

Planning & Goal Setting Management at BlackBerry

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Group #3

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Introduction

Technology is one of the fastest changing industries in the world. Advances in technological development have transformed the role of the industry's firms and forced drastic strategic shifts among many to remain relevant. The company that once brought a pocket-sized phone with a mini physical keyboard has become a completely transformed business. BlackBerry is no longer the company that once dominated the early 2000's with their revolutionary mobile phones and touch screen devices. The firm, rather, has pivoted their focus towards cybersecurity, providing organizations and government agencies with secure network access throughout the world. The BlackBerry of today operates in the information technology (IT) sector through its workings in cybersecurity, critical event management, and the Internet of Things (IoT). Our consulting team has been tasked with understanding critical organization problems at BlackBerry. We will be evaluating the planning and goal setting of the company with a focus on strategic management. BlackBerry is known for selling handheld devices, however, the company now has recently shifted its product focus to security and connectivity software. With this shift, BlackBerry is facing new strategic issues and our goal was to determine how the firm can mitigate these internal organizational concerns.

The company was founded in 1984 by Mike Lazaridis and Douglas Fregin under the original name Research in Motion (RIM) which focused on building communication devices such as pagers and modems. In 1997, RIM went public with the backing of initial investor Jim Balsille, with their initial public offering in the Toronto Stock Exchange reaching over \$155 million. The company worked on creating effective communication devices, putting out their first line of mobile phones in 2000. BlackBerry dominated the mobile communication industry until the mid 2000s when it faced the entry of competitors, Apple and Android. Users complained about the disappearance of a keyboard in their smartphone models and inferior OS to competitors, as their market value fell 75% by 2012. In January 2012 former Co-CEOs Lazaridis and Balsille stepped down, naming Thorsten Heins as head of the company. By November 2013 Heins stepped down and was replaced by John Chen, who officially rebranded RIM as BlackBerry, while continuing to produce smartphones. With little market value share by September 2016 the company ceased all production of smartphones and began to focus and commercialized encryption software suite called SecuSUITE. With the threat of substitutes BlackBerry decided to rebrand in 2016 and shift their focus to cybersecurity software and services (BlackBerry, 2023). The U.S National Security Agency gave SecuSUITE state approval to market security software to the government. With the shift in company focus and depletion by competitors, CEO Chen announced the decommission of its operating systems in January 2022.

Following the decommission of their operating systems, BlackBerry now operates as a leader in cybersecurity-helping businesses, government agencies, and safety critical institutions of all sizes secures the Internet of Things (IoT). The company currently manages from their headquarters in Waterloo, Ontario, Canada with operations in 30 countries employing over 3,200 people (BlackBerry, 2023). BlackBerrys is committed to tackling the technology industry's most pressing environmental challenges, creating equal opportunities for all, and making positive impacts on our communities. Their mission statement is to advance and build a more connected and secure world for today and tomorrow. The history of BlackBerry impedes on the rebranding

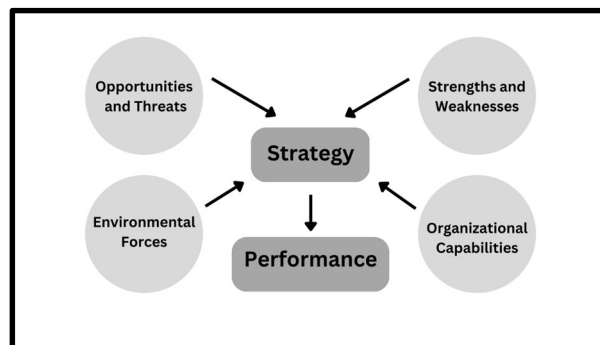
and growth of the firm as they navigate towards a new sector of the industry. BlackBerry's management is crucial in facilitating this change and ensuring the proper strategic management of the company as they move forward and look to grow publicly.

