

LEADING AND MANAGING ORGANIZATIONAL IMPROVEMENT

MGMT 4210 Fall Semester 2018
Tuesday 5:45 – 8:30pm.
Tentative Course Business Plan



INSTRUCTOR: Dr. Clinton O. Longenecker
Distinguished University Professor
Director – Center for Leadership and Organizational Excellence

OFFICE: 2010 Stranahan Hall

OFFICE HOURS: Mondays: 1:00-4:30pm
Tuesdays: 1:00-5:30pm
Before or after class or anytime by appointment

I strongly urge you to stop by during the semester and chat during office hours, or if I can be of any service to you. **This is your time – Please make use of it!**

PHONE: (O) 530-2368 (H) 382-7774 (F) 530-2365 (c) _____
If I am not in when you call, please leave a message with the department secretary (530-2366) or on my voice mail, and I will return the call ASAP.
Email: clinton.longenecker@utoledo.edu

TEXT:

- (1) *Running the Gauntlet** (MCT) – Hayzlett, McGraw-Hill (2012).
- (2) *Getting Results: Five Absolutes for High Performance** (GR) - Longenecker and Simonetti, Jossey-Bass (2001).
- (3) *The Two – Minute Drill: Lessons on Rapid Organizational Improvement from America’s Greatest Game** (TMD) – Longenecker, Papp and Stansfield, Jossey-Bass (2007).
- (4) *Management 4210 Reading Packet*, available at the Rockets Bookstore on West Bancroft, printed by Sylvania Repographics.
****All of these books can also be ordered at Amazon.com***

I. COURSE OVERVIEW

THIS COURSE IS ABOUT DEVELOPING YOUR ABILITY TO CREATE AND LEAD CHANGE!

This course is designed to help career-minded students understand and master the key practices that are necessary to help organizations grow and improve. Leading and managing change and organizational improvement are critical organizational practices because of increased global competition, rapid changes in the marketplace, the explosion of technology, increased customer expectations and the growing pressures associated with recruiting and retaining top workforce talent. For organizations to thrive and survive in the future, they must be able to change and develop rapidly to meet the needs of their customers, employees and shareholders. This requires that organizations improve their proficiency at learning, changing and developing so that people and processes are constantly kept in “alignment” with their environment. ***Thus, organization improvement and change management skills are among the most important skills that any professional can possess!*** This course will help you develop your knowledge and skill in leading organizational, professional and personal change/improvement!

“In the future there will be two kinds of organizations...those that change and improve and those that go out of business.”

Dr. David Ulrich - U of M School of Business

“If you want to develop a skill that will help your career in the future, learn how to lead the change process... change is something you can never know enough about in the marketplace of the 21st Century.”

Dr. John Kotter
Harvard Business School

II. COURSE TOPICS

The primary objective of this course is to give students a working knowledge “**tool kit**” of the key theories and practices of the change management and organizational development discipline. We will focus on the following key practices and topics during the semester:

- ✓ ***Understanding the critical nature of change***
- ✓ ***Examining the factors that drive and prevent real change***
- ✓ ***Designing effective organizational improvement initiatives***
- ✓ ***Leading and managing the change process***
- ✓ ***Organizational analysis***
- ✓ ***Team-building and people power***
- ✓ ***Rapid organizational improvement***
- ✓ ***Executing change game plans***
- ✓ ***Creating a “learning organization”***
- ✓ ***Measuring and monitoring change efforts***

III. SPECIFIC LEARNING OBJECTIVES: The following five (5) learning objectives are the desired outcomes for this course and will be evaluated at the completion of this class.

- (1) *To review current trends and practices in leading change and organization improvement.*
- (2) *To prepare students to effectively manage/lead organizational change.*
- (3) *To equip students to lead an organizational improvement process in both public and private sector organizations.*
- (4) *To help enhance student understanding of how people and organizations learn and develop.*
- (5) *To enhance the student’s knowledge of how to help create high performance organizations.*

The overall GOAL of this course is to learn the maximum amount of **USEFUL and PRACTICAL** knowledge about being a change agent in the time allotted. My goal is to make this class an awesome learning experience for each of you with practices that you can take to work!!

