

Syllabus

Course Number: HDCS 6331

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

Semester: Spring 2018, Session 6

Course Time/Location:

- Tuesdays from 5:30 – 8:30 pm, Central U.S. time (April 3rd – May 1st)
- On-campus -- Cameron 229

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

Instructors: 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)
- 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

Required Texts (order online – not at UH bookstore)

- Lum, Richard. *4 Steps to the Future*.
- Mintzberg, Ahlstrand, and Lampel. *Strategy Safari*.
- Raynor, Michael E. *The Strategy Paradox*.
- Rumelt, Richard. *Good Strategy Bad Strategy*.

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 (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	Weekly Assignments
1	Introductions to Strategy and Futures <ul style="list-style-type: none"> • Introduction to Futures Thinking • Foundations of Strategy and Strategic Planning • Collecting basic client information and documents 	Worksheet #1: Client Engagement and Organization Description Article on retail strategy
2	Analyzing the Past <ul style="list-style-type: none"> • Historical analysis • Continuing discussion of strategy 	Worksheet #2: Historical Analysis and Past Strategy Article on retail strategy
3	Assessing the Present <ul style="list-style-type: none"> • Trends and emerging Issues • Stakeholder analysis • Systems thinking • Continuing discussion of strategy 	Worksheet #3: Trends, Emerging Issues, and Stakeholders Article on nonprofit strategy
4	Anticipating the Future <ul style="list-style-type: none"> • Scenarios (possible futures) • Implications analysis • Continuing discussion of strategy 	Worksheet #4: Scenario Forecasts and Implications Article on military strategy
5	Articulating the Preferred <ul style="list-style-type: none"> • Vision, Goals, and Objectives • Crafting strategy 	Client Ready Report Article on strategy

Assignments

Team Projects

NOTE: All students should have an organization selected and assessed before week two of the 5-week Advanced Strategies session.

Graduate students will team up in teams of no fewer than three and no more than four students. Each team will select an organization (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 organization'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 organization 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 organization's readiness for change
- An assessment of the organization's leadership
- A strategy for dealing with one source of resistance
- A plan for implementing the steps of a change management project

Since we are discussing and posting materials about specific organizations, students should take care to maintain the organization's anonymity in all written communication. Therefore, create a fictitious name for the organization. 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 organizations should be shared with anyone outside the class, except in a very general way. The people in the organizations are doing us a favor by allowing us to work with them, and we should respect their privacy.

Weekly Assignments

- Weekly Project Worksheets
- Weekly submission of an article relevant to foresight in strategy development, strategic planning, and retail strategies

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 once.

Portfolio

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

1. **Your Five Articles on Strategy.** 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. **Organization Project Worksheets #1-4**
 - a. Project Worksheet #1: Client Engagement and Organization Description – initial project identification and client assessment
 - b. Project Worksheet #2: Historical Analysis and Past Strategy – analyzing the client organization's past
 - c. Project Worksheet #3: Trends, Emerging Issues, and Stakeholders – assessing the present landscape and current signals of change
 - d. Project Worksheet #4: Scenario Forecasts and Implications – forecasting possible futures and exploring their strategic implications
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

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 6.

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.