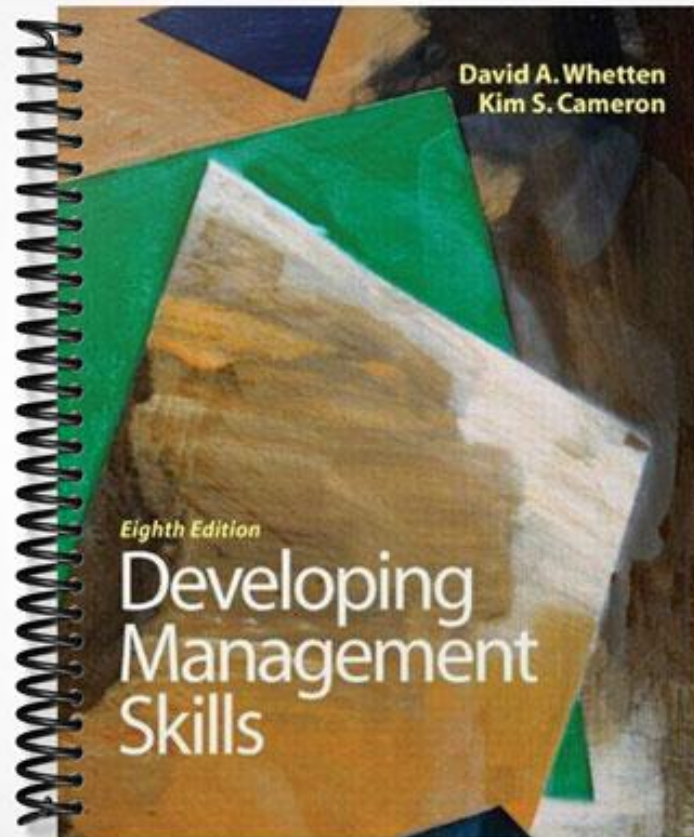# SOLUTIONS MANUAL

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Eighth Edition

Developing Management Skills

SECTION 2

TEACHING THE COURSE

INTRODUCTION CHAPTER

It is important to address any skepticism among your students regarding the merits of a "soft-skills" course and misconceptions they might have about the nature of the course. Undergraduates tend to be more skeptical than practicing managers. Shy students are often intimidated by the course, whereas the more gregarious students often assume that they'll ace this course without every cracking the book.

The key to helping students learn is to understand their learning needs as well as their learning readiness. Hence, we suggest you devote sometime during the first 1-3 class periods educating students about the general subject of management skills, providing them with a realistic preview of the course, and giving them a general management skills pre-assessment experience (What am I good at? What do I understand well? Where do I need to improve?).

Our advice is to allow as much time as *your* particular students need to develop both a taste and a thirst for what follows. We are confident that the materials in the Introduction chapter (plus several supplemental exercises in this section and a few extra PowerPoint slides) will help your students better understand the nature of this course and recognize its merit as an effective management development tool.

Following are a several ideas and suggestions for helping you get your course off on the right foot.

❐ Get to know your students personally and learn their names. Ask them to fill out information cards describing their backgrounds, majors, and management topics of most interest. Have them make name tents and bring them to class each day so you and the other students can get to know one another.

❐ Establish a supportive climate so students feel safe taking risks as they try to alter their behavior patterns. Encourage them to use the guidelines for supportive communication (Chapter 4).

❐ Explain the difference between a skills-oriented and traditional course approach. Create and display a chart showing the differences between alternative teacher and student roles. To highlight the differences between the two approaches, list the column and row titles from one or both of these charts on the board and ask students in small groups to fill in the cells. (Taken from Serey, T. T., & Verderber, K. S., 1988). Students and learners: A conceptual distinction to share during first class sessions. *Organizational Behavior Teaching Review,* **13,** 133–138.)

• Underscore the value of learning these particular management skills. This can be done in conjunction with the manager's exercise (at the end of this chapter), in which students learn firsthand from managers the value of various skills. Help students appreciate the value of these skills by showing them a feature film depicting managers in action. We have used *Missiles of October* (showing President Kennedy's cabinet responding to the Cuban missile crisis) with great success. (Schedule an evening or weekend showing.) Before showing a film of this

type, ask students to look for examples of the skills covered in the course. Use the course topics to organize the students' observations.

- To help students make the connection between skilled behavior and effective behavior, ask them to bring to class one-page descriptions of effective versus ineffective bosses for whom they have worked. These descriptions are generally good examples of principles taught throughout the book. For example, Table 5.2 in Chapter 5 (Gaining Power and Influence) of the book reporting results from the "derailed executives" study helps integrate students' comments on this topic. Distinguish between traits and behaviors and initiate a discussion about personal change. For example, "Would it be possible for someone on the worst list to move to the best list? If so, what would it take for this to happen?" The film, *Learning to Think Like a Manager*, from CRM McGraw-Hill Films illustrates several skills discussed in the text, as well as the process of poor managers becoming good managers. Stress that not all differences between managers are either good or bad. Many differences we observe have equally effective results. The Harvard cases "Fred Henderson" and "Renn Zaphiropoulos" (with the accompanying videotapes) are good portrayals of this point. Ask students which manager they would personally like working for the most. You can also discuss the types of jobs and businesses for which each manager would be best suited. This discussion leads naturally into encouraging students to adapt the behavioral guidelines in the book to their personality and application settings.

- Plan some type of "icebreaker" early in the term. One approach is to schedule a major management simulation during the first two weeks. We have used various large-scale organizational simulations with considerable success. Less elaborate, but equally effective, icebreakers are included at the end of this chapter. Of course it is useful to have students introduce themselves and tell a bit about their background. You might also consider asking them to name their favorite cereal, which is always a fun moment.

- Beginning with a simulation also serves as a general pretest that helps students who have had minimal practical business experience understand that being a manager is a taxing and often frustrating activity, requiring a great deal of interpersonal skill. It also provides a common experience that you can draw on throughout the remainder of the course. For example, when you discuss power, you could ask individuals placed in powerless positions to describe their feelings and the strategies they used to increase their power during the simulation. If you use a simulation to begin the course, consider repeating it as a culminating experience. Particularly if it is a complex and engaging simulation, students will enjoy discussing how their second performance differed from their first.

- Finally, early in the term help students learn what managers actually do day-to-day. Many students have little firsthand knowledge of what being a manager entails. For these individuals, one of the most useful outcomes of this course can be obtaining a "realistic job preview." This can result from discussions of the "Interviewing Managers" exercise, an in-class management simulation, and supplementary readings such as Mintzberg's "The Manager's Job: Folklore or Fact," (*Harvard Business Review*, 53, 49–61, 1975), (old, but gold) as well as thoughtful biographical accounts by successful executives. SSS Software can be used both as

an icebreaker and a way to expose students to the managerial role. On the first day, students discuss their personal responses to the e-mails in small groups.

MANAGEMENT CONCEPTS

I.   The critical role of management skills.

We are living in a period of extensive change and it is impossible to know the extent to which the current pace of change will continue. If the pace of change continues as it is today, the future will look very differently than today. Despite these changes, one constant is the set of skills that lie at the heart of good human relationships; freedom, dignity, trust, love, and honesty have long been the principles that comprise good relationships. Human relationships are perhaps even more important today than in the past, as they help us understand, manage, and cope with change.

Managers in organizations need healthy and productive work relationships and the skills in this book will help people develop these kinds of relationships. They will also help people develop personal management competencies; another key skill needed by managers.

II.   The importance of competent management.

There is a wide body of research that demonstrates the link between effective management and organizational performance. Well managed firms experience low turnover, high profits, productive employees, high long terms returns on investment, high rates of survival, low grievances, etc… Skilled managers enable effectively managed firms.

III.   The skills of effective managers

Several studies have sought out to identify the skills sets of effective managers. These studies usually fall short because instead of identifying "skills", they usually identify attributes, behaviors, orientations and strategies such as self-managed teams, training, and achievement-oriented management. While these important findings do not identify management skills, per se, they do point to the importance of skilled management.

IV.   Essential management skills.

Whetten and Cameron's research on management skills forms the foundation for this book. One study of 402 managers across several different industries identified the skills associated with effective management. These are listed in Table 1; Verbal communication, managing time, managing individual decisions, recognizing/defining/solving problems, motivating and influencing others, delegating, setting goals and articulating a vision, self-awareness, team building, and managing conflict. These skills are consistent with those found in others studies, such as those summarized in Table 2.

V. What are management skills?

The following dimensions differentiate management skills from managerial attributes; they are behavioral, controllable, developable, interrelated, and contradictory.

VI. Improving management skills?

Several studies show that people can learn how to become skilled managers. Formal education often focuses on providing academic knowledge, but this alone does not result in successful performance. In addition to formal knowledge, people need to develop skills to competently succeed in their endeavors. This is especially the case in managerial positions.

VII. An approach to skill development.

This book's approach to developing management skills combines both formal knowledge and practical application. The overall model is summarized in Table 3. It involves (1) assessing current skills, (2) learning skills, (3) analyzing skills, (4) practicing skills, and then (5) applying skills.

VIII. Leadership and management.

The skills in this book relate to both leadership and management. Figure 1 illustrates this relationship. Skills usually associated with effective management are those associated with the "hierarchy" and "market" quadrants, whereas the skills associated with effective leadership are those associated with the "clan" and "adhocracy" quadrants. As the dimensions of the model suggest, managerial skills are associated with stability and control whereas leadership skills are associated with change and flexibility. Both sets of skills, however, are associated with internal maintenance and external positioning. This interrelationship suggests that organizations need both sets of skills.

IX. Contents of the book.

The book is organized in three parts; Part 1 focuses on personal skills, Part 2 focuses on interpersonal skills, and Part 3 focuses on group skills. Figure 3 summarizes these parts and the specific chapters that fall within them.

The supplement chapters have information on three additional skills focusing on presentations, interviews, and meetings.

X. Organization of the book.

Table 4 shows how each chapter is organized. It begins with *skill assessments* and then provides the main body of content in the *skill learning* section. The *skill analysis* section provides cases and other materials so that students can see how the skills relate to

practice. The *skill practice* provides exercises to practice the skills and the *skill application* section provides assignments to apply the skills in everyday situations.

XI. Practice and application.

The authors urge students to practice and apply the materials learned in this book to their life outside of the classroom. The book is written based on this assumption. Incorporating new skills in one's routine life is crucial to the learning process. Otherwise, people will resort to, and rely on, their old habits and routines.

XII. Diversity and individual differences

Each chapter includes a discussion on how individual differences or cultural backgrounds may influence how these skills are perceived and used. This discussion is provided for the purpose of diagnosing differences, not managing them.

XIII. Summary

The book is intended to change its readers' behavior and to enable people to become more skilled in managing themselves and their relationships.

SUPPLEMENTARY MATERIAL

Diagnostic survey and exercises

Personal Assessment of Management Skills (PAMS)

The PAMS survey is included in the Introduction chapter. The Associates Version of PAMS is included at the end of this section.

Purpose: To identify the skill areas needing the most improvement as well as the areas of strength. Completed by the student at the very beginning of the course, the survey assesses all the critical management skills covered in the text. Subsections of PAMS appear in the first assessment survey of each chapter.

Procedure: Have the students reproduce as many copies as they need—at least two per student—of the Associates' Version of the PAMS. The Associates' Version of PAMS is worded so that others can rate the student's competency on each of the items. If you select this option, assign students to do the following:

1. Complete the PAMS instrument in the text yourself at the beginning of the course.

2. Select at least two other people who know you well—people you have worked with, who have observed you in work settings, or who can provide reasonable feedback on your skill performance.

3. Give an Associates' Version of the PAMS instrument to each of these other people, encouraging them to give their "best guess" for each item, even though they may not have observed you perform every behavior listed. Assure them their ratings will be anonymous.

4. Complete the scoring form in the Appendix of the text (comparing Self scores and average Associates' scores).

5. Identify significant gaps between Self and "Ideal," and between Self and Associates' ratings.

Teaching Tips

1. Some students may dismiss data lower than what they expect. Stress that the data is important input that provides some new insight, but they should not become discouraged because this is the time when they can most effectively, and safely, improve these critical skills.

2. On the other hand, some students who receive high scores from others may feel they have no room for improvement. Help them understand that practice is necessary to keep skills sharp and tuned.

3. The point of this questionnaire is to offer direction and motivation for improvement in the relatively safe environment of the class.

4. Point out that they should be as concerned, perhaps more concerned, about their strengths as their "weaknesses." Research suggests that successful managers—successful people—do better by building on their strengths than improving their weaknesses. [Marcus Buckingham and Donald Clifton (2001). *Now, Discover Your Strengths*. New York: The Free Press.]