Organizational Issue

Throughout our research, we noted that BlackBerry had critical organization problems that could be analyzed by evaluating the planning and goal setting of the company with a focus on their strategic management. BlackBerry was/is commonly known for selling handheld devices, however, the company has shifted its product focus towards Business-to-Business with security and connectivity software. Through our qualitative and quantitative data we established that organizational issues within BlackBerry focuses on the executive board oversight process to establish effective goals. As there is a shift within the company's focus, they are rebuilding the focus and work of their employees.

Of the four primary management functions - planning, organizing, leading, and controlling - many leaders suggest that planning is the most fundamental. From planning, all other aspects of the organization are developed from the information and insight derived. Within the planning of a firm, the organization will most often use goals as a blueprint for achievement. There are four major levels of planning and goal setting, which include: (1) Mission Statement, (2) Strategic Goals/Plans, (3) Tactical Goals/Plans, and (4) Operational Goals/Plans. The Mission Statement, as described above for BlackBerry, is the external message to stakeholders that legitimizes the firm's operations. Turning inward, Strategic Goals/Plans are developed and executed by senior management and most often have broad impacts on the organization as a whole. Transitional to a more focused approach, Tactical Goals/Plans are part of the middle management responsibility within certain major divisions and functions, leading both short- and long-term strategic guides, standards, and motivators. Moving into lower management, departments and individual associates are responsible for Operational Goals/Plans, which lay within the everyday operational agendas (Viquepedia, n.d.). Each of these four levels work simultaneously to achieve strategy and the firm's internal and external commitments. For our consulting team's purpose of this project, we are focusing on the senior management's Strategic Goals and Planning as driving forces and mediator amongst all other levels.

Before entering the research phase of the project, our team analyzed potential concerns associated with BlackBerry's challenges. Strategic change, in an optimal sense, would allow an organization to arrive at its intended goals by following a direct A through N (where N is equal to the number of steps in the given plan). However, internal and external uncertainty, the environment, and an organization's capabilities forces a firm such as BlackBerry to grapple with uncertainty when implementing strategy. The ability for managers to understand and adapt accordingly result in the outcome or performance (Johnson, 1992).



Method

To gain better insight on the Strategic Goal/Plans challenges and concerns at BlackBerry, our team conducted both quantitative and qualitative data collection and analysis. Our goal was to gather information on the strategic problems previously identified within the company, and we established contact with Mr. John Giamatteo, President of BlackBerry's Cyber Security Business Unit for access to organizational information and members. Mr. Giamatteo is responsible for the firm's business strategy, engineering, go-to-market, customer support, and operations. He has worked at BlackBerry for almost two years, and came to the firm with over 30 years of experience in go-to-market, marketing, customer relationships, and customer success with global high technology companies including McAfee (computer security software provider) and AVG Technologies (leading provider of internet and mobile security). He was a perfect fit to be our contact because his position and experience provides him a unique perspective into the organization's transformation.

First, our team conducted a virtual interview with Mr. Giamatteo on March 17, 2023 to determine his general position within BlackBerry, strategic role as an executive during a major transformation, current challenges the company is facing, and what he believes could be the best approach to solutions. To optimize our time with Mr. Giamatteo, our team determine the following eleven questions:

1. What kind of programs or actions is Blackberry doing to create higher engagement with younger audiences?
2. How has Blackberry communicated with you the strategic goals of the company. If these goals are not met, how does the company adjust accordingly?
3. How does HR communicate with employees to ensure satisfaction in the workplace?
4. How have you seen your position change during your time with the company? How do you believe your role will change in the next 5-10 years?
5. How does your employee's background influence your managing decisions?
6. Has the shift in company focus affected your work style? If so, how?
7. Which goals are emphasized in the company and how are they prioritized?
8. In what ways do you evaluate team members' ethics?
9. What improvements does Blackberry have in place to improve the firm's strategic planning?
10. How do you see your position fit with the strategic vision of the firm?
11. What type of leadership style do you think works best in this company's environment?

