COURSE DESCRIPTION

Overview

An organization’s performance depends critically on its ability to implement strategic change. Particularly in the fast-paced environment of business today, organizations must regularly plan for and deal with strategic change. A major challenge for global leaders at all levels, then, is to anticipate the need for these strategic changes and to introduce them in a way that maximizes acceptance and commitment across the organization and beyond.

Organizations are ultimately messy settings and the skills needed to understand and implement change often reflect that messiness. The discussions in our classroom may get similarly messy, as there are rarely right and wrong answers when analyzing cases about organizational change. As a result, this course is less about providing you with cookie-cutter recipes for change and more about developing your skills at understanding and using change models to inform your understanding of strategic change. The course will challenge you to think about change in more complex ways than more introductory courses you find elsewhere. The payback is that you should acquire not just a set of tools but also some skill in using them competently.

Importantly, this course uses the “case study method,” meaning that much of the learning will come from the class discussions and engaging with your peers. To enjoy and learn in this class, you will need to commit to this method by reading and analyzing the cases each week, participating fully in the class, and
not looking for easy black & white answers to the dilemmas presented in the cases. It will be difficult to do well in this class if you do not actively participate in the discussions.

You can view this class much like a **workshop** in which we will explore the challenges of leading strategic change in multiple ways.

- First, we will explore the levers at our disposal for achieving organizational alignment with the organization’s strategic vision: structure, processes, people, rewards and culture.
- Second, we will learn about how to effectively lead the processes of change within organizations.
- Third, we will participate in an organizational change simulation to apply and test our change skills and theories in a complex (albeit fictitious) company.
- Finally, we will conclude by exploring some special topics related to different kinds of change: cultural change, M&A, the middle manager role, and continuous learning.

To do this, we will draw from your own experiences, the insights from two accomplished guest speakers, as well as numerous examples of successful and unsuccessful change across cases from multiple industries and settings. We will do interactive exercises where you will analyze complex situations and present back to the class on what your team has discovered. We will explore the different types of challenges faced by CEOs and other top managers as they lead their organizations through turnarounds, mergers & acquisitions, restructurings, growth, and cultural transformations. We will also focus on the difficult role of middle managers in translating broad change programs into action and sustaining change.

The class will provide you with relevant readings, models, and a simulation of organizational change to help inform what you experience in your organizations and to further develop your skills at managing change.

If you have any questions, please email me at jillian.chown@kellogg.northwestern.edu.

**Learning Objectives**

1. Develop an understanding of the complexity and dynamics of change in organizations.
2. Understand the levers for achieving organizational alignment during strategic change: structure, processes, people, rewards, and culture.
3. Unpack the role of the strategic change leader.
4. Understand the critical tactics required to lead change and how to apply them in your future work.
5. Apply the learnings to your own past experiences to further your own skills as a change leader.

**Readings and Material**

All of the required readings are in the case packet or will be distributed in class. I have also created an optional course packet that contains the optional readings. These are available if you have interest in engaging more deeply with the content.

These are definitely not required, but if you are looking for more information on leading strategic change, you may find the following books interesting and helpful:


If you are looking for content on a particular topic and don’t see it in the course packs then please email me or make an appointment and we can discuss it.

**COURSE REQUIREMENTS**

**Overview of Assignments and Evaluation**

There are six main elements that compose your grade: class contribution, an application memo, an in-class exam, a group project, the Experience Change simulation (with written report) and a peer evaluation. There will be a one-letter grade penalty for each day that your written analyses are late. Students will be randomly assigned to one group that will work together throughout the quarter; you will complete the in-class exercises, group project and the simulation with the same group.

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<td>Class Contribution</td>
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<td>Thursday, May 24th</td>
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<tr>
<td>Group Project</td>
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**Class Contribution (20%)**

It is difficult to obtain an A in this class without consistent and high quality contribution. Absence is, of course, not a contribution. I understand your time pressures but regular attendance is a must. If you do miss a class, please email me and the TA in advance.

