

# SHEATH POST COMPANY (DIRECT REPORT & PEER ROLE PLAY)

## Participant Guide

### Instructions

In the following pages, you will be given detailed information about your role in a situation. You need to understand this information and develop your thoughts about the key focus areas. You have 30 minutes to read and understand the content following which, two role play discussions will be conducted for 15 minutes each with the assessor.

Note: Please approach the facts in this role play just as they are provided to you in the brief

### Timeline

- Reading time : 30 Mins
- Discussion time: 30 Mins

### Role Player Context (Participant role)

You will play the role of **Sanjay Kumar**, Market Head; Indian Subcontinent (comprising India and Sri Lanka) of **Sheath-Post Co. (SPC)**. Your colleague and the Sales and Marketing head for India, **Jayshree Goyal** left without completing the mid-year performance review meeting with one of her Direct Reportee, **Vijay Kapoor**. He is currently the Market Head of South India & Sri Lanka and as a result of **Jayshree's** exit now reports directly to you.

Your direct manager, **Rishi Singh, CEO of SPC**, has sent you an email explaining the situation and the importance of completing this task. Rishi has asked you to schedule a **15 minute** meeting with **Vijay Kapoor** to discuss his performance and forwarded you other background information. **Please read all the emails before your meeting with Vijay.**

Additionally, Rishi has asked you to schedule a **15 minute meeting** with Zima Ahmed, Country Manager (Sri Lanka), before meeting Vijay. There has been a client escalation where Vijay was involved and you need to understand the situation before bringing it up in your conversation. Vijay is a critical talent and it's important to deal with this situation well. You have heard from multiple stakeholders that Zima and Vijay don't get along well and had a huge tiff about a client deliverable in the recent past. You are also aware that they have very different working styles and feel any interpersonal issues must be ironed out soon.

You should familiarize yourself thoroughly with all the materials provided before conducting the meeting. You have 30 minutes to prepare, post which you will have a meeting with Zima for 15 minutes and then immediately with Vijay for another 15 minutes. (Zima & Vijay will be played by one of the assessors and therefore may be male or female). You have met Zima in several meetings and project discussions before. On the other hand, you met Vijay briefly before but this is your first formal business meeting. You should assume Vijay is aware that you are meeting to review performance as part of the meeting and manage the agenda accordingly.

## Overview

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<u>A</u> ttach	<u>O</u> ptions	<u>A</u> ddress
<b>Date:</b>	June 30, 2022	
<b>To:</b>	Sanjay Kumar, India Market Head	
<b>From:</b>	Rishi Singh, CEO	
<b>Cc:</b>	CEO, Executive Assistant	
<b>Subject:</b>	Performance Review for Vijay Kapoor	

Dear Sanjay,

There is an urgent matter that I need you to address that **Jayshree** was unable to do given the circumstances of her departure. Performance management is a key part of the way in which we ensure accountability for results in the business and Vijay Kapoor was due to receive a mid-year appraisal as soon as possible.

I have asked my executive assistant to schedule a meeting for you with Vijay later today to conduct this discussion as we need to get his performance re-aligned in order to meet our end of year targets.

I've attached Vijay's CV and scorecard at the end of this mail. The overall target for South India & Sri Lanka is US \$ 65 million and the region is well on the way to meet the target. While Vijay is great in achieving business numbers and is a valuable resource, he needs to develop on certain critical leadership competencies for him to grow in Sheath-Post.

Recently there was an opening for the position of Market Head for West India (a much larger geography in terms of revenue) which was filled in by another resource. Vijay is very disgruntled about this since he was expecting to be promoted to this role. Vijay is a key resource and if we lose him our business will be significantly impacted. Currently none of Vijay's direct reports are

ready in terms of skills and maturity to take on his role in case of any exigencies. I also have a sense that his client deliverables have been impacted post this instance. Please let me know how this goes as he is someone who is regarded as having high potential and is someone we would like to see grow further in the organization.

