

## **MGT 5310 - Organizational Behavior**

### **Guidelines for Organizational Analysis Project**

The purpose of the project is to provide an organizational analysis using a real world organization. More specifically, you learn about an organization and attempt to analyze its current situation, determine trends, and make suggestions for development and change regarding the people aspects of the organization. The project is designed for you to learn by going through the process of change and development in a real world setting. In class and in your reading, you will learn the theories and this is one experience that you will be able to use for the application of that theory.

The project will require you finding an organization willing to participate in your analysis. Preferably it needs to be an organization with 10 or more individuals. This is a serious project not to be taken lightly or to be shown disregard with respect to the organization. Projects will be focused, in-depth situations which can benefit from outside consideration. This project will require a great deal of teamwork.

### **SPECIFICS**

#### Team Membership

- You will be given your assignment of team membership. Team membership will be determined on a random basis. Hopefully this will provide you with the opportunity to work with new people. Also, this will simulate an organizational setting where the people you work with are determined by the organization.
- Teams will be provided to you on approximately the third day of class.
- Everyone on your team should be involved in EACH aspect of the project. However, realizing that people have time constraints and various talents, be sure to negotiate and re-negotiate roles as you go along to make sure that everyone is providing an equitable contribution to the project. The team as a whole will get a grade on the project and you will be evaluated by your team members based on your contribution which is part of your final grade as well.
- The first assignment of the team is to complete a team contract. This will be very critical in your teams functioning and final evaluation. (See Feedback Report #1)
- If you have problems with non-contributing team members please see me as soon as possible so this can be rectified. If a team member continues to be a non-contributing member, all team members must meet with the instructor and the team member will be removed from the team. That individual will then have to do all the team assignments independently and will receive a zero for team participation. This action of removing a team member must be done by the middle of the semester (day of the mid-term exam). If you come to me at the end of the semester I will not be able to expel the team member at that time.

### Identifying an Organization

- Create a list of organizations you might be interested in using for this project. Take turns trying to contact organizations for this project. Cold calls have been very successful for teams in the past but it often takes more than one.
- When you call, identify yourself as a member of a team of graduate students within the Hankamer School of Business at Baylor University. Inform them that this is a class project on organizational change. Do not represent yourselves as “real” consultants.
- Ask to speak with someone in Human Resources or Management (e.g., Director or Manager) or someone who is high enough up in the organization to approve your team gaining entry to conduct interviews with 10 - 12 management personnel in different areas. Be sure and inform them that you will need at least 45 minutes to 1 hour for each interview.
- Avoid schools and school districts including Baylor University. Also, it is best if you do not currently work for that organization. See a more detailed list of companies that are off limits later in this document.
- Ask for a personal meeting with the contact person to outline the scope and intent of the project. It is okay to express that most businesses have found student reports to be very beneficial.
- You can inform the organization you want to do an analysis of the current state of the organization. Your interview questions will provide an assessment of strengths and weaknesses. Your interviews and a final presentation are all you are asking of the organization
- If possible, establish a target date to present results back to the “client” organization sometime after your class presentation before the final exam.
- You must secure a letter of agreement from the organization agreeing to allow you to interview 10 employees and give the organization a final presentation. Be sure to retain a copy for your records as you will need to include it in the appendix of the final report. (See Feedback Report #2)

### Data Gathering

#### Interviews

- Conduct all interviews on-site with at least two team members present at each interview. (See Feedback Report #3 and #4)
- There is no one best set of questions and you should adapt the questions as you progress in the interviews.
- In general, your questions should reflect what you want to find out. What are the main organizational behavior issues for this organization?
- You must go in prepared with a set of questions to ask the interviewee.
- Start with a few broad questions, for example: (1) What do you like best about this company?; (2) What do you like least about this company?; (3) If you could change anything what would you change? (4) How do you think the organization needs to change in order to keep up with competition?
- Next, ask questions that assess how a company handles various process issues, such as how they handle conflict make decision, leadership styles, or how they communicate with each other. Try to assess the culture of the organization. You may also want to assess how motivated people are and if they feel motivated by the organization.