Sample PAMS Discussion Questions

1. What management skills are most likely to facilitate the success of a top executive, a financial analyst, a brand manager, a hospital administrator, a strategic planning officer, an accounting department head, and so on? Should the skill profile change with different managerial positions? How about different managerial levels? Is there a core set of skills that is applicable to all positions?

2. Describe the most- and the least-effective manager you have known. On which skills were these managers especially gifted? On which were they less developed? Was anyone terrific at all managerial skills? Does everyone have weaknesses? Are some weaknesses more benign than others?

3. What did you learn about yourself that was new? What were the surprises? In what areas are you the strongest? In what areas are you in most need of improvement?

PERSONAL ASSESSMENT OF MANAGEMENT SKILLS (PAMS)
(ASSOCIATES VERSION)

In order to provide your colleague with feedback on his or her level of competence in management skills, please respond to the following statements using the rating scale below. Please rate his or her behavior as it is, not as you would like it to be. If this person has not engaged in a specific activity, answer according to how you think he or she would behave based on experience in similar activities. Be realistic; this instrument is designed to help your colleague improve his or her competencies. After you have completed the survey, please give it back to your colleague for scoring.

Rating Scale
1   Strongly disagree
2   Disagree
3   Slightly disagree
4   Slightly agree
5   Agree
6   Strongly agree

In regard to his/her level of self-knowledge:

_____ 1.   He/she seeks information about his/her strengths and weaknesses from others as a basis for self-improvement.

_____ 2.   In order to improve, he/she is willing to be self-disclosing to others (that is, to share my beliefs and feelings).

_____ 3.   He/she is aware of his/her preferred style in gathering information and making decisions.

_____ 4.   He/she understands how he/she copes with situations that are ambiguous and uncertain.

_____ 5.   He/she has a well-developed set of personal standards and principles that guide his/her behavior.

When faced with stressful or time-pressured situations:

_____ 6.   He/she uses effective time-management methods such as keeping track of time, making to-do lists, and prioritizing tasks.

_____ 7.   He/she reaffirms his/her priorities so that less important things don't drive out more important things.

_____ 8.   He/she maintains a program of regular exercise for fitness.

_____ 9. He/she maintains an open, trusting relationship with someone with whom he/she can share frustrations.

_____ 10. He/she knows and practices several temporary relaxation techniques such as deep breathing and muscle relaxation.

_____ 11. He/she maintains balance in life by pursuing a variety of interests outside of work.

When he/she approaches a typical, routine problem:

_____ 12. He/she states clearly and explicitly what the problem is. He/she avoids trying to solve it until it has been defined.

_____ 13. He/she generates more than one alternative solution to the problem, instead of identifying only one obvious solution.

_____ 14. He/she keeps steps in the problem-solving process distinct; that is, he/she defines the problem before proposing alternative solutions, and generates alternatives before selecting a single solution.

When faced with a complex or difficult problem that does not have an easy solution:

_____ 15. He/she defines problems in multiple ways. He/she isn't limited to just one problem definition.

_____ 16. He/she unfreezes his/her thinking by asking lots of questions about the nature of the problem before considering ways to solve it.

_____ 17. He/she thinks about the problem from both the left (logical) side of the brain and the right (intuitive) side of the brain.

_____ 18. He/she avoids selecting a solution until he/she has developed many possible alternatives.

_____ 19. He/she has specific techniques that are used to help develop creative and innovative solutions to problems.

When trying to foster more creativity and innovation among those with whom he/she works:

_____ 20. He/she makes sure there are divergent points of view represented or expressed in every complex problem-solving situation.

_____ 21. He/she acquires information from individuals outside the problem-solving group who will be affected by the decision, mainly to determine their preferences and expectations.

_____ 22. He/she provides recognition not only for those who come up with creative ideas (the idea champions) but also for those who support others' ideas (supporters) and who provide resources to implement them (orchestrators).

_____ 23. He/she encourages informed rule breaking in pursuit of creative solutions.

In situations where he/she has to provide negative feedback or offer corrective advice:

_____ 24. He/she helps others recognize and define their own problems when providing counsel.

_____ 25. He/she is clear about when he/she should coach someone and when he/she should provide counseling instead.

_____ 26. When he/she gives feedback to others, he/she avoids referring to personal characteristics and focuses in problems or solutions instead.

_____ 27. When he/she tries to correct someone's behavior, the relationship is strengthened.

_____ 28. He/she is descriptive in giving negative feedback to others. That is, he/she objectively describes events, their consequences, and feelings about them.

_____ 29. He/she takes responsibility for statements and points of view, for example, "I have decided" instead of "They have decided."

_____ 30. He/she identifies some area of agreement in a discussion with someone who has a different point of view.

_____ 31. He/she doesn't talk down to those who have less power or less information.

_____ 32. When discussing someone's problem, he/she responds with a reply that indicates understanding rather than advice.

In a situation where it is important to obtain more power:

_____ 33. He/she puts forth more effort and takes more initiative than expected at work.

_____ 34. He/she is continually upgrading his/her skills and knowledge.

_____ 35. He/she supports organizational ceremonial events and activities.

_____ 36. He/she forms a broad network of relationships with people throughout the organization at all levels.

_____ 37. In his/her work, he/she strives to generate new ideas, initiate new activities, and minimize routine tasks.

_____ 38. He/she sends personal notes to others when they accomplish something significant or when passing along important information to them.

_____ 39. He/she refuses to bargain with individuals who use high-pressure negotiation tactics.

_____ 40. He/she avoids using threats or demands to impose his/her will on others.

When another person needs to be motivated:

_____ 41. He/she determines if the person has the necessary resources and support to succeed in a task.

_____ 42. He/she uses a variety of rewards to reinforce exceptional performances.

_____ 43. He/she designs task assignments to make them interesting and challenging.

_____ 44. He/she makes sure the person gets timely feedback from those affected by task performance.

_____ 45. He/she helps the person establish performance goals that are challenging, specific, and time bound.

_____ 46. Only as a last resort does he/she attempt to reassign or release a poorly performing individual.

_____ 47. He/she disciplines when effort is below expectations and capabilities.

_____ 48. He/she makes sure that people feel fairly and equitably treated.

_____ 49. He/she provides immediate compliments and other forms of recognition for meaningful accomplishments.

When he/she sees someone doing something that needs correcting:

_____ 50. He/she avoids making personal accusations and attributing self-serving motives to the other person.

_____ 51. He/she encourages two-way interaction by inviting the respondent to express his or her perspective and to ask questions.

_____ 52. He/she makes a specific request, detailing a more acceptable option.

When someone complains about something he/she has done:

_____ 53. He/she shows genuine concern and interest, even when he/she disagrees.

_____ 54. He/she seeks additional information by asking questions that provide specific and descriptive information.

_____ 55. He/she asks the other person to suggest more acceptable behaviors.

When two people are in conflict and he/she is the mediator:

_____ 56. He/she does not take sides but remains neutral.

_____ 57. He/she helps the parties generate multiple alternatives.

_____ 58. He/she helps the parties find areas on which they agree.

In situations where he/she has an opportunity to empower others:

_____ 59. He/she helps people feel competent in their work by recognizing and celebrating their small successes.

_____ 60. He/she provides regular feedback and needed support.

_____ 61. He/she provides all the information that people need to accomplish their tasks.

_____ 62. He/she highlights the important impact that a person's work will have.

When delegating work to others:

_____ 63. He/she specifies clearly the results desired.

_____ 64. He/she specifies clearly the level of initiative wanted others to take (for example, wait for directions, do part of the task and then report, do the whole task and then report, etc.).

_____ 65. He/she allows participation by those accepting assignments regarding when and how work will be done.

_____ 66. He/she avoids upward delegation by asking people to recommend solutions, rather than merely asking for advice or answers, when a problem is encountered.

_____ 67. He/she follows up and maintains accountability for delegated tasks on a regular basis.

When he/she is in the role of leader in a team:

    _____   68.   He/she knows how to establish credibility and influence among team members.

    _____   69.   He/she is clear and consistent about what he/she wants to achieve.

    _____   70.   He/she builds a common base of agreement in the team before moving forward with task accomplishment.

    _____   71.   He/she articulates a clear, motivating vision of what the team can achieve along with specific short-term goals.

When he/she is in the role of team member:

    _____   72.   He/she knows a variety of ways to facilitate task accomplishment in the team.

    _____   73.   He/she knows a variety of ways to help build strong relationships and cohesion among team members.

When he/she desires to make my team perform well, regardless of whether he/she is a leader or member:

    _____   74.   He/she is knowledgeable about the different stages of team development experienced by most teams.

    _____   75.   He/she helps the team avoid groupthink by making sure that sufficient diversity of opinions is expressed in the team.

    _____   76.   He/she diagnoses and capitalizes on the team's core competencies, or unique strengths.

    _____   77.   He/she encourages the team to achieve dramatic breakthrough innovations as well as small continuous improvements.

When he/she is leading change:

    _____   78.   He/she knows how to unlock the positive energy in other people

    _____   79.   He/she usually emphasizes a higher purpose or meaning associated with the work I do.

    _____   90.   He/she expresses gratitude frequently and conspicuously, even for small acts.

    _____   81.   He/she keeps track of things that go right, not just things that go wrong.

_____ 82. He/she frequently gives other people more positive than negative feedback.

_____ 83. He/she communicates a vision in ways that capture people's hearts as well as their heads.

_____ 84. He/she knows how to get people to commit to their vision of positive change.

What Does It Take to Be an Effective Manager?

Purpose. To give students (especially those without managerial experience themselves) exposure to practicing managers.

Procedure. Students should interview three or more managers by themselves or in small groups. Give this assignment during the first week of the term or on a staggered schedule over the entire course. A class discussion of this assignment is a good way to begin the second week of the class, after you present your own introductory material and after discussing the assessment instrument. Sharing interview results usually makes for a lively class. Or you may intersperse several small group reports throughout the term, highlighting specific types of managers, having students share stories of special successes or failures from the managers, or focusing on certain skill clusters.

Considerations.

1. The critical management skills included in this book were initially generated from a study in which questions similar to those listed here were asked of over 400 practicing managers. We have articles reporting more than a dozen such studies, all identifying critical management skills. Table 2 in the text's Introduction summarizes some of them. Students can generate their own list of critical skills from this exercise.

2. You may wish to supplement the questions listed in the text with others of your own choosing, including current issues in management such as quality, layoffs, or customer focus, or feedback about the business school education or the curriculum.

3. You may wish to highlight differences among managers in different types of organizations, different functions, different hierarchical levels, different amounts of time in the organization, and so on.

4. Remember some of the stories students tell as they report on their interviews. Some will be useful as you teach different skill areas throughout the term. Students can also continue to tell their own stories to illustrate the skill topics throughout the term.

SSS Software

This is an excellent case for introducing students to a wide variety of management issues and challenges. It helps them appreciate just how difficult it is to be a truly effective manager.

We suggest that you assign the exercise as homework. Have the students bring in written responses to all six e-mails, six voice mail messages, and five e-mail messages. It should take at least one class period to discuss all of the communications. We suggest that you divide the class into groups of five or six students and give them about five minutes to arrive at a consensus decision (they will need more time at the beginning and less time toward the end). Rotate among the members responsibility for conducting the discussion and reporting the group's decision. Following the groups' deliberations on a single e-mail, call on each representative to quickly summarize the group's response. You should

not allow these reports to be critiqued as they are given, but it is a good idea for you to point out the salient similarities and differences as you go along.

This discussion can be used to generate a list of "Management Principles." You should keep a running list on the board or on a flip chart. Several of these principles are illustrated following. Use the chapter titles shown in the following list to stimulate interest in learning more about these principles as the course unfolds. Following your commentary on the discussion of a memo, phone mail message, or e-mail, begin the process again with the next piece of communication.

Management Principles Illustrated in This Exercise

A variety of skills (defined next) are required to effectively manage the issues raised in this in-basket exercise. Following the discussion of each item is a list of the skills that will enhance managers' ability to respond effectively to the issues raised by the item.

Skills Definitions

Career facilitation:
Facilitating the career of others (or one's own career) by identifying assignments, projects, and jobs that are appropriate given the skill level, career objectives, and level of readiness of an employee.

Conflict management:
Managing interpersonal or task conflicts between individuals or groups by identifying underlying issues (as contrasted with stated positions) and implementing an appropriate conflict resolution strategy (e.g., collaboration, compromise, forcing).

Cross-cultural awareness:
Awareness of how cultural differences may affect how people or different cultures work together.