After completion of the interview, our team created a survey using the Qualtrics software that was sent to Mr. Giamatteo and eight of his colleagues who represent individuals he is most closely associated and connected with at BlackBerry. The survey began by first thanking the individuals for taking time to answer the questions, and provided a broad and brief description of the purpose of the survey, similar to the purpose stated in the Introduction. The survey introduction also stated that the questionnaire was organized so that these individuals' responses are anonymous, so our team could avoid certain social desirability biases present in identifiable questionnaires (Wildman, 1977). This risk can be significant, especially when dealing with potentially controversial questions on actions of executives and employers. The survey was then divided into three parts: (1) personal/demographic information, (2) performance and leadership satisfaction, and (3) goal setting and communication. The first section asked general questions that would allow our team to determine certain individual compositions including position/title and

brief description, tenure, gender, age, and ethnicity. For the second section, we asked scaled and short-response questions including satisfaction with current BlackBerry leadership, performance optimization, resource allocation, and human resource management. These questions allow our team to determine certain characteristics of individuals and thoughts on their position(s). For our third and final section, our team inquired about certain strategy and goal-orientation scaled and free response questions including strategy confidence, goal communication, goal confidence, position and strategy alignment, role future and ambiguity, and communication effectiveness. These questions were designed specially for our team to gain insight into the certain planning and goal setting challenges the organization is facing from the perspective of various employees. To end our survey, our team thanked them for completing the questions to ensure the individuals felt appreciated for their time.

To best visualize the survey, our team has provided a hyperlink [here](https://syracuseuniversity.qualtrics.com/jfe/form/SV_brrGPedwHjqepKu) to allow for validity and further analysis.

(Survey Link: https://syracuseuniversity.qualtrics.com/jfe/form/SV_brrGPedwHjqepKu)

Results & Analysis

To begin our team's analysis of the qualitative data, we have determined eight quotes that best illustrate direct answers to the questions we asked Mr. Giamatteo. The chart below is composed of related key topics in Organizational Culture, Goal Setting, and Planning alongside corresponding quotes.

Qualitative Quote Data

Topic	Quote
Organizational Culture	“HR plays a very significant role in providing for employees to <i>be heard</i> and <i>enlist their feedback</i> and suggestions on how we make BlackBerry a fun and rewarding place to work.”
Goal Setting	“We <i>set our goals with the oversight and support</i> of our CEO, CFO and board of directors.... we call this our Annual Operating Plan (AOP).”
Organizational Culture	“One of the strengths of the company is the global, racial, gender diversity and functional expertise we encompass. This truly makes us a stronger company. We have the <i>benefit of leveraging diverse ideas</i> to provide better outcomes for our customers, partners, employees, and shareholders.”
Planning	“We have a structured business process to closely <i>monitor our progress</i> which includes weekly staff calls, weekly forecast/pipeline reviews, monthly <i>progress updates across all functions</i> , quarterly business reviews and quarterly all-hands meetings across all functions/staff.”
Goal Setting	“Large, publicly traded companies need to have a published succession plan for their top executives to <i>ensure stability and continuity</i> in its leadership to carry out the strategic vision and execution.”
Goal Setting	“Our primary goals revolve around revenue, profit, shareholder accretion.”
Goal Setting	“We communicate these goals to all our employees and explain how the good work they do, factors into and plays a role in us achieving the goals we set.”
Planning	“Every quarter, with the board of directors, we review in depth, our strategy, and our progress towards achieving our short- and long-term goals.”

The collection of qualitative data from Mr. Giamatteo touches on the strategic processes and challenges identified within the company. His responses provide a more direct and literal approach to BlackBerry’s organizational, planning, and goal setting. Goals, he explains, have a foundation in revenue, profit, and shareholder accretion (environmental impacts on EPS). This is reasonable because the company is publicly traded, and leadership must have a clear vision that represents stability to carry out strategies and processes for shareholders to have high investment confidence. He also emphasizes that goals are communicated to employees as part of organizational processes to validate their roles within the company. This goal setting described by Mr. Giamatteo correlates to his responses regarding planning, which are also heavily structured. Progress is monitored and updated to various divisions and teams to ensure that the firm is advancing towards short- and long-term goals.

