The Heinz College
Organizational Design and Implementation
94-700
Fall 2024, Mini 2

Instructor: Professor Anna Mayo

Questions?
Piazza: https://piazza.com/cmu/fall2024/94700
Office Hours: Wednesdays 2-3 in Prof Mayo's office (HbH 2203); or by appointment (email atmayo@cmu.edu)

Class Time and Location
Section R2, Mondays & Wednesdays, 9:30am -10:50am, Hamburg Hall 2009
Section P2, Mondays & Wednesdays, 11:00am -12:20pm, Hamburg Hall 2009
Section O2, Mondays & Wednesdays, 3:30pm - 4:50pm, Hamburg Hall 1004

Course Learning Objectives

This course is designed to improve your effectiveness as an organizational member and leader by introducing you to a variety of frameworks and tools that you can leverage in your own work. This course will draw from over a century of research on organizational behavior, psychology, economics, sociology, and more to provide an evidence-based foundation of knowledge about how people, teams and organizations function. The course will cover this content via readings, videos/podcasts, case analyses, in-class exercises, and class discussions. By the end of this course, students will be better able to:

- make better decisions;
- design, launch, and lead a team;
- navigate conflict, diagnose power, and influence others;
- identify and use organizational structures to support motivation and coordination;
- map and use informal networks; manage their own networks;
- recognize culture and adapt to different contexts; and
- implement change.

Required Course Materials

This course uses a variety of articles and chapters, cases, and podcasts that are available on Canvas. Materials for in-class exercises will be provided during class sessions.

Course Summary

Class	Preparation	In-Class	Quiz	Homework	Takeaway
October 21 *Intro to ODI;* *Decision Making 1*	[Read] The Hidden Traps in Decision Making (Hammond et al., 2006) [20-30 mins] [Listen] Daniel Kahneman Doesn't Trust Your Intuition (2023) [36 mins]				How to make better decisions
October 23 *Decision Making 2*	[Read] Making Dumb Groups Smarter (Sunstein & Hastie, 2014) [17-25 mins]	Activity: Hiring at Atlantis (no prep needed)		Individual Homework (1) **Due Friday Oct 25** – Atlantis Case Report	
October 28 *Leading Teams 1*	[Read] Leading Teams (Bernstein, 2016, **only pages 3-31**; *optional*: pages 32-40) [40-60 mins] CASE: Medisys Corp. *we will collectively analyze this case with respect to the "Leading Teams" reading during class*	Case Discussion: MediSys			How to design, launch, and lead a team
October 30 *Leading Teams 2*	[Listen] Rethinking our work agreements with Mike Brevoort [40 mins – start at 2:51, run through 42:22]	Activity: Wise Up! (no prep needed) Project Teams Assigned		Individual Homework (2) **Due Friday Nov 1**– Wise up! Case Report	
November 4 *Managing and Influencing Others 1*	[Read] The Fundamentals of Power (Battilana & Casciaro, 2021; pp. 1-17) [20-30 mins] Getting disputes resolved: Designing systems at the costs of conflict. Chapter 1 (Ury, Brett & Goldberg, 1988) [30 mins] [Listen] Navigating Conflict (2019) [34 mins] [CASE] The Satera Team at Imatron Systems, Inc. *we will collectively analyze this case with respect to the assigned readings/podcast during class*	Case Discussion: Satera			How to navigate conflict, diagnose power, and influence others
November 6 *Managing and Influencing Others 11*	[Listen] The Truth about Honesty (2023) [60 mins]	Activity: Difficult Conversations (no prep needed)		Team Charter **Due Friday Nov 8**	

