IDM 7510 (G01) (1.5 CH)
STRATEGIC LEADERSHIP & MANAGING CHANGE
SUMMER 2021

INSTRUCTOR

Name:	Wenlong Yuan, PhD	Office Location:	Zoom meeting by appointment
Phone:	Zoom meeting by appointment	Office Hours:	by appointment
Email:	Wenlong.yuan@umanitoba.ca	Classroom:	Zoom link posted on UM Learn
		Class Time:	9:15am - 4:15pm, Jun 25 and 26
			9:15am - 12:30pm, Jun 27

Zoom link and password will be posted on UM Learn.

COURSE DESCRIPTION

The Calendar Description: An examination of the role of the manager as a change agent and processes associated with strategic vision and change. Analysis of factors affecting strategic decisions and how organizations adapt to their environment. Emphasis is upon the role of leaders: transformational leadership, charisma, organizational design and managing organizational culture change.

This course is designed to integrate intellectual and experiential learning to facilitate students' own capacity for effective leadership in managing change. This course examines the processes associated with strategic changes and how leaders manage change as change agents. Students will learn that, with rapid change and increasing complexity, organizations and society need different forms of leadership today than in the past. Building on the leadership concepts and skills learned, students will draw upon their own experiences to (a) develop a leadership vision for themselves, and (b) build specific leadership knowledge base and skills to help them as they continue to develop as leaders.

COURSE OBJECTIVES

On course completion, you should be able to:

1. To gain an understanding of how organizational change is achieved.
2. Understand how different kinds of leadership impact organizational change.
3. Understand more about the concept of leadership, how it emerges in work organizations, and how it impacts organizational performance.
4. Assess their own and others' leadership orientation, and identify their own strengths and opportunities for growth.
5. Articulate their personal leadership values and how to translate them into behavior.
6. Initiate and lead organizational change of various scales.

COURSE FORMAT

This course will be conducted "live" via videoconferencing using Zoom and will not involve in-person instruction. Classes will be during the scheduled class time.

All students are required to have a computer with functioning audio and camera. You are expected to be in a location with a reliable Internet connection that is strong enough for streaming video. For recording attendance and class participation, you will be expected to have your camera and microphone on during class time. The instructor may tell you to leave your camera/mic on for the duration of the class or may require you to mute yourself and unmute yourself only at certain times.

AACSB Assurance of Learning Goals and Objectives.

The Asper School of Business is proudly accredited by AACSB. Accreditation requires a process of continuous improvement for the School and our students. Part of "student improvement" is ensuring that students graduate with the knowledge and skills they need to succeed in their careers. To do so, the Asper School has set the **learning goals and objectives** listed below for the **MBA Program**. The checked goal(s) and objective(s) will be addressed in this course and done so by means of the items listed next to the checkmark.

	Goals and Objectives in the MBA Program	Goals and Objectives Addressed in this Course	Course Item(s) Relevant to these Goals and Objectives
1	**Strategic Thinking** Students will think critically and creatively about solutions to organizational problems, considering short-term and long-term goals, resources, risks, and opportunities.	X	Much of the material incorporates consideration of strategic change objectives and how leadership plays a role in achieving those objectives.
	A. Students are able to identify situations where strategic thinking is necessary.	X	Case studies and articles
	B. Students are able to identify different strategies.	X	Case studies and articles
	C. Students are able to perform a basic strategic analysis.		
	D. Students are able to recommend strategic alternatives and their implementations.		
2	**Global Perspective** Students will adopt a global mindset in considering organizational decisions.		
	A. Students have an awareness of global diversity, and multicultural awareness.		
	B. Students have an awareness of different global perspectives.		
	C. Students have been exposed to global business environments through course materials		
3	**Ethical Mindset** Students will consider ethical and moral issues when analyzing and recommending solutions to organizational problems.	X	Discussion about "bad" and "good" leadership practices
	A. Students demonstrate an understanding of the responsibility of business in society.	X	More emphasis on personal role of making good decisions about business and society
	B. Students demonstrate an understanding of ethical decision making.	X	Discussion of different types of bad leaders (Kellerman)
	C. Students demonstrate moral development in ethical decision making.	X	Through case discussion and discussion on roles of leaders
	D. Students demonstrate an understanding of the responsibilities of a leader's role as it relates to ethics.	X	Occurs through course readings, discussions, case studies, guest speaker, and personal self-assessment

4	**Quantitative and Financial Proficiency** Students will demonstrate the ability to approach organizational issues using quantitative and financial analysis.		
	A. Students are able to identify that a problem containing a quantitative aspect exists.		
	B. Students are able to apply financial methodologies in the answering of business questions.		
	C. Students are able to demonstrate a basic financial proficiency in understanding the role and flow of money in an organization.		
	D. Students are able to interpret the results of a financial analysis.		

