Residency Research Project
Organization & Leadership Course ITS630
Dr. Kelly Bruning

The research project will consist of:

1) Writing an analysis on each of the Decision Scenarios. There will be 5 or 6 Decision Scenarios
2) Two other reputable outside sources for each scenario along with your text with corresponding in-text citations on all is required as part of the research expectation.
3) A Decision Road Map for each scenario.
4) A related full-text pdf article on one of the concepts presented as a solution for EACH of the scenarios. One member of the group will upload these repository folder in the Ilearn platform located in the residency folder.

APA narrative form, font and style. APA Title Page, headers, etc.

In bold provide the title of each decision scenario which should start on a new page.

Provide the rationale for the decision. Intext citations, reference sheet at the end.

The Decision Road Map does not count as one of the narrative pages.

Each scenario decision response minimum of 3 pages of substantive Analysis **plus** the Decision Road Map with explanation of the Road Map. All references at the end of each scenario before going on to the next Scenario Decision which should be on the next page.

You will submit ONE document for the group in the ILearn Platform (Our class platform). Your grade may be different than other students if the professor evaluates lack of participation during her interaction with the groups or teammate's complaints of non-participation.

Residency Presentation - PowerPoint Presentation of ONE Scenario as assigned.

a) Each student must present
b) Each student submits the same powerpoint presentation to the drop box in the iLearn platform. Individual grades are earned for presentation based on each group member's portion on the presentation.
c) Presentation 15-20 minutes which includes explanation of the Road Map. (Presentation will be cut off at 20 minutes total)
d) Students are to be prepared to answer questions on their assigned decision scenario from the professor and the class...not just the part they presented on.

Note: BOTH Paper and PowerPoint are submitted before you leave the classroom on Saturday and no later than 9:00 pm.

APPENDIX A Clarity State Decision-Making Technique—A Summary

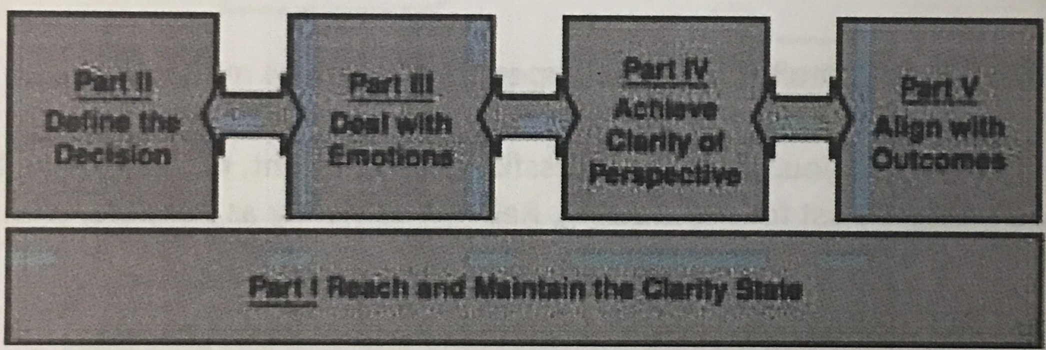
Root causes behind decision difficulties are:

- Lack of a clear objective
- Lack of clear constraints
- Difficulty in dealing with emotions
- Lack of a clear perspective
- Difficulty in selecting from among options

Clarity State is the state of being

- Physically relaxed
- Emotionally positive, happy, released from fear and anxiety
- Charged with power, success, self-confidence, and energy
- Totally in the present
- Mentally focused on the task at hand

Clarity State Decision-Making Process



Part I: Reach and maintain the clarity state. Utilizing breathing and mind-focusing techniques, reach a coherent state of mind, body, and emotions quickly and at will, whenever you need to make a decision.
Part II: Define the decision. Create a one-page decision map that captures the most salient factors related to the decision at the right level of detail.
Part III: Deal with emotions. Identify, acknowledge, and utilize emotions related to the decision to clarify the issues involved.
Part IV: Achieve clarity of perspective. Utilize several techniques, such as constraints relaxation, to identify, evaluate, and select the right way to look at the decision.
Part V: Align with outcomes. Reflect on the solution options in turn in such a way that it becomes clear that one option is the right solution.

