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Carrie Pan (B)

Kathryn Tang wrote this case under the supervision of Darren Meister and Don Uffen 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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moving on the new challenges

Recognizing that a factor of two had initially been applied and that Burgundy tended to err conservatively, Pan did not see the Bearings Tower structural support design as a threat to public safety. She did not pursue the debate further with Burgundy at this point but hoped to reopen the discussion once she had more experience on the team and was not under duress. Pan created and saved a detailed account of the discussion, including scans of handwritten derivations. She then sent a copy of these records to her internal email account, which displayed a time stamp. Pan knew that if this dispute were revisited later, her records would help verify the accuracy of her story. Pan spoke to another senior team member about the competing methodologies and became more confident that Burgundy had been incorrect. Pan continued to keep a keen eye out for similar projects throughout the next year, and because none existed, she was assured that there had been no threats to public safety.

Pan recognized that employment of less than one year would be unattractive to future employers, especially without a strong reference from her manager, and she decided to stay at LMC and look for opportunities to improve her environment and prospects. Pan’s first annual performance review was held in October 2013, five months after the Bearings Tower dispute. Pan had been a good contributor to the team overall and was given a good review with a modest salary increase. Burgundy indicated that Pan would receive another mid-year evaluation, which was unusual. Pan suspected that her performance review was somewhat dampened by the Bearings Tower project.

In her second year at LMC, Pan took on more challenging and diverse assignments. She found these challenges to be worthwhile and interesting: she extended her technical capabilities and was rarely bored. Through interactions with project managers, Pan learned that responsiveness, flexibility, and quality of service were key competitive advantages that clients sought from LMC. Pan focused on delivering these same values in her deliverables to enable project managers to facilitate stronger relationships with their clients. Pan’s initiative, organizational skills, and project summaries were especially appreciated on an eight-tower megaproject, where she acted as a critical point of contact between the technical director (Galbraith), the project manager, and her team. In addition, Pan utilized her knowledge in automation and programming to pioneer new ways to manage data, which drastically reduced design hours for the project. Pan cultivated a reputation among her colleagues for being proficient and innovative, and she received a mid-year salary increase without a performance review conversation.

Burgundy and the Team Environment

After seeing how Burgundy had handled their Bearings disagreement, Pan now doubted his leadership and technical abilities. She took a critical perspective on his behaviour. Pan expected Burgundy, as a central point of contact for all offices, to champion team initiatives and be supportive of each office. However, Burgundy continued to be hostile to the India and U.K. offices, sometimes reacting to mistakes by publicly exclaiming, “I am never using anything from the U.K. office ever again.” Pan wondered whether Burgundy’s negative attitude was motivated by his interrupted work history with LMC and whether it affected the feelings of the entire team. Unlike others within the team, Pan suspected that members of the team were somewhat to blame for missed deadlines and stagnant research and development.

In May 2014, the team had recently transferred two technicians from other teams to assist engineers on the structural team with what many felt was mindless procedural work. Burgundy disagreed with this as he saw the transfer as another threat to the job security of engineering staff. Burgundy was nearly in tears when he announced the change. The technicians were made to feel unwelcome, and Burgundy withheld work from them.

Training and Growth

Three new team members were added at the junior and intermediate levels of the structural engineering team in the fall of 2013, giving the team a total of 13 permanent members. Despite having extensive education in structural engineering, these new recruits faced significant difficulties with integration into the team. They felt that what took them four months to learn should take two months and that, with a better training program, they could contribute to the team much more quickly. Pan developed friendly relationships with the new recruits and helped them learn to the best of her abilities. New staff pushed for more team-building opportunities, including charity dodgeball tournaments and regular team lunches.

One consistent complaint from senior staff members was that they were assigned too much chargeable work while simultaneously being expected to spend too much time training and revising work from new staff members. At the same time, they insisted that all training should be provided by the senior staff. Pan knew from working with Galbraith on the megaproject that he had intended for the team to grow much faster than it had over the past few years. She thought this might have alleviated some stress on the team and saw the team members’ critiques of senior managers as somewhat unfounded.

To improve training, Burgundy assigned a co-op student to modernize documentation to reflect updated processes. However, Pan felt this approach to improving procedural instructions did not facilitate the transfer of any of the underlying knowledge that was key to making effective on-the-job judgment. Four additional staff members were expected to join the team by September 2014. Pan thought this was a prime time to build an onboarding program, and she asked to speak to Burgundy about this initiative. Burgundy attributed the slow ramp-up thus far to the new employees, who he said expected to be “spoon-fed,” and said he was “disappointed with the level of effort” put in by employees. Burgundy thought this onboarding plan was largely unnecessary. However, he agreed that some training could be provided by newer staff members and that Pan could help integrate the next group of hires.

Pan recognized effective onboarding as a key enabler of the team’s growth and success, but she did not have the full support to proceed with a new program. Her second annual performance review would take place in October, and Pan wondered whether developing an onboarding program would further strain her relationship with Burgundy. At the same time, Pan thought about whether her career would progress more effectively on a different team or in a different company. Pan was scheduled to spend a week in the U.K. office within the next month, and she could take this time to gather more information about her options. She had successfully worked with Kilfoyle before and hoped to build stronger working relationships with the U.K. staff.