

Syllabus

Course Number: HDCS 6331

Course Title: Advanced Strategies for Futures Planning in Consumer Sciences and Retailing

Semester: Spring 2016, Session 6

Course Time/Location:

- Tuesdays from 5:30 – 8:30 pm, Central U.S. time (April 5th – May 9th)
- On-campus -- Cameron 229

Online: Adobe Connect (<http://uh.adobeconnect.com/strategies/>)

Instructors: Dr. Jungkun Park, Dr. Richard Lum

Office Hours: By appointment

Prerequisites: Graduate Standing

Overview

The study of the future (futures studies) consists of two main activities: 1) understanding and anticipating change in society and; 2) applying that insight to expand what people perceive as possible and as preferable for the future. This course focuses on the second activity, applying foresight to help organizations reframe their expectations and preferences for the future, which translates into goals, strategies, and initiatives. For our purposes, the process of generating and then applying foresight involves:

1. understanding the expected future and forecasting possible futures,
2. identifying values and constructing preferred futures,
3. developing various approaches (plans) for moving toward the preferred futures, and finally,
4. implementing the plan to pursue the desired change(s).

Objectives: The student will:

- Be aware of and able to apply the tools and techniques of strategic planning (strategy, tactics, heuristics) – both in the for-profit (especially retailing) and non-profit sectors
- Be aware of values preferences and how they influence futures work
- Be able to construct a vision of a preferred future that can motivate others and guide actions to bring about the vision
- Be able to develop a strategic plan that guides an enterprise while creating change
- Understand the importance of change and factors crucial for change management
- Be familiar with the key ideas of innovation related to each facet of an organization (leadership, culture, workforce, process, product, consumers, and branding)

Required Texts (order online – not at UH bookstore)

- *Strategic Planning for Public and Non-Profit Organizations*, John Bryson (The 1995, 2004 and 2011 editions all have the same chapters.)
- *Thinking About the Future*, Andy Hines (2nd edition is preferred, but not required)
- *Good to Great*, Jim Collins

Classes

The UH futures program offers a unique blend of different modes of interaction for each course depending on the student's location and needs. The official course is conducted on the website (www.uh.edu/blackboard) but we will be using Adobe Connect for much of the class. All instructions, materials and submissions are done through Blackboard.

Each class will be divided into a retrospective section (looking back over the previous week's reading and activities) and a prospective section (looking ahead to next week's work). Student input will be used as the basis of the retrospective section; the instructor will lead the prospective section.

But since man (or woman) does not live by the internet alone, we also have personal modes of interaction. The one with the highest bandwidth is, of course, attending class on Tuesday evenings – face to face or through Adobe Connect (above). Those who cannot attend the class in either of these ways can also listen to a recording of the class and post any comments on the Archive Comments discussion board on the Home Page. The objective of the class time is to enhance and deepen the learning from each week's lesson through discussion and activities. Those who do attend report that they learn more when they do so.

If you are going to call into class, do the following before the first class:

1. Get a headset with a built in microphone and headphones. Using your desk speakers can create
2. feedback.
3. Click on the Audio Call-in link on the Homepage and download the Adobe plug-in if you need to.
4. We will practice how to use the Audio feature in class.

We also record the class for students who have a regular conflict with class time (work or other responsibilities). The classes will be posted in the Recorded Classes folder on the Home Page.

Finally, the website itself has an easy-to-use discussion tool that allows people to post and reply to any of the material posted. Use it in addition to or instead of the other modes of interaction. Even if you can't read all the posts, you are encouraged to 1) respond to posts that are addressed to you and 2) routinely check for posts by the instructor.

Communication with the instructors can be 1) in class, 2) through Blackboard email, 3) through regular email (jjpark21@central.uh.edu, rlum@uh.edu), 4) by cell phone (Lum: +1-808-256-7581), or 5) by Skype ([richard.lum1](https://www.skype.com/en/contacts/voice/richard.lum1)). All are fine, even the phone. For phone calls, please note that for the duration of the course Dr. Lum will be located in Honolulu, constituting a five-hour time difference.

Difficulties with Blackboard can be reported/resolved in two ways. If the problem is technical (username, password, connectivity, Blackboard functions, etc.), then contact Instructional Support (713-743-1475, blackboard@uh.edu). If the problem has to do with material (broken links, assignment drops, etc.), then contact me. The phone is fine if it is an emergency; Blackboard email is better in all other cases.

Schedule

Week	Classroom and Discussion Topics	Project Deliverables
1	Engaging the Client <ul style="list-style-type: none"> • Model of Business • Introduction to Futures Thinking • Foundations of Strategy, Tactics, and Heuristics • Basics of Evolutionary and Revolutionary Innovation • Delineations of Vision, Mission, and Values 	Worksheet #1: Client Engagement and Enterprise Description
2	Assessing the Immediate and Global Environments <ul style="list-style-type: none"> • Theories of Change and Resistance • Competitive Intelligence • Framework Forecasting • Leadership 	Worksheet #2: Immediate and Global Environments
3	Assessing the Client Organization <ul style="list-style-type: none"> • Appreciative Inquiry • Concept Map • Good-to-Great Hedgehog Model • Revisit Delineations of Vision, Mission, and Values 	Worksheet #3: Stakeholders, Mission, and Vision
4	Developing Plans <ul style="list-style-type: none"> • Change Management • Culture, Processes, and Branding • Foresight Maturity Model • Turbo Strategy • Systemic Innovation 	Worksheet #4: Goals, Strategy, and Initiatives
5	Keeping it Real <ul style="list-style-type: none"> • Topic Review • Theory vs. Implementation • Presentation is Everything 	Client Ready Report

NOTE: The Enterprise Worksheets will be updated each week and continually fleshed out through the entire course (working drafts will be posted each week to show progress). Final versions won't be due until the final portfolio and client ready report.