Part I: Technique of Reaching the Clarity State

Step 1: Prepare.

- Sit quietly in a comfortable position, preferably with your back straight.
- Close your eyes and look up about 20 degrees behind your eyelids. This helps you relax and focus easier.

Step 2: Relax your body.

- Start breathing deeply and slowly. It should feel like a sigh on the exhale. Imagine that the tension is coming out of you with each exhale.
- Scan your body. If you find tension anywhere, breathe through this tension and relax it.

Step 3: Calm your mind.

- Pick a word, sound, or phrase, such as "relax," and say it to yourself on the exhale.

Step 4: Clear your mind.

- When thoughts arrive, do not get involved with them; simply say to yourself, "I'll deal with it later," and return to your breathing and repetition.

Step 5: Charge up.

- Recall a situation when you felt totally happy. Re-experience it with as many senses as possible.
- Now recall an experience where you felt very successful, self-confident, excited, or on top of the world, with a "no barriers exist for me" feeling. Relive it as vividly as possible, with as many senses as possible involved. Get into this feeling of excitement, self-power, and success.

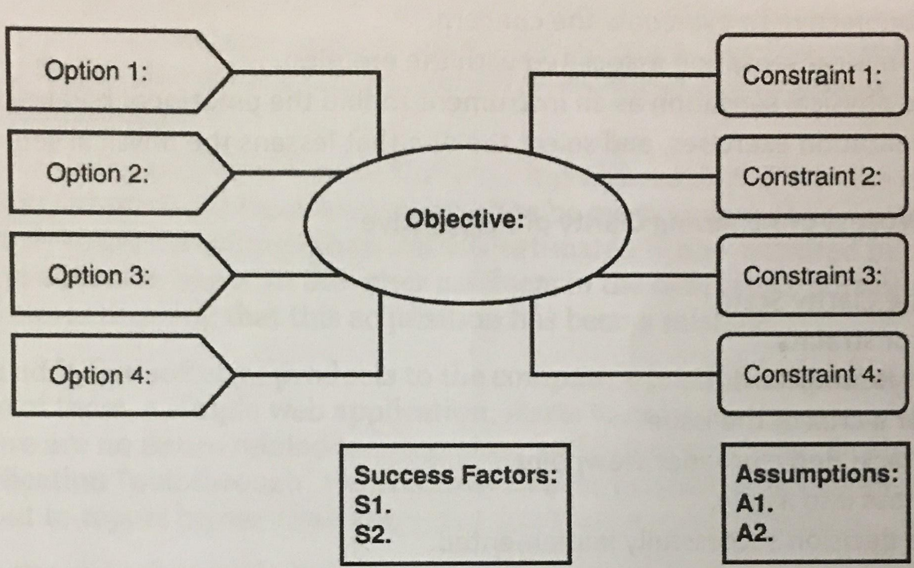
Part II: Define the Decision

Decision Definition = Objective + Constraints

Decision Map = Decision Definition + Solution Options

Decision Map

Decision Map



Process for Clarifying a Decision Objective

- Start with the decision question.
- Ask “Why is this important?” several times until you get to a fundamental reason behind this decision connected to the vision of the business.
- Focus on *one* parameter in your objective.
- Incorporate the decision question into the objective. Formulate the objective starting with “What is the best way to…;”.
- Identify success metrics.

Process for Clarifying Decision Constraints

- Compile a list of concerns.
- List easily identifiable concerns by asking “Why is this decision difficult for me?”
- Review commonly overlooked areas of concern for missing factors.
- Identify emotional, motivational, and other concerns.
- Convert each concern into an objective to overcome the concern.
- Make sure to use an action verb in defining an objective, such as *satisfy, improve, address, generate*, or *enable*.
- Tie decision constraints to the decision objective with “provided that I/we can…”.
- Identify and remove perceived or false constraints.

