**ADVANCED ORGANIZATIONAL CHANGE**

**COURSE SYLLABUS**

**BLOCK WEEK : JANUARY 22-25 & 28, 2019**

 **Draft 1.0 (Oct 16, 2018)**

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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 going through “advanced” innovative changes.

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. lifestyle 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?

We will then consider some challenging type changes—how to change in a fast changing, uncertain and unknowable world (which some call a “VUCA” world) AND how to make progress in the tech world with Diversity which seems to be still lagging considerably. We will spend a day with examples from Google and other tech companies.

Other topics will include “how to’s” such as—e.g. how to manage a post-merger integration process, how to be intrapreneurial and build an innovative organization inside a traditional organization, and how to lead large transformations of traditional organizations. Finally, we will examine how to come back from traumatic loss and change.

One significant feature and highlight of the block week course is the field visit to iconic NYC organizations to meet with Executives and discuss their experiences with change management. Each student will be assigned to a small group which will experience a half day field trip to one of the following organizations: New York Public Library, NY Fire Department, Metropolitan Museum of Art, and the New York Times.

The course will include case examples, a computer simulation, lectures, and a series of special class guests from different industries. 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. STUDENTS ARE EXPECTED TO BE VERY PARTICIPATIVE AND SHOULD ONLY CHOOSE THIS COURSE ACCORDINGLY.

**COURSE OVERVIEW AND SCHEDULE:**

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| **Day 1:** | **Leading Edge Organizations and Transforming Management Practices and Cultures**  |
| Topic: 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?* 1: *Leading Edge Management Practices - Why Change is Bursting Out….*
* 2: *Leading Edge Corporations Reinventing Organizational Models - Pros and Cons, How to Implement*
* **Guest Speaker: Guest Speaker: Lance Fensterman, Global Vice President,** ReedPOP - A Quirky Offshoot of Reed Exhibitions
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| **Day 2:** | **Taking on Complex Change Challenges—Case Examples from Google** |
| A.M. : Managing Change in a VUCA (volatile, uncertain, complex, ambiguous) World* **Guest Speaker: Shannon Mahon, Google—Continuous Change at YouTube Go**

Shannon will share her experience of leading and supporting the YouTubeGo team at Google through a major transformation in its thinking, global reach, and overcoming multiple barriers to changeP.M: The Diversity Challenge—Progress? **Case Study: “Google’s Diversity Debate” CBS Case (Todd Jick) (2018)****Guests: Cofounders of Women in Innovation, Alfia Ilicheva (’12) and Maria Potorocyzn** |
| **Day 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 ZX Ventures* Case Study (PREMIERE): “AB InBev and ZX Ventures: Thirst for Self Disruption” (CBS Case, Todd Jick) (2019)
* **Guest Speaker: Pedro Earp, (formerly) Chief Disruption Officer, ZX Ventures** **and currently, Global CMO, AB InBev**

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;
* **NY Public Library (NYPL)**: **Anthony Marx**, President and CEO;and others TBD such as **Sam Rubin**, Chief of Staff; **Terry Neal**, Director of Employee Relations and Talent Acquisitions
* **NY Fire Department**; Daniel Nigro, Commissioner and others TBD
* **Metropolitan Museum of Art**: Dan Weiss, President and CEO. And TBD: Loic Tallon, Chief Digital Officer, Laurel Britton, Chief of Staff, Sandra Jackson-Dumont, Chair, Education, Allison Rutledge-Parisi, VP and Chief HR Officer, Jamie Kelleher, VP and CFO and Treasurer, Tiffany Sen, Head of Procurement and Financial Operations,

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 in Organizations “Protecting Us”; Experiencing Loss and Resilience** |
| Topic 1: Team Presentation: NY Fire Department (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, engagement with course guests, participation in the field visit and field report, debrief, discussion…
2. **Individual Assignment** (10%): short paper due in first class
3. **Final Case Analysis** (40%): A take-home final will be a case analysis which ties together and taps course concepts.