- People are often nervous in interviews and will not talk or are real general. Try to get them to relax by saying something like “I am just going to ask you a few questions” or simply try and probe to get them to be more specific. The more the person accepts that there is something to be gained by speaking candidly with you, the greater the odds are that you will get good data.
- You will need to revise the questions as you go along. The questions you ask should be updated and modified based on the information you gather. Also, you may need to go back and ask questions you did not think of originally that are relevant to your recommendations. If they tried to change and it failed find out why. If they have something new to implement and have not done so find out the reasons.
- Remember you will need to provide the detailed interview responses (Appendix) in your final report. This will be a summary of the responses to each question. Thus, be sure and take notes at the interview. If you want to record them you **MUST** ask permission of the person being interviewed first. The detailed response can be summarized in your paper in about a paragraph telling in general what you did, how they responded, and what you found.

#### Additional Source of Data Collection

- One additional form of data must be collected as part of this project. This data should focus on one of the issues at the organization and help you gain greater understanding for how you deal with this issue.
- This may take a variety of forms. For example, you might be asking everyone to fill out a short survey. You might use a survey that the organization has recently completed. You might do an analysis of the competition (interviews of competitors, other data on competitors). You could do an analysis of the industry as a whole showing national or regional trends. You might use observation or online feedback sources.

#### Research

- What are human resource best practices for your industry?
- What are your competitors or others in similar industries across the nation doing that is helping them effectively utilize human potential?
- What else can you learn about this industry and competition to help you understand the organization better?
- What are key issues for your organization and what is out there to help you learn more about those issues? Have other organizations had these issues? How have they dealt with them?
- What are the main issues you have identified and how have others dealt with them? In other words don't just sit around and make up solutions see how other organizations have dealt with similar problems. What worked and didn't work.
- You must support all your recommendations with research. If you say they should change behavior, invest capital, change a process you need to have some research to support your recommendation.

### **DELIVERABLES**

The three deliverables of feedback reports, written report and oral presentation combine to constitute the final grade of the organizational analysis project.

#### Feedback Reports

All feedback reports are due at the beginning of class on the date assigned in the syllabus. They should be approximately 2 pages in length and must be typed. You will turn in one feedback report for each team for the 4 assigned reports. ***It is imperative that your team number and team member names are on each report.***

### **1. Feedback Report 1: Team Contract**

This document should contain the two parts of a team contract: purpose and code of conduct. This Contract must be signed by each member.

Part 1: The purpose of the team contract is to develop a statement of the team's purpose, primary goals and the duties/role of each team member including how leadership functions will be carried out. You must identify a team leader for your team. You should carefully describe what is expected from each member of the team. Sample questions to address: What is our team's primary outcomes or goals? What are duties/role of each team member? What is expected of each team member? How will the team handle the leadership/facilitation/management activities?

Part 2: The team must develop a code of conduct. Successful teams have either explicit or implicit rules that guide their behavior. A code of conduct states the norms or ground rules for team to follow. Ground rules are team guidelines or outcomes that the team will agree to follow to ensure high team performance and satisfaction. For ground rules to be useful, everyone one must understand them, agree on their meanings (importance of evidence), and commit to using them. Ground Rules should address both task-oriented and people-related issues. A suggested agenda is (1) Brainstorm a list of norms or ground rules that will affect how your team will operate. Make sure that some of these norms are related to task and some are related to team dynamics (people). (2) For each norm, identify what behavior you would see, hear, and feel if this norm were accepted by the team (evidence?). Discuss some hypothetical situations to see how it would work. This will help you develop evidence. (3) Check for consensus on the content and wording of your code of conduct. Can every team member agree to honor it as it stands? (4) Have each team member make a verbal commitment to follow the code of conduct. Some example issues to consider putting in your code:

What "on time" and "meeting attendance" mean (both in face-to-face and virtual modes)?

