**SOUTH EAST EXHIBITIONS: FILLING BIG SHOES**

**TEACHING NOTE**

**Critical Incident Overview**

Jason Kirkpatrick, president of South East Exhibitions, was confronted with the impending loss of a critical member of his company’s managerial team. South East Exhibitions hosted events, or “shows,” that brought together local exhibitors (primarily companies that offered landscaping, home improvement, and interior design merchandise and services). Prospective customers would attend the show and interact with this collection of exhibitors. Hosting such shows allowed South East Exhibitions a variety of revenue streams from exhibitors, show sponsors, and customer ticket sales.

This incident highlights Jason’s dilemma not only of replacing a particularly valuable and popular member of the management team, but also his effectiveness in communicating this decision to those who will be affected by it. With Diane Aldridge stepping down from her role as president of the Women’s Shows division, Jason must consider potential replacements for what could be termed the “irreplaceable manager” and/or he could restructure the role. South East Exhibitions had historically enjoyed positive internal relations and Jason wanted to preserve that dynamic, but his decision also needed to be made reasonably quickly.

This decision-based critical incident illustrates the challenges of choosing to replace a highly effective manager and/or to restructure the managerial framework of a multidivisional organization. In assuming the role of president of South East Exhibitions, students are asked to evaluate options for replacing a very popular and effective division manager whose role requires strong organizational, managerial, and social skills. This task also required effective internal communication skills to maintain the company’s harmony among affected parties who held varying opinions as to how the decision should have been made.

With the integration of management strategies for communicating about uncertainty and theoretical approaches to change and leadership processes, this incident is well suited for undergraduate and graduate courses in Organizational Behavior, Organizational Communication, and Leadership.

**Learning Objectives**

The learning objectives of this critical incident are for students to:

1. Identify potential advantages and disadvantages of various strategies for communicating about uncertainty to employees.
2. Be able to categorize and evaluate varied organizational approaches to change and leadership processes.
3. Articulate factors that may empower and/or constrain leaders when contemplating and communicating organizational change such as personnel decisions.
4. Be able to identify and recognize the relevant organizational approaches that determine how change and leadership processes are perceived.

**Theory Application**

Students should do some preparatory reading before analyzing the incident. According to Lewis (2000), “Communication process and organizational change are inextricably linked processes” (Lewis, p. 45). The decision incident provides a study of managerial decision-making amidst uncertainty and allows for an explanation of various communication strategies managers can employ when contemplating organizational change. This analysis applies five common and recurring management strategies (Spray & Pray, Tell & Sell, Underscore & Explore, Identify & Reply, Withhold & Uphold) to categorize and evaluate the quality of managerial communicating amidst organizational uncertainty (Clampitt, DeKoch, & Cashman, 2000). In addition, this analysis relies on relevant organizational approaches (Classical, Human Relations, Human Resources, Cultural) to change and leadership processes to better understand the decisions enacted and/or ignored by management at South East Exhibitions (Miller, 2006). The authors recommend that students have familiarized themselves with these theories either before analyzing this incident or in conjunction with analyzing this incident.

**Research Methods**

This critical incident was based on personal interviews of company managers. The company name and the names of company personnel have been disguised. No facts or other information pertaining to this incident, however, have been disguised.

**Questions**

1. **What are the various organizational communication strategies executives can use when communicating about uncertainty to employees?**
2. **How did Jason Kirkpatrick’s (mis)use of various communication strategies affect the quality of his personnel decision?**
3. **Identify the relevant organizational approaches that determine how change and leadership processes are perceived?**
4. **How are each of the relevant organizational approaches to change and leadership reflected in Jason Kirkpatrick’s personnel decision making?**
5. **Considering the various organizational communication strategies, how would you have recommended Jason Kirkpatrick approach this decision?**

**Answers to Questions**

1. **What are the various organizational communication strategies executives can use when communicating about uncertainty to employees?**

When attempting to account for and communicate organizational uncertainty to employees, executives choose among a finite set of strategies. According to Clampitt, DeKoch, and Cashman (2000), each of these five strategies include advantages and disadvantages:

1. Spray & Pray—This strategy assumes the more information employees have, the better the decision-making and communication. This strategy is the simplest (communicate everything as often as possible) but oftentimes the least effective strategy of addressing uncertainty because employees can quickly become overwhelmed and confused as to the relevance of messages.
2. Tell & Sell—Executives approaching organizational uncertainty using this strategy formally communicate a select number of options about a particular matter of uncertainty to employees but attempt to “sell the employees on the wisdom of their approach” (p. 47).
3. Underscore & Explore—Executives using this strategy focus their communication on issues they believe are essential to organizational success “while also allowing employees the creative freedom to explore the implications of those ideas in a disciplined way” (p. 48).
4. Identify & Reply—Executives employing this strategy listen to employee concerns about various decision-making options. Unlike Underscore and Explore, however, this approach is defensive in nature because much of executive communication is directed toward replying to employee concerns.
5. Withhold & Uphold—Executives applying this strategy purposely withhold information from employees as information is controlled at the total discretion of the manager who believes employees are incapable of making sense of information.
6. **How did Jason Kirkpatrick’s (mis)use of various communication strategies affect the quality of his personnel decision?**