Class	Preparation	In-Class	Quiz	Homework	Takeaway
November 11 *Organizational Design and Organizing 1*	Prep for Quiz [Listen] A Simple Way to Inspire your Team [19 mins] [Read] On the Folly of Rewarding A while Hoping for B (Kerr, 2017) [13-20 mins]	Activity: Words in Sentences (no prep needed)	**Quiz 1**		How to identify and use org. structures to support coordination and motivation
November 13 *Organizational Design and Organizing 2*	[Listen] Why Meetings Suck and How to Fix Them (2023) [33 mins] **Submit Team Meeting Agenda *Before* Class**	Team Meeting		Team Meeting Agenda Due **BEFORE CLASS** Team Meeting Notes **Due Friday Nov 15**	
November 18 *Informal Networks 1*	[Read] Informal Networks (Krackhardt & Hanson, 2011) [17-25 mins] [Read] Better People Analytics (Leonardi & Contractor, 2018) [17-25 mins]	Activity: Networks at "Silicon Systems" and the Pentagon (no prep needed)			How to map and use informal networks; how to manage your own network
November 20 *Informal Networks 2*		Activity: Networks (no prep needed)		Individual Homework (3) **Due Friday Nov 22** – Networks Case Report	
November 25 *Culture*	[Listen] What's your Leadership Language? [15 mins (less if skipping ads)]	Activity: Card Game (no prep needed)			How to recognize culture and develop your global dexterity
November 27	NO CLASS – THANKSGIVING BREAK				
December 2 *Managing Organizational Change*	[Read] Evidence-Based Change Management (Rousseau & ten Have, 2022) [45 mins] [CASE] Cynthia Carroll *we will collectively analyze this case with respect to the "Evidence-Based Change Management" reading during class*	Case Discussion: Cynthia Carroll Activity: Firefighting the 3D Way (no prep needed)			How to implement change
December 4 *ODI Wrap*	Study for Quiz [no other prep]		**Quiz 2**		
December 11	TEAM FINAL REPORT DUE				

Assessment Overview & Details

I. *Class Participation* (20% of final grade)

In-person __attendance__ is expected in all class sessions. If you are facing extenuating circumstances, please contact me ahead of the relevant class session to discuss options.

I have a few baseline expectations. I will be respectful of you by arriving to each class prepared and **_on time;_** I expect you do the same. Preparation includes reading/listening to the **_assigned readings and podcasts_**. I also expect everyone to **_participate in class-based activities_**. Doing these things will achieve my baseline expectation and would earn average marks.

Beyond that baseline, higher marks can be earned via participation in class discussions. This can be in the form of questions about or reactions to material being presented, contribution to a debrief of an in-class exercises, or other contributions to in-class discussions. Sharing your questions, knowledge and experience will benefit the whole class. Constructive contribution to the class discussion and genuine listening to others is an important element of class participation. It is not constructive to repeat what classmates have already said or to offer a comment unrelated to the conversation at hand. **Keep in mind that _high-quality participation in class discussions_ is the goal, not high quantity of airtime.**

II. *Individual Homework* (each homework is worth 10% of your final grade, for a total of 30%)

1. *Homework 1: Hiring at Atlantis Case Report*

This assignment calls for a structured case report, wherein the case is your personal experience with an in-class exercise. The exercise itself, "Hiring at Atlantis," will be done in class and will give you experience with individual and group decision making. Your assignment is 1) to analyze what happened based on course content about *individual* decision making and 2) to imagine that you are making a similar decision in the future and generate evidence-based recommendations for yourself. You will then repeat those steps while thinking about *group* decision making. There is a template on Canvas to follow that includes specific questions and offers a few example responses as a guide.

NOTES:
1. You must cite ideas that are not your own and include an reference list (not counted in the page limit; details available here). Failure to do so violates the academic integrity policy. At a minimum, this will result in the loss of one letter grade on the assignment.
2. You must include an AI appendix (not counted in the page limit; examples here). Failure to do so will result in the loss of one letter grade on the assignment.

This assignment is due on Canvas by **Friday October 25, 11:59pm**.

__If you are unable to participate in the exercise in class on October 23, contact Prof. Mayo (atmayo@cmu.edu) for details about an alternative assignment.__

2. *Homework 2: Wise Up! Case Report*

This assignment calls for a structured case report, wherein the written case is your personal experience with an in-class exercise. The exercise itself, "Wise Up!," will be done in class and will give you experience with working in a team Your assignment is 1) to analyze the team and its work

with respect to the team design, launch, and process management, and 2) to imagine you were going to repeat the exercise and generate evidence-based recommendations for the do-over. There is a template on Canvas to follow that includes specific questions and some example responses.

