Fully Virtual Class: BIDDING ONLY

B8507-001 Tuesday/Thursday
B8507-002 Tuesday/Thursday
B8507-003 Tuesday/Thursday

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.**

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: April 16 (1:00 PM) – April 19 (11:00 PM)
   Exam requires up to four hours to complete.
   **NOTE: Final exam period is non-changeable.**

4. Attendance Overall: this is a highly participatory course. If for whatever reasons, 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.

**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, 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 we craft a change plan and implement a hybrid workforce. We will next ask you to make a series of decisions to manage downsizing in a brokerage firm, called Sterling. You will then test your implementation acumen in a real-world-based computer simulation of being change agents in an organization, introducing change in a planful way to a Business unit.

**Module III** (Classes 10-12):

The course concludes with Module III; the module begins 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 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.
Module I: Leading Change I

| Session 1 | The World of Organizational Change: Leading, Implementing, and Experiencing Change | Tuesday, March 9 |

**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)


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:

a) (Research Data) “The Truth About Corporate Transformation,” M. Reeves, L Faeste, K. Whitaker, and F. Hassan, Sloan Management Review, Jan 31, 2018

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


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


Optional Readings:

a) Application: “Rutgers—How NOT To Manage Organizational Change”, WSJ, J. Baldoni, April 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*
Session 5  |  Leading Change V: Bold Stroke Change Management in the Public and Private Sectors  |  Tuesday, March 23

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

Optional Readings:

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

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

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<th>The Post Covid-19 Workplace—Back to the Office or Not? Planning for Change</th>
<th>Tuesday, March 30</th>
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**Topic:** There are many changes ahead for the workplace being talked about: Back to the Office? Never back to the office? Some Back to the Office? We will consider different scenarios and how they might be implemented.

**Assignment Questions:**

1. Based on the readings, the data, and you own views, what do you think is the most effective and practical vision for the workplace of the future?

2. What are the key challenges of transitioning to that vision?

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

4. How does your vision and implementation impact DEI issues?

**Required Readings:**


b) “Adapt Your D&I Efforts to the Reality of the Crisis,” Lily Zheng, HBR, May 7th, 2020

c) “Companies Start to Think Remote Work Isn’t So Great After All,” Chip Cutter, Wall St. Journal, July 25-26, 2020

d) “73% of Americans Fearful of Returning to Workplace Because of Covid-19 Concerns,” Edward Segal, Forbes, Oct 14, 2020


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:


b) Case: “Do you really think we are so stupid?” A letter to the CEO of Deutsche Telecom (A)” 2013 ESMT Case Study
Session 9  | Implementing Change IV: Managing a Product and Market Transformation | Tuesday, April 6
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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, April 8
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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:

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

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


**Optional Readings:**


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<th>Session 11</th>
<th>Implementing Change III: Cross-Cultural Change Management</th>
<th>Tuesday, April 13</th>
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**Assignment:** Read the two cases and the readings about cross-cultural change management.

**Required Readings:**

a) Case: “Cross-Border Change Management: Darlene Adams,” CBS, Todd Jick, 2018

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) Concept: “How to Successfully Work Across Countries, Languages and Cultures, Tsedal Neeley, HBR, Aug 29, 2017

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


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<th>Session 12</th>
<th>Continuous Change—Developing the Capacity for Change and Sustained Long-term Performance</th>
<th>Thursday, April 15 (Final Class)</th>
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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 with a photograph of yourself and post something by end of first week

☑ 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 TA!

☑ 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 (1 PM) - Dec 14 (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.

**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, April 16 (1:00 PM) – April 19 (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 Zoom room, you obviously cannot participate. You must notify Prof. Jick and your TA 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.
YellowDig Engage Guide

You will access YellowDig Engage by clicking the tab on the left-hand side of the Canvas course. Do NOT access through Web as you will not be in Class list that way—ONLY USE CANVAS.

Please add your PHOTO to your registration on Canvas.

YellowDig will function as a component of your Class Participation score. The YellowDig portion of your participation score will be satisfied by reaching weekly targets of “100 points.”

Points 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

As such, 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. You can go beyond 100 points per week, and while the “system” will inform you that 200 is your maximum capacity, you can feel free to keep adding as much as you have to offer!

*Please also tag/label each pin according to the topic you are discussing so we can “search” and code the materials as well.*

**An Important Tip:** Be careful when linking to sites or articles that require logins! Make sure to make use of the “Preview” feature to make sure YellowDig can display your Pin 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 Pin.

**How to Begin:** Make a Pin!

1. First, press the pin button at the top left
2. Copy and paste the link and an image and short summary of the article should appear
3. Create a title for your contribution which will entice people to want to read it!
4. Write down your thoughts on the article (where appropriate add pictures, videos, or documents)
5. Select the Topic (either industry or organizational change challenge) that relates to your post
6. Select as many topics as you would like that apply to your post
7. Press post
You can tag people in your post by typing @theirname in your pin.

You can also search for posts by industry or topic by searching for the tag.

YellowDig will send you e-mail notifications, based on your Notifications Settings.

NOTE: These are independent of your CANVAS Notifications Preferences.

You can adjust your YellowDig Notifications Preferences by first your name and dropdown menu from the upper-right.

Then, choose the items when you want to get notified, and click UPDATE:
Example Introduction Post:

Intro: Kendall Kalagher

Hello!

My name is Kendall; I'm from Charlottesville, Virginia, and spent the last 6 years in Washington, D.C. working in public policy strategy. I came to CBS to pivot into the media technology space.

COURSE GOALS: I am very excited about this course and hope to learn a) how to identify which type of change (strategic, cultural, structural, etc.) or combination of changes are most effective in solving different organizational problems, and b) how to best prepare for the rapid organizational changes happening currently in the media technology industry.

ORG CHANGE EXPERIENCE: In terms of dealing with organizational changes, I was working in the House of Representatives during a change in Majority party control, which resulted in leadership and structural changes on every committee and significant strategic and cultural shifts as priorities were reshuffled and new Members joined the House.

BACKGROUND: After undergrad (Virginia Tech - Go Hokies!) I moved to D.C. and worked for a mid-size government affairs consulting firm. After several years of working on the client-advisory side, I wanted to move to where the industry decisions were being made. This led me to take a job working in the U.S. House of Representatives for a Congressman from Ohio serving on the Appropriations (government spending) Committee. I covered commerce, justice, science, defense, and homeland security policy, and ultimately rose to be the Congressman's Legislative Director, at which point I focused on the overall strategy and "political brand" for the Congressman and led a team of staffers working on the Congressman's legislative initiatives.