**ASSIGNMENTS:**

**Individual Assignment (10%)**

* 2-3 Page Paper, **due at first class**

**Readings (TBA)**

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**Assignment Questions:**

1. Why is there a call to “reinvent organizations” and what are the key dimensions of Management 2.0?
2. Which of the Management 2.0 reinventions are you personally most excited about and why?
3. In the subtopic you have been assigned, how far have we come in transforming organizations? And what are the two discussion questions you most want us to debate and consider in class regarding your topic?

**Group Assignment (Required, but Not Graded)**

* Field Site PowerPoint—Analysis and Recommendations
* **Due at 3:00pm, on Friday, Jan 25th (3 teams) or 9:00am on Monday, Jan 28th (1 teams)**
* 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?

**READINGS (To Be Updated ) :**

*To be completed before each class session.*

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| **Session 1: Tuesday, January 22, 2019**Leading Edge Organizational, Management and Culture Reinventions |
| **To Do Before Class:**Individual Assignment due at 11:00pm the night before Class 1 |
| **Topic 1A: Leading Edge Management Practices - Time to Change and Reinvent!** |
| **Required Readings:** | **Optional Reading (Pick At Least One):** |
| 1. “Moonshots for Management,” Gary Hamel, HBR, Feb 2009, pp. 91-98.
2. “Creating the Best Workplace on Earth” Rob Goffee and Gareth Jones, HBR, May 2013, 8pp.
3. (*Skim*) “The Future of Management is Teal” Frederic Laloux, Strategy and Business, July 6, 2015.

 AND/OR “Laloux Cultural Model” on YouTube (*9 minutes*) 1. Case: HCL Technologies (A) HBS, 9-408-004
 | 1. (*Explore*) Hamel Website: Management Innovation Exchange
2. (*Skim*) “Twelve Forces That Will Radically Change How Organizations Work” Vikram Bhalla, Dyrchs, and Strack, BCG, March 27, 2017.
3. “Impossible and Now: How Leaders are Creating the Uncorporation” Wolff Olins Report 2015.
4. (*Skim*) “How to Upgrade the Industrial Organization to the Age of Ideas” Marcela Bremer, Leadership and Change, Sept 22, 2015.
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|  **Leading Edge Corporations Reinventing Organizational Models** |
| **Topic 1B: Organizational Design/Structural Change: Holocracy** **(Zappos, Medium, and Others)** |
| **Required Readings:** | **Optional Readings:**  |
| 1. “The Zappos Holocracy Experiment” Bernstein, E. and J. Bunch, HBR Blog, July, 2016
2. “Beyond the Holocracy Hype”, HBR, July-Aug 2016, Bernstein, Ethan, et al.
3. “Management and Organization at Medium” Andy Doyle, March 4, 2016, Medium, 4pp.
 | 1. “Safe Enough to Try: An Interview with Tony Hsieh,” Aaron De Smet and Chris Gagnon, McKinsey Quarterly, Oct. 2017, 10pp.
2. “I studied the Zappos CEO’s Schedule for a Year and Here’s What I learned,” Daniel Rodic, Medium, Dec 15, 2015 (*10 min read*)
3. “Holacracy and the mirage of the boss-less workplace: Lessons from the failures at Github, Medium & Buffer” Vladmir Oane, Medium, Sept 26, 2016, (*9 min read*)
4. “What is Holocracy and Is It Destroying Companies?” Tamara Luzajic, Jan. 2017,Customer Experience Magazine,
5. (*European example*) “Radical Agility is the Dogma That Delivered for Zalando,”Tony Barber, Financial Times, March 2, 2017, 1p.
6. (*European example*) “The Drive for Success: Michelin’s revolutionary experiments in Trust” Andrew Hill, Financial Times, May 15, 2017, 1p.
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| **Topic 1C: Organizational Culture: Transparency (Bridgewater, Goldman, etc.)** |
| **Required Reading:** | **Optional Readings:** |
| 1. “The Smart Path to a Transparent Organization” Ethan Bernstein, WSJ, Feb 23, 2015
2. “Bridgewater Manager Defends His Firm’s Radical Transparency” A. Stevenson and M. Goldstein, NY Times, Sept. 13, 2016