COURSE MATERIALS

The course builds on prior courses related to Leadership and Organizational Development. We will be using two sources of course materials to build a deeper understanding of leadership and change management. First, students should access reading materials via the UMLearn course website. Second, we will be using two case studies and one simulation in the course which are available from HBR. Please refer to the file entitled "IDM 7510 - Wenlong Yuan - reading and simulation" for details.

Required cases and simulation:
HBR case: P&G Canada;
HBR case: GE;
Simulation: William Q. Judge, Linda A. Hill. HBR. Change Management Simulation: Power and Influence V3.
You can purchase the course pack here:
https://hbsp.harvard.edu/import/826787

COURSE ASSESSMENT

Student progress will be assessed through:

- Personal Change Project Analysis, 35%

- Group Organizational Change Proposal, 35%

- Participation and Contribution, 30% (including "Exercise are you up for the change challenge", 10%; **the exercise will start no later than Jun 10**)

Late submissions will not be accepted and will receive a zero (except where there are legitimate and documented reasons beyond a student's control).

Note that, in some cases, peer evaluation may be considered by the instructors while assigning final grades. Final grades may be curved.

Final grades will be assigned as follows;

Cumulative Marks	Grade	GPA	Performance
90-100	A+	4.5	Excellent

80-89.99	A	4.0	Very Good
75-79.99	B+	3.5	Good
70-74.99	B	3.0	Satisfactory
65-69.99	C+	2.5	Marginal
60-64.99	C	2.0	Unsatisfactory
50-59.99	D	1.0	Unsatisfactory
49.99 and below	F	0.0	Unsatisfactory

NOTE: Class attendance is required. Missing more than 20% of this course due to absences may result in a failing grade. It is your responsibility to inform your professor in advance of your absence and the reason for it (medical documentation or employer note if away for a work commitment) is required. The professor decides how to deal with the impact of missed classes on your final grade.

PERSONAL CHANGE PROJECT

This is an individual project in which you will identify a desired personal change to implement during, and in the weeks following, the course. This will require you to put your plan in place, track progress, and evaluate success. The project deliverables are:
(1) a short paper (2-3 pages, double space) of your change initiative built on the exercise on the final day of class. This paper is more forward looking and more on leadership related change. Assess your capabilities and focus on what you intend to reach in the near future.
(2) a short (2-3 page) paper presenting reflections of your change experience including detailing your key learnings about your own personal strengths and weaknesses in implementing this change, and takeaways for dealing with future change initiatives. This part of the assignment is more about your reflection on your past change experience. It can be about leadership related topics, but not limited to this area.

You are encouraged to incorporate information you have received during the course (e.g., reflections from class exercises and discussions, and feedback from group members, as well as including information from outside the course (e.g., previous leadership assessments, and external feedback you have received). The paper should include reference to relevant literature to support your analysis and arguments. References, tables and appendices are **not** included in the word count and may be used to supplement the analyses within the paper. Papers are due by midnight **July 20, 2021** and should be submitted via the UMLearn Dropbox that will be set up for the course. The papers should be submitted in Word format.

Your task: Complete the two short papers and submit to UM Learn.

GROUP ORGANIZATIONAL CHANGE PROPOSAL

Students will form teams by themselves. This is a group project (4-5 members) designed to facilitate your practice of initiating and implementing an organizational change that interests you. Students will be given some time during the class to progress this project, but the final deliverable will be due two weeks after the class ends. This project requires that students first pick an organization of mutual interest, and a problem or issue that the group would like to help ameliorate. Then, the team will take steps to craft a change proposal project, including:
(a) background on the organization and problem
(b) description of the change that needs to happen, especially about the content of the proposed change, such as vision, culture, and business processes.