NOTES:
1. You must cite ideas that are not your own and include a reference list (not counted in the page limit; details available here). Failure to do so violates the academic integrity policy. At a minimum, this will result in the loss of one letter grade on the assignment.
2. You must include an AI appendix (not counted in the page limit; examples here). Failure to do so will result in the loss of one letter grade on the assignment.

This assignment is due on Canvas by **Friday November 1, 11:59pm**.

If you are unable to participate in the exercise in class on October 30, contact Prof. Mayo (atmayo@cmu.edu) for details about an alternative assignment.

3. *Homework 3: Leveraging Networks*

This assignment calls for conducting a self-assessment of your own network, analyzing it, and developing recommendations for yourself with the aim of developing and leveraging your network towards a goal of yours. Your assignment is 1) to complete the self-assessment (link available on Canvas), and 2) to complete an analysis and develop recommendations for yourself. There is a template on Canvas to follow that includes specific questions. No example responses are provided; you should build on your learnings from homeworks 1 and 2.

NOTES:
1. You must cite ideas that are not your own and include an reference list (not counted in the page limit; details available here). Failure to do so violates the academic integrity policy. At a minimum, this will result in the loss of one letter grade on the assignment.
2. You must include an AI appendix (not counted in the page limit; examples here). Failure to do so will result in the loss of one letter grade on the assignment.

This assignment is due on Canvas by **Friday November 22, 11:59pm**.

III. *Quizzes* (Each quiz is worth 10% of your final grade, for a total of 20%)
1. **Quiz 1** will be administered at the start of class on **November 11**. It will cover material on: decision making; leading teams; managing and influencing others. All podcasts, readings, and course slides are relevant.
2. **Quiz 2** will be administered at the start of class on **December 4**. It will cover material on: organizational design and organizing; informal networks; culture; managing organizational change. All podcasts, readings, and course slides are relevant.

Both quizzes will be closed-book and will include multiple choice items.

IV. *Team Project. (There are multiple milestones, including a final report, totaling 30% of your final grade)*

Project Description

Overview of the team project: Your assignment is to identify a real-life organizational problem and demonstrate your ability to apply course concepts and theories to solve it. You will do this by focusing on an organization, unit/team within an organization, or inter-organizational partnership.

Collecting data: To develop your case, I encourage you to find multiple relevant news stories, along with any other sources that might be of interest including white papers, the company annual report, etc.

Analyzing the case and developing recommendations: A handout on the case method describes best practices for crafting a strong case report.

<u>Five</u> Deliverables

1. **Team Charter (5% of your final grade):** in class on October 30, your team will be assigned and given time to start work on a team charter. This assignment is designed to give you experience with an evidence-based practice in launching a team. The template to follow is available on Canvas and will allow your team to develop a shared understanding of the task and expectations for each other and the process of working together. All questions in the template should be answered.

   Team charters (one per team) are due by **<u>November 8</u>** at 11:59pm.

   - - -

2. **Team Meeting Agenda (2.5% of your final grade):** Meetings are a basic coordinating mechanism in organizations, but they can be terribly ineffective. Meeting agendas can make meetings better, if done well. This assignment is designed to give you experience with the process of crafting an effective agenda.

   BEFORE class on November 13, your team should have decided on the company for your case.

   This assignment applies to the time your team will be given time to meet in class on November 13. The course readings/podcasts leading up to this assignment will highlight what makes a meeting (and agendas) more/less effective. You should design your agenda based on that course material as applied in your own team based on your own preferences. A template is available in Canvas.

   The meeting agenda (one per team) is due **BEFORE class** on **<u>November 13</u>**.

   - - -

3. **Team Meeting Minutes (2.5% of your final grade):** Building on the meeting-agenda assignment, it's worth noting that meetings can be a waste of time if no one remembers what happened during them and the team later has to repeat its work, or team members find themselves in a conflict because they disagree about decisions that were made or who was supposed to do what and by when. Meeting notes, when documented and in a useful format, can thus serve as an additional coordinating mechanism by creating a brief record of what was decided, what's an open question, what needs to happen next, etc. This assignment is designed to give you experience with effective meeting documentation. A template for notes from your in-class meeting is available in Canvas.

   A copy of the meeting minutes is due by **<u>November 15</u>** at 11:59pm.