“Goldman Makes Feedback Shift” Liz Hoffman, WSJ, April 22-23, 2017.2pp. “Radical Transparency Can Reduce Bias—but Only If It’s Done Right” Francesca Gino, HBR, Oct 10, 2017, 4pp.  | 1. “Company Culture and the Power of Thoughtful Disagreement” Dec 12, 2014; interview with Ray Dalio by Andrew Sorkin, You Tube. (*Watch 0:00-18:00*)
2. “Employees at the World’s Largest Hedge fund Use an App to Rate Each Other on over 100 traits—here’s how it works” Richard Feloni, Business Insider, Feb 14, 2017, 3pp.
3. “A Start Up Where Board Meetings are Open to All,” John Simons, WSJ, Oct 30, 2017.
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| **Topic 1D: Transforming Performance Management**: **Systems and Culture Change:** |
| **Required Reading:** | **Optional Readings:** |
| 1. “What About Teams?” Marjorie Devan, SHRM, Nov 29, 2017, 6pp.
2. “Why GE had to Kill Its Performance Reviews After More Than Three Decades” Max Nisen, Quartz, Aug, 2015:
3. “Don’t Kill Performance Evaluations Yet”, Lori Goler, Janelle Gale, and Adam Grant, HBR, Nov 2016.
 | 1. “How Performance Reviews Are Being Reinvented, Refined and Perfected” Eric Jorgenson, Evergreen, July 20, 2015.
2. “Ready to Scrap Your Annual Performance Reviews? Try These Alternatives” Pavithra Mohan, Fast Company, April 13, 2017 (*7 minute read*)
3. “Seven Ways to Positively Transform Your Annual Review Process,” Forbes, Feb 14, 2017.
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| **Topic 1E: Millennial Generation Impact** |
| **Required Readings:** | **Optional Readings:** |
| 1. “Millennial Leaders Are Here: What Will Change and How to Manage It,” Frank Sofia, Forbes , March 15, 2017“ 6pp.
2. The US Chairman of PWC on Keeping Millenials Engaged,” HBR, Nov 2014, pp.41-44.
3. “Millennials: Burden, Blessing or Both” Joanna Barsh, Lauren Brown, and Kayvan Kian, McKinsey Quarterly, Feb 2016 (6pp)
4. “How Will Milllennials Transform Organizational Change” Change Management Review, July 15, 2016.

**Guest Speaker on Intrapreneurship Readings**: 1. “Growing Pains at Popular New York Comic Con” NY Times, Oct 10, 2014
2. “New York Comic Con Gets Into Gear” Merissa Marr, Wall Street Journal, p. B2, Oct 7, 2013.
3. “How Pax Became the Biggest, Greatest Fellowship of Gamers, Geeks, and Civility in the World,” Forbes, Sept 9, 2013
 | 1. “A Survey of 19 Countries Shows How Generations X, Y and Z Are—and Aren’t—Different,” Henrik Bresman and Vinika Rao, HBR, Aug. 25, 2017. 7pp.
2. “Millennials are not Monolithic” Geoff Colvin, Fortune, Oct 25, 2016.
3. “Three Workplace Trends Millennials are Eliminating in 2017” Elizabeth Dukes, Inc. Nov 7, 2016 (2pp)
4. “Estee Lauder Applies Millennial Makeover” Sujeet Indap, Financial Times, Nov 17, 2016. (2pp)
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| **Session 2: Wednesday, January 23, 2019**Advanced Change Challenges—The Google Cases |
| **Required Reading:** | **Optional Readings: TBD** |
| **VUCA World Readings**1. “How Netflix Expanded to 190 Countries in 7 Years” Louis Brennan, HBR, Oct 12, 2018
2. “How YouTube Reinvented Itself for the Next Billion Users” David Pierce, Wired Magazine, Sept 27, 2016.

