

Case study: How should leaders include all team members in the in-group?

(Modified version. Original case study written by Céleste M. Brotheridge and James Toller.)

In this case study, Roxanne approaches Professor Ian Finagle in his office. She had enjoyed great success in her job but, lately, feels excluded, isolated, blamed, and demeaned. She believes that her job is at risk. As you read the case study, consider why her manager may have placed her in the out-group, what you would do if you were her manager, and what advice you would give to Roxanne if you were Professor Finagle.

After class one day, Roxanne visited Professor Finagle at his office to get some feedback on her situation at work. “Up until about a year ago I had what I thought was a great job with The Firm. I’m their sole Human Resource Development (HRD) Consultant, and when I first got there, HRD was a backwater. The guy I replaced just stuck to giving a couple of customer service courses a year, but I did a lot more. I put together a management development program and an entire staff development program. I increased our training offerings by 500%, and I did it without a budget increase. In two years, the management development program had over 200 participants. I also developed and delivered a bunch of workshops on everything from communications, career planning, and conflict management to time management.



“That’s an impressive set of accomplishments, Roxanne. What did your boss, Rob, think of your performance?”

“It’s funny, Professor, I’m not sure he was paying attention. He had a bunch of special projects on the go, so I ran HRD. I even reworked our entire performance management system. Do you know how hard that is? It took months of work and weeks of committee meetings working with the unions. Since I’m more of a backroom worker, I didn’t feel qualified to chair the committee, so Rob became the chair on paper, but *I* did the work and often chaired the focus group sessions with employees. He was okay with that. He was really hands-off. Our weekly meetings, meetings I suggested we have to

update each other, became less regular, but that was okay – and I did get outstanding performance ratings.”

“Did anyone pay attention?”

“Well, yes, Ben did. Ben originally hired me from Another Firm. I had worked with him there for, oh, about four years, as his assistant. Anytime he had a sticky problem that needed fixing, he would give it to me. I could usually sort it out in a week or two. After The Firm recruited him, he made me a job offer that I could not refuse. Ben introduced me to lots of people at The Firm, he let me commit resources without consulting him, and he kept me in the loop. I felt like I was part of something special. Why, a bunch of us who Ben had hired even went out after work every Friday. And, at our Christmas party, Ben gave me the *Landspeed Project Management* award because of my success with the management development program.”

“But Roxanne, I thought you worked for Rob.”

“Well, on paper I did. After I didn’t apply for the job, Ben hired Rob as the HRD Manager. Ben had written the job description and wanted me to apply, but I didn’t. I only had a few months of experience with The Firm, and I thought the position was meant for someone who had been in the game for 10 or more years. Boy, was I surprised to see Rob show up; he has been in a couple of my MBA classes, and he’s not a ‘shining star’ so to speak. Anyhow, Ben eventually hired Rob, but made it clear that Rob and I were to work together as equals. Rob was okay with that.”

“Argue for your limitations, and they’re yours. Roxanne, you were a shoe-in for that position. When someone takes over an important position where they’re at risk, they like to have people around them they trust. Technical skills can be learned, but competence has to be demonstrated, and trust has to be earned. Nevertheless, I can see now why Rob left you alone. In any case, it sounds like a workable proposition. What’s the problem?”

“Well, it started after Ben left. He got a great job in another city. He called me about a month later and said he needed a Director of Management Development. But I turned it down. I didn’t want to move, I had started my MBA by that time, and selling my house would have been a colossal pain. After Ben left, Jan became the director. Now, Rob didn’t think much of her; he said that she didn’t understand HRD, being from accounting and all, but I thought this was sour grapes because Rob had applied for her job and was turned down. A few months later, Rob quit; he said that he had enough of Jan’s bossiness. Her philosophy is ‘People are paid to work, and they shouldn’t expect anything from a job but money.’ This from the head of HR! Anyhow, I applied for Rob’s job, finally realizing that I had enough experience, but I didn’t get it. Jan told me that she was happy with my work, but that she ‘didn’t feel comfortable with me personally.’ I don’t know what that meant; we had never worked together so she really didn’t know me, and I didn’t know her. Jan hired Pat instead. I found out later that Jan and Pat had been friends for years, and Pat happened to be looking for a job.”