Decision making:
Implementing the most appropriate decision-making strategy given situational constraints (e.g., Vroom-Yetton model). Evaluating when sufficient information is available to make a high-quality decision (e.g., as contrasted with making a premature decision).

Establishing priorities:
Determining the activity or project to which resources (e.g., time, staff, funds) should be directed, given competing demands for limited resources.

Ethical decision making:
Considering the ethical implications of your behavior and using ethical standards to guide decision making. Communicating the value of ethical behavior to organizational members and constituents.

Gaining power and empowerment:
Acquiring power and sharing power with others (e.g., subordinates) so that they may effectively complete important work and attain personal and organizational objectives.

Information analysis:
Accurately analyzing and interpreting information or data to support decision making and problem solving.

Information gathering:
Recognizing when additional information is required to enable effective decision making and problem solving. Identifying the type of information that is required and the source(s) from which information can best be acquired.

Integrating information:
Integrating information from several different items (e.g., in the in-basket exercise) to identify underlying patterns or issues that could not be readily identified by attending only to information presented in a single item.

Managing diversity:
Effectively managing employees who have different background (e.g., race, sex, education, age, sexual orientation, marital, or family situation) to make optimal use of their unique abilities, interests, and dispositions.

Motivating others:
Energizing employees to accept, work toward, and remain committed to difficult organizational goals by identifying and removing obstacles to goal achievement and reinforcing successful behavior and outcomes.

Problem solving:
Effectively using rational and creative problem-solving procedures to arrive at optimal (as contrasted with merely satisfactory) solutions.

Stress management:
Identifying symptoms of stress and burnout in other employees (and oneself) and implementing effective strategies to eliminate, reduce, or cope with stresses.

Supportive communication:
Using the principles of supportive communication (including listening, reflecting, and probing) to counsel and coach employees. Effectively planning and conducting one-on-one or group meetings.

Team leadership:
Forming, managing and coordinating teams to ensure the appropriate blend of technical, interpersonal, and problem-solving skills can be coordinated to efficiently achieve organizational goals.

Discussion of In-Basket Exercise Items

Introductory Material. The introduction provides background information about the company and its market, financial status, and employment profile. Students learn about their role and responsibilities as Chris Perillo, newly appointed Vice President of Operations for Health and Financial Services. The stage is set for Chris' role to begin with a 90-minute period to review and respond to in-basket, voice mail, and e-mail communications.

The importance of international projects is noteworthy. Also, because competition is increasing, and rate of growth for revenue and net income are declining, Chris Perillo will have to keep a close eye on expenses and cannot try to solve all problems merely by adding additional staff or resources to the budget.

The Employee Classification Report also contains some pertinent data. For example, white employees comprise 90% of all management-level positions, but comprise only 45% of all technical/professional positions. Note especially the decline in the proportion of Asian employees; they comprise 28% of the technical professional staff but only 4% of the management staff. Also, the proportion of women in the workforce declines sharply as organizational level increases (i.e., from 80% to 38% to 21% to 8%).

Item 1. No response to Roger Steiner is needed, but note that Chris Perillo is responsible for all staffing (as well as technical and financial issues). Therefore, Chris cannot merely refer such issues to Sharon Shapiro (VP of Human Resources). Chris may want to schedule an introductory meeting with the group managers. The agenda could include:

- ❐ Introduce staff
- ❐ Inform them of upcoming trip to Paris
- ❐ Get a brief report on the status of their current projects, including timetables
- ❐ Mention the Kenya project
- ❐ Plan for regularly scheduled meetings in the future
- ❐ Encourage them to keep up the good work
- ❐ Let them know "the door is always open," and you look forward to working with them
- ❐ Plus any other issues Chris wants to discuss based on other items in the in-basket exercise

Required Skills: Information analysis, information gathering, supportive communication, team leadership.

Item 2. Perhaps it would be a good idea to ask Hal Harris (VP of Public Relations) to put together a press release to counter the negative connotations about SSS Software in the *Los Angeles Times* article (e.g., "loss of key staff to a competitor can often create serious problems..."). For example, the *LA Times* article mentions the international expertise of Janice Ramos. Any press release by SSS Software could mention Chris Perillo's international experience.

Chris Perillo might also decide to meet or call all key customers after returning from Paris, especially because Michael Grant is contacting some of Chris' customers (see item #11). While in Paris, Chris's staff can prepare a status report about each customer.

Meeting or calling these customers would provide Chris with an opportunity to assure them that SSS Software will continue to meet their needs. (Note that it would probably not be a good idea to mention the *LA Times* article when speaking to customers. Chris should not assume that all customers have read the article, and mentioning the article and the concerns it raises may merely raise doubts in the minds of some customers who otherwise were not worried.)

Also, Chris should become familiar with what Michael Grant was doing in the last six months. What clients, projects, meetings, or overseas involvement is pending?

Required Skills: Establishing priorities, information gathering, supportive communication.

Item 3. Chris might send a voice mail to Paula (Executive Assistant of Roger Steiner, the CEO) and thank her for providing this information.

There are several ways that Chris might interpret this e-mail. For example, the information it contains may be limited or biased. Therefore, Chris might also request additional (more objective) information from other sources about these managers, such as asking for recent performance appraisals, work samples, length of service, educational backgrounds, recent training, prior work histories both in and outside of SSS, or customer feedback about their work. Such information will help Chris learn more about these mangers, and it will also help Chris judge the accuracy and objectivity of the information Paula included in this brief report.

Note that is seems inappropriate for Paula to have provided some of the information (e.g., race, marital status) contained in this e-mail (and doing so may raise some legal concerns). Chris will need to learn more about Paula. For example, is she trusted and relied on by Roger? Does she have any hidden agenda or bias that she may be pushing?

Chris will need to move quickly to fill the position left vacant by the resignation of Janice Ramon (i.e., replacing the skills she had in the area of international software development and integration). In doing so, Chris will need to be sensitive to EEO issues, including the race/sex profile concerns that are evident from the Employee Classification Report.

Paula's final paragraph (about building a cohesive team) raises several questions. For example, how should Chris deal with Leo (who was apparently favored by Michael Grant)? Must Leo be thinking of moving with Michael to Universal Business Solutions? (Because Leo seems to be a strong manager, SSS Software probably does not want to lose him.) Or, could Leo be angry with Michael for leaving SSS Software and leaving Leo behind? Or might Leo still have loyalty to Michael, and therefore be difficult to assimilate into a cohesive team? Also, Chris may wonder if Michael had an in-group and out-group of subordinates (e.g., vertical dyad theory of leadership). How will Chris deal with these issues?

Required Skills: Career facilitation, information analysis, information gathering, integrating information, team leadership.

Item 4. This e-mail raises an ethical (and perhaps legal) issue.

Chris again needs more information. How did Wanda Manners (Group 2 manager) learn about the unethical behavior of software developers from Group 5? If Wanda knows, how many others know? Does Mark McIntyre know? Is it really unlikely that First National Investment or University Business Solution will find out (remember that Michael Grant is now working for UBS)? The use of the word *borrowed* seems merely to be a polite euphemism for stealing, does this situation expose SSS Software to legal risk? Does SSS Software (like many firms) have a code of business ethics that has been widely circulated

and discussed with employees? Is this an isolated incident? Was there anything about the climate of the organization, work group, or project that contributed to this problem (e.g., unreasonable pressure to complete the project under budget)? Or did employees steal the application programs because they lacked the technical expertise to write such programs themselves? If so, a long-term solution to this issue will need to include an examination of training needs for the technical/professional staff.

In view of the information in this e-mail, it is not surprising that the project was completed under budget. Chris' response to this situation will send a strong message about expectations concerning ethical behavior at SSS Software. On the one hand, it appears that SSS Software could risk damaging its public image and disappointing the customer (thereby risking other "substantial projects" from the customer) if it acknowledges its improper behavior in this matter. On the other hand, the company also risks serious damage to its public image and customer relationships if this improper behavior is discovered by others.

Moreover, Chris should probably consult with the company's attorneys and gather additional information by talking to Wanda, Mark McIntyre, and others. If improper behavior has occurred, it needs to be promptly acknowledged and corrected. (Note that shredding the e-mail would constitute very improper behavior.) Also, any SSS Software employees involved in such improper behavior need to be disciplined. Taking such action will send a clear message that the company expects the highest level of ethical behavior from its employees and will not tolerate unethical behavior.

Chris should let Roger know about this issue before leaving for Paris (e.g., "would like to meet with you to discuss a confidential matter that we will probably want to refer to our attorneys"). It is important to let Roger know about this issue in case things "blow up" while Chris is in Paris. Chris should not merely "dump the problem in Roger's lap." Instead, Chris should tell Roger the steps he or she will be taking to investigate and resolve the issue (e.g., What would it cost to redo the work?).

Required Skills: Decision making, establishing priorities, ethical decision making, information analysis, information gathering, problem solving, team leadership.

Items 5 and 11. Item #11 is clearly a priority item. Westside Hospital is obviously an important customer ("two large million dollar projects") who needs "to move quickly" to get some work done. Michael Grant has contacted Westside Hospital and offered to have Universal Business Solutions do the work. This is a customer who SSS Software does not want to lose and therefore wants to respond promptly to their request. However, Chu Hung Woo and Elise Soto (specifically requested by Westside Hospital) have also been asked by Paula Sprague (see item #5) to help out on the C.A.R.E. project (i.e., an important project given that Roger Steiner, CEO, has promised timely help to C.A.R.E.). How should Chris deal with this apparent conflict?

First, Chris needs to contact the appropriate group manager to determine if Elise, Harris, and Chu Hung are available to help Westside Hospital. (Note that in item #5, Paula appears to have gone directly to Elise and Chu Hung without checking with their group manager. It is important for Chris to respect the role of the group manager.) It is also noteworthy that neither C.A.R.E. nor Roger Steiner specifically requested the help of Elise and Chu Hung. It is therefore possible that Elise and Chu Hung could be assigned to

handle the Westside Hospital work, and other technical/professional staff could be identified to work on the C.A.R.E. project.

Chris might promptly call Lorraine Adams. For example: "Thanks for the call, Lorraine. First, let me apologize that you were notified about my new position through the *LA Times*. We should have let you know before you read it in the paper. Second, I sincerely appreciate your confidence in us. I will try to resolve your problem as soon as possible. I will speak with the people you are requesting and get back to you by the end of the day."

Chris might also send a voice mail to Roger Steiner to let him know that Michael Grant is now soliciting SSS accounts. Of course, it is important for Chris to deal promptly with the Westside Hospital situation. But Chris should not dismiss the importance of the C.A.R.E. project. Roger Steiner has committed SSS Software to provide the timely help that C.A.R.E. needs, even though C.A.R.E. is not a paying customer. Thus, Chris needs to take the initiative to make certain that C.A.R.E.'s (and Roger's) needs are met, as well as meeting the needs of Westside Hospital.

Although there may be concern about the appropriateness of Paula Sprague contacting Woo and Soto herself (rather than first contacting their supervisor about their availability), Chris should also not dismiss Paula by viewing her as merely a secretary. Paula is Roger Steiner's Executive Assistant. As such, she may play an important role as a "gatekeeper" for Roger, and Roger trusted Paula enough to ask her to "line up people" to work on C.A.R.E.'s accounting system.

In view of this, Chris needs to explain to Paula the importance of meeting Westside Hospital's needs and honoring their specific request for Elise and Chu Hung. Chris can offer to help Paula find other staff who are capable and available to help C.A.R.E., or Chris can ask Paula to speak with the group manager to determine who else in the group is capable and available. (If staff availability is especially limited, perhaps Elise could be sent to Westside and Chu Hung could be sent to C.A.R.E.)

Note also that this is the second situation (see item #3) in which there is concern about the appropriateness of Paula Sprague's behavior.

Required Skills: Career facilitation, conflict management, establishing priorities, integrating information, managing diversity, supportive communication.

Item 6. In this e-mail, Chris learns that an approaching deadline of November 5 (remember, today is Monday, October 18) for the Halstrom project is in jeopardy due to problems and conflict among group members. Harry, a group member, tells Chris in this confidential e-mail that the problem centers on John Small (i.e., the same John Small who made the sexual joke noted in item #16) who is apparently having a relationship with Mala, one of the team members. Harry notes that Mala's background is especially valuable for the project. But Harry also states that two group members, Kim and Fred, do not want to work with Mala. Commitment and morale have declined. Harry is proposing that the team will complete the project while Mala is on vacation. The e-mail certainly raises another question about the behavior of John Small. Is John's relationship with Mala interfering with the group's work? Is it not risky for the group to finish the project during Mala's absence, given that Mala has valuable expertise concerning the project? (Thus, it would appear unwise to reinforce Kim and Fred's request by allowing them to

not work with Mala.) Research tells us that the most effective groups are those that recognize and use the relevant expertise of their members. Failing to use Mala's expertise may therefore hurt the group's effectiveness. Moreover, task conflict among group members can be healthy if it encourages a thorough evaluation of different approaches and alternatives. However, the interpersonal conflict experienced by this group is clearly counterproductive. Chris needs to help the group deal with the interpersonal conflict, while encouraging the group to explore all viable alternatives and make optimal use of the expertise of its members (including Mala).