(c) a proposal of the recommended change protocol, especially the tools/tactics that you intend to use to implement the changes – the enabling levers (credibility, communication, training) and substantive change levers (technical, political, and cultural) are major examples of such tools. Also include which tools you intend to use first, and when to switch to other tools, as what you have done in the simulation. (d) expected areas of resistance, and a plan for addressing them.

All proposals should use course lessons to understand how to generate support for the proposed change, and to implement the change effort. Maximum length, **not** including references, appendices, figures or tables, is **5 pages** double-spaced. Papers are due by midnight **July 28, 2021** and should be submitted via the UMLearn Dropbox that will be set up for the course. The papers should be submitted in Word format.

Peer Evaluations: Students are required to complete a peer evaluation that corresponds to each group member's contribution to the group project. The instructor reserve the right to adjust the group project marks to reflect individual peer assessments. Failure to submit peer evaluations on time may result in 2% deduction from your final grade. In cases with strong supporting materials from a single team member, the instructors may decide to adjust students' grades.

Your task: The group will complete the paper and one group member will submit it to UM Learn.

PARTICIPATION AND CONTRIBUTION

Component 1: "Exercise: are you up for the change challenge" (account for 10% of your course work). You can start any day after the start of the semester, but the latest day for you to start the exercise is Jan 18. You also need to post your tracking every day on UM Learn for at least 10 days.

Research demonstrates how seemingly unimportant gestures can have astonishing results. These gestures can cause a ripple effect in our lives and the lives of people around us! Specifically, completing the following task each day for a period of 10 days will greatly decrease your stress levels and increase your happiness. Think about a habit that you want to implement or break and track your progress every day for at least 10 days.

Your task: Start the task no later than June 10. Post your tracking on UM Learn every day for a period of 10 days. Refer to the file entitled "IDM 7510 - Wenlong Yuan - Exercise are you up for the change challenge" on UM Learn for details.

Component 2:

The course will be a highly interactive course that includes case studies, exercises, and discussions. It is essential that students come to class prepared and ready to contribute. General class participation will be rated by the instructor based upon student contributions during discussions and completion of daily feedback forms. The group participation and contribution will be judged primarily through ratings from group members and the class.

Case Discussions. During the term we will have two case discussions in order to bring to life specific leadership ethics and change issues in a real world setting. I am not requiring students to turn in a write-up of the case analysis. However, it is essential that students come prepared to discuss the case in detail. Below are ways to guide your preparation.

Issues: Identify the essential issues described in the case. Issues represent current or emerging problems faced by individuals and groups in the organization. Keep in mind there are many issues in any given

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case, but not all of them are equally important.

Analysis: What are the causes/factors producing the situation described in the case? Who are the stakeholders? What seems to be causing the key problems? You may want to list, draw, or somehow represent the factors you see as important. You might find a visual representation helpful in capturing the core dynamics. The goal is to discern how and why the situation arose in the first place.

Action: What course of action would you adopt if you were involved in this situation? Your solution should address the underlying causes of the issues. How would you implement your suggested actions? What potential failure points do you need to anticipate? You want to be as concrete and realistic as possible.

Your task: Actively participate in class discussion and exercises. Make significant contribution to team work.

PRE-CLASS PREPARATION
Readings:
1. HBR case: P&G Canada;
2. HBR case: GE;
3. Articles listed in the outline (available via UMLearn).

COURSE SCHEDULE

Session	Topic and Activities	Preparation Work
Day 1, AM	***Topic:*** The change path, resistance to change, readiness for change, and why change	1. Ice breaker game. 2. **Case**: HBR "P&G Canada"
Day 1, PM	***Topic:*** Contextual factors	***Read:*** 1. Beer, M. & Nohria, N. (2000). Cracking the code of change. <u>Harvard Business Review</u>, (May/Jun), 133-141. 2. Kotter, J.P. (1995). Leading change: Why transformation efforts fail. Harvard Business Review, (March/April), 1-10. Reprint 95204. ***Activities/exercises:*** 1. **Simulation:** William Q. Judge, Linda A. Hill. HBR. Change Management Simulation: Power and Influence V2 (scenarios 1 and 2). 2. Exercise: assess your self as a change agent
Day 2, AM	***Topic:*** Dynamics of change/Strategic leadership	***Read:*** 1. Kotter, J.P. & Schlesinger, L.A. 2008. Choosing strategies for change. Harvard Business Review, (Jul/Aug), 130-139.