These goals represent BlackBerry's shift in focus from a device company to an enterprise software company and a completely different way of doing business. Mr. Giamatteo explains that the organization previously worked closely with telecommunication providers as their primary route to market. Now, as an enterprise software company, BlackBerry has multiple distributors that represent and cover various regions and aspects of the business, resellers that provide value in their support systems, service providers and consultants to represent value and differentiation, and system integrators to incorporate the product into a customer. This shift represents not only a change in technology but also in the firm's structure as part of planned organizational development. To properly ensure successful implementation, Human Resource Management acts as a mediator between functional employees and executives for employees to provide feedback on the plans and goals and ensure their suggestions are being heard by those developing strategies.

Mr. Giamatteo's interview responses provide a comprehensive overview and foundation for certain change and mitigation of challenges within BlackBerry; however, there is very limited recognition of the actual issues the firm is facing. This type of response can be associated with executive overconfidence, which is an effect common amongst organization executives. Overconfidence bias is when a decision maker, such as Mr. Giamatteo, holds an unrealistically positive view of themselves and performance (Charles Schwab, 2021). In this situation, it is undoubtedly accidental yet still an effect that must be considered in the analysis. Executives tend to have greater overconfidence biases because of their position, presumably because of association between overconfidence and optimism (Schrand & Zechman, 2010). The survey, therefore, is an effort to combat the effect and develop a deeper understanding of the challenges from a non-presidential perspective.

Our survey results are analyzed in the figure below, which sorts each individual and assigns a number based on the order of completion. By doing so, we are able to classify answers better and understand trends within and amongst the individuals. The survey data collected can be analyzed to directly understand employee attitudes towards BlackBerry and its strategic efforts.

Based on our first sets of data, we could develop a personal and demographic image of each individual and the sample as a whole. The respondents' positions represented a large variety of roles within the firm, including (1) Vice President of Sales Asia-Pacific, (2)

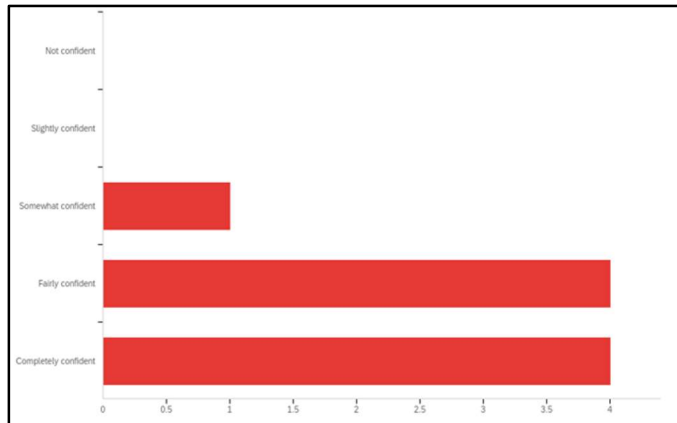
Individual #	Gender (Male/Female)	Age (Years)	Ethnicity
1	Male	45-60	Caucasian
2	Male	45-60	Caucasian
3	Male	45-60	Caucasian
4	Male	30-45	Caucasian
5	Male	45-60	Caucasian
6	Female	45-60	Caucasian
7	Male	45-60	Caucasian
8	Male	60+	Two or More

Vice President of USA Enterprise Sales, (3) Chief Revenue Officer, (4) Executive Assistant, (5) General Manager, (6) Director of Sales Forecasting, (7) Senior Vice President of Strategy and Business Development, (8) Vice President of Marketing, and (9) President. These roles are responsible for a range of activities at BlackBerry, including managing, planning, and strategic implementation with an average tenure of 3.2 years, with a range between 1 year and 12 years. With all respondents being employed with BlackBerry for more than one year, we can determine that they are most likely comfortable with and understand their role (Stafford and South

Staffordshire, n.d.). This translates to understanding of the company's vision and strategic goals. Of all respondents, 88% were male with the remaining one identifying as female. The same percentage of respondents identified themselves as Caucasian, and one identified as Two or More ethnicities. This homogeneity amongst respondents gender and ethnicity is something that should be noted but not necessarily cause for concern or bias is this situation because there is enough diversity of position.. There was a greater range of ages, with 11% between 30-45 years old, 78% between 45-60, and 11% over 60 years of age.