Note also how work-family issues (in this case, child care needs) may also be limiting the group's performance.

Given the approaching deadline for the group's work, Chris will probably want to meet with Harry before leaving for Paris and gather some additional information (perhaps also by speaking with other group member and John Small). However, Chris should not violate Harry's trust (the e-mail was labeled "personal and confidential").

Chris may decide to ask Harry to meet directly with John Small and offer some guidance to Harry about how to do so effectively.

John Small certainly needs to be made aware of the effect that his support of Mala's ideas is having on the group's morale and performance. John needs to understand the many difficulties that can be caused by relationships in the workplace. For example, might some perceive John's support for Mala's ideas (see also item #14) as merely a reflection of John's bias or favoritism? What would happen if their relationship ended and John's treatment of her constituted sexual harassment?

A number of possibilities may be explored. Can the November 5 deadline be extended without serious consequences? To answer this, Chris needs more information about the Halstrom project. (Note from item #3, that John "has had some trouble keeping his people on schedule.") Extending the deadline would provide time to help the group learn and implement some conflict management strategies (e.g., see the chapter on conflict management in the Whetten and Cameron text). Perhaps someone with group facilitation skills could be brought in to help the group manage its conflict and develop more-effective group processes.

Chris might also benefit by separating short-term issues (satisfying the customer) from longer-term issues (e.g., building a more cohesive team and evaluating John's suitability to create or lead such a team).

Note also that Chris must make some decisions about this issue now, because there will be too little time to act if Chris waits until returning from Paris.

Required Skills: Career facilitation, conflict management, decision making, establishing priorities, ethical decision making, gaining power and empowerment, information analysis, information gathering, integrating information, motivating others, problem solving, supportive communication, team leadership.

Items 7 and 13. Chris probably wonders why Jose sent the e-mail in item #13 to Michael Grant rather than Jose's Group 1 supervisor (Robert Miller). For example, did Michael

Grant routinely get involved in problems faced by Miller's staff (and if so, why)? Did Jose feel more comfortable going to Grant than to Miller (and if so, why)? Did Jose think that Michael Grant should deal with this issue because Grant had a good working relationship with Jim Bishop from United Hospitals?

There is not enough information to know who (if anyone) is at fault here. Was the customer (e.g., Controller) making unreasonable demands? Might there be some stereotyping of Jose by people at United Hospitals? Was Jose insufficiently concerned with the customer's needs? Is Jose experiencing job burnout ("long hours," "stretched too thin"), and if so, what should SSS Software do to help?

Although one might initially be inclined to simply refer this problem to Robert Miller (e.g., requesting that Miller talk to Jose and Bishop, and then provide a prompt status report to Chris), this is probably not an optimal response in view of item #7.

Item #7 suggests that Jose's problem with United Hospitals is relatively recent (thereby suggesting that this is not a chronic problem of ability or motivation). It also raises the suspicion that Jose is experiencing some job burnout ("seemed distant and on edge in conversations," "does not seem to be getting much accomplished," "defensive and not entirely in control of his emotions").

Clearly, the customer (Jim Bishop) wanted to talk to Michael Grant. It would therefore be inappropriate for Chris Perillo to delegate this matter to Miller. Doing so may hurt the firm's relationship with United Hospitals and send a bad message to staff that Chris does not see customer concerns as being a high priority. Therefore, Chris should call Jim Bishop immediately (not after Chris returns from Paris). Before calling Bishop, Chris may want to speak with Miller to see if Miller and Bishop have talked, and to determine if Miller is aware of the problem. When talking to Miller, Chris can focus on Bishop's call to Chris—there is little to be gained at this point by mentioning Jose's e-mail to Michael Grant (at least without first getting Jose's approval to do so first).

Chris will also need to focus on a way to get Miller involved if similar situations occur in the future. That is, Chris needs to encourage managers to resolve these issues at the lowest feasible level of the organization.

Chris should call Jim Bishop: "Jim, this is Chris Perillo. I recently took over Michael Grant's position at SSS Software. I am sorry to hear that we have hit a few bumps in your project. I have scheduled a meeting with Jose and his group manager and I will call you tomorrow to arrange an appointment to address these issues. Let me assure you that we will do whatever is necessary to ensure you are completely satisfied with our work."

Required Skills: Information gathering, managing diversity, stress management, supportive communication.

Item 8. Why is Armad Mark going to Michael Grant with these problems instead of trying to solve them himself? Is Armad the kind of employee who brings problems (as opposed to thoughtful analysis and alternative solution) to the boss? Or did Michael Grant discourage independent thinking and behavior from his staff? Or does Armad feel that he cannot obtain the resources required to address the problem at his level?

Chris clearly needs more data (information). How long are the delays? How often are technicians unable to solve the customer's problem? What kinds of problems are the technicians unable to solve? Could this be corrected with additional training? How many complaints have we received concerning rude service? How does this data compare to the behavior and performance of our competitors? How understaffed are we?

Is there a system to gather this kind of data and monitor customer satisfaction?

Remember that Armad delivered this message to Michael Grant's (not Chris') voice mail. Chris needs to take account of this when approaching Armad about this issue.

Chris can ask Armad to gather the data Chris wants while Chris is in Paris and schedule time to meet with Armad immediately after Chris returns from his trip. Armad should be expected to gather and review relevant data and prepare alternative solutions and recommendations (accompanied by information about any financial or other resources needed).

Note that Chris understands the priority of this customer service problem (and its implications for customer satisfaction and retention), but will not act without getting the information necessary to make an optimal decision. Chris also wants to establish expectations among his staff that they should not merely bring problems to him. Instead, they should gather relevant data and information and come prepared with thoughtful analysis of alternative solutions. Also, Chris needs to encourage Armad to take greater independent action by appropriately delegating authority and responsibility to Armad.

Note that Chris should not simply initially assume that the problems of the technical services phone line can be solved merely by providing additional funds or staff. For example, sufficient dollars may be available for training; however, the training may not be adequately preparing technicians to handle all customer problems.

Armad's e-mail also raises questions about the climate for service quality at SSS Software. Also, it raises some stress management and work-family (bringing children to work) issues.

Armad's last comment ("we're feeling a lot of stress here") and the tone of this voice mail message suggest that Armad may want to vent his frustrations. Chris may want to listen to his problems and offer support.

This child care issue may also be of concern. Does the company (or should the company) offer support for child care?

Required Skills: Establishing priorities, gaining power and empowerment, information gathering, managing diversity, motivating others, problem solving, stress management, supportive communication.

Item 9. This voice mail from Pat, an employee who Chris has mentored, is not a high-priority item. For example, Chris might simply call Pat after returning from Paris and set up a lunch meeting when things have settled down a bit in Chris' new job. Also, this item might prompt Chris to wonder whether there are any mentoring programs for minority or female employees (e.g., technical/professional staff) at SSS Software. Note that

employees from these groups appear to be underrepresented at the management and executive levels of SSS Software. Of course, any mentoring program needs to operate in such a way that it avoids the appearance of showing unreasonable favoritism to some employees but not others.

Required Skills: Career facilitation, establishing priorities, managing diversity.

Items 10 and 16. In the item #10 voice mail, Bob Miller tells Chris that John's joke is "being blown out of proportion" and that "we all know this is a good place for both men and women to work." Bob also asks Chris to call him if Chris wants to "chat" about this.

Chris should not let this item go without a thoughtful response. For example, Chris should probably tell Bob that he views any sexual jokes as clearly inappropriate and unacceptable. Chris needs to send a strong message that such behavior will not be tolerated in the organization. Stated simply, Chris needs to make it clear that he or she views this situation as serious. Moreover, this is certainly not a topic about which to "chat" casually.

Also, the Employee Classification Report and item #8 both suggest that women and minorities may perceive a glass ceiling at SSS Software. And the information in item #6 suggests that everyone does not share Bob Miller's view that "this is a good place for both men and women to work."

It is certainly worth trying to learn why the reaction to this inappropriate joke seems to be rather severe (e.g., as noted in item #16, "quite a few women have been very upset and have met informally to talk about it," "decided to call a meeting of all people concerned about this kind of behavior throughout the firm"). How do women perceive the work climate at SSS Software? Does the climate support diverse perspectives and backgrounds? Is there any evidence of tension between males and females?

Note also that John Small is a supervisor (Group #6 Manager) reporting to Chris Perillo. As such, John Small may be legally viewed as an agent of the company, and this kind of behavior could expose the company to charges of sexual harassment (i.e., based on a hostile environment rather than quid pro quo harassment). It is especially troubling because many employees, including Chris Perillo and Sharon Shapiro, know of the behavior. Also, the tone of the letter suggests that this may not be an isolated incident. Moreover, it would seem inappropriate for Chris to merely assume that Sharon Shapiro should and will deal with the situation.

Chris should determine whether the company has a widely circulated policy against sexual harassment and a specific grievance policy to deal with such issues. Given the visibility and serious nature of the situation, it may also be worthwhile to suggest that advice be obtained from the company's attorney.

Chris may also ask Sharon Shapiro if it would be appropriate for Chris to attend the meeting that some women are planning concerning this issue. Attending the meeting may give Chris an opportunity to express concern about the situation (i.e., John Small's inappropriate joke) and to send a strong message that sexual harassment will not be tolerated. Also, Chris may be able to learn more about any underlying problems that may have been exacerbated by this incident.

Finally, an investigation of John Small's behavior (as well as appropriate remedial or disciplinary action if called for) should be considered. Chris will need to meet with John Small and (a) tell him that his behavior (i.e., sexual job) is offensive and unacceptable, and (b) communicate Chris' expectations concerning John's future conduct. Chris may want to discuss whether an apology from John to the offended parties would be appropriate at this time. Chris should also document the meeting and send such documentation to Sharon Shapiro.

Note that Chris needs to consider his or her response to this issue (and other issues) on two levels. On one level, Chris is responding to this specific incident. On another level, Chris's response sends a message about his or her values and expectations and about the kind of climate Chris wants to create in the organization.

Required Skills: Decision making, information analysis, information gathering, integrating information, managing diversity, supportive communication, team leadership.

Item 12. This is another example of work and family issues faced by SSS Software (see also items #6 and #8). Chris needs to know if SSS Software has a policy that deals with family leave issues. Chris should also be familiar with the provisions of the Family Medical Leave Act of 1993. The Act allows workers to take up to 12 weeks of unpaid leave in and 12-month period for the birth of a child or adoption or to care for a child, spouse, or parent with a serious health condition (or for the worker's own serious health condition). The Act also provides that the employee must be returned to his or her old job or an equivalent position on returning to work.

Although not a high-priority item, Chris can arrange to meet with Roosevelt after completing the Paris trip. Clearly, Chris could use some more information here. What was Roosevelt's performance like before the paternity leave? Has the absence of a group manager (created by Janice Ramos' resignation) contributed to this problem?

This item also raises issues about how Chris will select a replacement for Janice Ramos. It seems that both Mala and Roosevelt are interested in the position. Are other internal candidates also interested? What knowledge, skills, abilities, and other characteristics are required to perform the job effectively? Has a job analysis been conducted? Are there valid procedures in place to screen candidates for such positions? To what extent should EEO or affirmative action concerns play a role in the decision? Note the relatively low proportion of women and minorities in such positions.

Chris probably wants to convey several messages. First, Chris is accessible to staff (especially in the absence of a group manager). Second, employees should not perceive that taking a leave (that is consistent with the law and company policy) will hurt their career. If employees develop such an impression, it will hurt the company's image as an employer concerned about work and family issues. This in turn, can hurt the company's ability to attract and retain employees, especially as such issues are becoming increasingly important to many workers.

Required Skills: Career facilitation, establishing priorities, integrating information, managing diversity, supportive communication.

Item 14. This item is clearly related to several other items (e.g., item #6). Chris has learned that John Small is supporting Mala for the Ramos vacancy, and Roosevelt Moore is also interested in the position. Chris will need to determine Mala's objective qualifications for the job, given that John Small's opinion of Mala may be biased due to their relationship.

Chris should be candid with John about the concerns raised by John's relationship with Mala. These concerns will also need to be addressed when Chris talks with John about the problems with the Halstrom project (item #6).

Other issues related to filling this position are discussed above under item #12.

