

Case Study 3: Integrating Teams After Downsizing

Because of downsizing and layoffs at his regional insurance office, Pascal got a new department to manage. Previously he had managed the claims department for auto insurance but now he has been assigned to manage the homeowners insurance claims department as well. Both departments were hit by the recent layoff and are still reeling from those changes.

Now he has to merge both departments into one unit. He also had a lot to learn because it has been many years since he worked in homeowners insurance claims.

You are Pascal, and you need to understand and unify two separate departments into one entity. What would you do to help forge a strong and unified team in the claims area for your company in the days and weeks to come?

For the Trainer or Facilitator

Pascal could:

- Hold regular meetings with all employees (weekly or even twice-weekly to begin)
- Meet with his new employees individually to get to know them better
- Ask questions of people about what resources they need, what's holding them back, and listen carefully to their ideas
- Ask questions, observe, and learn new procedures from the homeowners claims area with which he is less familiar
- Network better with new employees, customers, and vendors
- Ask each of his separate areas to present "mini-training" sessions to the other area to increase the depth of general knowledge in both areas
- Create cross-functional teams whenever possible to work on specific problems in order to promote additional understanding and teamwork

Your group may think of additional appropriate things that will help unify these two functions.

Case Study 2: Poor Interpersonal Skills

Jennifer is the Accounting Department manager for a regional chain of convenience stores. Jennifer is an accounting "superstar." She has a bachelor's degree, recently passed her CPA exam, and is really exceptional in her accounting knowledge.

She was so good, in fact, that she was promoted to department manager in her previous company after only two years on the job. She has been at her current company for ten months. She has implemented two accounting procedural changes that have streamlined the work and resulted in cost savings for the company.

She reports to the CFO, and he is concerned about Jennifer, despite her obvious talents. There is no denying that she has had a positive impact, but Jennifer is not fitting in so well. Jennifer is a poor communicator and seems to have alienated quite a few of her peers and her employees.

She is often aloof and distant, and her usual way of motivating performance is to simply dictate what will be done and expect compliance with her orders. She has good ideas but has little ability to present them well or to work as part of a team.

You are Jennifer's CFO, and you believe you can coach Jennifer. How would you approach her and what would you say? What issues would you work with her on? How would you hold Jennifer accountable for improvement on the issues you identified?

For the Trainer or Facilitator

The CFO could:

- Make an appointment with Jennifer to talk privately
- Offer specific and detailed feedback and observations about what he/she has seen that is of concern. Be direct but kind;
- Explain why her methods may be of concern and the impact they are having on others
- Identify a maximum of three change goals to which Jennifer will agree
- Set specific behavioral objectives and ask her to document what she does in regard to each goal
- Agree to meet again (weekly?) to discuss progress
- Consider assigning Jennifer an in-house mentor in another department if available or securing the services of an outside coach to help train her in and encourage practice of human relations skills
- Let her know that her performance appraisals will reflect how she is performing in her leadership role in addition to her accounting role
- Be a good role model for building teamwork and collaboration

Your group may think of additional appropriate things that will help improve Jennifer's performance.