Our second section of the survey questioned performance and leadership satisfaction. First, individuals placed their overall satisfaction with current leadership on a scale from 1-5. The mean was 4.78, with most respondents selecting 5. Then, transitioning to performance optimization, most respondents indicated in a short-response that BlackBerry's work environment allows for their performance to be optimized. Many respondents indicated that, yes, because of certain performance metrics, trust from leadership, and growth opportunities, they can produce their best work. However, there was concern drawn to certain rules and regulations that limit employees, including rules and regulations that are not empowering. Further, a bureaucratic structure limits certain planning. This distribution in response is similar to the yes/no question which asked if the company provides necessary resources to complete position-related tasks, with 78% answering yes and 22% answering no. While most feel supported and optimized, there is still a group of employees that feel left behind. Some feel that the resources are antiquated, while others feel that gaps in training prove detrimental.

Our third and final section of the survey focuses on goal setting and communication within BlackBerry. The bar graph to the left contains data from the question asking for confidence of the strategic position and goals of BlackBerry. The y-axis represents the level of an individual's confidence, ranging from Not confident to Completely confident, and the x-axis represents the number of respondents who selected the respective level. There were four individuals who selected the highest level of confidence, however, the majority of respondents selected a level lower than that. This informs our team that, although Mr. Giamatteo was confident in his interview that the goals and strategic objectives are outlined well, many employees do not share that same feeling. Our team also analyzed the effectiveness of goal communication at BlackBerry (visualized at right), which reveals 33% of respondents feeling the communication is Somewhat effective. This

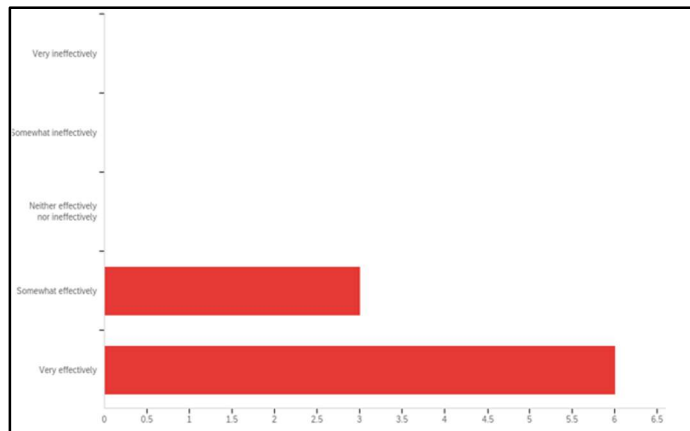


also draws slight concern to the ability for BlackBerry to communicate strategic objectives properly.

An interesting finding our team discovered from this third section in the survey was that when asked to name BlackBerry's strategic goals, each individual answered differently. When developing the survey, our team wrote the question to ensure no confusion between company-wide versus position-focused objectives, however, even with such consideration, respondents still could not

name consistent strategies of the company. Instead, they seemed to respond based on more position-focused objectives and strategies that fixated simply based on their role. This proves the inability for BlackBerry to clearly communicate its strategy from a company-wide scope. Further, when looking for clarity, respondents indicated that the Human Resources department at BlackBerry provides limited (if any) feedback to employees.

The ability to communicate goals and confidence in their leadership correlate directly with each other, and research suggests that confidence and strategic leadership can be the determinant to whether certain organizations succeed or fail. There is a positive relationship between strategic planning and performance. Therefore, we can use the results and analyses from our interview and survey to best develop a solution to BlackBerry's challenges.



