

PC+

You are a VP of Sales at PC+ Computers and are responsible for all of PC+'s corporate contracts. Competition in the industry is intense and major corporate sales are critical to PC+'s success. Word travels fast among corporate customers (usually CIOs and/or directors of purchasing), so avoiding missteps and maintaining smooth customer relations are of paramount importance. You have been able to do so, and to gain an edge over competitors like IBM and Compaq, by meeting aggressive delivery schedules with large orders of customized PCs and peripherals.

Your largest customer is Carlsen Consulting, a major consulting firm which accounts for nearly 15% of your sales. You are Carlsen's largest supplier, supplying 40% of its desktop and laptop PCs. Joe Coleman, Director of Purchasing at Carlsen, has been a satisfied customer for several years. His role as president of the International Association of Purchasing Directors (a professional organization) also puts him in frequent, direct contact with many of your other customers (and potential customers).

The Situation

It is 1:00 p.m. and at 2:30 you must leave for the airport. You are heading overseas for a week-long conference of the International Association of Purchasing Directors (IAPD) — the single largest gathering of your primary customers and target customers. You are excited about the conference — your first IAPD meeting since becoming VP of Sales. You will be representing PC+'s interests, as well as unofficially scouting around for new contracts. Given the conference's overseas location, you have high hopes that you will be able to make important, new, international contacts and expand PC+'s sales abroad.

Because communication links at the conference will be unreliable, you are trying to attend to the last few details awaiting your attention. As you begin to read your e-mail, you get a call from Judy Dawson, your direct boss and mentor. Judy went out to Los Angeles two days ago, and she is calling from there. Lately, Judy has been delegating more and more of her duties to you, "testing you," she says, "to see if you deserve to fill my shoes one day."

"We've got problems out here," she tells you. "I heard from an associate at the tennis club that Joe Coleman at Carlsen has been complaining about a late order. A large order of laptops promised for September 1 is still not there three weeks later. And that's not all -- he's complaining that Roscoe Trent, your agent in San Jose in charge of the Carlsen account, hasn't been very helpful lately. Are you sure Trent knows what he's doing? Apparently, Joe's calls have not always been returned, and he can't get accurate information on the problem. The situation sounds serious. What concerns me most is that Sam Steele from IBM probably overheard the conversation and will, no doubt, be moving in on Carlsen. You'd better get on the problem right away."

Your heart sinks, as you secretly wish that this problem could have waited a few days -- or even a few hours -- to appear. "But Judy," you say, "I'm leaving the country in an hour. I don't have time to do anything now."

"You've got to do something," she says. "We can't afford to lose Carlsen. I'm sure IBM would be happy to move in and pick up any business we lose. Find out what's wrong and take some action before you leave. And be sure to reassure Joe Coleman that you are doing something to solve his problem. I won't be reachable for the next few hours, but I'll be back in Houston tomorrow. Leave me word of what you've done."

"OK, Judy. I'll do what I can," you say before hanging up. You look at the clock and realize that you have exactly one hour and fifteen minutes before you must leave for the airport.

Roscoe Trent is an acquaintance of yours from the period when you were at the San Jose office. In the past he has always taken his job seriously and has performed his duties capably. Although you were never personally close to him, you have always liked and respected him. You know he is currently involved in a divorce and a child custody battle over his two children. You know he is upset, but you didn't realize his family problems had been affecting his performance so seriously.

A call to the warehouse reveals that the order in question was put through from Roscoe Trent's office only last week, arriving at the warehouse on Sept. 14. The order will be shipped tomorrow, Sept. 23.

You call an old friend, Dan, in another department of the San Jose office to see if you can find out more. From him you learn that Roscoe's family problems have caused him severe anxiety, and that he's gone into intensive therapy. These problems are making it hard for Roscoe to concentrate on his work. Dan speculates that the litigation and consequent stress are likely to drag on for at least three or four more months, during which time Roscoe's work will probably continue to suffer. He suggests that Roscoe's assistant, Mary Moore, could probably take over Roscoe's responsibilities, at least temporarily, and do a competent job. He agrees with your perception that Roscoe is generally an excellent worker and worth keeping.

Trusting that Dan's assessment is accurate, you act on the matter immediately. You call Roscoe, ready to offer him a three-month leave of absence with pay. Unfortunately, Roscoe's secretary tells you that Roscoe is on his way to court right now and will not be back until later in the day. In spite of the awkwardness of dealing with the situation in writing, you decide that you must take care of it before you leave town. You may not be able to reach him by phone during the flight; and in any case, you want to guarantee his privacy and document your decision. You will have to e-mail him.

Another phone call connects you with Mary. In discussing the situation, Mary is surprised to learn that the large order has not yet reached Carlsen. She remembers that Roscoe had misplaced the original order which had never reached the warehouse. In a phone conversation she overheard two weeks earlier between Roscoe and Coleman, Roscoe had explained that the original order had been slow in reaching the warehouse, but that he had sent in a new order and would call to rush it. He reassured Coleman that the equipment would arrive by Sept. 14.

After a cautious but reasonably candid conversation with her in which Dan's assessment of Roscoe's preoccupation with personal matters is reaffirmed, you reach an understanding that she will take over the Carlsen account during Roscoe's leave of absence. You ask her not to say anything to Roscoe until you have told him about your decision.

'Now,' you think, 'What shall I do about Joe Coleman?' You want to placate him at all costs and ensure that he doesn't speak poorly of PC+ at the conference. You have told Mary to get in

touch with him after the conference and you decide to let her take care of the details when she talks to him. However, you want to pave the way for Mary's talk with Coleman and your interaction with him at the conference. You know your decision will send a mixed message to Roscoe (i.e., that you value his work greatly, but that his personal affairs are jeopardizing a key contracts), and you would like him to hear about all of this first, but are unsure whether you will be able to send your messages and sequence any conversations to do so.

The Task

A glance at the clock reveals that you now have less than an hour before you must leave. You will not be able to speak directly with Judy Dawson, your boss, or with Joe Coleman at Carlsen; so you have several choices to make. You consider the messages you need to send and available means of sending them. Then, you sit down to draft the content for your communications with:

- Roscoe, telling him of your decision to give him a leave of absence and temporarily replace him with Mary Moore;
- Joe Coleman, addressing his concerns about the late order and preparing him for the change from Roscoe to Mary; and
- Judy Dawson, summarizing what you've done, and why.

Then you depart for the airport.

Note: Your approach to dealing with Joe Coleman may include a combination of voice- or e-mail and a conversation once you both reach the conference. Remember that Joe is president of the Association and, thus, presiding at the conference. Furthermore, you may not be able to corner him for a private conversation at the beginning of the conference. Keep this in mind as you consider how to handle the situation.

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In-Class Activity

Working in your groups for the group project, please analyze the situation and decide on a strategy for each of the three communications. In particular, focus on the channel choice for each communication: what channel(s) would you use, and why? Members of the groups will report back to the whole class.