



Providing Feedback

Overview

This situational dilemma was designed to explore the impact of the Values on decision-making at our company. The dilemmas presented in the cases were developed with our culture and business situation in mind. This was done to closely simulate the types of challenges that associates throughout the company experience on the job.

Instructions

The situational dilemma is intended to stimulate discussions about the Values in small group settings. Take 10 minutes to read the situation and answer the discussion questions. Spend the next 15 minutes analyzing and discussing situational dilemma as a group. Keep in mind that there isn't always a "right" answer to the dilemmas posed in the scenarios; the value generated by the situational dilemma is often in the richness of the discussion that takes place.

Juan is a Customer Service Manager who manages 15 associates and is involved in several critical projects. At time he feels overwhelmed and stressed by his workload. At his last performance review, he was rated as approaching expectations and he is now working hard to meet expectations. At his last review, he was given feedback that his inability to control his temper and his lack of attention to his associates were both factors in his lower rating. He has committed to his manager that he will regularly conduct one-to-one meetings with all his associates, and he has been trying to fit them into his busy schedule. However, since he made that commitment, he and his manager have not discussed the issue and he is not sure about his manager's perspective on his performance.

Martina, one of his associates, is responsible for large customer accounts. Although she is fairly new to her job, she is one of Juan's strongest performers and produce some of the best results in the department. She is quick to take action to address customer needs, and her peers see her as delivering outstanding service to her customers.

In the past couple of months Juan has noticed that Martina sometimes does not demonstrate appropriate patience with customers, but has yet to give her this feedback. Today, Martina demonstrated her impatience again by escalating a complicated and critical customer relationship problem to Juan. Juan doesn't understand why she didn't handle the situation herself, as he believes she has the knowledge and skills, and is the associate who is primarily responsible for the customer relationship. He is angry and frustrated, not only by Martina's escalation of the problem to him, but also with the amount of his time that will be consumed by dealing with this situation. He is also concerned about time to attend to his own high profile project, Martina's performance, and the customer.



Juan is scheduled to meet with his manager next week to review his progress against his objectives.

Discussion Questions:

- *What Values are addressed in the case scenario?*
- *In what ways could the Values be used to guide the decisions and situations presented in the case?*
- *Review “Juan’s Options” on the following page. What should Juan do?*





Juan's Options

Time Limit: 10 minutes

Which option should Juan choose to be in the greatest alignment with the company Values?

1. Express his anger, and tell Martina that she will just have to figure this one out herself. Hold her accountable for being able to solve customer problems and explain that now is the time for her to do it!
2. Tell Martina that he will handle it even though he knows little about the account, the individuals involved, or the issues. Plan to discuss how Martina could have handled this situation during their next scheduled one-to-one meeting.
3. Take a break and get control of his anger. When she is off the phone, ask Martina to come into his office, and coach her on what to say and how to handle the situation. Practice the conversation with her and assure her that he has every confidence that she can handle this successfully. Ask her to send him an email describing the outcome and what she learned by doing it.
4. Take a few minutes to think through the best way to approach Martina. Give her some quick feedback about his concern regarding her performance. Find another more experienced associate to work with Martina and to help her figure out how to handle the situation. Schedule time with Martina to give her more comprehensive performance feedback and to coach her on her customer handling skills.
5. Take a few minutes to think through the best way to approach Martina. Meet with her privately to ensure he has all the facts regarding the situation. Collaboratively develop an approach to handling the immediate situation. Explain very specifically what he expects from her in situations like this in the future, and jointly develop an action plan to help her improve her performance. Ensure Martina understands that it is her responsibility to improve her performance, but that he will coach and support her efforts.

Agree on an option before proceeding. You may combine elements of the options provided to create a new option, if desired.



Analysis and Discussion

Underlying Option 1 are **Best People, Teamwork** and **Well-Managed** issues. Juan is not developing Martina, treating her in a respectful manner, nor is his tone likely to increase Martina's respect for him. This option does, however, require Martina to assume responsibility and *act like an owner*.

With Option 2, Juan is likely to not *deliver value to the customer* and is missing an opportunity to *develop and challenge* Martina.

In Option 3, Juan models the Values of **Best People** and **Ownership**, but in the end it may not bring about the best result for the customer.

Option 4 takes into consideration the Values of **Best People, Ownership, Teamwork, Well Managed**, and **Integrity**. In this option, Juan balances the needs of the business by bringing in a more experienced associate to help handle the customer. In addition, he is working effectively with Martina to give her the performance feedback and coaching she needs to help her develop.

In Option 5, Juan demonstrates **Respect Each Other, Teamwork**, and **Open**. His approach both demonstrates and encourages Martina to demonstrate **Ownership**. Juan models **Best People, Analytical** and **Well-Managed**. He is able to address both the immediate situation as well as the longer-term need for development and performance improvement.

Follow-Up Questions:

- *Based on your team's discussion, what Values and Behavioral Descriptors are addressed in the case scenario? Identify the specific behaviors or actions that led you to your conclusions.*
- *What challenges have you faced, or are you currently facing, in living these Values?*
- *What can you do to more consistently live these Values on a day-to-day basis?*