Solution

Our team has developed a solution for BlackBerry that will allow for substantial improvement in their planning and goal setting techniques, leading to more effective strategic execution and performance overall. BlackBerry has been experiencing organization change over the past few years, as certain external factors including technological advancements and the economy have changed handheld devices and consumer electronics preferences. This has led to significant internal changes, including strategic development and workplace structure adjustments. Organizations are built to support enduring values, stable strategies, and bureaucratic structures, not to change. Recent trends have challenged foundational assumptions and require firms to be able to adapt and do it quickly (Lawler & Worley, 2006).

Goals have a significant impact on employee behavior and performance, and can be ultimately linked to motivation. There are certain conditions that must be met to provide the most beneficial environment. Some of these characteristics include:

1. Specific;
2. Difficult but Attainable;
3. Accepted;
4. Feedback Provided on Goal Attainment;
5. Deadlines to Improve Effectiveness;
6. Learning Goal Oriented versus Performance Goal Oriented;
7. Group Goal-Setting versus Individual Goal-Setting.

(Lunenburg, 2011)

Our team has determined that the areas BlackBerry must focus on most are numbers 1, 4, and 7. These characteristics are what we determined are missing from the organization's current processes based on results of the interview and survey. First, specific goals allow organization members to perform at higher levels because they are often quantifiable and individuals can measure progress independently and adjust roles accordingly. Research reveals that even the smallest specific goals assist an organization achieve all other goals because attitudes are carried throughout other job tasks (Locke & Latham, 2012). BlackBerry can begin implementing this style of goals simply by being more descriptive and direct regarding what are the organization's goals and which are not. Secondly, there must be feedback provided to employees regularly to help achieve goals. Feedback is critical because it allows people to determine how well they are doing, and determine adjustments that need to be made for improvement. According to the survey, BlackBerry's Human Resources department is not doing a sufficient enough job at providing feedback at regular intervals. Adjustments should be made to this current process, where organizational members meet to achieve all components of this environment characteristic. When meeting, individuals should be required to set personal improvement goals based on the feedback, as this can determine how well an individual may respond to another person's feedback and most effectively accomplish this objective (Locke & Latham, 2012). Finally, BlackBerry must focus on group versus individual goal-setting. Organizations in recent years have shifted their work structures from more hierarchical and individual work to team-based structures. As BlackBerry transitioned from electronic devices to enterprise software, they were no exception to this trend. Research has shown that productivity can be increased when employees work towards a specific team goal rather than only individual goals (Lunenburg, 2011).

Another significant finding from the data collected, especially the survey, was a fault in the organization's communication. Communication is the foundational means to effectively set goals and plan (as detailed above). Within an organization as complex as BlackBerry, there can often be barriers that hinder the effectiveness of communication amongst individuals and teams. Ways to combat communication barriers include, using feedback, simplify language, actively listen, constrain emotions, and be aware of nonverbal cues. Feedback is crucial because a lot of problems occur because of miscommunication. This is less likely to happen with verbal and non

verbal feedback. Using simple language ensures the message is both received and understood in order to prevent mistakes or conflict. Along with simple language is actively listening to the message without making premature interpretations. Every person has emotions, good or bad, and they can cloud someone's judgment or communication. It is best to let strong emotions settle before communicating anything so that the message or goal is clear. Nonverbal cues are the most important to be aware of. Actions speak louder than words, which is why actions must complement the verbal messages (Robins, 2020).

If the plan outlined throughout is implemented at BlackBerry executives and associates alike will benefit. Low- and mid-level employees will see performance ratings increase, and C-suite executives will see their strategic visions more effectively executed. Communication, planning, and goal setting go hand-in-hand, and each must be adapted to the changed needs of BlackBerry in their post-device world. Each of these suggestions, however, must be clarified as long-term actions the organization can take over the next few years to implement. These characteristics are embedded into the culture, which can take many years and hard work to alter. However, if the right agents are placed within teams at BlackBerry, employees will become motivated and look forward to a more clearly defined organization and improved performance in enterprise software for many years to come.

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