ORLD 5054: Strategy Development as a Learning Process in Organizations

Fall 2013 • 212c Zankel Hall

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COURSE OBJECTIVES:

The purpose of this course is threefold:

1) To provide graduate students with a good foundation for understanding strategy, strategic thinking, and strategic innovation as applied to organizations (private and public, for profit and not-for-profit,) and individual action for effective performance within these distinct institutional settings;

2) To expose students to models for understanding the emergence of strategy as processes of individual, group, and organizational learning;

3) To develop students' capacity for strategically addressing organizational and societal challenges marked by complexity.

In this course students will be invited to participate in a number of experiential activities designed to make the strategy concept applicable to their particular organizational setting, or the professional/personal challenges that they are currently confronting. Accordingly students should leave the course with:

- An enhanced capacity for approaching challenges strategically;

- The ability to demonstrate strategic thinking;

- Being able to demonstrate the use of one or more practices of facilitating strategic thinking as a learning process;

- An approach for developing strategic capacity in organizational and adult learning settings

- The ability to develop a practice designed to enhance strategic thinking

COURSE DESCRIPTION:

This course provides graduate students with a comprehensive view of organizational strategy from a learning perspective. The position taken is that strategy is an emergent phenomenon that continually undergoes adjustments as the tasks and the environment of the organization or context changes. Accordingly, development of strategy is viewed as a problem of individual and organizational learning that is distinct from structured problem solving. This is seen as an increasingly challenging learning process as globalization and technology are accelerating and intensifying the influence of complexity. The course provides students with an opportunity for developing a strategic perspective, examining various models for facilitating the development of strategic initiatives through learning inventions. Extensive group conversations in an action learning space will focus on how strategic thinking relates to both the development of emergent strategy and the linkage of learning initiatives to the organizational and institutional strategies in complex environments.

COURSE SITE:

This course will utilize Schoology.com for its learning management system. A presentation will be given on the first class on how to access the course through Schoology.com and set up a student profile. If you have any questions regarding the use of the Schoology.com course site please contact the graduate assistant, Jody Barto at jb3375@tc.columbia.edu.

Consulting faculty member Dr. Dominic Mentor will also be available to address any technical questions regarding the schoology.com course site. He can be contacted at djm2123@tc.columbia.edu.

GENERAL COURSE EXPECTATIONS:

The following are the instructor's general expectations about student participation in the course:

- Students are to come to class prepared for the discussions by having done all requisite reading in advance.

- Active class participation is expected of all students. Students are strongly encouraged to provide relevant information from their own experiences or other materials they have read; probe for clarification; make connections among the readings; and integrate ideas. This includes preparing a personal case study (see below) and being an active participant in a small learning group. The quality of participation, not the just the quantity, will be assessed.

- Students are to attend all classes. Students are to give advance notice, if possible, of any expected absence or provide immediate follow-up, if they are unexpectedly absent.

- Students who miss more than two classes will be asked to complete additional assignments in order to gain additional experience.

- If a student misses a class, he or she is responsible for obtaining all notes and materials. In addition, if a class is missed on a day the action learning groups commence, the student should let their group members know of their absence.

- Assignments are to be completed on time.

- The quality of the writing and as well as the content will be assessed for this course.

- Group discussions are an integral part of the course. Students will be assessed on their ability to participate in and facilitate good group dynamics, throughout small group and whole class discussions. This includes respectful listening, support and encouragement of all colleagues, as they test out ideas and opinions in an academic learning environment.

- The online discussion board includes private threads for group members to continue sharing, and also includes areas for full class sharing. Each of the full class sharing areas are optional, however as part of class participation, students are expected to actively participate in at minimum one of the full class discussion areas.

READINGS:

Required Texts:

Pietersen, W. (2010). Strategic Learning. New York: Wiley Books

Sloan, J. (2006). Learning to Think Strategically. Boston: Butterworth-Heinemann.

Selected chapters from the following texts:

DeLuca, J. R. (1999). *Political savvy: Systematic approaches to leadership behind-the-scenes*. Evergreen Business Group.

Fisher, D., Rooke, D. & Torbert, B. (1999). Personal and Organizational Transformations through Action Inquiry. U.K.: Edge\Work Press

Illbury, C. & Sunter, C. (2001). The Mind of a Fox, Cape Town, SA. Human & Rousseau/Tafelberg, pp. 36-43.