Part III: Process of Dealing with Emotions

- Maintain your Clarity State.
- Find an emotion or emotions associated with the situation related to the decision. Acknowledge them.
- Shift the emotion into a constructive, positive statement by formulating the concern that is causing the emotion as a constraint in your decision definition. The process for clarifying decision constraints will necessitate that the concern related to the emotion be converted into a subobjective to *overcome* the concern.
- Find a physical sensation associated with the emotion.
- Use the physical sensation as an instrument to find the emotional balance point. Work with visualization exercises, and select the one that lessens the physical sensation.

Part IV: Process of Achieving Clarity of Perspective

- Be in the Clarity State.
- Relax constraints.
- Stretch assumptions.
- Look for a crux of the issue.
- Stand back; find a broader viewpoint.
- Shift a loss into a gain.
- See the decision successfully implemented.

Part V: Process of Aligning with Outcomes

- Educate your intuition with data and analysis. Use one or more analytical methods to evaluate solution options.
- While in the Clarity State:
    - Perform solution sensitivity analysis. For each solution alternative:
        - Identify key uncertainties.
        - Consider the most likely scenario.
        - Accept the worst.
        - Identify reasons for failure, and prepare to avoid them.
        - Develop the best scenario.
        - Assess the fit between this solution and decision aim.
    - Find your preferred solution by listening to your emotions.
    - Finalize your choice. Commit to the implementation.

In order to reach decision clarity, develop your vision power. Use Clarity State as your spring platform, imagination and visualization as tools, and emotions as your guide.

If you have a complex decision, separate a communications layer and one or two other layers focused on the most critical aspects of the decision.

EXAMPLE 1 ELLEN—What is the correct decision?

Ellen is the CEO of a public software company. She took the role two years ago with an objective to find and execute strategies to dramatically grow the company. The strategy that the company embarked on under her leadership is a combination of organic growth in certain market segments where the company's products are highly differentiated and acquisitions in others.

Her team looks for a good acquisition for 12 months. After the initial discussions with three selected targets, only one company remains under consideration. The due diligence highlights several issues, but the team recommends going ahead and completing the transaction. Ellen agrees.

Six months after the acquisition, concerns that were highlighted during the due diligence (related to product integration) have been assessed to be more serious than was initially estimated. A much larger investment than initially estimated is now required in order to bring acquired products in line with the other products in the company's portfolio. Privately, Ellen starts thinking that this acquisition has been a mistake.

The acquisition adds five software products to the company's portfolio. Suddenly, the demand for one of them, a simple web application, starts to grow. In the case of this application, there are no issues related to integration with other products. The higher sales of this new application "pull through" the company's other products. As a result, Ellen's company is about to report higher-than-projected quarterly revenue numbers.

Did Ellen make the right decision? Explain with rationale integrating course concepts with intext citations into your analyses.

EXAMPLE 2: MARC—BUSINESS TURNAROUND

Marc was asked to become the CEO of a technology company whose CEO had left. During the first month, Marc discovered serious problems with the business. As he was doing the initial business situation assessment, it was becoming clear to him that the Internet and other market dynamics would eventually eliminate the revenue of the whole subdivision that was currently responsible for half of the business.

Members of his staff, on the other hand, were unwilling to face the issue, denying such a possibility—a situation that was frustrating to Marc. In the long run, he needed to put together a turnaround plan. In the short term, he felt that a significant layoff was required to offset the revenue risk.

The difficulty in this decision was that Marc had no previous experience in this industry. He felt that he was "running blind," especially without the total cooperation and buy-in of his staff. The decision was emotional because of the fear of making a wrong move and the risk to his career that such a move would entail.

You are to propose a turn-around plan to Marc. You can assume you have the funds and resources you need. Explain with rationale integrating course concepts with intext citations into your analyses.