I will undertake “supportive cold calling” to encourage balanced involvement, to ensure appropriate preparation and attention, and to raise the quality of class discussions. If you are not prepared for a particular session and do not wish to be “cold called” please email me and the TA beforehand.
To facilitate my evaluation of class contribution, please bring your nameplates to all classes and sit in the same seat after the 2nd class session.

Participation grades will be based on attendance, quality and quantity of contributions.

You may contribute constructively to class discussions in many different ways:
- Asking clarifying questions
- Explaining and justifying your preferred course of action
- Identifying key issues in a case or reading
- Building on discussion using (relevant) personal experiences and other supplementary material (e.g., news)
- Listening to your colleagues and engaging them in constructive dialogue and debate
- Advancing critical evaluations of arguments and evidence

Participations that demonstrate lack of preparation, or repetition of points already made without advancing the discussion may be graded negatively.

In addition, between class meetings, if you find interesting and relevant materials, add them to the discussion section of CANVAS or email me and the TA. We will try to discuss them in class.

Application Memo (30%, in two parts)

You will get the most out of this class by reflecting on what we have discussed, how it applies to your own past experiences, and how you may change your approaches in the future. For this assignment, I recommend that, after each class, you put down a few analytical notes on what you found to be the most important learnings from each class. Based on these notes, you will write up and submit an Application Memo covering all of the sessions in the course. It is important that in the memos, you demonstrate how the content from the course might apply to your own experiences at work. The Application Memo should also include analytical reflections on what you hope to remember moving forward. Be sure to use the concepts analytically and be specific. The difference between an excellent submission and a mediocre one is in how clearly you integrate the course content with your own experiences in an analytical way. Simply summarizing the content or rehashing your previous work experience is not sufficient. Integration is key!

Assignment details:
- Your Application Memo should have an **entry for every single class session**.
  - For sessions with guest speakers, focus on what you learned from the speaker
  - For the simulation, reflect on your personal learnings from the simulation sessions and on your experience working in your team to lead change.
- You will submit your Application Memo in two parts:
  - Part 1: covers sessions 1 through 8
  - Part 2: covers sessions 9 through 20
- Each submission should be a maximum of 5 pages (double-spaced), 1 inch margins, 12-point font, excluding exhibits. Please place any exhibits at the end of the document.
Exam (20%)  

There will be one in-class exam in the class.

Experience Change Simulation (10%)  

A customized computer change simulation has been designed to enable you to hone your change diagnosis and change management skills while designing and leading a change effort. Through this simulation experience, you will get a hands-on experience in managing the multi-dimensional complexities of change and further familiarize yourself with the best practices in change management. The simulation will provide risk-free decision-making practice allowing for maximum learning with limited real-world consequences. The simulation will place you in the role of a consulting team to a fictional company “GlobalTech” which faces a desperate need for change. With limited time and budget, you must quickly identify the issues, create a change plan, and implement your plan in the face of companywide resistance. Following the simulation, you will have on-going access to the program and its online decision-support tools. These tools can be very effective in advancing real-world change initiatives and are expected to help you with your group’s final written project.

The simulation will take place across four sessions.
  - **Thursday, May 10th:** I will introduce the simulation and we will do the “diagnosis” component of the simulation.
  - **Monday, May 14th:** I will do a brief lecture on the change model underlying the simulation and then you will work with your teams to do the “planning” stage of the simulation.
  - **Thursday, May 17th:** In your teams, you will do the “executing” part of the change simulation and may have time to start working on your report.
  - **Thursday, May 24th:** We will do a debrief in class. Be prepared to talk about your teams performance and your impressions of the simulation.

**NOTE:** The change simulation is a **MANDATORY** part of the class. If you fail to participate in the change simulation, you will lose a letter grade on your final course grade.

This Change Simulation assignment has three parts:
  1. Prepare for and participate in the simulation
  2. With your group, write a report evaluating your experience in the simulation
  3. Discuss your learnings with the class

1. Simulation Preparation & Participation

   During the simulation, each group will work as a consulting team to complete the simulation. You will be provided with a document outlining the ExperiencePoint Change Theory which outlines their model for successfully implementing organizational change. You will also be
provided with a Players Guide which provides important information about the simulation. It is very important that you read these documents thoroughly before participating in the simulation.