Langer, A. M., & Yorks, L. (2013). *Strategic IT: Best Practices for Managers and Executives*. John Wiley & Sons.

Articles:

Beinhocker, E. D. & Kaplan, S. (2007). Tired of Strategic Planning? The McKinsey Quarterly, August, 3.

Fahey, L. & Randall, R.M. (1998). Ch 1. What is Scenario Learning? & Ch2. Integrating Strategy and Scenarios. In L. Fahey & R.M. Randall (Eds.). Learning from the Future, (pp. 3-38). New York, John Wiley & Sons.

Gavitte, G. & Rivikin, J. W. (2005). How Strategists Really Think: Tapping the Power of Analogy. Harvard Business Review. April: 54-63.

Kim, W. C. & Mauborgne, R. (2004). Blue Ocean Strategy. Harvard Business Review October, pp. 76-113.

Lovallo, D. P. & Mendonca, L. T. Strategy's Strategist: An Interview with Richard Rumelt. The McKinsey Quarterly. http://www.mckinseyquarterly.com/article.

Mintzberg, H. (1994). The Fall and Rise of Strategic Planning. Harvard Business Review,72(1).

Nakamura, Y. T. (2013). Social Networks that Improve Performance at Work: The Impact of an Executive Education Program at the Fire Department of New York. Developing Leaders: Executive Education in Practice, Issue 11.

Nakamura, Y. T. & Yorks, L. (2011). The role of reflective practices in building social capital in organizations from an HRD perspective. Human Resource Development Review, 10, 222-245.

Prahalad, C.K. & Hamel, G. 1990.The Core Competence of the Corporation. Harvard Business Review, 68(3): 79-91.

Porter, M. 1996. What is strategy? Harvard Business Review. 74(6):

Richardson, K.A. & Tait, A. (2010). The Death of the Expert? In A. Tait & K.A. Richardson (Eds.), Complexity and Knowledge Management: Understanding the Role of Knowledge in the Management of Social Networks., pp. 23-39. Charlotte, NC: Information Age Publishing.

Rooke, D. & Torbert, W.R. (2005) 7 Transformations of Leadership. Harvard Business Review, 83(4), 67-76.

Yorks, L. & Nicolaides, A. (2012). A conceptual model for developing mindsets for Strategic insight under conditions of complexity and high uncertainty. *Human Resource Development Review, 11,* 182-202.

COURSE REQUIREMENTS:

Two assignments are required in the course. The purpose of the first assignment is to have students develop and clarify an actual strategic challenge that is confronting them in their career or work settings. This challenge will be the basis for several action learning discussions in your small learning groups throughout the course. These discussions will involve application of concepts and practices being developed throughout the semester. The purpose of the second assignment is for the student to reflect on the ideas, experiences and literature discussed during the semester. In addition students are expected to actively participate in assigned class activities that help clarify the concepts and competencies being presented in the course. These will include certain "mini-assignments" that will provide "data" for class discussion and help with the second paper assignment. These assignments must be completed in a satisfactory way and are considered part of the class participation component of the course grade.

Assignment #1: Framing My Strategic Challenge

Write an 8-10 double-spaced page description of a significant and current challenge that you face in your current professional and or personal context. Here are some things to consider as you select a challenge to describe to your colleagues:

- Recent past or current and personally significant

- This challenge does not have a 'right' answer or solution, is marked by ambiguity (uncertainty of action) and that many possible approaches to the challenge may be worth exploring and learning from regardless of how you handled the challenge at that moment.

- Be comfortable with sharing the content of your learning case with your colleagues in class and specifically your small learning group.

A detailed description of how to develop and write your challenge is provided in the Assignments area on Schoology.

Length: 8-10 double-spaced spages

Due: October 8th.

Assignment #2: Paper on Application to a Field Setting

This paper will be a reflective summary of your experience with your challenge. It will consist of a discussion of how your thinking and approach has, or has not, changed as you experienced the course. More specifically, how the challenge has been reframed (if it has), and your rationale, the range or scope of the issue and possible outcomes and actions, the assumptions and premises that support your thinking and how you tested them, next steps or actions, which concepts and practices were most helpful, and final reflection on your understanding of strategy and strategic thinking. Specific, descriptive examples should be used throughout to support your arguments. Connect your arguments and thinking to theory presented in the course.

Length: 12-15 pages.