EXAMPLE 3: JOEL—EVALUATING AN ACQUISITION

Joel is President and CEO of a multibillion-dollar division of a very large conglomerate company, one of the largest in the world (let's call it LG). Joel was called by the Chairman of the company on Friday afternoon and told about a phone call that the Chairman received from a member of the board of a very large computer company (we will call it CMP) earlier that week. The director wanted to know whether LG would be interested in acquiring CMP. An LG board meeting was scheduled for Tuesday of next week, where the Chairman wanted to discuss this situation and make a decision. Joel's division was a natural fit for the proposed acquisition within LG. The Chairman wanted Joel and his team to work through the weekend and prepare a "pros and cons" presentation as well as a recommendation by Monday morning.

Even though Joel's division was considered to be a beneficiary of the potential acquisition, CMP had little overlap with Joel's business. As Joel's team was pulling together information about the acquisition candidate, issues facing CMP started emerging. A new technology platform was putting pressure on CMP's revenue and margins numbers. Regardless, the company was still the leader in its field.

On the other hand, LG was feeling "invincible," having successfully done a series of acquisitions and having beaten analysts' projections on growth year after year.

The decision was difficult because Joel personally felt that this acquisition would be a great entry into a growing technology market that LG has not played in before. He and his team were excited about additional value that the acquisition could bring to other divisions across LG. However, he believed that LG in general, and his division in particular, did not know much about CMP's market and business model.

What decision should Joel Make? Explain with rationale integrating course concepts with intext citations into your analyses.

EXAMPLE 4: JACK—SELECTING A WAY TO TRANSITION TO A NEW TECHNOLOGY PLATFORM

Jack is the CEO of a company (MP) that was spun off from the parent several years ago. MP took with it software applications that were developed on an older hardware platform. The market for these applications was gradually moving to the Microsoft software platform. Jack was aware that security and industry analysts were expecting MP to have applications on that platform as well. The decision was pressing. The company needed to find the best way to move to a new development platform and find the right timing for a switch to this new technology.

Three options were open:

- Convert existing applications.
- Develop new applications from scratch based on the existing functionality.
- Abandon internal development and acquire a company with products on the right platform.

All options were feasible and achievable. The product suite consisted of 12 million lines of code that matured over 22 years into 52 applications. These products were very stable. Customers considered the toolset extremely reliable and deep in functionality.

The fastest way was to convert existing applications. The problem with that option was that as with any software that was developed over a long period of time, it had issues buried in it that would have been difficult, if not impossible, to convert. Developing new applications from scratch, on the other hand, was time- and cost-prohibitive. As a result, Jack and his team were looking for a balance between the first two options.

The third option, acquiring a company with a product suite on the right platform, had its own issues. From the information that was publicly available about potential acquisition candidates, none of the software packages that could have been bought in an acquisition provided the depth and breadth of the functionality of MP's existing applications. Therefore, this solution would have to have been amended by either continuing to develop existing applications on the old platform or combining the needed functionality on the new platform over time. Proceeding with an acquisition and also spending money on expanding the acquired software with the needed functionality made this option the most expensive solution. The speed to market was its main advantage, however.

Explain the pros and cons of each of the three options. Explain with rationale integrating course concepts with intext citations into your analyses. Then select which option is best and why.

EXAMPLE 5: LIN—ACHIEVING GROWTH THROUGH CUSTOMER INTEGRATION & TECHNOLOGY

Lin is the CEO of a company that is considering a total revamp of its IT system. Lin has a vision of the new IT system helping the business become integrated with customers, thus positioning the company above all competitors. Two people on his team disagree, both stating objections: one, the system is too expensive, and two, what if it does not work?

Lin has specific areas in mind for the customer integration, which he notes in the success factors:

1. Immediate visibility of the customer's shipping needs directly from the customer's systems.

2. All documentation handled electronically.

3. Ability for customers to easily adjust/schedule shipments online.

4. Online visibility of accurate, frequently updated (every half hour) schedules and committed deliveries open to customers and us.

Recommend a plan to Lin incorporating all of the four success factors. Explain with rationale integrating course concepts with intext citations into your analyses. Assume you have the funds for your recommended plan. You also have authority to hire personnel and you will need to articulate the title and role of any new personnel you propose.