IV. STUDENT EVALUATION AND PERFORMANCE APPRAISAL*

Mid Term	20%
Final Exam	20%
Case #1	10%
Case #2	10%
Individual Term Project	20%
Class Participation*	20%
	100%

*(Includes article presentation, class writing assignments and two personal development exercises)

1. **Exams*** will be primarily essay in nature. Review sessions outside of class will precede both the mid-term and final examinations. **NO MAKE-UP TESTS WILL BE GIVEN without prior arrangement or **unless there has been an emergency.**** The examinations are evaluated on the basis of defining, evaluating, critiquing, explaining, and utilizing theories, concepts, and practices studied in the course. Study sheets will be provided for all exams. Examinations will test what has been taught and will be very challenging so be prepared.

*I fully endorse and enforce the **COBI Code of Student Academic Conduct**, which has a zero tolerance for cheating and academic dishonesty. More importantly, I expect academic honesty from all of my students because it says a great deal about YOU!

2. **Individual Term Project** - As a key component to the learning process, each student will be asked to write an **Individual Semester Case Study Project (see attachment p. 4)** on an organization of their choice **OR** conduct **The Organizational Improvement Exercise (see attachment pp. 5-6)**. Term projects will be evaluated on professionalism, originality, current evaluation of the field, organization of material, application of theory to practice, conclusions and learning applications.
4. **Cases** will be a group project and are expected to be presented in a short (12-page) to-the-point analysis and they will be evaluated on the criteria handed out in class. **No late cases!** For your project to be a success, teamwork is critical! Apply the principles learned in class to this group effort. If your group needs any assistance, please meet with me for consultation!
5. **Class participation** is evaluated on the basis of discussion, student's willingness and motivation to communicate, quality of communication, knowledge of material covered, and EFFORT. ***This is not an attendance grade!*** As a businessperson, you must have excellent communication skills! Use this class as an opportunity to develop these skills. In addition, class members will be given the opportunity to critique and present course articles in class in a dynamic and effective fashion to enhance their participation grade. ***Pop quizzes will be given over the course of the semester to encourage students to keep up with the readings and for bonus points on their final grade!***

IMPORTANT: All cell phones must be turned off during class as texting and other phone applications have been proven to be distractions to real classroom learning and damage our ability to concentrate. If you have a special need to have your phone on for a particular class please let me know. THANKS!

Personal Development Assignments (PDA) are two take home exercises that will give you an opportunity for self-reflection and analysis on the topics of leadership and dealing with change. These are thinking and feedback exercises designed to help you know yourself better and become more effective in leading your career and working with others.



V. PROPOSED CLASS SCHEDULE AND READINGS

#	Date	Topic	Book Chapter:	Reader:
1	August 28	Orientation to Class: Ice-Breaker	-	-
2	September 4	A Model for Change	RTG 1-5	1, 2, 3
3	11	Are you Change Ready	RTG 6-11	4, 5, 6
4	18	The Change Process	RTG 12-16	7, 8, 9
5	25	Resistance to Change <i>(PDA #1 Due)</i>	RTG 17-22	10, 11
6	October 2	Continuous Improvement	RTG 23-28	12, 13
7	9	Real Change Agents <i>(Case #1 Due)</i>	RTG 29-33	14, 15
8	16	Mid-Term Exam	-----	-----
9	23	Exam Debrief - Leading for Results	GR 1-2	16
10	30	Preparing for Battle and Climate	GR 3-4	17,18
11	November 6	Nurturing Relationships and Renewal	GR 5-6	19, 20
12	13	Rapid Organizational Improvement Developing a TMD Mindset	TMD 1-2	21,22,
13	20	TMD – Playing to Win <i>(PDA #2 Due)</i>	TMD 3-5	23, 24
14	27	Execution <i>(Case #2 Due)</i>	TMD 6-7	25,26
15	December 4	TMD – Scoring and Post-Game Learning <i>(Individual Semester Assignments Due)</i>	TMD 8-9	27,28
	December 11	Final Exam 7:30-9:30	Finish Strong!	

