

MICHAEL PATTERSON (B)

David House wrote this case under the supervision of Elizabeth M. A. Grasby solely to provide material for class discussion. The authors do not intend to illustrate either effective or ineffective handling of a managerial situation. The authors may have disguised certain names and other identifying information to protect confidentiality.

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It was 10 a.m. on June 12, 2008, and Michael Patterson waited patiently outside of William Peake's office while Peake finished a discussion on the phone.

Peake: "Come on in, Mike. Sorry for the wait, just a little problem with one of our suppliers. Have a seat. I just wanted to meet with you quickly to make sure you understand your reassignment and answer any questions you might have. With all the changes recently, I want to make sure everybody understands what's expected."

Patterson: "Thanks, I appreciate your time."

Peake: "From what I understand, you were in Engineering before you moved to Customer Service, so the move to Product Development shouldn't be a difficult transition, but you will still be responsible for many of your customer service jobs. It may seem like more work, but we all need to work harder if we are going to get this company profitable again. Now, I know you've been told that you will be reporting to me. That's changed, and I'm going to have you report to John McAteer. Here's a letter just to make sure everything is documented officially. What are your thoughts about John?"

Patterson looked at the letter carefully (see Exhibit 1). The rumour had turned out to be true, and now he tried to compose himself to respond thoughtfully.

Patterson: "Well, I have no problem with the job responsibilities or switching departments. I understand that we all need to do more, and I was in the engineering department for a long time. But I'm not sure that I can work with John McAteer. We haven't always got along very well in the past, and I'm not sure we will get along any better now. I've been with the company much longer than he has, and I will have a difficult time taking instructions from a person who I don't respect. I'm not sure how working as a lackey for McAteer can possibly utilize my abilities. To me, it makes more sense if I report directly to you as, I was told originally."

Peake sat and listened very quietly. When Patterson was finished voicing his concerns, Peake seemed lost for words but thanked him for his time, and Patterson left the office. As Patterson worked on his projects during the rest of the day, he wondered whether he might have said too much, but he hoped that his remarks would allow him to report directly to Peake, as he originally had been told. After all, Peake had asked for his thoughts.

The next day, Patterson received a phone call from Peake asking for a meeting in Peake's office immediately. Patterson dropped what he was doing and proceeded to Peake's office. He was surprised to see that Confederation's human resources manager, Lauren Freemont, was in the office as well. She was holding a pad of paper and a pen, clearly planning to take notes. Peake closed the door, handed Patterson a letter (see Exhibit 2) and sat down.

Peake: "Mike, your comments about working for John McAteer yesterday were completely unacceptable. I've asked Lauren to be here to witness our meeting and provide any advice that we may need regarding company policies. I am formally issuing you a reprimand based on your comments, and it will be placed in your employee file. You need to understand that your statements were not appropriate and that your reassignment is not negotiable. Do you have anything you wish to say?"

Patterson sat in his chair shocked and, this time, he was at a loss for words. How had this happened? He had simply responded to Peake's inquiry about working with McAteer and had given his honest opinion. Now he was going to receive a reprimand!

Patterson did not know what to do. Should he try to explain more clearly what he meant? Should he say nothing? Had Peake told McAteer about the conversation? If so, how could he ever hope to have any kind of professional relationship with McAteer now? McAteer already disliked him. As he sat there, Patterson tried to think of how best to respond to Peake's question and wondered what action he should take in the future. Maybe he should just quit and find another job.

Exhibit 1

MICHAEL PATTERSON'S SECOND REASSIGNMENT LETTER

June 12, 2008

To: Mr Michael Patterson
From: William Peake
Re: Reporting Structure
Cc: Employee file

Michael,

This letter will follow-up on the letter of May 22, 2008, where you were informed that you would be transferred to Product Development.

In trying to organize the department effectively, you will be asked to report to and take day-to-day direction from John McAteer.

Respectfully,

William Peake
Manufacturing and Engineering Manager

Source: Company files.

Exhibit 2

LETTER TO PATTERSON REGARDING PERFORMANCE EXPECTATIONS

June 13, 2008

To: Michael Patterson
From: William Peake
Re: Performance Expectations
Cc: Employee File

Mike,

This letter is a follow-up to the discussion that took place on June 12 with me regarding the reporting structure for your transfer to the Product Development department.

It was discussed that your current project work and day-to-day activities will remain basically the same as when you reported to the Customer Service department; however, within Product Development, you will report to John McAteer for day-to-day direction starting on June 16, 2008. In this meeting, you have expressed negative sentiments with respect to reporting to John McAteer and the unlikeliness of having a positive relationship with him. This is unacceptable.

Your transfer to Product Development was part of a larger realignment of duties that took place within Confederation Kitchen. To clarify, our expectations of you are that you will report to John and that you will follow his express direction; that you will maintain a level of satisfactory performance; that you will act professionally; and that you will endeavour to build and maintain a positive and harmonious working relationship with John as your supervisor.

Respectfully,

William Peake
Manufacturing and Engineering Manager

Source: Company files.