How will relevant information be shared?

What are appropriate and non-appropriate behaviors or discussion topics?

How will you keep team focused, committed and energized?

How will decisions be made?

How will conflict/disagreements be handled? (What procedures will you use?)

What behaviors should be encouraged? Avoided?

What happens when ground rule is broken? How will you handle exceptions?

What recourse will you take when a team member does not perform agreed to responsibilities? In other words, what happens when one of the team members lets the others down?

How will specific roles (activities, tasks) be assigned for team projects?

How will team members give each other feedback on their performance in team?

### **2. Feedback Report 2: Organization**

What company was chosen? Who is the main contact person (include name and phone number)? How did you find this company? Why is it of interest to your team? Provide a

general summary of the organization. This would include the mission of the organization, size of the organization, location, etc. You must get a mission statement from the organization. If they don't have one then you must summarize what you see is their mission. The mission of the organization is a required element of the final written project. You must include a SIGNED letter of agreement with the organization. Keep a copy of the letter of agreement as this will be a required appendix in your final written report.

### **3. Feedback Report 3: Data Gathering Part 1**

- Provide a list of the questions being asked. How many interviews have been conducted? How will the questions change for the second set of interviews?
- Provide an organizational chart and show on the chart the people you have interviewed so far and the ones you are going to interview. You should have at least half of the interviews done by this point! Keep a copy of the organizational chart as this will be a required appendix in your final written project.
- Provide a cultural summary of this organization. How would you describe it in one word? Provide a cultural description of this organization in no more than half a page
- Provide a brief industry or competitor analysis. Included in your competitor/industry analysis where this organization fits in this particular market and what is going on in this market. This should be approximately half a page to a page.

### **4. Feedback Report 4: Data Gathering Part 2**

- Provide an updated organizational chart showing all the interviews conducted. They should all be complete by this date. Summarize the findings of your interviews. In other words, what are the common themes or issues identified (half a page to a page – part of your final report)?
- Provide a summary of your secondary data. Your collection of secondary data should be completed by this time and if it not give an account of what stage you are in. Report your source and how you have collected this data. If you chose to do a survey it must be more extensive than the 12 questions in the book. How will you use this data for your analysis?
- Prepare your SWOT analysis. You must have three elements in each category (strengths, weaknesses, opportunities, threats). Remember strengths and weakness are internal while opportunities and threats are external (see optional reading in module 3 if you have questions about how to do a SWOT analysis).
- Provide a list of references of the outside material you MIGHT incorporate into your project. Remember you must have references to support your recommendation.

### Written Report

The written report must be submitted using TurnItIn through the assignment on Canvas. Have one member of your team submit the project. Submitting for the team has the implied understanding that each member in the team is responsible for the content of the project and is subject to evaluation.

Your written report should contain the following sections. Please see the grading rubric to know which elements need to be included in each section. The paper is to be no longer than 20 pages (not including the title page, TOC, references, or appendix):

1. Title Page
2. Table of Contents (including all parts of project and all appendices)
3. Executive Summary (no longer than one page)
4. Organizational Overview - A short section containing an overview of the organization. Who are they, what do they do, what size are they, what is their mission?
5. Data Collection - Summary of the major findings from the interviews and additional source of data collected. Overview, gestalt, big picture....of the organization.
6. Analysis - So what does the information gathered mean? Provide a SWOT analysis. Justify how you will get from the overarching SWOT to the specific issue you will focus on in your recommendations.
7. Recommendations – You should provide recommendations of how to effectively develop the organization as well as any other issues you feel would be relevant to their situation. Be sure and clearly link the recommendations to the issues identified in the SWOT analysis. Back up your recommendation with theory, class material, and research as a basis for your diagnosis recommendations. Be sure and make specific recommendations for solutions. These should entail what you would do (i.e., what specific interventions would be used and why). Discuss the stream analysis which details the implementation of your recommendations.
8. References
9. Appendix
10. Copy of Slides used in Presentation