Required Skills: Career facilitation, integrating information, managing diversity, supportive communication.

Item 15. Although the team of four managers will not embark on their 10-month visit to Kenya for at least 6 months, this item deserves immediate attention. Item #3 contains some background information (e.g., job performance, and international experience) of Chris's direct reports. Of course, Chris should also consider whether there are staff in other parts of SSS Software who may be suitable for this assignment.

Chris will need to consider many issues when putting together a team for the Kenya project. For example, the most common cause of failure (i.e., premature return from the overseas assignment) among U.S. expatriate managers is adjustment problems encountered by the employee's family to the overseas assignment. Expatriate failure is unusually very expensive in terms of direct (salary, training, relocation) and indirect (lost market share, problems with customers or the host government) costs. Also, international assignment often require the company to become involved with issues like health care, children's education, and housing in overseas assignments. Travel arrangements, tax equalization policies, obtaining required visas, and compensation issues are also often complex. These issues, coupled with the need for cultural (and perhaps language) training for employees and their families, require considerable time and planning.

Chris will probably want to tell the organization about the Kenya project and ask employees to consider their level of interest in such an assignment. It may however be unwise to ask for volunteers at this point. First, Chris probably cannot provide sufficient information for employees to make an intelligent choice about accepting such an assignment. Second, Chris does not know much about the skills that will be required for success on the project.

A number of Chris's employees have some international experience (e.g., Wanda Manners, Mark McIntyre), but Chris will need to put together a team that has the right mix of technical skills, as well as having the ability to adjust to and function effectively in a different culture for a relatively long assignment. It will be important to select people who can work effectively with each other for an extended period of time. That is, team effectiveness is likely to be critical to success.

It is also worth remembering that an employee's prior success on an overseas assignment in one country or culture (e.g., Germany) does not necessarily ensure that employee's success in another overseas location and culture (e.g., Kenya). Also, characteristics that

contribute to an employee's success in a domestic assignment may be liabilities in another culture. For example, an aggressive style may be helpful in some domestic settings and assignments, but may be viewed as inappropriate or offensive in some other cultures.

Also, Chris will need to arrange for employees' families to get an in-depth overview of how such an assignment would affect their lives. Doing so will help employees and their families to make better decisions about whether to accept such an assignment.
Chris should also be aware that the skills to work on this assignment may be an important consideration when selecting a replacement for Janice Ramos. (Remember from item #2 that Janice had special expertise in the area of international software development and integration.)

It will be useful for Chris to contact people in SSS Software who can begin to address many of the issues outlined and gather information Chris will want to provide to the staff after returning from the Paris trip. Clearly, Chris needs more information on the Kenya project before he or she will be able to select the right people for the assignment. For example, Chris will need to know more about issues such as the political climate, living conditions, customs, and language. An overview of the contract will also be important (e.g., key contacts, hardware and software issues, systems documentation, needs assessments).

Finally, it is important to note that this assignment may require four of Chris's eight group managers to be overseas for 10 months. How will this deployment of resources affect other projects? Will Chris need to acquire temporary (contingent) employees to address this problem? How can the impact on other projects be minimized?

Required Skills: Career facilitation, cross-cultural awareness, establishing priorities, information gathering, integrating information, team leadership.

Item 17. Because Chris is responsible for staffing issues in his or her department, this report should be carefully attended to. Although the total absolute number of hires and promotions in this report is rather small, the promotion and hiring rates for women and minority employees raise some concerns. For example, 88% of the promotions to management-level were white employees, whereas (based on the employee classification report), only 45% of the technical/professional staff was white. Stated differently, white candidates (and males) seem to be promoted at a disproportionately high rate. Here again, Chris should seek more information. For example, what have the hiring and promotion figures looked like in previous years (i.e., is this data unusual or is it consistent with a long-standing trend)? What are the figures in Chris's organization?

Are these figures enough to suggest disparate impact against minorities to the Equal Employment Opportunity Commission (EEOC) or the Office of Federal Contract Compliance Programs (OFCCP)? Note that, because it has 15 or more employees, SSS Software is subject to regulation by the EEOC concerning compliance with Title VII of the 1964 Civil Rights Act. Generally, disparate impact against minorities or women requires the employer to demonstrate that its hiring and promotion procedures (and criteria) are clearly job related. This is very difficult to do when a company uses informal and subjective procedures for making hiring and promotion decisions.

Also note that SSS Software has a number of government clients (see the introduction), therefore the entire company is probably required to develop an affirmative action plan, and this plan may be reviewed by the OFCCP. The OFCCP is usually especially interested in a company's progress at increasing the amount of minority and female employees in parts of the organization where such employees are underrepresented.

Required Skills: Career facilitation, information analysis, information gathering, integrating information, managing diversity.

Summary. This in-basket exercise requires Chris to use a number of management skills. Chris needs to distinguish priority items (those that are both urgent and important) from items of lower priority (e.g., items that are important but not urgent). Chris's responses are designed to emphasize key values (e.g., ethical behavior) and expectations. Chris wants staff to not merely bring their problems, but also to bring relevant data and careful analysis of alternative solutions. Chris also avoids jumping to premature conclusions, but is sensitive to underlying factors (e.g., EEO, climate for diversity, work and family issues, job burnout) that may be contributing to problems. Chris wants to be accessible to staff while avoiding any favoritism and empowering group managers to deal with issues (e.g., technical services phone line). Chris must also be knowledgeable concerning legal issues (e.g., disparate impact, sexual harassment, family leave) and be skilled in managing conflict (between employees or between competing demand for resources). And Chris must be familiar with the many issues found in managing international work that are not usually present in domestic operations.

SSS Software Self-Evaluation Exercise

The SSS Software in-basket exercise can be a helpful tool for diagnosing your strengths and limitations as a manager. A variety of skills (defined following) are required to effectively manage the issues raised in this in-basket exercise.

Directions

First, read the skill definitions provided. Then review your responses to each of the items in the in-basket exercise. Consider the extent to which your response effectively addressed the issues discussed by the instructor and summarized in the handout.

Second, evaluate the extent to which your responses demonstrated each of the skills listed. Following each skill definition is a list of the in-basket items that require use of the skill. Rate your effectiveness using the 1 to 5 rating scale that is provided. Cite specific evidence from your responses to support your evaluations.

Finally, review your self-evaluations for each of the skills. Note areas of strength (where your response closely matched the desired response). Also note the three skills that you would most like to further develop. These will probably be the areas where your self-evaluations were least favorable. That is, areas for development should represent skills that were not adequately demonstrated by your responses to the items.

Career Facilitation

❐   Facilitating the career of others (or one's own career) by identifying assignments, projects, and jobs that are appropriate given the skill level, career objectives, and level of readiness of an employee.
❐   To evaluate your effectiveness in demonstrating this skill, review your responses to the following items: 3, 5 & 11, 6, 9, 12, 14, 15, and 17.
❐   Describe evidence of your using this skill effectively. Note instances where you did not make optimal use of this skill.
❐   Based on the evidence you described, circle the number that best reflects your level of effectiveness in this skill area

Little evidence of effectively using this skill		Some evidence of using this skill effectively		Effectively used this skill in each of the items listed
1	2	3	4	5

Conflict Management

❐   Managing interpersonal or task conflicts between individuals or groups by identifying underlying issues (as contrasted with stated positions) and implementing an appropriate conflict resolution strategy (e.g., collaboration, compromise, forcing).
❐   To evaluate your effectiveness in demonstrating this skill, review your responses to the following items: 5 & 11, 6.
❐   Describe evidence of your using this skill effectively. Note instances where you did not make optimal use of this skill.

❒ Based on the evidence you described, circle the number that best reflects your level of effectiveness in this skill area

Little evidence of effectively using this skill		Some evidence of using this skill effectively		Effectively used this skill in each of the items listed
1	2	3	4	5

Cross-Cultural Awareness

❒ Awareness of how cultural differences may affect how people of different cultures work together.
❒ To evaluate your effectiveness in demonstrating this skill, review your responses to the following items: 15.
❒ Describe evidence of your using this skill effectively. Note instances where you did not make optimal use of this skill.
❒ Based on the evidence you described, circle the number that best reflects your level of effectiveness in this skill area

Little evidence of effectively using this skill		Some evidence of using this skill effectively		Effectively used this skill in each of the items listed
1	2	3	4	5

Decision Making

❒ Implementing the most appropriate decision-making strategy given situational constraints (e.g., Vroom-Yetton model). Evaluating when sufficient information is available to make a high quality decision (e.g., as contrasted with making a premature decision).
❒ To evaluate your effectiveness in demonstrating this skill, review your responses to the following items: 4, 6, 10, & 16.
❒ Describe evidence of your using this skill effectively. Note instances where you did not make optimal use of this skill.
❒ Based on the evidence you described, circle the number that best reflects your level of effectiveness in this skill area

Little evidence of effectively using this skill		Some evidence of using this skill effectively		Effectively used this skill in each of the items listed
1	2	3	4	5

RELATED VIDEO CLIPS AND FILMS

Missiles of October

Overview

For 13 chilling days in October 1962, it seemed that John F. Kennedy and Nikita S. Khrushchev might be playing out the opening scenes of World War III. The Cuban missile crisis was a uniquely compact moment of history. For the first time in the nuclear age, the two superpowers found themselves in a sort of moral road test of their apocalyptic powers.

The crisis blew up suddenly when the United States discovered that the Soviet Union, despite repeated and solemn denials, was installing nuclear missiles in Cuba. An American U-2 spy plane came back with photographs of the bases and their support facilities under construction—clear, irrefutable evidence. Kennedy assembled a task force of advisors, some of whom wanted to invade Cuba. In the end, Kennedy chose a course of artful restraint; he laid down a naval quarantine. After six days, Khrushchev announced that the Soviet missiles would be dismantled.

The crisis served some purposes. The United States and the Soviet Union have had no comparable collision since then. On the other hand, the humiliation that Khrushchev suffered may have hastened his fall. The experience may be partly responsible for both the Soviet military buildup in the past two decades and whatever enthusiasm the Soviets have displayed for nuclear disarmament.

On the 20th anniversary of the crisis, six of Kennedy's men collaborated on a remarkable joint statement on the lessons of that October. It contains some new information, particularly in Point Eight, and at least one of their conclusions is startling and controversial: their thought that, contrary to the widespread assumption of the past two decades, the American nuclear superiority over the Soviets in 1962 had no crucial influence with Washington or Moscow at the time—and that in general, nuclear superiority is insignificant.

The authors are Dean Rusk, then Secretary of State; Robert McNamara, Secretary of Defense; George W. Ball, Undersecretary of State; Roswell L. Gilpatric, Deputy Secretary of Defense; Theodore Sorensen, special counsel to the President; and McGeorge Bundy, special assistant to the President for national security affairs.

Experts' analysis

In the years since the Cuban missile crisis, many commentators have examined the affair and offered a wide variety of conclusions. It seems fitting now that some of us who worked particularly closely with President Kennedy during that crisis should offer a few comments, with the advantages both of participation and of hindsight.

First: The crisis could and should have been avoided. If we had done an earlier, stronger, and clearer job of explaining our position on Soviet nuclear weapons in the Western Hemisphere, or if the Soviet government had more carefully assessed the evidence that did exist on this point, it is likely that the missiles would never have been sent to Cuba. The importance of accurate mutual assessment of interests between the two superpowers is evident and continuous.

Second: Reliable intelligence permitting an effective choice of response was obtained only just in time. It was primarily a mistake by policy makers, not by professionals, that made such intelligence unavailable sooner. But it was also a timely recognition of the need for thorough over flight, not without its hazards, that produced the decisive photographs. The usefulness and scope of inspection from above, also employed in monitoring the Soviet missile withdrawal, should never be underestimated. When the importance of accurate information for a crucial policy decision is high enough, risks not otherwise acceptable in collecting intelligence can become profoundly prudent.

Third: The President wisely took his time in choosing a course of action. A quick decision would certainly have been less carefully designed and could well have produced a much higher risk of catastrophe. The fact that the crisis did not become public in its first week obviously made it easier for President Kennedy to consider his options with a maximum of care and a minimum of outside pressure. Not every future crisis will be so quiet in its first phase, but Americans should always respect the need for a period of confidential and careful deliberation in dealing with a major international crisis.