2. Written Simulation Report

Following the simulation each group will write a report evaluating their experience in the simulation. The report should be written as a brief intended for future consulting teams facing similar tasks.

Please address the following questions in your report:

1. What were your group’s most successful moves? Why? (i.e., what did you do right and why?)
2. What were your group’s least successful moves? Why? (i.e., what did you do wrong and why?)
3. What is your opinion of the model used as a framework for change implementation?
4. How would you change the model?

In your analysis of the successful and unsuccessful moves, be analytical in explaining why you think those moves hurt or benefited your change initiative. What are the alternative courses of action you would have taken now and why? Similarly, when you critique the model and suggest changes, please adequately support your argumentation. It is always a good idea to go back to, and rely on, class materials at any stage of the analysis.

Your report should not exceed five (5) double-spaced typewritten pages (minimum 11 pt font, Times New Roman, 1” margins). I will only read the first 5 pages so please stay within the page limit. The page limit does not include appendices, which should include your group’s tactics chart.

The written document is DUE ON Thursday, May 24th and must be turned in before class begins via CANVAS.

Group Project: Moneyball Case Analysis (20%)

This American 2011 biographical sports drama film, based on Michael Lewis's 2003 book of the same name, is an account of the Oakland Athletics baseball team's 2002 season and their general manager Billy Beane's (Brad Pitt) attempts to assemble a competitive team. In this film, Beane challenges the system and defies conventional wisdom when he is forced to rebuild his small-market team on a limited budget. Despite opposition from numerous stakeholders, Beane changes the team and how it is run, and along the way, forever changes the way the game is played.

Case Analysis Report
Each group should write a report analyzing Billy Beane’s approach to leading change at the Oakland Athletics. The group should focus its analysis on applying, in depth, the concepts from
the course. For example in your analyses you should consider the following: (1) the alignment between the organization’s strategy and its structure, processes, people/reward systems and culture; (2) our discussions about managing the change process, from seeing the need to change, taking charge and ultimately leading the change; (3) the insights from our guest speakers; and (4) the special topics discussed at the end of class (i.e., persuasion, middle manager-led change, culture change, learning organizations, etc). You don’t have to draw from all the material, but your analyses should be rooted in the relevant content from the course.

The reports should include:
(a) Relevant background information describing Oakland A’s situation (be brief here)
(b) Analyses describing the issues and forces Beane faced prior to his attempted change
(c) An analysis of Beane’s plan and the way in which he implemented it: How did he address the issues and forces? What did he do well? What did you like about his tactics and are there any important characteristics of successful change management that we can learn from him?
(d) What should, and could, he have done better?

Your analysis should not exceed five (5) double-spaced typewritten pages (minimum 11 pt font, Times New Roman, 1” margins). The limit does not include appendices, which can be used to provide charts, figures, or other background material. All appendices should be referenced in the report.

The written report is due Monday, June 4th and must be turned in on CANVAS before class begins.

**Group Presentation**
Each group will be required to present a portion of their analyses of the Oakland Athletics. The professor will assign each group a specific topic to present on. The topics may include:

- How well did Beane’s align the structure, processes, people and reward systems to his new strategy?
- How effectively did Beane see the need for change and take charge of the situation?
- Describe the forces both for and against Beane prior to his attempted change
- Evaluate Beane’s execution of Kotter’s steps to leading change.
- Provide overall assessment of the strengths and weaknesses and what you think he should and could have done better.

Presentations will be followed by a class discussion. Presentations should be approximately 5 minutes. The rest of the class will play the role of the Oakland Athletics team's board so please be ready to answer questions and address other comments / concerns that your classmates might have. Everyone should have seen the movie before class.

Email your slides (if you have them) to the professor and TA by 8AM on Monday June 4th.