		2. GE **Case**. HBR.
		Think about:
		1. What was the environmental context and changes needed at the point when Jack Welch became CEO of GE?
		2. How did GE prepare for the environmental changes?
		3. What role did Welch's leadership approach play in the organizational changes?
		4. What are the pros and cons of Welch's leadership approach?
		5. What are GE's values and how did they facilitated/inhibited GE's performance?
		(Current context – what has happened at GE since Jack Welch stepped down as CEO?)
Day 2, PM	**Topic:** Types of strategic leadership/influence	**Read:** 1. Meyerson, D.E. 2001. Radical Change the Quiet Way. Harvard Business Review. October. 2. Q. N. Huy, 2001. In Praise of Middle Managers, Harvard Business Review. September. **Activities/exercises:** 1. **Simulation:** William Q. Judge, Linda A. Hill. HBR. Change Management Simulation: Power and Influence V2 (scenarios 3 and 4). 2. Exercise: change plan (Compare "Exercise: assess your self as a change agent" and your role model of strategic leaders)
Day 3, AM	**Topic:** 1. Bad leadership. 2. Identify change initiatives.	**Read:** 1. Kellerman, B. (2004). Leadership: Warts and all. Harvard Business Review, January, 40-45. 2. Ma H, Karri R, Chittipeddi K. 2004. The paradox of managerial tyranny. Business Horizons 47(4): 33-40. 3. Kramer RM. 2006. The great intimidators. Harvard Business Review 84(2): 88-96. **Activities/exercises:** 1. Personal change plan/presentation.

ACADEMIC REGULATIONS AND STUDENT SERVICES

HUMAN ETHICS APPROVAL FOR DATA COLLECTION

As part of coursework, if you will be collecting data from people who are not students in this class, you must obtain Human Ethics approval from the UofM's Research Ethics Board (REB) prior to data collection. This applies to data collection such as surveys, interviews, focus groups, experiments, video recording, etc., where a respondent is solicited for participation.

If the entire class will be working on the same project, your instructor will apply for human ethics approval from the REB. If individuals or small groups of students will be working on different projects, it is the responsibility of the students to obtain approval (only one group member needs to apply). Your instructor will tell you whether s/he will be or you need to. When in doubt, please talk to your instructor.

Instructions and forms to apply for human ethics approval can be found at:
http://umanitoba.ca/research/orec/ethics/guidelines.html

In most cases, you will be using the "Protocol Submission Form" which is under the "REB Forms - Fort Garry Campus" heading.

It can take up to six weeks to process human ethics applications and obtain approval. Therefore, plan early. Note that approval must be obtained prior to data collection and cannot be obtained during the data collection phase or retroactively. Violation can get you, your instructor, and the Asper School in serious trouble with the REB.

If you will be collecting data only from other students in the class, you do not need REB approval. If you have any questions, please contact humanethics@umanitoba.ca or your instructor.

UNCLAIMED ASSIGNMENT POLICY

Pursuant to the FIPPA Review Committee's approved recommendations of August 15, 2007, all unclaimed student assignments will become the property of the faculty and will be subject to destruction six months after the completion of any given academic term.

STUDENT SERVICES AND SUPPORTS

The University of Manitoba provides many different services that can enhance learning and provide support for a variety of academic and personal concerns. You are encouraged to visit the below websites to learn more about these services and supports. If you have any questions or concerns, please do not hesitate to contact your instructor or the Graduate Program Office.