   - - -

4. **Team Project: Final Report (20% of your final grade):**

Background about case reports: A typical case report about a single entity would include the following sections: Background, Analysis, Recommendations. *See the "Case Report Handout" (link in Canvas) for more details.*

In this assignment, your team will be creating a report that includes a **comparison of cases**. That is, rather than develop a case report about a single organization, the team will agree on a topic from class (e.g., decision making, networks, culture) and each team member will first become an expert on a different organization, focusing on their examination of that organization through the lens of the agreed-upon topic. For instance, one teammate might examine John F Kennedy's cabinet, with a team focus, highlighting the team design (all close ties, often family members, all trained at elite universities) and the known cabinet failures. Another teammate might examine Abraham Lincoln's "team of rivals" cabinet or the early Pixar team and their successes. As another example, one teammate might examine Boeing's latest blunders, focusing on organizational design, particularly with regard to motivation mechanisms, while another teammate focuses on Wells Fargo, with the same focus on organizational design and motivation.

Once each team member has become an expert on their chosen organization, the team's task is to come together to compare and contrast their learnings. The final report should include the following.

A) Background: For each organization your teammates investigated, you should briefly address the question, what is the overarching situation or the main events at hand as they pertain to each organization, unit/team within an organization, or inter-organizational partnership, that your team selected? In doing so, you might also address: Who are the critical players? The relevant goals? Are there any historical trends that are relevant?

B) Analysis & Case Comparison: For each of the organizations: Why is this situation so important that someone needs to do something about it?

In a comparison of the organizations, you should address what is different or similar about the primary organizational issue you focused on. For instance, you might consider whether some organizations are doing things better / worse than others, and what the evidence is for that conclusion. You might consider whether the primary issue you focused on has similar or different secondary issues (e.g., the motivation structures are affecting the culture and exacerbating the quality failures at Boeing, but perhaps elsewhere the motivation structures are affecting decision making).

C) Recommendations: Pick ONE (1) of the organizations your group investigated. Develop a specific, evidence-based recommendation that is targeted to a specific person. Rather than say "the organization" should do something, identify the person (or perhaps people) who should be taking certain steps. You should address all issues identified in the analysis section. Also, be clear about the timeline (e.g., What should be done *first*? What recommendations are for the near-term, what are for the long-term?). Is this likely to work and what are the risks? Finally, would it work for the other organizations, and why (or why not)? You should apply the topic(s) from class that are most relevant.

Your report should be no more than 2500 words (not counting references). Failure to adhere to this requirement will result in a substantial grade reduction.

NOTES:

1. You must cite ideas that are not your own and include an reference list (not counted in the page limit; details available here). Failure to do so violates the academic integrity policy. At a minimum, this will result in the loss of one letter grade on the assignment.

2. You must include an AI appendix (not counted in the page limit; examples here). Failure to do so will result in the loss of one letter grade on the assignment.

The final report (one per team) is due **December 11** at 11:59pm.

- - -

5. **Peer Evaluations (*<u>individual</u>* <u>completion of this evaluation is necessary to receive a grade on your team report</u>):**

Teams are most effective when there is accountability at the team *and individual* level. And you are best suited to evaluate the level of each teammate's contribution. Therefore, each of you should *privately* evaluate each teammate's contribution using a form in Canvas. Responses may be used to adjust individual scores on the team report.

Peer evaluations (completed individually) are due by **December 12** at 11:59pm.

How to Ask Questions: Piazza

This term we will be using Piazza, a system highly catered to getting you help from classmates, the TAs, and myself.

Rather than emailing questions, I encourage you to post your questions on Piazza. The Piazza forum should be used for general course-related questions that may interest others in the class. The quicker you begin asking questions on Piazza, the quicker you'll benefit from the collective knowledge of your classmates and instructors. I encourage you to ask questions when you're struggling to understand a concept.

Find our class signup link at: https://piazza.com/cmu/fall2024/94700

In Piazza, we will have dedicated areas (e.g. HW1) where you can post questions in a public or private setting. A public post will be seen by the entire class, while a private post will only be seen by Prof Mayo and the TAs.
Public posts should be general, conceptual, or logistical and should not involve any assignment answers or otherwise violate the academic integrity policy. Be sure to make your posts cohesive and comprehensive so that everyone can learn from your questions.