Group analyses will be evaluated based on the following criteria:
Content: Did you do the assignment?
Theory: How well do you apply appropriate materials from readings and lectures?
Data: How do you utilize evidence to analyze, to make inferences, and to support arguments?
Analysis: How logical, coherent, and complete is your analysis and assessment?
Action plan: Does your action plan build on your analysis? Is it concrete and practical?
Writing: How clear and organized is your presentation of the material?

Peer Evaluation

At the end of the course you will be asked to evaluate the performance of all of the members of the group you worked with during the semester, taking into consideration their work on all work group assignments. This evaluation works just like a peer review and will be figured in as part of your group project and simulation grades. Grades may be adjusted +/- 3 percentage points based on the peer evaluation.

Late assignments

There will be a one-letter grade penalty for each day that your written analyses are late.

ADDITIONAL CONSIDERATIONS

Criteria for Evaluation of Written Work

As a manager you have to be precise in your written communications. Your superiors will continually be suffering from information overload. Therefore, you will have to organize your thoughts clearly and make your points with logic and supporting rationale. Therefore, I will be looking for the following in evaluating all your written work:

- Your presentation should be organized. What is the main point of your argument? You must demonstrate the logic of your answer. How do you get from A to B?
- Support your arguments by using the reading and class material. Make your references explicit. Remember, you are trying to convince an uninformed reader of the evidence supporting your position.
- The quality of your own ideas is important. Show your own creative independent thinking as much as possible.
- In presenting a plan of action, be specific as to why it will work. Develop logical arguments. Remember, in an organization people continually ask why you think the way you do. Don't assume anything on the part of the reader.

The Kellogg Honor Code:
The professor and all students enrolled in this course agree to abide by the Kellogg Honor Code. The code can be found at: http://www.kellogg.northwestern.edu/stu_aff/policies/honorcode.htm

**Laptop and cell phone use:**
You will need laptops for the simulation and some class exercises. However, laptop use is not permitted during class; but you may use lay-flat laptops or tablets. All cell phones must be turned off in class.

**Entering and leaving class:** All students must arrive to class on time. Lateness will result in a penalty for your class participation grade. A timely start and end of class helps improve the learning experience for all.
## COURSE OUTLINE

### PART 1: Introduction

| #  | Date       | Topic                                | Readings & Preparation                                                                                                                                                                                                 | Assignments                                                                 |
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**Optional readings:**

**Case preparation questions:**
- TBD

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<td>4 Thurs, Apr 12</td>
<td>Organization Structure, Processes &amp; Change (Part 2)</td>
<td>Refer to previous session’s case</td>
<td>Refer to previous session’s readings</td>
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<td>People / Reward Systems &amp; Change</td>
<td>Marshall &amp; Gordon: Designing an Effective Compensation System</td>
<td>Refer to previous session’s readings</td>
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<td>6 Thurs, Apr 19</td>
<td>Organizational Culture &amp; Change</td>
<td>Mary Barra’s GM (see two readings below)</td>
<td>Refer to previous session’s readings</td>
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**Required readings:**

**Optional readings:**
- Groysberg, Nanda & Nohria, “The risky business of hiring stars,” HBR.

**Case preparation questions:**
- You are Kelly Browne and you are committed to pursuing a strategy that adds executive positioning to your traditional public relations services. What challenges does this new strategy create inside your firm? What (if any) changes do you need to make to the firm’s compensation system? What risks might be associated with those changes?
- In general, what roles does a professional firm’s compensation system play in helping to attract, motivate and retain talent?

- Colvin, “Mary Barra’s (unexpected) opportunity,” *Fortune*, October 6, 2014.