Fourth: The decisive military element in the resolution of the crisis was our clearly available and applicable superiority in conventional weapons within the area of the crisis. U.S. naval forces, quickly deployable for the blockade of offensive weapons that was sensibly termed a quarantine, and the availability of U.S. ground and air forces sufficient to execute an invasion if necessary, made the difference. American nuclear superiority was not in our view a critical factor, for the fundamental and controlling reason that nuclear war, already in 1962, would have been a catastrophe for both sides; the balance of terror so eloquently described by Winston Churchill seven years earlier was in full operation. No one of us ever reviewed the nuclear balance for comfort in those hard weeks. The Cuban missile crisis illustrates not the significance but the insignificance of nuclear superiority in the face of survivable thermonuclear retaliatory forces. It also shows the crucial role of rapidly available conventional strength.

Fifth: The political and military pressure created by the quarantine was matched by a diplomatic effort that ignored no relevant means of communication with both our friends and our adversary. Communication to and from our allies in Europe was intense, and their support sturdy. The Organization of American States gave the moral and legal authority of its regional backing to the quarantine, making it plain that Soviet nuclear weapons were profoundly unwelcome in the Americas. In the U.N., Ambassador Adlai

Stevenson drove home with angry eloquence and unanswerable photographic evidence the facts of the Soviet deployment and deception.

Still more important, communication was established and maintained, once our basic course was set, with the government of the Soviet Union. If the crisis itself showed the cost of mutual incomprehension, its resolution showed the value of serious and sustained communication, and in particular of direct exchanges between the two heads of government.

When great states come anywhere near the brink in the nuclear age, there is no room for games of blind man's bluff nor can friends be led by silence. They must know what we are doing and why. Effective communication is never more important than when there is a military confrontation.

Sixth: This diplomatic effort and indeed our whole course of action were greatly reinforced by the fact that our position was squarely based on irrefutable evidence that the Soviet government was doing exactly what it had repeatedly denied that it would do. The support of our allies and the readiness of the Soviet government to draw back were heavily affected by the public demonstration of a Soviet course of conduct that simply could not be defended. In this demonstration no evidence less explicit and authoritative than that of photography would have been sufficient, and it was one of President Kennedy's best decisions that the ordinary requirements of secrecy in such matters should be brushed aside in the interest of persuasive exposition. There are times when a display of hard evidence is more valuable than protection of intelligence techniques.

Seventh: In the successful resolution of the crisis, restraint was as important as strength. In particular, we avoided any early initiation of battle by American forces, and indeed we took no action of any kind that would have forced an instant and possibly ill-considered response. Moreover, we limited our demands to the restoration of the status quo ante, that is, the removal of any Soviet nuclear capability from Cuba. There was no demand for "total victory" or "unconditional surrender." These choices gave the Soviet government both time and opportunity to respond with equal restraint. It is wrong, in relations between the superpowers, for either side to leave the other with no way out but war or humiliation.

Eighth: On two points of particular interest to the Soviet government, we made sure that it had the benefit of knowing the independently reached positions of President Kennedy. One assurance was public and the other private.

Publicly we made it clear that the U.S. would not invade Cuba if the Soviet missiles were withdrawn. The President never shared the view that the missile crisis should be "used" to pick a fight to the finish with Castro; he correctly insisted that the real issue in the crisis was with the Soviet government, and that the one vital bone of contention was the secret and deceit-covered movement of Soviet missiles into Cuba. He recognized that an invasion by U.S. forces would be bitter and bloody, and that it would leave festering wounds in the body politic of the Western Hemisphere. The no-invasion assurance was not a concession, but a statement of our own clear preference—once the missiles were withdrawn.

The second and private assurance—communicated on the President's instructions by Robert Kennedy to Soviet Ambassador Anatoli Dobrynin on the evening of October 27—

was that the President had determined that once the crisis was resolved, the American missiles then in Turkey would be removed. (The essence of this secret assurance was revealed by Robert Kennedy in his 1969 book *Thirteen Days*, and a more detailed account, drawn from many sources but not from discussion with any of us, was published by Arthur M. Schlesinger Jr. in *Robert Kennedy and His Times* in 1978. In these circumstances, we think it is now proper for those of us privy to that decision to discuss the matter.) This could not be a "deal"—our missiles in Turkey for theirs in Cuba—as the Soviet government had just proposed. The matter involved the concerns of our allies, and we could not put ourselves in the position of appearing to trade their protection for our own. But in fact President Kennedy had long since reached the conclusion that the outmoded and vulnerable missiles in Turkey should be withdrawn. In the spring of 1961 Secretary Rusk had begun the necessary discussions with high Turkish officials. These officials asked for delay, at least until Polaris submarines could be deployed in the Mediterranean. While the matter was not pressed to a conclusion in the following year and a half; the missile crisis itself reinforced the President's convictions. It was entirely right that the Soviet government should understand this reality.

This second assurance was kept secret because the few who knew about it at the time were in unanimous agreement that any other course would have had explosive and destructive effects on the security of the U.S. and its allies.

If made public in the context of the Soviet proposal to make a "deal," the unilateral decision reached by the President would have been misread as an unwilling concession granted in fear at the expense of an ally. It seemed better to tell the Soviets the real position in private, and in a way that would prevent any such misunderstanding. Robert Kennedy made it plain to Ambassador Dobrynin that any attempt to treat the President's unilateral assurance as part of a deal would simply make that assurance inoperative.

Although for separate reasons neither the public nor the private assurance ever became a formal commitment of the U.S. government, the validity of both was demonstrated by our later actions; there was no invasion of Cuba, and the vulnerable missiles in Turkey (and Italy) were withdrawn, with allied concurrence, to be replaced by invulnerable Polaris submarines.

Both results were in our own clear interest, and both assurances were helpful in making it easier for the Soviet government to decide to withdraw its missiles.

In part this was secret diplomacy, including a secret assurance. Any failure to make good on that assurance would obviously have had damaging effects on Soviet American relations. But it is of critical importance here that the President gave no assurance that went beyond his own presidential powers. In particular he made no commitment that required congressional approval or even support. The decision that the missiles in Turkey should be removed was one that the President had full and unquestioned authority to make and execute.

Ninth: The gravest risk in this crisis was not that either head of government desired to initiate a major escalation but that events would produce actions, reactions or miscalculations carrying the conflict beyond the control of one or the other or both. In retrospect we are inclined to think that both men would have taken every possible step to prevent such a result, but at the time no one near the top of either government could have

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that certainty about the other side. In any crisis involving the superpowers, firm control by the heads of both governments is essential to avoid an unpredictable escalation.

Tenth: The successful resolution of the Cuban missile crisis was fundamentally the achievement of two men, John F. Kennedy and Nikita S. Khrushchev. The fact that an earlier and less-prudent decision by the Soviet leader made the crisis inevitable does not detract from the statesmanship of his change of course. This was coupled with our own President's cautious determination, steady composure, deep-seated compassion, and, above all, continuous attentive control of our options and actions.

Cast of Characters

The Americans

- John F. Kennedy—President
- Robert McNamara—Secretary of Defense
- Ros Gilpatric—Deputy Secretary of Defense
- Dean Rusk—Secretary of State
- George Ball—Deputy Secretary of State
- Robert F. Kennedy—Attorney General
- Douglas Dillon—Secretary of the Treasury
- Theodore Sorensen—Aide to JFK
- McGeorge (Mac) Bundy—National Security Advisor
- John McCone—CIA Director
- Dean Acheson—private citizen (visits Paris)
- Lyndon B. Johnson—Vice President
- Adlai Stevenson—United States representative to the United Nations
- General Maxwell Taylor—Joint Chiefs of Staff
- George Anderson—Chief of Naval Operations
- Kenneth O'Donnell—Appointment Secretary to JFK (old political ally)
- Pierre Salinger—Press Secretary
- Llewellyn Thompson—just returned U.S. Ambassador to USSR
- Charles "Chip" Bohlen—new U.S. Ambassador to USSR
- William Knox—President of Westinghouse (in Moscow)
- John Scali—ABC diplomatic correspondent (meets with Fomin)

The Russians

- Nikita Khrushchev & the Presidium
- Andrei Gromyko—President
- Alexander Fomin—(meets with Scali) listed as "counselor" at Russian embassy, known to CIA as a colonel in the KGB.
- Valerian Zoria—USSR representative to the United Nations
- Anatoli Dobrynin—Soviet Ambassador to the United States

The Cold War (miscellaneous dates)

1959	Fidel Castro comes to power in Cuba.
1961	Castro declares himself a Marxist and vows to export the revolution. Soviets support him with encouragement.
1961	(April) Bay of Pigs fiasco (shortly after JFK becomes President).
1961	(August) Soviet Union begins work on the Berlin Wall.
1962	(October) Cuban missile crisis.

Group Assignments

Each group is asked to watch the movie with a particular set of questions in mind. The group will meet during the class following the movie to discuss its answers and to choose a member to present a short summary to the rest of the class. (HINT: Make notes as soon as possible after the movie, while everything is still fresh in your mind. The attached page gives you a cast of characters.)

Group One: Describe, with as much detail as possible, the problem-solving strategy used by the Americans, and then, the Russians. How did each nation's leaders come to the realization that there was a problem to be dealt with? Who participated in the problem solving?

Group Two: Find specific examples of effective and ineffective communication. Give examples of verbal, nonverbal, and written communication that convey emotion as well as information. Did the receiver respond to the emotion content as well as to the fact content? With what results?

Group Three: Find specific examples of interpersonal conflict. How was the conflict handled? Was the conflict harmful or beneficial to the overall decision-making process? (HINT: Bobby Kennedy is in conflict with several other members of the group.) Try to identify the basic causes of the conflicts.

Group Four: Find examples of the use and misuse of power and authority. Power is the ability to influence others' actions or thoughts. We all know that JFK has formal power because he is President; find some less-obvious examples. Pay particular attention to the influence styles used by those in power.

Group Five: The movie is largely a study of a decision-making group. Analyze the group: Did they work well together? Why or why not? Who were the formal leaders and the informal leaders? How could you tell they were leaders (if informal)? Should some people have been excluded from the group, others included? Why? Support your arguments.

All Groups: Contrast Kennedy's group to Khrushchev's. Note differences and similarities. Pay particular attention to the flow of information. How is it handled? In Ex-Comm? In the Presidium?

The Apprentice—Selling Lemonade
Janet Rovenpor, Manhattan College

Overview

Donald Trump is the host of an NBC show called, "The Apprentice." Eight men and eight women compete to become president of one of Trump's companies for a year with a salary of $250,000. The contestants must complete a series of assignments in teams. Tasks include selling lemonade in New York City, creating an advertising campaign for a private jet firm, managing a Planet Hollywood restaurant for an evening and raising money for a charity.

The team that turns in the best performance (sells the most lemonade, wins approval for best advertising campaign, raises the most money) usually gets rewarded. The winning team eats dinner at an expensive restaurant in Boston, flies in a helicopter over New York City or visits Trump's brand new Westchester golf course. The losing team must meet Donald Trump in the boardroom. One member of the losing team is fired each week.

In the first episode of the show, contestants are given $250 in seed money to purchase supplies and set up a lemonade stand in New York City. They are told that the team that sells the most lemonade by 7:30 pm will win the competitive exercise. The men doubled their money while the women quadrupled their money. The women are treated to a tour of Donald Trump's luxurious suite in Trump towers. David Gould, from the men's team, is fired.

The show airs for approximately 45 minutes. Students view the show and are given the following instructions at the end of this teaching note. I recommend using the exercise during the first or second class of the semester (right after the syllabus has been reviewed).

Discussion Points

1. In general, students do a good job listing various management characteristics and skills displayed in the show. They provide examples of delegating, setting priorities, communicating, problem solving, influencing others, listening and asking questions, managing time and stress, motivating and managing conflict. Students, however, tend to confuse personality traits with management skills. They include such traits as persistence, enthusiasm and authoritarianism.

This provides the instructor with an opportunity to clarify the difference between the two constructs:

> a. Personality traits are defined as "predispositions to respond to different kinds of stimuli in the same or similar manner" (Allport). They are relative stable and enduring over time and across situations. The best-known traits, called the "Big Five Model," are: openness to experience, conscientiousness, extraversion, agreeableness and neuroticism (known by the acronym, "ocean").

b. Management skills focus on behaviors. They are the means by which managers translate their own style, strategy, and favorite tools/techniques into practice. They can be acquired through formal and/or informal learning and through practice.

As group members share their lists of management skills with the rest of the class, I ask them to classify them into personal skills, interpersonal skills and group skills. Students notice that some of the skills may fall into more than one category. Problem solving, for example, can be done at the individual level as well as the group level. Goal setting could be part of career counseling (interpersonal skills) as well as a way of focusing a team's attention on desired performance (group skills). The instructor can provide a rationale for the classification system used in the textbook.

2. The show enables students to evaluate project leadership and team performance under time pressure and stress.

a. Time Stressors: The teams are faced with too much to do in too little time. They must sell the most lemonade by 7:30 pm.

