



People Management

Balancing Work and Life Quality

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.

Pat is the group manager of a customer service call center group that services customers in our prime markets segment. In this capacity, Pat manages a team of front line managers, and has overall accountability for the performance of customer service representatives in the call center. She is responsible to ensure that all call center metrics are achieved. Pat reports to James, the Site Ops Director. Both are based out of the Call Center.

Pat was promoted to her current position at the end of last year. Prior to her promotion, Pat spent five years as a Senior Manager at our Big River Customer Call Center. Her strong business sense, excellent analytical skills, and strong people management skills set her apart from her peers, making her an obvious choice for the role. An ambitious and dedicated associate, Pat graciously accepted James' offer for promotion and new role without hesitation.

Soon after assuming her new role, Pat found herself working 12-14 hour days and traveling extensively to train supervisors and other associates. Although she was finding the work challenging, Pat began to regret the fact that she was spending less and less time at home with her husband and four young children. While she'd never been a traditional, "nine-to-five" associate, Pat had always been able to balance her work and family priorities in the past. She began to rely on family and friends to take care of her children after school, and frequently deferred evening



childcare activities to her husband to allow her time to accomplish more work before turning in for a much-needed night of rest. Desperate to get a handle on things and increase the quality of her personal life, Pat scheduled a one-to-one meeting with James to discuss her situation.

Two days before Pat was due to meet with James, the M&A group unveiled a new product campaign aimed at increasing the company's revenue and market share. Given the recent downturn in the economy, the campaign was viewed as a critical component of the company's growth strategy. James immediately called a meeting with his direct reports to discuss the new campaign. He told his group that the implications for the Call Center were significant, requiring new product training, and organizational, technical, and business process-related changes. To help support the product launch campaign, Pat was informed that she would be losing three of her seven front line managers in an asset reallocation effort, and that her operating budget was being cut by 35%. While the new product and campaign sounded exciting and innovative, Pat instantly knew that it would require longer hours and more responsibilities for her.

After the meeting, James took Pat aside to let her know that he wouldn't be able to keep the one-to-one meeting with her because an emergency business trip that came up. He asked if there was anything serious going on that he could help with. Pat shared her personal anxiety over the number of hours she'd been working, and mentioned her concerns about the implications the new product launch campaign would have on further burdening her already heavy workload. James stiffened, then told Pat that the organization was facing a "call to action," which would require managers such as herself to "knuckle down" and put in the extra time that would be required to move the business forward in accordance with the new strategy. He reminded her that as a leader, she was expected to model the behaviors and actions required of her reports. James suggested that Pat find more creative ways in which to accomplish her work more efficiently.

Pat decided to put her best foot forward and follow James' advice. She quickly identified several innovative ways to delegate some of her responsibilities to her direct reports that they found to be developmental and highly rewarding, and worked with the training department to design and implement an accelerated training and development system to prepare customer service representatives for supervisory responsibilities much more quickly than ever before. She was commended for her efforts, and lauded by her people who found their jobs to be much more enriched as a result. Despite these accolades, Pat was still working between 65-70 hour weeks. There was seemingly no end to the mountain of work coming in. At her husband's urging, Pat planned a two-week vacation that would get her away from the office and provide her with an opportunity to regroup and spend some quality time with her family.

Three days before her scheduled trip, James rushed in to Pat's office with news of a "developmental" opportunity for her. He explained that during the most recent product launch campaign planning meeting, he had been asked to kick off the launch in the U.K. next month. Since he would be out of the country for more than 2 months, someone needed to take his



place in the U.S. campaign planning team, and he asked Pat if she would take on the responsibility, beginning the next week.

Pat considered the news, knowing that this was indeed a fantastic developmental opportunity for her to strengthen her corporate ties, network across groups and gain visibility. Unfortunately, it would require her to miss the first half of her much-needed vacation. Knowing the company stresses the importance of work/life balance, Pat decided to tell James that she wouldn't be able to make the first meeting due to personal plans.

James was not pleased with her decision, and made it clear that it would send a bad signal if she did not attend the first meeting. He stressed the importance of the role, and encouraged her to "think long and hard" about what would be best for both her career and the new product launch.

For the next few days, Pat vacillated back and forth on what to do. She decided to call James and tell him she would not be able to attend the meeting.

Discussion Questions:

- What Values are addressed in the case scenario?
- Is it typical and/or fair for associates to work a 65-70 hour week?
- In what ways could the Values have been used to guide the decisions and situations presented in the case?
- Are the operating expectations for business executives the same for both men and women?
- Was Pat wrong to have chosen her vacation over the meeting?
- When, if ever, is it appropriate to cancel personal plans to accommodate business needs?
- Did James' actions demonstrate adherence to the Values?
- What are the positive and negative elements of his actions?
- From what you know of the business culture and policies in your own business unit, what would be the most common response to Pat's decision?