“Well Roxanne, that doesn’t sound like much of a problem. You might not have gotten a better job, but you still have one you like, and Pat might insulate you from Jan.”

“I wish that were true, Professor Finagle, but it hasn’t turned out that way. Pat had never been a manager before and didn’t know HRD. I was warned that Pat would be intimidated by my track record, and I think she was, but when she first arrived, I spent three hours every day for two months just teaching her the basics of HRD and introducing her to folks at The Firm. Why on earth do I have to teach my boss how to do her job? Anyway, once I got her up to speed, she cut me off.”

“Cut you off?”

“Well, yeah. She became cold and distant. No more lunch or coffee breaks together, and it was even hard to schedule a meeting with her. I would ask for one but she would always schedule another meeting about 15 minutes after we were supposed to meet – and then complain to Jan that I wasn’t keeping her informed. I would go into her office about the smallest thing, and she would ‘take it under advisement,’ then write me an email about it. She does everything in writing. Professor Finagle, I once got a four-page email about taking my secretary to lunch on Secretary’s Day. Pat tore a strip off me because other areas didn’t do anything for their secretary, and I did, so the other areas looked bad. But I had talked with Judy in recruitment about it, and we agreed – verbally – that each area would take their secretary out for lunch. However, afterwards, Judy denied even talking with me. Oh, and then Pat placed a copy of this four page email on my personnel file. She’s distant and will not even say good morning unless I do first. She will walk right by my office and not say anything, but she’ll joke with the guy in the office next to mine or ask him how his weekend went. If I take a minute to talk to someone in the hallway, Pat will glare at us (and once she even kicked a box). If that nonsense isn’t bad enough, things have gotten worse. A few months ago, I wanted to go to an HRD conference, but Pat said we couldn’t afford it. I even offered to pay half the cost myself, but she turned me down flat, and then SHE went to the conference. I was really pissed off when a friend of mine in accounting told me that Pat and Judy got their expenses paid out of my HRD workshop fund!”

“I don’t understand why Judy got to go to the conference,” said Finagle, “But, for Pat, was this a one-time event? Maybe she thought the conference was more important for her since she was new to HRD.”

“I don’t think that’s it, Professor Finagle. She uses the ‘we can’t afford it’ excuse for other things too. I belong to a couple of professional associations, and, when Ben was around, The Firm would pay the dues for me. But the last time I asked to be reimbursed, Pat wrote ‘DENIED’ on my application in big block letters and sent me another email about the need for greater efficiencies in the department. Nevertheless, she has *her* dues to the same associations paid by The Firm! Also, Ben received many industry magazines; he would pass them on to Rob, and Rob would pass them on to me. Now they stop at Pat’s desk. If I ask to borrow something from her, she’s always ‘using it’ or says she will forward

it, but doesn't. It's the same with a lot of stuff I need to do my job. She's cut me out of other workshops, she took me off The Firm's mailing lists, and 'forgets' to tell me about meetings with other departments. When I asked to take a workshop on a personality assessment tool that we contracted with others to teach, she told me, 'I don't want to invest money in someone who might be leaving us.' Professor Finagle, I have *never* said anything about leaving. And she wouldn't even give me the time off to go."

"So, Roxanne, it seems that she's cutting you out of the loop and won't pick up some costs that were picked up before. I have found that many things are 'nice but not necessary' to do my job. Usually this stuff only matters in the short run, if at all."