**Required readings:**
- None

**Optional readings:**

**Case preparation questions:**
- TBD

<table>
<thead>
<tr>
<th>7 Mon, Apr 23</th>
<th>Beyond the Global Hub: Applying Course Learnings in the Real World</th>
<th>Reading/Preparation:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Familiarize yourself with your assigned “current event.” You will be given your current event in class on Thursday, April 19th.</td>
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<td>Be prepared to analyze your company’s approach to change, suggest improvements based on class content and discuss with the class.</td>
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</tbody>
</table>

**PART 3: Managing the Change Process**

| 8 Thurs, Apr 26 | **Dean Blount:** The Kellogg Story (Guest Lecture) | Case: None | Questions to ask Dean Blount about Kellogg Change Journey: Email professor and TA 2 (or more) questions or topics you would like to discuss. **Due:** Wed, Apr 25 @ 1 PM |
|                |                                                   | Required readings: None |

<table>
<thead>
<tr>
<th>9 Mon, Apr 30</th>
<th>Taking Charge</th>
<th>Case: Redesigning Nissan (A): Carlos Ghosn Takes Charge</th>
<th>Application Memo, Part 1</th>
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<tbody>
<tr>
<td></td>
<td></td>
<td>Required readings:</td>
<td>Due: Monday, April 30th by start of class</td>
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<tr>
<td></td>
<td>Date</td>
<td>Session</td>
<td>Case: Redesigning Nissan (B): Leading Change</td>
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<td>10</td>
<td>Thurs, May 3</td>
<td>Leading Change</td>
<td>Required readings:</td>
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<td>11</td>
<td>Mon, May 7</td>
<td>Exam</td>
<td>Case preparation questions:</td>
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<td>▪ TBD</td>
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</table>

PART 4: Experience Change Simulation

| 12| Thurs, May 10| Introduction & Interviews| Case: GlobalTech (see below) |
|   |              |                          | Required readings:            |
|   |              |                          | ▪ GlobalTech Experience Change: Change Theory |
|   |              |                          | ▪ GlobalTech Experience Change: Player Guide |
| 13| Mon, May 14  | Theory & Planning       | Case: GlobalTech (see below)   |
|   |              |                          | Required readings:            |
|   |              |                          | ▪ GlobalTech Experience Change: Change Theory |
|   |              |                          | ▪ GlobalTech Experience Change: Player Guide |
| 14| Thurs, May 17| Executing               | Case: GlobalTech (see below)   |
|   |              |                          | Required readings:            |
|   |              |                          | ▪ GlobalTech Experience Change: Change Theory |
|   |              |                          | ▪ GlobalTech Experience Change: Player Guide |

PART 5: Situations of Change
<table>
<thead>
<tr>
<th>Date</th>
<th>Topic</th>
<th>Case:</th>
<th>Questions to ask Mike Warmuth about Abbott: Email professor and TA 2 (or more) questions or topics you would like to discuss.</th>
<th>Simulation Report</th>
<th>Due:</th>
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<tbody>
<tr>
<td>15 Mon, May 21</td>
<td>Leading Change</td>
<td>None</td>
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<td>Guest Speaker:</td>
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<td></td>
<td>Mike Warmuth, Abbott Laboratories</td>
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<td>16 Thurs, May 24</td>
<td>Simulation De-brief</td>
<td>John Smithers at Sigtek</td>
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<td>Simulation Report</td>
<td>Due:</td>
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<td></td>
<td>The middle manager perspective</td>
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<td>Thursday, May 24th, by start of class</td>
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<td>Case preparation questions:</td>
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<td>7 Wed, May 30</td>
<td>Recognizing the need to Change</td>
<td>Marie Trellu-Kane at Unis-Cite</td>
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<td>(Makeup for Memorial Day)</td>
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<td>Case preparation questions:</td>
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<td>18 Thurs, May 31</td>
<td>Creating Learning Organizations</td>
<td>Children’s Hospital and Clinics (A)</td>
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<td>Required readings:</td>
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<tr>
<td>Date</td>
<td>Event</td>
<td>Case</td>
<td>Group Project Report</td>
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<td>19</td>
<td>Mon, June 4 Moneyball Project Presentations</td>
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<td>Thurs, June 7 Leading Change: The role of</td>
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<td><strong>Application Memo, Part 2</strong></td>
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<td>persuasion</td>
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<td><strong>Due:</strong> Friday, June 8th by 11:59PM</td>
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**Optional readings:**
- TBD

**Case preparation questions:**
- TBD

**Required readings:**
- The necessary art of persuasion

**Optional readings:**
- TBD