### **Details of Final Written Report**

- The final written report for ALL teams is due at the beginning of class on the 1<sup>st</sup> day of presentations.
- Please refer to the grading rubric to verify the items that need to be included in the appendix. Remember all appendices need to be referenced in the paper.
- References: It is very important to gather information beyond just the things discussed in class that are relevant for your organization. You must have 12 unique references in this project. Half of them have to be from a source other than what we used in class. Be sure to integrate the references in the written project, having a bibliography is not enough.
- Include subheadings as well as page numbers. It is recommended that the report be spiral bound. Include a copy of the slides you will use for the presentation at the end of the report (preferably in the format of three slides per page with space for notes).
- Your final report should be in APA style, 12 point font with 1 inch margins, double spaced.
- You must submit your complete paper to me (1) hard copy, (2) electronically (via e-mail) see file format requirements on page 8 and (3) via Turnitin. Note that you can submit your document in several forms to Turnitin (including Microsoft Word and PDF); however, Turnitin will reject PDF files in which the text cannot be recognized. Your paper will not be graded unless it has been submitted to Turnitin. This submission is done by clicking the “view/submit” link found under the “Assignment” Tab on Canvas.

### Organization Overview

- The organizational chart is a requirement of this project. If they don't have one then you create one. At a minimum include the people you interviewed and how they relate to one another. The chart should clearly show who you interviewed (highlight, bold, etc.).
- The overview of the organization should come from your earlier feedback report. Be sure to include the mission and the culture of the organization. The size of the organization should be included. The industry/competitor analysis should be included here as well.

### Data Collection

- Summarize your interviews. Be sure and tell the process you went through to get the information; how you chose the people interviewed (i.e., how they represented different levels, divisions, job characteristics); how you adapted the questions as you learned more about what was going on; what diagnostic tools you used. The interview data must be in the appendix.
- Summarize your second source of data. Be sure to tell how you got it, what it means, and how it was used. It is not enough to just gather it but it must also be used to identify issues in the organization.

### Analysis

- Given the information you have gathered, what is your analysis of the organization. This should focus primarily on organizational behavior issues. Provide a detailed SWOT analysis. The SWOT summary chart is a required appendix. The analysis should clearly identify strengths and weakness and give an explanation for the analysis.
- You will need to demonstrate why these are important to the organization. If you have a large number of issues identify the key issues or those they should start with and justify your recommendations. Accurate diagnosis is critical and the diagnosis should be clearly stated and flow from the interview summary. You need to state specifically what criteria you used to go from all the issues identified in the SWOT to what you are focusing on for the recommendations.
- If you do not find any real weaknesses then frame this section as opportunities to adapt to a changing environment and what the organization needs to do to have continual improvement.

### Recommendations

- Based on what you have identified as the major issues for the organization, find outside reading material to help you in recommending effective solutions. This may be a book on change in general or specifically on leadership, communication, or motivation. This material must be incorporated into your recommendations for how the company should effectively deal with change. This should be a great resource for you and for the organization. You can use what we learned in class but I expect you will have to do much more in depth application of the concepts we learned. What have other people in this industry done regarding this issue? How have other organizations dealt with this problem successfully?
- Implementation is the heart of your paper and presentation. In other words they should be the majority of both. It is very important to be as specific as possible. For example, if you recommend reorganization then provide an example of what the new organizational chart might look like.

- You must include a stream analysis (required appendix and explain in paper). The stream analysis is the graphical representation of your implementation strategy over time. This will address what time frame, who would be included, what would be done first, second, etc. It is important that this flows clearly from your recommendation and is linked backed to the major issues identified in your analysis. Please remember that the stream analysis is the strategy of change plotted over time demonstrating your recommendations. It is NOT the results you expect, do not include outcomes. Examples from previous semesters are provided on web simply as examples of what others have done but are not without error.
- Remember you must support your recommendations with research. It would be very useful to look at what others are doing in the industry. Analyze the competition; look for trends in the industry, etc. Think of it as your recommendations need to look to outside research or how other organizations have dealt with similar issues. Your intuition and general opinion need to be backed up with data or resources.
- You must support your recommendations with references. You must have 12 unique references in this project. Half of them have to be from a source other than what we used in class. Be sure to integrate the references in the written project, having a bibliography is not enough.
- After you give your recommendation be sure to include some information on expected resistance to the change and overcoming resistance. In other words, think of everything you have learned about change that would apply to your situation.