Findings from an Important Survey on Organizational Change

1. *86% of leaders reported that organizational improvement was a major concern.*
2. *72% stated that they needed better skills to cope with the changes.*
3. *81% of the leaders reported that their organizations were currently in the process of a major change initiative.*
4. *69% of leaders reported that their organizations need to get better at implementing change.*
5. *74% stated that successfully leading an organizational change had a significant impact on their career trajectory and success.*

***The goal of this learning experience is to prepare you for these challenges and for life!**



INDIVIDUAL SEMESTER CASE STUDY PROJECT GUIDELINES

MGMT 4210

Dr. Clinton O. Longenecker

1. **PURPOSE:** To allow the student an opportunity to immerse themselves in an organizational change effort at an enterprise of their choice to chronicle and analyze the effort from start to finish. For purposes of confidentiality, the identity of the organization that is the target of the case analysis can be changed in the written case study, but it is essential that you inform me of the name of the actual organization.
2. **METHODOLOGY:** The student is responsible for conducting an in-depth analysis that describes and explains a major organizational improvement effort with an organization with which they can gain access to both primary and secondary data sources. Case study organizations can include both public and privately held enterprises as well as government agencies. Data collection methods can include face-to face interviews with principles involved in the improvement initiative, review of change effort documentation, and performance data analysis and review.
3. **KEY CASE ISSUES TO BE ANALYZED:** The following issues should be systematically addressed in writing the case:
 - a. Provide background on the organization
 - b. What are the current challenges that the organization is facing?
 - c. What were the triggers or causes for the improvement initiative that is the focus of the case?
 - d. Describe the improvement process that the organization designed to bring about the desired changes.
 - e. Provide a detailed description of the role of organizational leaders in this change effort.
 - f. Describe the challenges associated with designing the change.
 - g. Describe how the organization measured the impact of the change effort.
 - h. What were the biggest barriers to successfully implementing the change?
 - i. What did the organization learn about itself when going through this improvement process?
3. **PAPER FORMAT:**
 - a. **COVER PAGE:** Title (something catchy), Name, Rocket #, Course Title and Number and Date.
 - b. **EXECUTIVE SUMMARY:** An overview of the contents of the case analysis should be provided on 1 page (*this page should be single-spaced*).
 - c. **DISCUSSION OF KEY CASE ISSUES:** Provide the reader with a review of the issues that were explored during your case analysis. Consider making (a) through (i) in the above section headings in your case write up.
 - d. **WHAT YOU LEARNED DURING THE CASE ANALYSIS:** This section should be a discussion of what observations you would like to make about the case as an observer to what took place within the context of this organizational improvement effort.
 - e. **LESSONS FOR CHANGE:** In one page, write down what you would consider to be the key lessons that you learned about leading change in organizations. Make your lessons catchy and pithy so that the reader can really remember your ideas and advice!
 - f. **REFERENCES:** If you need to reference material, do so by simply putting a number in the text of the case with a corresponding endnote number that describes the source of the information being cited.
4. **LENGTH:** The length of the paper is up to the author. The key is to take as much space as is needed to tell a complete story of the organizational change effort that is being described. Depending on the analysis, twelve (12) to twenty (20) pages should be sufficient. Pages should be typed double-spaced with 1-inch margins all around. ***Make liberal use of section headings and number all pages. Please do not put your papers in a binder, as a staple will suffice.***
5. **REMEMBER:** Be creative! Integrate course material. Work from an outline. Give me real content

not fluff. **Proofread your paper at least twice!!** Try to have fun as you learn!!

THE ORGANIZATIONAL IMPROVEMENT EXERCISE

Dr. Clinton O. Longenecker
MGMT 4210

"Organizational change and improvement is one of the greatest challenges facing organizations today...because if organizations cannot recreate themselves on a continuous basis their future is in jeopardy. The more we learn about change the more we learn there is to know about change."