The Versacorp team is able to quickly choose a location, buy supplies and sell lemonade. Its goal is to sell the product as soon as possible (within 10 minutes). Yet, the team chooses the first location (next to the Fulton fish market) that comes to mind. The project manager accepts the first alternative suggested. He does not stop to define the problem or search for a range of alternatives. Had he done this, he might have decided to break the team into two smaller groups (with 4 members each) and sell in two separate high traffic areas (e.g., Grand Central, Penn Station, Rockefeller Center). Business at the Fulton fish market is slow. The team moves to a difference location.

The Protégé team gets off to a chaotic start. The project manager gets overly emotional, team members yell at one another and the women do not even know where they are headed. Most members do not even stop to drink a glass of water during the day.

b. Encounter Stressors: result from interpersonal interactions.

Protégé team members are annoyed when Tammy takes a one-hour lunch break. Omarosa takes Tammy aside to tell her that she is not connecting with the rest of the women. Omarosa advises her to reach out to them. When Tammy rejoins the group, she explodes and asks angrily, "Do you have a problem that I took a one hour break?" Tammy has become defensive (Omarosa's feedback has crossed her sensitive line). Omarosa feels that Tammy has betrayed her and did not live up to her agreement. Tammy became argumentative instead of conciliatory to the rest of the team. Omarosa vows not to help Tammy again.

c. Situational Stressors: arise from the environment in which a person works or from individual circumstances.

It's a hot day in New York City, there's noise, dirt and traffic. The women are seen standing most of the day. Tammy gets tired and complains that her feet hurt. She says that she wants to go home. She copes with her physical discomfort by escaping for an hour break, which then leads to the conflict described above.

d. Anticipatory Stressors: potentially disagreeable events that threaten to occur.

Every contestant is aware of the consequences of losing the competition. A disagreeable event is inevitable for one of the teams. The losing team will have to face Donald Trump in the boardroom. He or she might be blamed for the team's failure and fired.

Sam experiences this type of stress most acutely. Before entering the boardroom, we see him taking a pill. In subsequent episodes, he takes deep breaths and uses visual imagery to calm down (a nice serene country scene). These are temporary relaxation techniques.

Sam provides students with another example of how negative feedback can cross one's sensitive line. Trump asks Troy if he would trust Sam with his bank account. Troy says, "No." Sam becomes defensive and accuses Troy of saying he is dishonest. Sam insists that he would never break the rules of an organization.

3. The instructor can comment on the diversity of the teams.

To his credit, Trump selected candidates with diverse skills and backgrounds.

a. Protégé Corporation: The women have backgrounds in criminology, real estate, industrial engineering, technology, finance, politics and marketing. Some have MBAs; others are entrepreneurs or small business owners. There is an Asian-American woman and an African-American woman on the team.

b. Versa Corporation: The men have slightly less diverse backgrounds compared to the women. They have experience in advertising, medicine, sales and real estate. Some have MBAs; others are self-made entrepreneurs. There is one African-American on the team.

Neither team, however, is diverse in terms of age (they range from 21 to 36 years) or gender (women in one group and men in another group). This does not accurately reflect the composition of today's workforce.

4. The Apprentice episode raises two ethical issues.

a. The women used sex appeal to sell lemonade. Many companies today use such a strategy to sell lingerie, beer, automobiles and other products. Is this appropriate?

A <u>USA Today</u> panel of experts gives its opinion:

- "Sex does sell in the short term, particularly from females who are attractive. In the long run, however, wisdom and knowledge is what really sells." Earl Stafford, CEO of Unitech

- "It was obvious that the women used their good looks and natural charms to attract men to buy lemonade. In some cases, they went beyond the normal bounds of sales behavior by touching, hugging and even kissing their customers. This behavior may be acceptable in a nightclub, but not in the business world. . . . In the long run, the winner will not win simply because of sex appeal." Jay Sidhu, CEO of Sovereign Bank

- "As the female contestants get older, the sex appeal they are offering now will inevitably decline or totally diminish. I suggest this group of gals get a backup plan: education, common sense and a decent interview suit. The lemonade they're selling now may not be as appealing when they're 40." Cynthia McKay, CEO of Le Gourmet Gift Basket.

- "Some companies use sex to sell in interesting and entertaining ways within certain sectors and demographics of the economy. But for every person you may entice with a sexy message, you are playing a risky game of alienating as many or more potential customers. You may find you have damaged your brand or created an image you might not have intended, including a loss of integrity." Joe Moglia, CEO of Ameritrade

(source: http://www.usatoday.com/money/media/2004-01-09-apprentice-panel1.htm)

In a later episode, Trump himself, warns the women that sexuality won't get them the job.

b. Sam, from the men's team, spends 20 minutes trying to sell lemonade for $1,000. While this huge premium may be legal, is it ethical? What is a fair price? When can a sales pitch be called a scam? Some students argue that this markup is acceptable. The buyer does not have to agree to the price. What if the buyer is elderly? Does not speak English? There was a recent case in New Jersey in which some mason workers were arrested for "theft by deception" for charging an 87 year old woman $3,000 for chimney repairs. What if the product is not lemonade but a one-of-a-kind drug to cure a disease? Is it acceptable to overcharge then? One viewer of the show said that selling a glass for $20 with the promise of being on NBC would work better than trying to sell it for $1,000 in order "to experience the American dream," as Sam told a potential customer.

5. The instructor can point out a number of artificial or contrived elements to the show.

a. There is no meaningful definition of success versus failure. Why did the men's team fail? After all, it doubled its money. Wouldn't a manager be satisfied with such a result?

While it is true that the women's team quadrupled its money, its members resorted to a short-term strategy (using sex appeal to sell the product). Does the end justify the means? Perhaps a better measure of success would include: number of useful ideas generated by each team; resourcefulness of each team (e.g., finding a discarded table instead of purchasing one); ability of each team to leverage the skills and talents of its members.

b. In the real world, when an employee is fired for poor performance, often a replacement is found. It may take some time to create a team with the optimal mix of skills and talents. If the men continue to get eliminated from the Versacorp team, morale will suffer. They will be outnumbered by the women and will not have added the "new blood" they need to compete effectively. A better test of skills would be to allow both teams to compete intact in all 13 assignments and then to determine which one performed best over time and across different situations.

c. The reward system is divisive. The teams are monitored for success or failure. But, in the end, the team that performs the best does not get the coveted prize. Only one individual will be selected to work for Trump. So, at times, contestants have to be team players yet at other times they have to assert themselves as individuals. They must show that they are very task oriented and supportive of their team members. Yet, when they enter the boardroom they feel compelled to defend themselves and criticize others. The bonds and trusting relationships established during the team effort get severed when the losing team is asked who is to blame for the team's failure. Contestants will do almost anything to stay on the show. This could have a very detrimental effect on the next assignment. Why trust someone and try to work cooperatively with that person when he/she just attacked me in the boardroom? Why take a risk and make a major decision when, if my team fails, I will get blamed? Perhaps, the best strategy is to maintain a low profile, be supportive, show enthusiasm but not make a major intellectual contribution. This, of course, reduces overall creativity.

6. Other issues that you might want to address.

Trump's terminal and instrumental values could be discussed. His advice to the contestant's is to "work hard, have fun." The theme song's refrain is: "Money, money, money." Trump's jets, casinos and lavish life style are shown. He might score high on the personal terminal values (e.g., a comfortable life; an exciting life). He might score high on the following the instrumental values: ambitious, capable, independent. So far, only one task, in the 6th episode, focuses on social terminal values (raising money for a pediatric AIDS foundation).

Tammy in the opening scene, when she arrives at Trump Towers, sees other contestants socializing. She says, "I don't know these people, I'm not going to communicate with them, I only care whether or not Trump likes me." It seems that she has a low need for inclusion. She doesn't feel a need to belong to the group. Yet, this attitude is incompatible with the need to work cooperatively in a team. We see later on that she has trouble relating to her team members.

David is criticized for not believing in himself as a leader. It's important to know yourself and your strengths and weaknesses. Management skills can be learned and improved upon. Self-awareness is a prerequisite to becoming a good manager.

Note: Rules Governing the Use of the Apprentice Video

Dear Janet,
As long as you are not showing episodes of The Apprentice for profit, showing the show for educational purposes for your class and any other educational forum is allowed by Mark Burnett Productions. You may not however make copies or distribute copies of the show without express clearance from NBC and Mark Burnett Productions. Thank you for contacting us regarding this issue. We certainly appreciate it!
Hope you continue to enjoy the show!

Karen Fong
Executive Assistant to Jay Bienstock & Kevin Harris The Apprentice

THE APPRENTICE—SELLING LEMONADE

Instructions for Students

In the first episode of NBC's show, "The Apprentice," viewers can observe the effective and ineffective use of different management skills. The skills of Donald Trump, as he directs the two competing teams in their tasks, are on display. So are the skills of the two project managers in charge of the selling of lemonade on the streets of New York City.

In groups of four students, please do the following:

(a) Identify as many management skills as you can. Describe briefly, whether or not they were used effectively or ineffectively. Would you have done anything differently as one of the project managers? As Donald Trump?

(b) Comment on the group dynamics occurring within the competing teams. Did you observe any instances of interpersonal conflict? Did the project managers deal effectively with conflict?

(c) Refer to the "Cast of Characters." Are the teams created by Donald Trump diverse? Are members compatible with one another? What types of issues do you think the project managers will need to resolve in the future?

(d) Provide your opinion on whether or not the show is "true to life." Are there any artificial or contrived elements to the show or to how the search for an apprentice is being conducted?

Cast of Characters

The Protégé Corporation

Heidi Bressler has a Master's in criminology from American University and worked alongside FBI agents at the National Center for Missing and Exploited Children. Raised in Wayne, NJ (but currently residing in Philadelphia,) Heidi holds a senior account executive position at Qwest Communications. She is one of the top sales reps in her region.

Katrina Campins, a native Miamian, graduated with a BBA in International Finance and Marketing from the University of Miami (4.0 G.P.A.). A licensed Florida real estate Agent since the age of 18, Katrina has established herself as a multimillion-dollar producing agent who ranks in the top 3% of all Realtors nationwide. Campins' clientele list is extensive and impressive, many of whom are well-known business executives, sports figures, diplomats and celebrities. Katrina is actively involved in her community through her participation in charitable organizations.

Jessie Connors was born in Minnesota and endured hardship in her early years. Growing up traveling -- from the city of Minneapolis to a 265 acre farm in Wisconsin with no running water or electricity to an orphanage in Monterrey, Mexico. She now owns her own hobby farm and is a successful business owner. With her home school education, at

the age of 17 Jessie started a chiropractic marketing and management company. She currently runs chiropractic clinics and is a realtor in Minnesota and Wisconsin.

Kristi Frank grew up in Lake Tahoe, NV where she worked as a blackjack dealer to help pay for her college education. Kristi attended the University of Southern California where she graduated with a degree in Industrial Engineering. Soon after, with her broker's license in hand, Kristi started investing in real estate and now owns two residential properties by the beach in Santa Monica, CA. Kristi expanded her investments and is currently a partner and co-owner of the trendy new restaurant, Juliano's RAW in Santa Monica.

Amelia Henry grew up in Arlington, Texas. She graduated magna cum laude from Texas A&M University and received her MBA at Texas Christian University where she was recognized as a Neeley Scholar, graduating in the top of her class. Amelia began her hi-tech career at the SABRE Group and then joined as a pre-IPO employee in 1999 at Commerce One, one of the Internet's highest fliers during the dot.com boom. She currently works for BetweenMarkets, a high-tech startup in Austin, TX.

Tammy Lee, an Asian-American stockbroker, attended the University of Washington and received a B.A. in Economics. After college, Tammy pursued her interest in acting in TV commercials and also sought work in public relations and advertising, which ultimately landed her a job in Merrill Lynch's Private Client Group as a stockbroker. Tammy ended her nine year career there as an assistant vice president in 2002. She lives in Seattle and enjoys classical music, modern art, international travel and architecture.

Omarosa Stallworth is a former political appointee in the Clinton and Gore White House. She currently works as a political consultant in Washington, DC. Omarosa had a humble youth, growing up in the projects of Youngstown, Ohio, but she eventually graduated from Central State University. She also earned a Master's degree from Howard University and is now working toward her Ph.D, which should be awarded to her in the spring of 2004. Omarosa's hobby is pageantry and she enjoys working as an image consultant who has successfully trained a Miss USA, Miss Taiwan and Miss Guyana.