### Presentation

You will need to present your organizational analysis both in class and to the organization representatives. You should focus mainly on the issues you have identified and the recommendations you are making for change. The presentation should be a maximum of 15 minutes. You will be given a 5 minute question/answer period following the presentation. The presentation should roughly be the same presentation you will give to the organization as a summary of your findings. You must give your presentation to the organization sometime after the day you present in class and the final exam (or close thereafter). In addition, you will need to ask an organization member to provide me with an e-mail, fax or phone call regarding the completion of your project (feedback form will be provided).

- The presentation must be e-mailed to me by the beginning of class on the 1<sup>st</sup> day of scheduled presentations for ALL teams. It cannot be changed after submission. Save the presentation with the format of semester, team #, company name (i.e., Fall2011\_team2\_Med-Equip)
- In general I would think it would be most fruitful for you to write your report and then develop your presentation from the report. However, your presentation will not be exactly from your report. DO NOT read your report for your presentation. Look over rubric to see points that must be covered.
- The main content of your presentation should be your analysis of the existing organization and what you would recommend regarding change. Remember to keep it positive and show change as a chance for future opportunity. Also, be sure and show



why you recommend certain changes and the benefit of this to the organization. Include your stream analysis.

- *DO NOT focus on process but focus on implementation!*
- Be professional in presenting the information. Also, you should dress professionally when presenting to the class and to the organization.
- All members of the team must speak. You will be graded on your presentation of the material as well as content.
- Don't use theory or ideas that would not be understood by the general public. You need to present your ideas in concepts that the organization will understand.
- Provide evidence of external support in your slides.
- Try and keep your organizational presentation to 15 minutes (maximum time for class presentation) as the members of your organization are busy and you do not want to use a great deal of their time. Offer to give the presentation to your contact person as well as any other management that would be interested as well as the people you interviewed.
- A form for the organization to complete will be provided on the day of your in class presentation. You must ask your contact to return it to me or give it to you in a sealed envelope to prove that you have given your presentation. You should also inform them that it is possible I will be contacting them to get feedback regarding your project. Thus, make sure I have the correct name and phone number.

#### Organizational Analysis Project Companies:

You may **not** use Baylor University and/or a School or School District. You may not use any company used as a Focus Firm organization in the last three years. You may not use the companies from the following list:

Cameron Park Zoo  
Dell  
The Dwyer Group  
Harley Davidson Waco  
Capstone Mechanical  
Hole in the Roof  
Hilton Waco  
Brazos River Authority  
Hillcrest Physician Services  
Curves

Mars  
RBDR Architects  
Patillo, Brown & Hill  
Bear Bills  
Southwest Sports Medicine  
Care Net Pregnancy Center  
Animal Birth Control Clinic  
Marathon Norco Aerospace  
Providence Surgical Center

#### Grading

The project is 30% of your overall grade. The final grade for the organizational analysis project will be calculated as an average of your presentation grade and written report grade.

The presentation will be evaluated by two sources. (1) Dr. Carlson will evaluate your presentation on above specified criteria. The evaluation form entitled "Presentation Evaluation Form" can be found below. (2) Your classmates will grade each presentation as well as rank your presentation relative to the others given in the class. Each of these elements will be considered in determining a final presentation grade.

You will also evaluate each of your team members to determine the peer evaluation portion of the project which is 7.5% of your overall grade. This grade is a function of the overall performance of the group on the project.