Dr. Peter Drucker

- A) **PURPOSE:** The purpose of this exercise is to encourage students to learn the lessons of organizational change and improvement from managers/professionals in their field. These lessons will be the basis for the report that will chronicle what you learned and draw lessons to help you better understand how to lead and support organizational change. **Proofread your paper at least twice.**
- B) **LEARNING INTERVIEW METHODOLOGY:**
You will conduct structured interviews with at least five (5) managers/professionals whose organizations are currently undergoing significant change. You can do multiple organizations or interview five people from the same organization. The key is to find people whose organizations are currently experiencing serious changes. At the start of each interview, explain the purpose of the interview with the manager/professional. The attached structured interview questions should be uniformly addressed in each interview. The student could consider tape-recording each interview (with the permission of the participant) as a means of collecting accurate data. The student should probe and ask for further explanation of the interviewee's response when necessary. At the completion of each session ask the manager if they have any questions and send them a thank you note within two working days. You might consider offering them a copy of the finished paper as a professional courtesy.
- C) **ANALYSIS:** When all of the interviews have been completed, compare the responses across each of the interview questions. What similarities/differences do you observe? What lessons can be drawn in each area that are important to your own career development? Develop a spreadsheet with responses across each question/each respondent to aid in your analysis and discussion in the paper. Spell out what you learned in each section in a dramatic fashion.
- D) **THE REPORT:** Once you have analyzed the interview data, you will write a report on what you have learned through this experience using the following format:
- 1) **Dramatic Cover Page** - Name, Creative Title, Phone # and Rocket #
 - 2) **Executive Summary**- Provide a brief overview and lead in to the purpose, process, and key findings of your paper.
 - 3) **Interview Results** - In this section you should summarize what you learned from interview questions #1 - #10 and share these results in a clear, concise fashion. Provide a spreadsheet of your findings as an appendix to the paper.
 - 4) **Lessons on Organizational Improvement/Change** - In this section, you will discuss what you have learned about organizational change from the participants you interviewed. Then you will develop a list of specific lessons that you think are critically important for the success of any organizational change effort. Be very specific and feel free to cite any examples that were provided to you by the people you interviewed in your study.

**THIS EXERCISE IS TO HELP YOU GROW IN KNOWLEDGE AND BUILD
YOUR PROFESSIONAL NETWORK!**

**ORGANIZATIONAL IMPROVEMENT EXERCISE
STRUCTURED INTERVIEW QUESTIONS
MGMT 4210 FALL 2018**



PURPOSE: To learn more about the process of leading and managing change and improvement from the perspective of practicing managers in the field.

Participant Demographics/Background Information (do your homework before the interview):

- a) How long have you been working?
 - b) How long have you been a manager?
 - c) What is your current position and title?
 - d) Tell me a little about your organization.
-
- 1) *At present, what are the greatest challenges your organization is experiencing?*
 - 2) *How has your industry changed during the past five (5) years? Please be specific.*
 - 3) *What specific kinds of change and improvements has your organization had to make in the recent past to remain competitive?*
 - 4) *As a leader, what are the greatest barriers/roadblocks you face when your organization implements change?*
 - 5) *As a leader, what are the greatest challenges that must be addressed in implementing change?*
 - 6) *Can you think of an example of an organizational improvement effort that was very successful? What made this effort work so well?*
 - 7) *Conversely, can you think of an example of an organizational improvement effort that was less than effective? What made this effort struggle?*
 - 8) *Based on your experience, what are the most important steps to ensure that organizational efforts to change and improve performance are successful?*
 - 9) *What recommendations do you have to make change/improvement happen faster in any organization?*
 - 10) *Any additional thoughts on leadership or organizational improvement?*

Thank you for your valuable input!

PERSONAL DEVELOPMENT ASSIGNMENTS (PDA)

(Part of Your Participation Grade)

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MGMT 4210 Fall 2018

Assignment #1: How You Handle Change Exercise Due: Sept. 25th.

Think of the biggest change that you have ever had to make in your life:

1. What was the change?
2. Provide a detailed description of the cause of the change that you had to make.
3. Describe how the change personally affected you and how you responded.
4. Write out the specific things that you learned by going through this experience.
5. Develop a list of life lessons that are advice you would offer to others in helping them go through a similar experience.

Write up your responses to these questions in a creative way and turn them in to complete this assignment.

Assignment #2: Leadership Feedback/Reflection Assessment Due: Nov. 20th.

Part 1: Ask four or five people in your life that you truly trust and respect (two from work, one friend, and one family member) to write a candid and honest 500-word assessment that answers each of the following questions about you based on their experience with you:

1. What are your strengths?
2. What are you really good at doing?
3. What are the things that you need to be working on in terms of how you work with others?
4. Why are people willing to follow you?