Although South East Exhibitions had a history of good relations and open communication with its employees, Jason Kirkpatrick did not communicate effectively with his employees concerning the range of decision making opportunities because he was “scared to disrupt the wonderfully peaceful work environment.” Thus, he did not utilize the Spray and Pray strategy because little, if any, information about Diane Aldridge’s ongoing personnel decision was communicated.

After learning in 2007 of Diane’s desire to assume a different role with less responsibility at Women’s Show, Jason talked almost exclusively to Diane about staying on longer to delay an inevitable decision. Consequently, Jason’s communication strategy utilized Tell & Sell but only insofar as it involved selling Diane on the idea of “staying a little longer.”

Jason did explore options with his various managers but the exploration focused on their beliefs about how they might be able to “fill Diane’s shoes.” Thus, while he utilized some aspects of the Underscore & Explore strategy, Jason failed to take full advantage of this approach because the exploration process focused on managers’ individual qualities and desires, not on exploring authentic opportunities to receive feedback and constructive synthesis from Diane and other veteran managers about what might be best for organizational success.

Jason Kirkpatrick’s approach to organizational uncertainty most clearly embodies the Identify & Reply strategy. While Jason listened to his various managers concerning their thoughts on possible advancement, he allowed the managers’ comments (i.e., “I really don’t think anyone could have taken her place, including myself”) to drive the agenda, thereby limiting employee input to rumor, conjecture, and fear.

Finally, while Jason did not explicitly engage in Withhold & Uphold, the three year time frame of delaying a permanent decision concerning Diane Aldridge’s position implied an underlying belief that his employees were simply “not sophisticated enough to grasp the big picture” (p. 48).

In sum, the quality and timeliness of Jason Kirkpatrick’s decision making was hampered by ineffective communication, thus impairing organizational performance. According to Clampitt, DeKoch, & Cashman (2000), Underscore & Explore is often the best strategy to employ because it:

maximizes organizational potential by creatively synthesizing executives’ initiatives and employee concerns. It allows executives to shape the agenda as implied in the Tell & Sell strategy while devoting time to employee concerns as suggested by the Identify & Reply strategy (p. 49).

Although Jason believed no one could have done the job like Diane, he unknowingly limited his own decision making options by providing answers to his own questions (i.e., he *felt* there was no one who could fill Diane’s shoes and he *felt* there could be reluctance among current employees if he hired someone from outside the company), without receiving essential feedback from Diane and other loyal managers concerning possible change that might actually improve overall organizational structure and performance.

1. **Identify the relevant organizational approaches that determine how change and leadership processes are perceived?**

There are a variety of theoretical approaches to organizational change and leadership processes that can help explain a particular leader’s (in)decisions (Miller, 2006). Particular to this decision incident, five relevant theoretical approaches influence how change and leadership are interpreted:

1. Classical—Change and leadership are to be avoided unless the desired change can be conceived and implemented exclusively by management.

b) Human Relations—Change and leadership are considered in light of employee satisfaction and the extent to which change and leadership processes will positively or negatively influence employee needs and morale.

c) Human Resources—Employees are expected and invited to participate in the conception and development of change processes as change opportunities are believed to highlight the skills, insight, and creativity of employees.

d) Systems—Change and leadership are evaluated in terms of how they might affect relationships among and between employees, departments, the external environment, competitors, etc.

e) Cultural—Enacting effective change cannot be divorced from understanding the long-standing and dominant beliefs, assumptions, and values of employees concerning how things are and how things should be in their particular organization (Miller, 2006).