"I suppose I can do without some of that stuff. But I can't be cut out of meetings with my professional associations and the other departments and still do my job. And I can't afford another negative performance review. I think I was set up. The first thing that Pat did was set my performance objectives for the year without involving me, and then she sent them to me in one of her *Patagrams* – an email that said, 'this is what you'll do for the following year.' When I wanted to discuss it with her, she agreed to a meeting, but she cancelled it because 'something came up.' When we finally met, she agreed to do some of the things she had assigned to me, since I already had a huge workload. However, she never followed through, and when the things she said *she would* do weren't done, she gave *me* a negative review. She also said that I had 'no organizational pride', that I wasn't 'a team player', that I 'failed to meet appropriate deadlines', and that I'm 'uncooperative.' However, I have been working as hard as ever managing the HRD program. All is going well from a program perspective."

"It doesn't seem that your performance evaluation was justified, Roxanne."

"Tell me about it, Professor. Why, just after Pat became my boss, I managed a Service Recognition event, and it was a major success. I received a nice thank you letter from the President, but I heard zip from Pat. The next Service Recognition event followed my format to a T but was organized by another guy because the function had been transferred to his area. Anyhow, this guy received a box of chocolates and a thank you card from both Pat and Jan. When I asked Pat why she had ignored me the first time around, she didn't reply. Maybe, I should have just let it go, but I was tired of being ignored and treated as if I don't have feelings. When my grandma died last November, and my childhood home burned down the following January, I was upset when I was telling my secretary about it. Well, Pat overheard the conversations and said 'Don't let your personal life affect your work.' So uncaring! And I could give you lots more examples of Pat micromanaging, going back on her word, or blaming me for things *she* was supposed to do but didn't. Some of those things were critical, so to cover for her, I was working a lot of overtime. But the worst happened last week. You might have noticed I wasn't in class for about two weeks."

"Well, now that you mention it, yes."

“I had to miss class, and work too, because I was sick. I got a letter from my doctor ordering me to stay home from work for two to three weeks to recover from a stress-induced illness. When I got back to the office from my doctor’s appointment, The Firm’s health nurse agreed with the doctor’s assessment, and she said that I should slip a copy of the doctor’s note under Pat’s door, and go home to bed, which is what I did. I felt like hell. When I returned to work two weeks later, Pat started yelling at me, ‘You weren’t sick; you were faking it.’ She was pounding on my desk, screaming, ‘I’m going to work your ass off to make up for the time you’ve missed.’ I have never been talked to that way ... ever. Even my secretary asked, ‘Why would you take that from her?’”

“So what have you done since?”

“Well, I’ve mostly kept my head down. I shut my office door and tried to get caught up. But then Pat accused me of working on my MBA during office hours and stealing time from The Firm. She ordered me to keep my office door open at all times. Also, Jan sent me an email telling me to provide her with a list of all the documents on my computer and all my passwords and not to erase anything. I also think someone has been going through my computer files and my emails at work. To make matters worse, someone named Alexandra called me, expressing interest in HRD. So, I met with her and told her what HRD is like. She didn’t seem to have a clue about it and had no training, but she wanted to become an HRD consultant, and she seemed to think that this would happen soon. After our meeting, I walked her to the elevator and, when I started to walk away, I saw Pat put her arm around Alexandra, and they both laughed. I’m worried because there’s been a lot of turnover in the department. One day senior employees are here, the next day they’re gone. Some were pushed out, and some resigned; like Bob, he said that he knew there was a problem when Jan disciplined him for buying an \$80 book on employee safety, and he was the manager of Employee Safety, for Pete’s sake! Oh, and as far as I can tell, they were replaced by people with no work experience, people who were ‘yes men.’ Anyway, Professor, what do you think? What’s happening here? What should I do?”

Reflection

Answer the following questions in your learning journal:

1. How would you describe the leadership shown at The Firm?
2. Why do you think Roxanne found herself in her manager’s out-group?
3. What you would do if you were to replace Pat as Roxanne’s manager?
4. If you were Professor Finagle, how would you respond to Roxanne’s dilemma?
5. What important lessons have you learned from this case study?