Pre-Reading (read all for your site; skim the others)** |
| *Union Square Hospitality Group* |
| 1. “Danny Meyer: Hospitality is King: Signal or Noise,” Feb 2007. 2. “Danny Meyer’s Rule for Success: Slow Down,” Inc, Jan 2013. 3. “A Classic Recipe for Business Success,” P.D. Broughton, Financial Times, June 4, 2013. 4. “Restaurateur takes on the “destructive nature” of tipping,” Financial Times, Oct 17/18, 2015 5. “Behind the Move to Ban Tipping” Sophia Hollander, Wall Street Journal, Nov 11, 2015 <http://www.wsj.com/articles/behind-the-move-to-ban-tipping-1447206602> 6. “Shake Shack Gives Up its Sizzle,” Steven Russollilo, Wall St. Journal, May 12, 2016. |
| *ZX Ventures* |
| Readings TBD |
| *New York Public Library* |
| 1. “The Library Re-Booted,” Strategy and Business, Scott Corwin, Elisabeth Hartley, and Harry Hawkes, Spring 2009, pp.78-89. 2. ‘Resurgent City Libraries Turn a Whisper into a Roar,” Winnie Hu, NY Times, July 5, 2016. 3. “The Education of Tony Marx,” NY Times, Oct 11, 2012, E1. 4. “Firestorm on Fifth Avenue” Paul Goldberger, Vanity Fair, Dec, 2012. 5. “Too Poor to Afford the Internet,” Anthony Marx, NY Times, Aug 12, 2016. |
| *New York Times* |
| 1. “A Leaner Times Aims for Global Growth,” NY Times, Christine Haughney, Oct 7, 2013. 2. “What the NY Times Innovation Report Says About the State (and Future) or Digital News,” Mark Potts, American Journalism Review, May 19, 2014. 3. “Are Newspapers Getting a Second Wind?” Rem Rieder, USA Today, 3B, Sept 19, 2013. 4. “The Times and the Post They Are a Changing” CBS Case (Jick, 2015) |

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| **Session 5: Monday, January 22, 2018**  **Transformation, Loss and Resilience** | |
| **Required Reading:** | **Additional Reading (Pick At Least One):** |
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| 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. | 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. “Organizations Can’t Change If Leaders Don’t Change With Them” Ron Carucci, HBR Blog, Oct 24, 2016. |
| **Required Pre-Reading:** *Healing and Resilience* | |
| 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. | |