For Information on…	…follow this link
Course Outlines, Year-at-a-Glance, Concentrations, Textbooks, VW Dates and Final Exams	MBA Course Information
Exam Rescheduling Policy - *Please refer to Missing a Test/Exam on page 14 of the MBA Student Handbook*	MBA Student Handbook
Help with research needs such as books, journals, sources of data, how to cite, and writing	Library Resources
Tutors, workshops, and resources to help you improve your learning, writing, time management, and test-taking skills	Writing and Learning Support
Support and advocacy for students with disabilities to help them in their academic work and progress	Student Accessibility Services
Copyright-related questions and resources to help you avoid plagiarism or intellectual property violations	Copyright Office
Student discipline bylaws, policies and procedures on academic integrity and misconduct, appeal procedures	Academic Integrity
Policies & procedures with respect to student discipline or misconduct, including academic integrity violations	Student Discipline
Students' rights & responsibilities, policies & procedures, and support services for academic or discipline concerns	Student Advocacy
Your rights and responsibilities as a student, in both academic and non-academic contexts	Your rights and responsibilities
Full range of medical services for any physical or mental health issues	University Health Service
Information on health topics, including physical/mental health, alcohol/substance use harms, and sexual assault	Health and Wellness
Any aspect of mental health, including anxiety, stress, depression, help with relationships or other life concerns, crisis services, and counselling.	Student Counselling Centre
Support services available for help regarding any aspect of student and campus life, especially safety issues	Student Support Case Management
Resources available on campus, for environmental, mental, physical, socio-cultural, and spiritual well-being	Live Well @ UofM
Help with any concerns of harassment, discrimination, or sexual assault	Respectful Work and Learning Environment
Concerns involving violence or threats, protocols for reporting, and how the university addresses them	Violent or Threatening Behaviour

ACADEMIC INTEGRITY

The online format of class delivery does not lower the Asper School's academic integrity standards. The same high levels of academic integrity are expected as they are in regular terms.

It is critical to the reputation of the Asper School of Business and of our degrees that everyone associated with our faculty behave with the highest academic integrity. As the faculty that helps create business and government leaders, we have a special obligation to ensure that our ethical standards are beyond reproach. Any dishonesty in our academic transactions violates this trust. The University of Manitoba General Calendar addresses the issue of academic dishonesty under the heading "Plagiarism and Cheating." Specifically, acts of academic dishonesty include, but are not limited to:

- using the exact words of a published or unpublished author without quotation marks and without referencing the source of these words (includes Chat messages posted during videoconference sessions)
- duplicating a table, graph or diagram, in whole or in part, without referencing the source
- paraphrasing the conceptual framework, research design, interpretation, or any other ideas of another person, whether written or verbal (e.g., personal communications, ideas from a verbal presentation) without referencing the source
- copying the answers of another student in any test, examination, or take-home assignment
- recording exam questions using any method, regardless of whether those are shared with others
- sharing exam questions with those who are yet to take the exam, including future students
- providing answers to another student in any test, examination, or take-home assignment
- taking any unauthorized materials into an examination or term test (crib notes)
- impersonating another student or allowing another person to impersonate oneself for the purpose of attendance, earning class participation marks, submitting academic work, or writing any test or examination
- stealing or mutilating library materials
- accessing test prior to the time and date of the sitting
- changing name or answer(s) on a test after that test has been graded and returned
- submitting the same paper or portions thereof for more than one assignment, without discussions with the instructors involved

Many courses in the I. H. Asper School of Business require group projects. Students should be aware that group projects are subject to the same rules regarding academic dishonesty. Because of the unique nature of group projects, all group members must exercise extraordinary care to insure that the group project does not violate the policy on Academic Integrity. Should a violation occur on a group project, all group members will be held jointly accountable, no matter what their individual level of involvement in the specific violation.

Some courses, while not requiring group projects, encourage students to work together in groups (or at least do not prohibit it) before submitting individual assignments. Students are encouraged to discuss this issue as it relates to academic integrity with their instructor to avoid violating this policy.

In the I. H. Asper School of Business, all suspected cases of academic dishonesty involving a graduate student (i.e. MBA, MSc or PhD student) will be reported directly by the instructor to the Dean of the Faculty of Graduate Studies.

FACULTY BIOGRAPHY

Wenlong Yuan
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Dr. Wenlong Yuan is the Stu Clark Chair in entrepreneurship and innovation at the Asper School of Business. Before his current position, he was Associate Professor of Strategy and International Business in the Faculty of Management at the University of Lethbridge, Canada. His main research interests cross entrepreneurship, strategy, and international business. His work currently focuses on entrepreneurship in large firms, the impact of top management teams' (TMTs) characteristics on middle-level entrepreneurial activities, entrepreneurial learning from failure, and behaviors of academic entrepreneurs.