Part 2: Prior to reading the input from your friends answer the same questions for yourself in 500 words or less:

1. What are my strengths?
2. What am I really good at doing?
3. What are the things that I need to be working on in terms of how I work with others?
4. Why are people willing to follow me?

Part 3: Read the input of your friends and write a 500-word analysis of what you learned by comparing and contrasting their input with what you have written about yourself. Upon completion, all three parts will be turned in with a cover sheet and pithy title.

TEAM CASE STUDY ASSIGNMENT GUIDELINES

MGMT 4210

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- YOUR POSITION:** An Organizational Improvement Consulting Team
- YOUR CLIENT:** The troubled organization in the case provided.
- YOUR MISSION:** To provide your client with a consulting report that has been generated through the joint efforts of the consulting team that helps the client solve their problem(s). Each team is to turn in one report no longer than 12 typed pages (double-spaced with 1" inch margins using 11 font) excluding the group evaluation and consulting fee invoice for services rendered.

REPORT FORMAT AND CONTENT:

Each report should be professionally written using the following format and should include an evaluation of each member's performance on the final page.

- 1) **COVER PAGE:** Name of group - Names of group members.
- 2) **EXECUTIVE SUMMARY AND CONCLUSIONS:** A one-page single space statement reviewing the contents of the report in clear, concise language.
- 3) **CORE PROBLEM:** Explain the major over-riding problem that dominates the situation explained in this case.
- 4) **SUB-PROBLEMS:** Identify and explain the smaller, situational problems that are present in this case and must be solved.
- 5) **RECOMMENDATIONS:** Should be specific steps of action that solve each of the organization's problems. There should be a recommendation for every sub-problem. If the Core Problem is caused by a collection of sub-problems, your recommendations hopefully, will solve the sub-problems and thus solve the core problem. List the recommendations in point-by-point form and be specific.
- 6) **IMPLEMENTATION PLAN:** It is not enough to find the problems and make recommendations; you must tell how you plan to put your recommendations into action. Implement each recommendation so that it is clear how they will solve the sub-problems and the core problems. List your implementations point by point and identify such issues as who does what, when, where, and how. In addition, include a time-line for implementation of your plans for improvement.
- 7) **MONITOR AND FOLLOW-UP:** The final step after diagnosing the problem, prescribing the cure and administering your remedy is to build monitoring devices into the system to prevent the problem from

occurring again. Creatively develop a means of preventing the problem from reoccurring in the future and to make your recommended changes stick.

- 8) **GROUP EVALUATION:** The team must turn in an evaluation of each group member's contribution to the report. This must be an accurate description of each member's actual contribution to the effort. **Develop your own system.** To avoid problems, discuss this at the start of your work on the case. Be candid and systematic in your assessment! If someone does not pull their weight in this effort, the evaluation should clearly communicate that to me. (This is an appendix to the report)
- 9) **CONSULTING FEE INVOICE:** This section of your report should be an itemized bill for the services rendered, as you need to determine what your services are worth and add in any expenses incurred during your consulting effort. (This is an appendix to the report)

TIME TABLE:

Team selection: September 4th

Case #1 Reports Due: October 9th

THINGS TO REMEMBER:

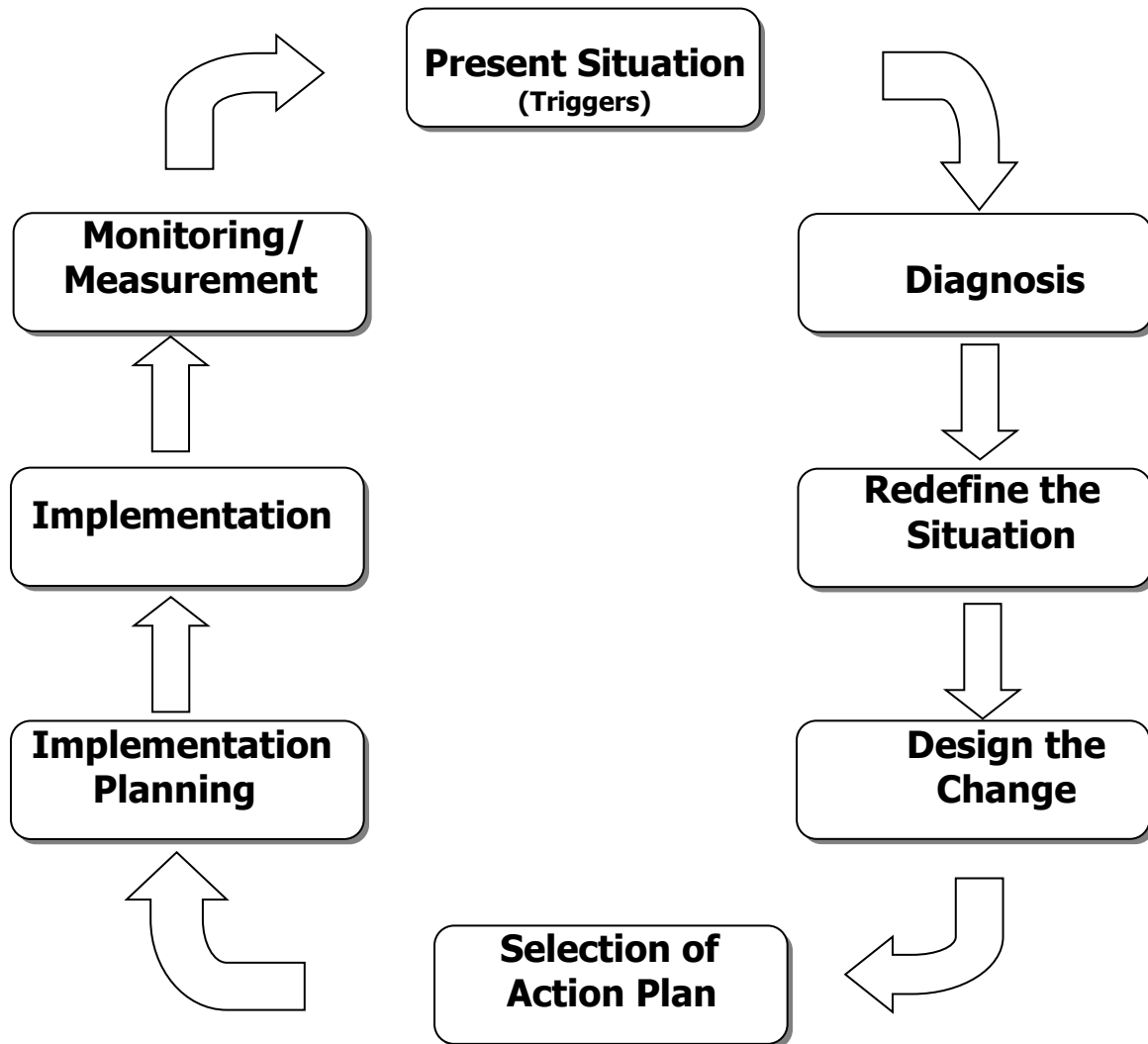
- 1) Use common sense and good theory in all that you do!
- 2) Use group problem-solving techniques that draw upon everyone's knowledge, expertise and input!
- 3) Get a schedule in place and remember that you are a team. If you are having problems see me and we'll develop a plan to work them out!
- 4) Be creative and innovative but very practical and realistic!
- 5) Be professional and apply your knowledge!
- 6) Use a strong report format and make liberal use of sub-headings!
- 7) Schedule your time accordingly!
- 8) Proofread your final copy at least twice and make sure that it reflects well on your team!
- 9) NO LATE REPORTS!
- 10) ***Ask yourself if you worked at this organization would you have a good feeling about paying the bill.***

THIS IS A GREAT OPPORTUNITY TO APPLY THEORY TO PRACTICE: MAKE THE MOST OF IT AND LEARN MORE ABOUT THE POWER OF TEAMWORK!



A MODEL FOR CHANGE

(or is it Problem-Solving?)



KEY QUESTIONS

1. *What is it about the change process that is so challenging for people and organizations?*
2. *What are the greatest challenges associated with each step of this process?*
3. *Why is it important to master the change process?*