Due date: Dec. 17th

Strategic Action Learning Groups (Collaborative In-Class Learning Groups)**:**

The strategic action learning groups give you an opportunity to engage your and other people's learning challenge through in-class application and generative dialogue. These are structured opportunities for you to discuss and apply your learning, various approaches to strategic thinking and exploring your underlying assumptions regarding your own and others approaches to challenges requiring a strategic learning approach.

The aim of these in-class working groups is to engage with the literature, concepts and real time application of a strategic learning approach. We will speak more about these groups and their formation in the context of the class and as we approach the in-class group work a few weeks into the semester. These groups and their content are confidential. This is important for ethical considerations associated with a learning approach; it is also important for building a trusting and productive learning community.

This is an in-class space where you will be asked to freely discuss and share your current organizational and or personal challenge. The expectations for participation in these in-class learning groups is that you prepare an 8-10 page description of a strategic challenge (first assignment) that you are faced in your specific context. This will be distributed to your working group on October 8th.

Closer to that date we will distribute guidelines for your interactions in the group. Our expectation is that you will read each other's work and bring your full attention to your colleague's specific challenge, sharing your own experience and integration of the strategic learning concepts. We expect that each of you will support your colleague's development of a

strategic learning approach to their challenge. This is an opportunity to consult to each other and learn from each other in a dynamic and interactive way.

GRADING:

Final grades will be determined as follows:

Final paper: 50% of final grade

Class participation* :   50% of final grade

> * *Class participation includes:*
> - *writing your strategic challenge case*
> - *in-class discussions*
> - *keeping up with the readings*
> - *active participation in your strategic learning dialogue group*
> - *active participation in a minimum one of the full class discussion board threads*

COURSE OUTLINE:

Week	Topic	Readings	Due
9/10	**Introduction and Course Overview**	• Course Syllabus	Join the Schoology course site
9/17	**Strategic Frameworks and Key Concepts**	• Sloan, Chapter 1, 2, & 3 • Pietersen, Chapter 1 • Porter, What is strategy? • Mintzberg. The Fall and Rise of Strategic Planning • Beinhocker & Kaplan, Tired of Strategic Planning?	
9/24	**Strategic Frameworks and Key Concepts continued**	• Pietersen, Chapters. 2 & 3 • Kim, W.C. & Mauborgne, R. (2004). Blue Ocean Strategy. • Prahalad. & Hamel. The Core Competence of the Corporation. • Lovallo, & Mendonca, Strategy's Strategist: An Interview with Richard Rumelt	

10/1	**Action Inquiry for Strategic Insight**	• Torbert & Assoc. Action Inquiry Ch. 1 & 2 • Rooke, D. & Torbert, W.R. (2005) • Yorks, L. & Nicolaides, A. (2012). A conceptual model for developing mindsets for Strategic insight under conditions of complexity and high uncertainty.	

Week	Topic	Readings	Due
10/8	**Social Capital as a Resource for Strategic Learning**	• Nakamura, (2013). Social networks that improve performance at work. • Nakamoura, Y. T. & Yorks, L. (2011). The role of reflective practices in building social capital in organizations • Pietersen, chapter 11	Strategic Challenge paper due
10/15	**The Strategy Making Process as Dialogue and Discourse**	• Sloan chapters 7, 8, 9, 12, & 13	
10/22	**Mapping the Political Territory**	• Deluca, J.R. (1999) Political Savvy. Chapter 5	
10/29	**Action Learning Groups**	• Langer & Yorks (2013) Strategic IT, Chapter 3 • Pietersen, Chapter 4	Political Territory Map due
11/5	**Strategic Learning through Reasoning from Analogies**	• Gavitti and Rivkin, How Strategists Really Think • Sloan Chapter 8	
11/12	**Action Learning Group Dialogues**	• Pietersen, Chapter 5 • Sloan, Chapter 15	
11/19	**Strategic Learning and Scenarios**	• Iibury & Sunter, *The Mind of a Fox*, pp. 36-43. • Fahey & Randall, Chapters 1 & 2.	
11/26	**Action Learning Group Dialogues**		

12/3	**Strategy making as Single, Double, Triple loop Learning**	• Fisher, Rooke, and Torbert, Chap. 6 • Sloan Chapter 15, 16	
12/10	**Action Learning Group Dialogues**	• Richardson & Tait (2010). The Death of the Expert?	
12/17	**Synthesis and Transfer of Learning**	• Pietersen, Chapter 7	Final Paper due