It would also be great if you can meet Zima Ahmed. There seems to be a lot of tension between Vijay and Zima lately. You must understand the client issues, however, it's equally important that Vijay continues to liaise with the Sri Lanka team effectively. They can learn a lot from him and he is the right person to drive business aggressively. Zima's concerns are valid but he needs to start appreciating what Vijay brings to the table.

Trust you will manage this well.

Regards,

Rishi

P.S. I have heard that there is some tension coming from some of Vijay Kapoor's team and other parts of the business/clients. You may want to discuss these issues with Vijay as well.

## **Vijay Kapoor's Curriculum Vitae:**

### **Career**

#### **Present Role:**

November 2020 – present: Head of South India & Sri Lanka, Sheath-Post Co.

#### **Main Responsibility**

He oversees the sales and overall performance in the South India & Sri Lanka Market which includes Bangalore, Hyderabad and Sri Lanka markets. Additionally, Vijay Kapoor has overall responsibility for the welfare and development of all staff within the South India & Sri Lanka Market and has direct line management responsibility for 4 regional managers.

#### **Past Experience:**

March 2018 – November 2020: Regional Manager, Hyderabad, Sheath-Post Co.

June 2016 – March 2018: Senior Sales Manager, Bangalore, Sheath -Post Co.

May 2013 – June 2016: Key Client Sales Lead, Bangalore, Sheath -Post Co.

Sept 2010 – May 2013: Senior Sales Manager, Bangalore, Aoral Logistics Solution Pte. Ltd.

#### **Education**

Bachelor degree in Engineering, from Singapore University

Executive Master in Business Administration, from Cranfield, England

#### **Personal**

40 years old, married with 2 children

**Sheath-Post Co. – Half Year Performance and Development Review**

<b>Unit/Location</b>	South India & Sri Lanka Market	<b>Date</b>	June 15th, 2022
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**1. Personal Data**

<b>Last Name</b>	Kapoor	<b>First Name</b>	Vijay
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<b>Position</b>	Head of Market- South India and Sri Lanka
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<b>Languages</b>	<b>Proficiency</b>	<b>Mobility</b>	<b>Preferred Location</b>
English	Fluent	Global	SEA
Spanish	Fluent		

**2. Competence / achievement profile**

	1	2	3	4	X
Customer Orientation			✓		
Change Management		✓			
Team Orientation			✓		
Developing People				✓	
Business Acumen	✓				
Accountability & Ownership		✓			
Communication Skills		✓			

1 = outstanding, 2 = exceed requirements, 3 = fulfils the requirements, 4 = partially fulfils the requirements, x = not applicable

<b>Areas of strength</b>	<b>Areas of improvement</b>
Professional Competence / Rich Experience	Work Results, Team Orientation, Leadership

<b>Career goals from the employee's perspective</b>	<b>Time frame</b>
Become India Market Head	2 Years
Become COO at Sheath-Post Co. (APAC Role)	5 Years

<b>Individual goals in 2022</b>		<b>Weight %</b>	<b>Achievement %</b>
Financial Targets	Lead Sales in South India & Sri Lanka Market to Meet 2022 overall financial target	25%	90%
	Increase new accounts of Digital and Logistics by 30%	25%	35%
Customer	Increase 10% in overall customer satisfaction	20%	50%
	Improve repeat volume per client by 20%	10%	48%

Learning & Development	Ensure all staff have a personal development plan in place to address development needs	15%	40%
	Complete performance reviews for direct reports	5%	40%

<45% = Below target; 45% -- 65% = Meet target; ≥65% = Above target

Jayshree

Superior's Signature

Vijay Kapoor

Employee's Signature

<b>Electronic Mail 2</b>		
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<b>Attach</b>	<b>Options</b>	<b>Address</b>
<b>Date:</b>	June 30, 2022	
<b>To:</b>	Sanjay Kumar, India Market Head	
<b>From:</b>	CEO, Executive Assistant	
<b>Cc:</b>		
<b>Subject:</b>	FW: Concerns in our sales team	

Dear Sanjay,

At the request of Mr. Rishi Singh, I'm forwarding the following emails for your review and action.

