

SkillsForTomorrow Case Analysis (Chen Ziao, U1420681G)

What is the main role of the management consultant in this particular situation?

The management consultant's main role is to identify and correct the morale issues among SFT Harrisburg's branch management team. In details, she needs to discover the main causes of the management discord through interview or survey approach and derive a solution that help solve the various issues. Under the SFT case, she will need to provide suggestions on how to strength the management team in terms of trust and teamwork and she will also need to organize the retreat for the management team based on Alvarez's request. Last but not least, the consultant will also need to consider the political and social areas of the speaking to relationship between herself as well as the executive director.

What are the main issues facing the SFT Harrisburg team of directors? What are the root causes of these issues?

From the survey response, there are in total two issues to be identified, which are lack of communication across the organization, lack of teamwork and morale. According to Exhibit 5, the average rating scores for these three aspects are 2.73 and 2.73 respectively, which are all below adequate (3). For the communication issue, the root cause could be the 10 percent budget cut are not well explained and understood by the whole management, which leads to complaints. Team members also do not share a full understanding of each other's role and responsibility and relationship between members are not well established especially between old and new employees. There is no enough communication channel such as suggestion box or team bonding activities for employees to understand each other. For the teamwork and morale issue, the root cause may be the mistrust (with average rating score 2.82) between people in the organization. Employees only have the "cover my own back" mentality rather than an organizational focus and therefore fail to maximize the benefit from an organizational perspective. Goals and missions are loosely defined and therefore employees from different departments have no incentives to work together towards a common goal. Alvarez's management style may also play an important role in causing these two issues because he should have treat everyone equally instead of creating a trusted "inner circle" kind of environment for his management which may make others feel untrusted and therefore break the morale.

How would you characterize Alvarez as a leader?

Alvarez is a relatively aggressive leader with good experience and acumen. He likes to carry out his tasks or missions with drive and sweep. Since he had been with SFT for 14 years in a variety of roles and locations, he must have great experience in managing SFT business. The good acumen could be observed from the fact that he is able to quickly identify the existing issues like inefficient communication in Harrisburg branch. Furthermore, he likes to execute task fast and simple, which can be told from his impatience in listening to Jones' suggestion during the preparation meeting. However, he is a bit conservative in terms of trusting people due to the fact that he has brought two previous colleagues to the branch and the "inner circle" comment from other management team members.

What recommendations would you make to help improve the situation?

To resolve the lack of communication issue, the organization should set up anonymous communication medium such as suggestion box so that everyone's voices can be heard and people would feel more engaged. Alvarez can maintain regular meetings with management team so that events such as budgets cut can be explained promptly. Job shadow presentations can also be organized to promote understanding between directors, which builds the fundamentals of any future collaborations. To address the teamwork and morale issue, first and foremost, the organization should establish a common goal or mission which must be aligned with everyone's responsibility so that directors have incentives to accomplish the goal together. Alvarez should try to promote participatory leadership in decisions through creating voting structures for key decisions that require multiple stakeholders in order to build trust and effectiveness. Every director should be treated equally without excluding anyone in decision making. Team bonding activities can be held regularly to provide chances for directors to build relationship with others.

If you were Martina Jones, specifically how would you approach the Monday afternoon meeting with the directors? What would you do before, during, and after the briefing with the directors?

If I were Jones, I would focus on presenting the interview and survey result with recommendations for Monday afternoon meeting. Before the meeting, due to time constraints, I would not reach out to directors again for information. Instead I would focus on the current data and information obtained and try to identify main issues, root causes and summarize them in a clear and structure way. After that, based on my team's experience, I would address each issue with a few actionable recommendations and concrete steps to execute these recommendations. Any other possible future issues would also be identified to mitigate any potential risk. Last but not least, I will also plan the off-site retreat by providing some possible ways of having an effective retreat and the usual agendas for each type of retreats. All information would be compiled into a presentable format before the meeting. During the meeting, data on survey and interview would be shown first and then main issues would be introduced to directors. Next, recommendations for each issue would be explained, after which feedback from directors would be asked to refine the issues and recommendations. Discussion and debates on alternative perspectives or strategies should be encouraged. Question and answering session would happen after feedback is received. Finally, the retreat would be discussed by first providing several options on the venue, time and activities. In order to encourage all directors to be more participative, it is helpful for everyone to provide input into the retreat structure and agenda. After the briefing, I would reach out to directors to do a meeting follow-up in case there is any concerns or questions either through interview or survey. The follow-up result would also be compiled and discussed with Alvarez so that next step can be better planned.

Is an off-site retreat advisable at this time? If so, what would be the focus of the retreat? Specifically, how would you organize the retreat?

Yes, it is advisable. Off-site retreat should focus on the overall important and pressing issue which are communication issue and teamwork issue. During the retreat, communication should be encouraged so that everyone's opinion can be heard and everyone can have a deeper understanding of each other. The retreat should be organized with a clear goal and agenda. Before the actual retreat day, to further understand directors' personal characteristics, a personality assessment such as the Myers-Briggs Type Indicator can be conducted so that activities can be arranged based on the assessment result. After that, the participants, time, venue and activities of the retreat should be planned. For the actual retreat, it can be divided into two parts: the intense part and the relaxing part. The intense part stands for an open discussion with directors where everyone can express their opinions freely with a cup of coffee on hand. For example, Alvarez can start it with explaining the budget cut on how it aligns with the mission of SFT on education, after which directors can share their concerns and also raise up some other existing issues. The takeaway can be a strategic plan on resolving the issues raised or maybe just simply a deeper mutual understanding of roles and responsibilities on each other. The relaxing part would mainly be a group activity that can bond everyone together such as river rafting, cooking or playing golf. Directors now have the chance to talk to each other personally so that mutual connection and understanding can be built. More importantly, through the activity, everyone gets involved and trust is gained. After the retreat, follow-up is required to obtain feedback and also ensure decision made during the retreat is properly carried out. A follow-up meeting may also be useful to monitor the process of strategy execution.