 **Diversity Readings**1. “The Problem of Visibility for Women in Engineering, and How They Manage It” D. Fernando, L.Cohen and J. Duberley, HBR, Oct 10, 2018.
2. CBS Case: Google’s Diversity Debate (A) Todd Jick (2018)
3. “How to React to Biased Comments at Work” J. Honesty, D. Maxfield, and J. Grenny. HBR, May 3, 2017.
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| **Session 3: Thursday, January 24, 2019**a) Self-Disruption Change; b) Post Merger Integration-- Tactics and Techniques |
| **Required Readings:** |  |
| *Post-Merger Integration* | *Self Disruptive Change* |
| 1. Merger simulation participant guide: “Project Brief—Northern Bank, Southern Bank)

Appendix: Summary of Due Diligence - Southern Bank Acquisition | 1. CBS Case: “AB InBev and ZX Ventures: A Thirst for Self Disruption” (2019)
2. “Six Ways to Sink a Growth Initiative” D. Laurie and J. B. Harreld, HBR, July-Aug 2013.
3. The 3G Way: Dream, People, Culture.
4. “ZX Ventures Funds Development of New Non-Alcoholic Beverage Made From Spent Grain”
5. ZX Ventures 2017 Summer Accelerator Recap (Video) <https://vimeo.com/240068357>
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| **Field Site Prep:** Teams to prepare site visit questions and “ghost deck” |

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| **Session 4: Friday, January 25, 2019**Field Visits to Prominent NYC Organizations Facing Change |
| **To Do Before Class:*** Read about your organization and prepare interview questions
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| **Required Pre-Reading (read all for your site; skim other sites, time permitting)** |
| ***NY Fire Department*** *(Readings TBD)* |
| TBD. |
| ***New York Public Library*** |
| * 1. “Library Rewrites Its Renovation Plans,” Leslie Brody, WSJ, Nov 16, 2017.
1. “NYPL Head Tony Marx On Dealing with Billionaires and the Homeless,” David Wallis, Observer, March 24, 2016

c. “New York Public Library” Deborah Fallows, The Atlantic, June 30, 2015.‘ d. Resurgent City Libraries Turn a Whisper into a Roar,” Winnie Hu, NY Times, July 5, 2016.e. Tony Marx, President, NYPL,” Sarah Murray, Financial Times, Nov 11, 2015.  |
| ***New York Times*** |
| 1. “The Times and the Post They Are a Changing” CBS Case (Jick, 2015)
2. “Journalism That Stands Apart: The Report of the 2020 Group” NY Times, Jan, 2017,
3. “With the 2020 Report, NY Times Charts a Path for Its Future,” Benjamin Mullin, Poynter, Jan 2017. https://www.poynter.org/news/2020-report-new-york-times-charts-course-its-future
4. “The Washington Post is a Software Company Now” Harry McCracken, Fast Company, Nov 17, 2017.
5. “Donald Trump is Helping But the NY Times is Struggling” Matthew Ingram, Fortune, Feb 2, 2017
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| ***Metropolitan Museum of Art*** |
| 1. “Is the Met Museum ‘A Great Institution in Decline?’ ” Robin Pogrebin, NYT, Feb 4, 2017.
2. “The New Strategy at the Met,” Kelly Crow, WSJ, March 22, 2017.
3. “What Broke the Met?” Boris Kachka, Vulture, April 17, 2017.
4. “Met Museum Changes Leadership Structure” Robin Pogrebin, NYT, June 13, 2017.
5. “A Leadership Shift at the Met” Robin Pogrebin, NY Times, June 14, 2017
6. “How the New Met Can Work,” Eric Gibson, WSJ, June 21, 2017
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| **Session 5: Monday, January 28, 2019**Transformation, Loss and Resilience |
| **Required Reading: Transformation** |  |
| 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.
4. “A Strategy for Leadership in an Unsteady World,” Bill George, Feb. 14, 2017. HBS Working Knowledge, 3pp.
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| **Required Reading: *Healing and Resilience*** |
| e. “Memorializing that Day,” Boston Globe, Todd Jick, Sept 11, 2003.f. “Alice Greenwald: The Woman Writing the History of 9/11” Pooja Bhatia, Ozy.com, 2014. |