Ereka Vetrini is a native New Yorker who graduated with honors from Boston College. She has worked in Hong Kong, Australia, Greece and Spain as an internal operations consultant for Estee Lauder. Most recently, Ereka worked as a global promotional marketing manager for Clinique where she managed all promotional programs worldwide. Growing up she learned her business principles by working in her parent's pizzeria.

The Versa Corporation

Bowie Hogg received his business degree from Texas A&M University. He is the youngest of four boys and comes from a long line of Texas heritage. Bowie worked as an account executive at FedEx handling multi-million dollar accounts. He is currently focusing on a new career as a motivational speaker.

Jason Curtis is a Michigan Stat alumnus who graduated with a BA in Advertising. He decided to enter a career in real estate. Jason is the president and founder of his own

company called JMG Management, LLC. He currently owns 39 rental units and 11 properties and rents primarily to low-income families.

Originally from Philadelphia, David Gould works in New York City as a venture capitalist in the healthcare sector. His group is raising money to invest in biotechnology and medical device companies. David currently holds two advanced degrees, an M.D. from Jefferson Medical College and an MBA from New York University.

Kwame Jackson was born in Washington, D.C. and raised in Charlotte, NC; which he considers home. He holds a B.S. in Business Administration from the University of North Carolina at Chapel Hill and an MBA from Harvard. True to his entrepreneurial training at Harvard and the bounty of opportunities in the late 90's, Kwame was heavily involved in several "dot-com" start-ups during his time in business school. However, his Fortune 500 professional foundation includes sales and marketing roles at Procter & Gamble and, most recently, on Wall Street as an Investment Manager for Goldman Sachs.

Born in Anchorage Alaska, Troy McClain spent the majority of his childhood split between both Alaska and Montana. He was not able to pursue any higher education because he took on the responsibility of supporting his mother and sister at a very young age. Troy ran a health club in Spokane, WA for a couple of years, before he decided to enter the field of investing. He is currently building an insurance business and working as a mortgage lender. He is also involved in real estate development and owns 7 properties.

William "Bill" Rancic founded cigarsaroundtheworld.com eight years ago in a 400 sq. ft. studio apartment. Today it is a thriving multi-million dollar national operation. The son of educators, he is a true entrepreneur, paying his way through college by starting a boat wash and wax business in the Chicago area. He is also an adventure junkie. When he is not making business deals he enjoys skydiving and scuba diving. In addition to his cigar company, Bill also develops real estate and speaks at universities and businesses around the country.

Sam Solovey grew up in the suburbs of Washington, DC. The youngest of three children. Following graduation from Colgate University, he headed to New York City to work for Accenture (formerly Andersen Consulting). After a year in the corporate world, Sam returned to the DC area in 1999 and co-founded an Internet media company called Potomac Tech Wire. Tech Wires since launched in seven other markets in the U.S. and Europe. Sam oversees sales and business development for all the Tech Wires but says his true passion is talk radio, having hosted an innovative radio program, titled The Untrained Psychologist, during his days at Colgate.

Nick Warnock hails from Bayonne, NJ where he was a star athlete for much of his youth. Nick attended The University of Richmond for a brief time before finishing up his degree at The University of San Diego. During his summers off from college, Nick launched a small Italian ice business known as Nick's Authentic Italian Ice. He currently spearheads a sales team for Xerox in Los Angeles, CA where his salary is based completely on commission.

Source: http://www.nbc.com/nbc/The_Apprentice/contestants/

Startup.com

This film (Artisan Entertainment, 2001, available at any video rental store or retail outlet) tells the story of the birth, brief life, and demise of an Internet company designed to simplify access to government agencies. The two main characters in the film are Kaleil Isaza Tuzman and Tom Herman, high school friends, and founders of a startup Internet company called govworks.com. Have students watch the first 15 – 18* minutes of the film, and answer the following questions:

❒ How are Tom and Kaleil different as people? How are their personalities reflected in the roles they each assume in the organization?

Tom is focused on people and details – this is shown in the initial scene with his daughter, where he asks her what she wants him to do with her hair, then makes sure he gets her ponytails exactly right. His attention to detail appears as a manager, when he starts to describe his process for delivering building plans during a meeting with a venture capitalist. Note, too, that Tom is the one who sets up interviews to hire the technical people needed to write the software to make the company work. Tom is also willing to step aside and let Kaleil make decisions as shown in the company name discussions.

Kaleil is more mercurial – he laughs more, and gets more emotional about things. This is shown in multiple places throughout the movie – his vacillation on the name of the office, his enthusiastic response prior to going into Kleiner, Perkins, Caufield & Byers. His ego and self-confidence are shown to positive effect when he pitches the company to various venture capitalists, but the downside of a large ego is apparent when he rejects the advice he receives from Kleiner, Perkins, Caufield & Byers. Kaleil has different faces – compare the person who makes the angry phone call to Tom, with the executive in charge of the strategy meeting the next day.

❒ Analyze the communication patterns at govworks.com, identifying examples of both effective and ineffective communication.

Effective communication – disagreements and conflicts are brought out openly
Ineffective communication – different people communicating a different plan for the company, contradicting each other in front of outsiders (note that it is Kaleil who does this, not Tom), withdrawing from discussion, leaving an angry message on an answering machine.

❒ Describe how the following activities are conducted at govworks.com: conflict management, decision making, establishing priorities, information analysis and integration, motivation and team leadership. How do you think a manager in a larger organization might approach these same activities?

Students will be able to find examples of all of the activities mentioned above, with the possible exception of information analysis and integration. Conversation around large vs. small companies should focus on the need for the manager of a small company to do everything, and the speed at which decisions must be made. This could lead into an interesting discussion of how to get a large company to act more like a small company (a problem faced by virtually all of today's high-tech organizations.)

* Note that at 15 minutes, there is some strong language in the movie. If you feel this will be offensive to your students, stop the movie at the end of the scene where Kaleil is coming back to the office after the venture capital meeting – otherwise, show the class Kaleil's outburst in the office, and the subsequent strategy meeting, and stop the movie at the point where it says "August – 30 employees."

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ICEBREAKER EXERCISES

To set the tone for a highly interactive course and to help students get to know each other quickly, consider using one or more of these exercises.

Introduce Your Partner

Ask students to form pairs. Have them introduce themselves to one another and interview each other using the following questions. Then, in the larger class, each student introduces his or her partner based on the answers to the interview questions.

1. Tell me something about your background and personal history.
2. What's the most memorable success in your life?
3. What's the most memorable failure in your life?
4. What do you want to become or achieve in the future?
5. If you were an animal, what kind would you be, and why?
6. What is your favorite cereal?

Group Discussion and Introductions

Form groups of students based on any one of the following factors. Groups should be no larger than five or six, so you may need to divide large groups into smaller ones.

1. Astrological sign
2. Geographical area (or state) where you were born
3. Major in school
4. Main country from which ancestors came.
5. Favorite sport

Now have groups meet together and do the following tasks.

1. Assign one person to report to the larger class at the end of the exercise. Groups may want to record the answers on a flip chart or a blank transparency.
2. Introduce yourselves to each other.
3. (Optional: All conversations must begin and end with another group member's name. For example, "My experience is similar to Mary's. . . ." "What do you think about that Bill?")
4. At the end of the discussion the recorder introduces all the members of the group to the class and then reports on the group's responses to the following questions.

Discussion Questions

1. Identify the major strengths that members of the group share in common.

2. Identify the major weaknesses that the group members share in common.

3. Identify other dominant things that the group has in common (other than the factor that formed the group in the first place).

4. Identify the most striking difference you find among members of the group.

What Would You Do?

Instructions

1. Divide your class into small groups.

2. Have them designate a recorder and then introduce themselves.

3. Assign each group one of the following problem scenarios (see following).

4. Give them about 15 minutes to answer two questions: What would you do? Why? The group must reach a consensus plan of action.

5. Ask the recorder of each group to present their plan to the class.

6. Share with the group the analysis provided by Vroom and Yetton, from their book, *Leadership and Decision Making*. Also, link the comments to various key concepts discussed in the text (for a quick overview see the learning objectives in the beginning of each chapter). This serves as a preview of future activities.

The Finance Case

You are the head of a staff unit reporting to the vice president of finance who has asked you to provide a report on the firm's current portfolio, including recommendations for changes in the selection criteria currently employed. Doubts have been raised about the efficiency of the existing system given the current market conditions, and there is considerable dissatisfaction with prevailing rates of return.

You plan to write the report, but at the moment you are perplexed about the approach to take. Your own specialty is the bond market, and you know that detailed knowledge of the equity market, which you lack, would greatly enhance the value of the report. Fortunately, four members of your staff are specialists in different segments of the equity market. Together, they possess a vast amount of knowledge about the intricacies of investment. However, they seldom agree on the best way to achieve anything when it comes to investment philosophy and strategy.

You have six weeks before the report is due. You have already begun to familiarize yourself with the firm's current portfolio and have been provided by management with a specific set of constraints your portfolio must satisfy. Your immediate problem is to come up with some alternatives to the firm's present practices and to select the most promising for detailed analysis in your report.

The Universal Data System

You are on the division manager's staff and work on a wide variety of administrative and technical problems. You have been given the assignment of developing a universal method that each of the five plants in the division would use to manually read equipment registers, record the readings, and transmit the scorings to the centralized information system. All plants are located in a relatively small geographical region.

There is been a high error rate in reading and transmitting data. Some locations have considerably higher error rates than others, and the methods used to record and transmit the data vary between plants. It is probable, therefore, that part of the error variance is a function of specific local conditions, and this will complicate establishing a uniform system for all plants. You have information on error rates, but no information on the local practices that generate these errors or on the local conditions that necessitate the different practices.

Everyone would benefit from an improvement in the quality of the data, as it is used in a number of important decisions. Your contacts with the plants are through the quality control supervisors, who are responsible for collecting the data. They are a conscientious group committed to doing their jobs well, but are highly sensitive to interference by higher management in their operations. Any solution that does not receive their active support is unlikely to reduce the error rate significantly.

Commentary

The Finance Case: The recommended management action in this case is not to delegate the decision but to share the problem with subordinates as a group and get their advice. Because of previous biases among subordinates and the fact that no other person has all the information necessary, delegating the decision would not be productive.

The Universal Data System: The recommended management action in this case is to delegate the decision to the entire group, not to a single individual, and to participate in that group discussion. That is, the manager should become part of the team, not the leader or director of it, and the team should make the decision consensually.

Life Lessons

In November, 2001, Inc. Magazine published an article called "Everything I Learned…" According to this article, many of the top 500 entrepreneurs for 2001 learned their most important business lessons in unlikely places: on the golf course, tending bar, as a missionary in Taiwan, and going through a bankruptcy. These experiences taught people valuable lessons about the need for self-directed learning, how to have effective conversations with anyone, fundamental sales tools and skills, and how to treat low-income customers.

Think about your life to date. Ask yourself what experiences you have had that taught you something which you can apply to work or school. Then write a paragraph in the format shown below, linking your life lesson to a key learning. Write down the experience, the lessons it taught you, and how you apply those lessons in your everyday life. Here is a sample paragraph from the article to get you started:

> **VITALS:** Chad Christofferson, CEO, Safehome Security (#266), a burglar-alarm sales and service company in Provo, Utah
>
> **CURRICULUM:** Missionary work
>
> **BACKGROUND:** Young mormons customarily spend time as foreign missionaries. In 1993 the church sent Christofferson, then 19, to Taiwan, where he worked 12-hour days going door-to-door, using his hastily learned Mandarin to sell his beliefs. "I talked to 100 people a day, if not more," Christofferson recalls. Perhaps one person a day didn't shut the door   outright.
>
> **WHAT HE LEARNED:** Persistence, obviously. But the experience in Taiwan also cemented Christofferson's faith in the power of high-volume, in-person sales. "The only way you could be effective there was by seeing as many people as you could," he says, "and the only way to do *that* was to go door-to-door."
>
> **HOW HE APPLIES IT:** He instructs his company's new employees -- who are often brimming with what they consider creative new approaches to selling security systems -- to start with the basics: knocking on doors. "When it comes right down to it, that's why we're so successful," he says. (The company's revenues have grown by more than 1,100% since 1996.)

Life Lessons

COMMENTARY

This exercise provides opportunities for several different types of in-class discussions. It can be used as an icebreaker by having students share their experiences and lessons with the class. Another icebreaker/team exercise approach would be to divide students into small groups, and ask them to develop a list of the most important skills for businesspeople, based on their experiences. Then compare the lists of skills developed in the small groups with the list of manager skills listed at the beginning of the "In-Basket" exercise above. A different type of discussion could center on the pros and cons of "common sense" or experiential learnings and more rigorous research-based learning. Note that each approach has advantages and disadvantages – balance the discussion rather than just emphasizing the superiority of research over experience.