All the best,  
CEO, Executive Assistant

*Forwarded*

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From: Zima Ahmed, Country Manager (Sri Lanka)  
To: Rishi Singh, CEO

Dear Rishi,

It is after a lot of thinking that I am writing this mail, with all good intentions and faith that you will be able to help. After Mr. Vijay Kapoor took over the South India and Sri Lanka Market, we have been experiencing high levels of disengagement in our team here in Sri Lanka. Three high performing Sales Directors in my market put in their papers recently, because they felt that Mr. Kapoor had no appreciation of the amount of hard work they put in and not providing sufficient guidance while setting impossible targets and working timeline. In fact, Mr. Kapoor often remarks that professionals in Sri Lanka are too relationship focused and lack the business acumen required to grow the market aggressively. These remarks have not gone down well with the teams here. The general feeling within the department is that Mr. Vijay sets difficult targets, without providing us with any guidance or support. On behalf of the department, I would appreciate if you could look into the matter.

Yours faithfully,  
Zima Ahmed

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<div> <div>Attach</div> <div>Options</div> <div>Address</div> </div>		
Date:	June 30, 2022	
To:	Sanjay Jumar	
From:	CEO, Executive Assistant	
Cc:		
Subject:	Our relationship with Vijay Kapoor	

Forwarded

From: Viral Pandey, BioProbe Technologies, Bangalore India  
 To: Jayshree Goyal, Indian Sub-continent Market Lead

Dear Ms. Jayshree,

We have been associated with your company for over 5 years in your logistics service. Over this time period, we have had extensive dealings with you.

We have worked very closely with Vijay Kapoor over the years and are very impressed with his ability to deliver on his commitments. Vijay recently serviced an urgent request from us in warehousing and distributing more than 600 pieces of our biotechnology products to a few countries within a limited time.

With this, I wanted to acknowledge the efforts of Vijay in managing with his team to deliver effectively as per our request. I know it is not easy to manage this urgent arrangement; however, Vijay does have an unusual ability to always deliver.

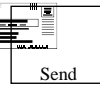

Best regards

Vijay Kapoor

Chief Lab Manager, Bangalore

BioProbe Technologies



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Attach	Options	Address
<b>Date:</b>	June 30, 2022	
<b>To:</b>	Sanjay Kumar	
<b>From:</b>	CEO, Executive Assistant	
<b>Cc:</b>		
<b>Subject:</b>	Frustration over Delivery Contract	

Forwarded

From: Zima Ahmed, Country Manager (Sri Lanka)

To: Jayshree Goyal, Indian Sub-continent Market Lead

Hi Jayshree,

This is with respect to my telephone conversation with one of our key customer Naturel Pharmaceuticals regarding the international delivery to their newly constructed lab at Colombo. Naturel Pharmaceuticals had escalated the issue to me because of the delay in their equipment delivery according to the timelines we had promised them. This long time customer was rather upset as the delay in delivery which will result in substantial losses, in addition to a compromise to their reputation.

My Logistics Director Tushar Agnihotri tells me that it is humanly next to impossible to meet the 24-hour timeline for 20 tonnes parcel which Vijay had agreed upon earlier during his meeting with client without prior checking with the logistics and delivery team. As of now, we have 3 orders of other key customers pending, which at present are at the top of our priority. The only way to avoid time overrun would be to ask the delivery team to work overtime. Having said that, Tushar's team is already stretching itself and I am inclined to side with them.

It has been very difficult to make Vijay to see our perspective. I would appreciate if you could speak to Vijay on this. He needs to request a reasonable timeline from client before signing any contract. We need to be involved to discuss with the client about the delivery and negotiate the timeline, rather than passively receive what the client has requested. I feel if this continues it will do great harm to one of our core values of Delivers Excellent Results.

Yours faithfully,  
Zima Ahmed