Piazza Threads and Follow-ups. Each unique question or comment should be its own, original post (i.e., not part of a conversation or thread). Of course, if you have a follow-up on the same question/topic, then it can be added to the original post. If you post a question to an unrelated chain, we will ask you to repost the question as a separate post before answering. This will allow for better clarity for everyone.

Monitoring Piazza. We will be monitoring Piazza every day to answer your question as quickly as possible. Please allow 24 hours during weekdays, and 48 hours on the weekends, and do not expect replies from Prof Mayo or the TAs outside of typical working hours (9-5).

Responses are unlikely to be instantaneous; therefore, I encourage you to begin your assignments early and be proactive about asking questions during weekdays.

We encourage you to check Piazza before sending any questions via email to any TAs; the answer to your question might have already been posted.

Every student in the course will be enrolled in the Piazza. If you have not been enrolled in the first week of class, please email Prof Mayo (atmayo@cmu.edu). If you have any technical problems, please send an email to team@piazza.com.

Policies and Course Statements

Policy on Late and Missed Work
It would not be fair to all students to accept late work after releasing grades and feedback. I also want to provide timely grades and feedback on assignments. Thus, unless otherwise discussed with a student ahead of time, I will accept assignments for up to 2 days (48 hours) after the assigned deadline. Each day that it is late you will be eligible for one lower letter grade (i.e., a submission that is turned in within one day of the submission is eligible for a max score of B+; if turned in within two days of the submission it is eligible for a C+). After two days the work will not be accepted. Missed assignments cannot be made up. If you anticipate this being a challenge, please contact me early in the semester.

Policy on Re-Grading
If you wish to have your work re-graded, I require that you wait 24 hours after grades are released. You can then contest your grade and request a re-grading by emailing me (atmayo@cmu.edu) *with specific notes about where your submission addressed the areas in the rubric where you lost points*. Re-grading will only be considered if the latter step is taken. You have one week after the grade is released to contest the grade.

Policy on AI
You are free to use AI for any assignment. That said, AI is a tool, and one you must acknowledge. For any assignment for which you used an AI tool, you must turn in an appendix describing a) what was used and b) how it was used. Failure to do so constitutes a violation of the academic integrity policy.

Note: AI can be great for some things (e.g., improving writing, idea generation), but it has limitations.
- If you provide minimum-effort prompts, you'll get low quality results. Do the work to refine your prompts.
- Don't trust it! Assume there are errors. Fact-check the output and then edit/improve it. Add in references to the scientific evidence we cover in class. This will work best for topics you understand (i.e., it's hard to use for things you know nothing about.) Ultimately, *you are responsible for the accuracy of your work*.

Policy on Academic Integrity
Plagiarism and other forms of academic misrepresentation are taken extremely seriously. Misrepresentation of another's work as one's own is widely recognized as among the most serious violations. The violation is clearly flagrant when it occurs as plagiarism on a required paper or assignment or as cheating on an examination, regardless of whether it is a take-home or in-class examination. The punishment for such offenses can involve expulsion from the program. There are many other ways in which a violation can occur.

Accommodations for Students with Disabilities
If you have a disability and require accommodations, please contact Catherine Getchell, Director of Disability Resources, 412-268-6121, getchell@cmu.edu. If you have an accommodations letter from the DRO, I encourage you to discuss your accommodations and needs with me as early in the semester as possible. I will work with you to ensure that accommodations are provided as appropriate.

Statement on Student Wellness
As a student, you may experience a range of challenges that can interfere with learning, such as strained relationships, increased anxiety, substance use, feeling down, difficulty concentrating and/or lack of motivation. These mental health concerns or stressful events may diminish your academic performance and/or reduce your ability to participate in daily activities. CMU services are available, and treatment does work. You can learn more about confidential mental health services available on campus at: http://www.cmu.edu/counseling/. Support is always available (24/7) from Counseling and Psychological Services: 412-268-2922.

Respect for Diversity
It is my intent that students from all backgrounds and perspectives be well served by this course, that students' learning needs be addressed both in and out of class, and that the diversity that students bring to this class be viewed as a resource, strength and benefit.