Assignments

NOTE: HDCS students will be working with Dr. Park for their projects/enterprises with a focus on retailing. Foresight students will work with Dr. Lum. *All students should have an enterprise selected before the start of the 5-week Advanced Strategies session.*

Each graduate student will select an enterprise (retail related for HDCS students) and secure permission to manage or assist a change process in that enterprise. Students will turn in various products from that process as the semester goes along. The required products are:

- The change project and its leader (point of contact)
- The enterprise's consumers, mandates, stakeholders and mission
- An external assessment of the enterprise's current and future global and immediate environments, including a list of strategic issues
- A long-term direction for the enterprise consisting of a vision and/or a grand strategy, goals, measures and strategies
- A project plan for an initiative that implements the strategic plan
- A professional summary of the strategic plan for your client
- An assessment of the enterprise's readiness for change
- An assessment of the enterprise's leadership
- A strategy for dealing with one source of resistance
- A plan for implementing the steps of a change management project

The due dates are the week following the reading and discussion about a particular product. Products will receive individual feedback, usually within one week of the due date, and they may be resubmitted as many times as you wish. The more times it is submitted, the better it goes, as does its final assessment.

Since we are discussing and posting materials about specific enterprises, students should take care to maintain the enterprise's anonymity in all written communication. Therefore, create a fictitious name for the enterprise. You may also create fictitious names for the participants or simply refer to them by title or position. None of these materials nor any discussion we have in class about specific enterprises should be shared with anyone outside the class, except in a very general way. The people in the enterprises are doing us a favor by allowing us to work with them, and we should respect their privacy.

Portfolio

The portfolio in the Advanced Strategies course represents your collected works and will include the following:

1. **Your Five Best Discussion Postings** (Not including Enterprise Worksheets). An ideal posting is one that is:
 - a. substantive -- truly adds something to your and others' learning
 - b. complete -- contains all the parts necessary
 - c. generative -- sparks discussion and responses from instructor(s) and/or other students.Few postings are "ideal" on all these dimensions, but you can use the criteria nevertheless to rate the ones you did.
2. **Final Version of all the Enterprise Project Worksheets #1-4**
 - a. Project Worksheet #1: Enterprise Engagement and Description – Initial Project Identification and Enterprise Assessment
 - b. Project Worksheet #2: Immediate & Global Environments – Describe the Current and Potential Future Market Conditions of the Particular Enterprise
 - c. Project Worksheet #3: Stakeholders, Mission, & Vision – Describe the Aspirations, Mandates, and Future of the Enterprise
 - d. Project Worksheet #4: Goals, Strategy, & Initiatives - Develop the Strategic, Tactical, and Heuristic Plan for a Subset of Enterprise Goals
3. **The Completed Client Ready Report**, including the following sections:
 - a. Introduction – the objective of the report, including the time horizon for the plan
 - b. Methodology – a brief description of the approach used
 - c. Enterprise – a brief description of the enterprise today, including its mission and any recent major discontinuities or disruptions in the enterprise or in the environment
 - d. Environment – a description of the trends, plans and potential discontinuities in the enterprise's immediate (transactional, business) and global (STEEP) environments that could impact the enterprise and the plan before the time horizon
 - e. Plan – the enterprise's vision, long-term goals (2-4 yrs), strategic activities to achieve the goal, and 2-3 initiatives that implement the strategic activities in the short-run.
 - f. Execution – recommended guidelines and principles for managing the change process
4. **An optional essay** that describes what you learned in this course. (The optional learning essay receives an automatic A, and is not read until after the grades are turned in.)

Any assignment may be resubmitted based on the feedback received. Please show the changes since the last time you submitted the product

Zip all the material together for each portfolio and submit it through Blackboard. Be sure to clearly label the filenames.

Incompletes: A grade of Incomplete is given only in special circumstances at discretion of the instructor

DROPPING THE COURSE: The last day to drop the course without a grade is April 27.

Disabilities: Students who require individualized accommodations for this course must inform the professor in order that appropriate arrangements can be made. For information about services provided by The Center for Students with Disabilities, please call 713-743-5480.

Academic honesty policy: All students are responsible for knowing the standards of academic honesty. Please refer to the UH catalog and the student Life Handbook for the University Academic Honesty Policy. Plagiarism, that is, using research without citations, or using a created production without crediting the source, will result in a grade penalty or failure of the course. Internet sources must be credited according to the sites recommended citation guideline if available. If no citation guideline is provided by the web source, then the date, URL site owner, author must be included with the web material used.