



## Learning From Others

### Sharing Best Practices Across Functional Units

#### *Overview*

This case study was designed to explore the impact of the Values on leadership behavior and business results at our company. The issues presented in the case were developed with our company culture in mind. This was done to closely simulate the types of challenges that managers throughout the company experience on-the-job.

#### **Instructions**

The case is intended to stimulate discussions about the Values in small group settings. Take 10-15 minutes to read the case and answer the discussion questions at the end of the document. Spend the next 45 minutes de-briefing the case as a group. Keep in mind that there isn't always a "right" answer to the case study; the value generated by this case is often in the richness of the discussion that takes place.

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Bob is the Marketing Director for the Super prime portfolio of products. He has been with the company for 5 years, and is considered to be a productive, loyal associate known for consistently meeting and/or exceeding his business targets. Bob is very aware of his strengths and weaknesses as an executive; he knows that he is not an overly inspirational or innovative leader, but he has always been able to rely on his own perseverance, technical competence and wide breadth of functional experience to get the job done.

Over the last eight months, Bob has failed to meet his goals despite working long hours behind closed doors. He has personally noticed a decline in associate morale, and he recently overheard a conversation between two of his direct reports in which they indicated a general sense of apathy and disinterest amongst the associates in the group. They went on to say that there was a lack of motivation and passion across the function, despite the recent introduction of several groundbreaking products that have the potential to generate significant revenue growth for the next five years and capture – and hold – greater market share. The last sentence that Bob heard were muffled, but he was able to clearly make out the phrase “...more like Tom’s group.”



Bob went back to his office to consider what he had heard. He sensed that for the first time in his career, he would not be able to count on his technical skills to solve the problems that were surfacing. Bob thought about what he'd seen other Marketing Directors do to overcome morale problems brought on by dips in business performance. He immediately recalled the recent troubles associated with the Private Label Group (PLG).

Three years prior, the marketing department of the PLG went through a serious downturn following the resignation of the group's highly successful and well-liked Marketing Director, Susan. Associates lost their focus in the aftermath of Susan's departure, and several product packages were recalled due to errors in printing. Making matters worse, a print advertisement neglected to mention a key piece of rate information.

The PLG business unit leader decided to fill Susan's position by promoting Tom, a young, innovative high-potential associate. Tom's high-energy, motivational leadership style and "pioneering" approach to reshaping the function quickly gave him traction in his new role. Within eight months, the group was back on plan and generating some of the most creative marketing strategies the company had seen in years. Tom's group quickly earned the reputation of being an internal center of innovation and cutting-edge thinking.

Bob met Tom at a quarterly Marketing Director's meeting shortly after his promotion. Tom was very personable, and appeared eager for Bob's suggestions and input on the PLG's situation. Bob was happy to help; he periodically called and/or sent e-mails to Tom with advice and recommendations to consider. Tom appreciated Bob's assistance early on, but soon began to ignore his correspondence.

At subsequent Marketing Director meetings Tom began to exhibit signs of arrogance that became more evident as his group's performance improved. He seemed reluctant to share his leadership techniques for fear that his group would lose their "unique" foothold in the company. He saw his group as more important and progressive, which somewhat alienated him from his peers. Still, he had proven himself to be very capable and forward-thinking, and in that sense he still had the respect of the other Directors.

As Bob reminisced about Tom's rise to success in the company, he again reflected on his unit's current downturn. Could he now call Tom to ask *him* for advice on his own situation? Would Tom make him feel like a fool? Even if he did offer suggestions, would Bob be able to adopt and implement Tom's techniques without drastically changing his own management style? With the morale and overall happiness of his group in mind, Bob swallowed his pride and placed a call to Tom.

Tom picked up the phone immediately and cheerfully greeted Bob. As Bob launched in to his



groups' troubles, Tom seemed genuinely concerned, but was not forthcoming with suggestions for Bob's situation. When Bob finally got around to asking if Tom would be willing to meet and kick some ideas around, Tom's tone changed. He cited his crazy schedule, upcoming travel, and "relative inexperience in the role" as excuses that would prevent him from meeting with Bob in the coming weeks. Tom suggested that Bob contact a more experienced Marketing Director from another group to solicit advice.

As Bob sat in his office following the call, he reflected on Tom's general unwillingness to share and empower others with his success stories. As Bob scanned the walls of his silent office, it occurred to him that perhaps he was making too many decisions on his own. He decided to schedule a meeting with the two associates that he had overheard earlier to ask for their input on what could be done to improve the morale and effectiveness of the group.

## Discussion Questions:

- What Values/Attributes are presented in the case scenario?
- What Values/Attributes do Bob and Tom seem to demonstrate alignment with?  
Misalignment with?
  - What can Bob and Tom do to improve their alignment with respect to the Values/Attributes that they are not currently "living?"
- Can leaders in our company be successful by demonstrating superior alignment with one Value, and mediocre alignment with others?
  - If yes, what are the implications on both the leader and the organization?
  - If no, does that mean our company is becoming aligned with the Values?
  - What techniques can leaders use to break down silos and encourage more knowledge sharing?
  - What techniques involve tactical vs. cultural change(s)?