1. **How are each of the relevant organizational approaches to change and leadership reflected in Jason Kirkpatrick’s personnel decision making?**
2. Classical—Throughout, Jason’s approached change as a “problem” that must be delayed at nearly all costs because change was considered a threat to the peaceful environment at South East Exhibitions. Consequently, Jason acted as if this personnel issue was his problem and he alone was best equipped to handle it. This classical approach to change and leadership was further evidenced in his view that the current mangers seemed incapable of filling Diane’s role, let alone helping him conceive of possible solutions to this problem using their feedback.
3. Human Relations—Jason Kirpatrick demonstrated a human relations approach to change and leadership as reflected in his concern for the satisfaction of employees. In not wanting to “disrupt the wonderfully peaceful work environment”, Jason’s personnel decision might have been constrained out of fear of changing the “good relationships” South East had traditionally enjoyed with its employees, many of whom had worked for South East for more than 20 years. In addition, Jason’s concerns about the possibility of Diane’s position being filled by current managers was affected by his concern for the feelings of his mangers as he did not want to hurt others’ feelings or risk a managerial uprising. From a human relations perspective, the desire to maintain good relationships meant Jason’s decision involved more than simply the bottom line.
4. Human Resources—Jason’s approach to change and leadership least reflected the human resources belief in the creative and intellectual capacity of employees to participate in and enact change. Despite the fact that each manager had successfully endured a grueling interview process that underscored the abilities of the staff to work with senior management and self-manage, Jason repeatedly dismissed the talents and ingenuity of his employees. For example, Jason attempted to delay Diane’s decision while not encouraging feedback from Diane concerning how she might remain with the company in a changed role. Second, Jason seemed to believe that the managers currently on staff were incapable of rising to the challenge of organizational change, noting that he believed “none of the managers had the creative and organizational skills possessed by Diane.”
5. Systems—In many instances, Jason’s indecision could be traced to a systems approach to change and leadership processes. Even his conception of change as a “problem” could be attributed to his concern for disrupting the “environment that his company had enjoyed.” With each company running the show like an individual business, Jason felt this personnel decision would impact not only the entire company, but also its good relationships with exhibitors and sponsors. In addition, Jason’s decision was constrained by his concern with how choosing one current manager to replace Diane would affect the relationships among other mangers. Finally, and perhaps most importantly, Jason’s unwillingness to hire from outside the company was justified by his worry of how an outside hire might “disrupt the structure that had successfully existed since the company’s inception.” Thus, Jason wasn’t simply making a decision about Diane Aldridge’s position, he believed he was making a decision about the very structure of his company.
6. Cultural From this perspective, Jason’s thought process and decision-making cannot be understood apart from South East Exhibition’s organizational culture. In particular, his parents had founded the company in 1959. Ever since finishing graduate school, Jason had worked at the company. In addition, he had worked at the company for 17 years while his mother and Diane Aldridge oversaw Women’s Shows, a division of South East Exhibitions. Thus, the decision at hand involved much more than simply personnel. Jason Kirkpatrick’s decision was impacted by his apprehension concerning changing the culture of a close-knit, family-like organization defined by trust, self-initiative, loyalty, and strong relationships.
7. **Considering the various organizational communication strategies, how would you have recommended Jason Kirkpatrick approach this decision?**

Jason’s decision was a difficult one that did not have a simply answer; therefore, not all students will come to the same conclusions or make the same recommendation. Working through the analysis, however, should provide students a basis for developing and for supporting their recommendation.

While students might argue for advantages of other approaches, the authors agree with Clampitt et al.’s arguments for the advantages of an Underscore and Explore approach. Jason would have benefitted from additional two-way communication with personnel who would be affected most by this decision. The Underscore and Explore approach would have provided Jason the mechanism for understanding employee concerns while still allowing him to guide the direction of the communications with these personnel. In so doing, these individuals would have also been better able to understand Jason’s perspective and would have likely been more willing, therefore, to buy-in to whatever decision he would ultimately make. Although, no approach would have ensured Jason could have achieved each of his goals in the midst of organizational uncertainty, the Underscore and Explore approach would have allowed Jason the best opportunity to have made a decision that would have

* Addressed key personnel’s concerns;
* Increased their understanding and buy-in of the decision that would be made for the betterment of South East Exhibitions; and
* Maintained social harmony within South East Exhibitions

**General Discussion or Additional Issues**

A particularly astute student will recognize that there is no one magic bullet for communicating amidst uncertainty. Making important decisions is not simply a personnel decision. Rather, change brings about uncertainty concerning organizational culture, job security, job performance, and the very values that define the company. Thus, it is no surprise that all parties involved in this incident, Jason Kirkpatrick, Diane Aldridge, and relevant managers were impacted by the stressors of change that often result in “negative psychological reactions [that] may lead to resistance or other ‘problematic’ outcomes for implementing change” (Lewis, 2000, p. 49).

**Epilogu**e

Jason Kirkpatrick decided against looking outside of the company, and also made his decision without consulting the six show managers. Instead, Jason elected to divide Diane Aldridge’s responsibilities among five of the six show managers, based on his perceptions of their relative strengths. Each of those five managers received pay increases as a result of taking on additional tasks. Several months later, Jason felt that the restructuring had turned out relatively well, as the company continued to produce high quality women’s shows. The managers all seemed to be enjoying their new job challenges. A problem occurred, however, with the sixth manager who was not given any additional responsibilities. She felt shortchanged and overlooked, and within two months had tendered her resignation. This manager had not done anything disruptive after the plan was announced, but continued working in her existing capacity while seeking another job. Kirkpatrick was sorry to see her leave, but admitted that replacing a show manager was a much easier task than finding a single replacement for Diane would have been.

**References**

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