The written report will be graded by Dr. Carlson based on the criterion specified for this project in this document and on the syllabus. The final written report as well as the four feedback reports due during the semester will be considered. The grading rubric for the oral presentation and written project can be found below.

You can receive your project grade after I have obtained the feedback form from your presentation to your organization. This form will be provided to you in class on the day you present to the class.

### Organizational Analysis Presentation Evaluation Form

Using the following scales, evaluate the team's presentation. Circle the number that best represents their performance, where 1 is "needs improvement" and 10 is "outstanding". Try to be as objective as possible; these will be used to determine team grades. Write additional comments at the bottom or on the back.

#### 1. Organizational Overview

Clear understanding of organization; organized

10      9      8      7      6      5      4      3      2      1      Unclear and rambling

#### 2. Data Collection

Summarized both sources of data

10      9      8      7      6      5      4      3      2      1      Have no idea what this is based on

#### 3. Analysis: SWOT

Very clearly identified and stated

10      9      8      7      6      5      4      3      2      1      Lots of stuff going on but not clear as to main issues

#### 4. Recommendations: Clarity

Understandable recommendations

10      9      8      7      6      5      4      3      2      1      No clue what they are recommending

#### 5. Recommendations: linked back to the problems/Value to the organization

Clearly linked and will really help

10      9      8      7      6      5      4      3      2      1      No clue how this will solve the problems; no value added

#### 6. Recommendations: Reasonable to Implement

Compelling and will really help organization

10      9      8      7      6      5      4      3      2      1      Not a cost effective solution

#### 7. Support for Recommendations

Great research support was provided

10      9      8      7      6      5      4      3      2      1      No real references, out of thin air

#### 8. Specific Implementation/Stream analysis

Clear, detailed implementation

10      9      8      7      6      5      4      3      2      1      Very unclear

#### 9. Resistance to Change/Overcoming Resistance to Change

Implementation issues addressed

10      9      8      7      6      5      4      3      2      1      no direct discussion of implementation issues

#### 10. Ability to field questions / knowledge of organization and situation

understanding of the org.

10      9      8      7      6      5      4      3      2      1      no clue as to what is going on

           **TOTAL POINTS OUT OF 100**

## Management 5310- Organizational Analysis: Written Project Grading Form

### Organization Overview

Requirement	Poor/NA	Fair	Good	Excellent
Letter of agreement/corresp.*				
Summary of organization				
Mission/vision				
Organizational chart*				
Clear identification of interviews *				

\_\_\_\_ TOTAL (out of 15 possible)

### Data Collection

Requirement	Poor/NA	Fair	Good	Excellent
List of questions/adapted *				
Detailed responses *				
Interview process				
General summary of interviews				
Second source of data gathered				
Contribution of additional data				

\_\_\_\_ TOTAL (out of 15 possible)

### Analysis

Requirement	Poor/NA	Fair	Good	Excellent
Strengths				
Weaknesses				
Opportunities				
Threats				
SWOT Analysis *				
Justification of Importance for Issues Chosen to Focus on				

\_\_\_\_ TOTAL (out of 15 possible)

### Recommendations

Requirement	Poor/NA	Fair	Good	Excellent
Reasonable and clear				
All opportunities addressed				
Compelling and innovative solutions				
Linked to problems				
Show value added of change				
Reasonable recommendation for org.				

Each recommendation was supported				
Reference Material well incorporated				
Change Resistance				
Overcoming Resistance				
Implementation specific				
Stream analysis *				
Other:				

\_\_\_\_ TOTAL (out of 50 possible)

### General

Requirement	Poor/NA	Fair	Good	Excellent
Communication from organization				
Feedback report #1				
Feedback report #2				
Feedback report #3				
Feedback report #4				
Well written and integrated				
Overall professionalism of report				

\_\_\_\_ TOTAL (out of 5 possible)

\* Required Material in Appendix

Comments:

**TOTAL POINTS FOR WRITTEN PROJECT** \_\_\_\_