Table of Contents

Case Study Overview

You are Paddy McOak, Sr. Manager of the Data Development and Administration Division (DDAD). Given the materials you have reviewed on managerial attributes, team building, group dynamics, and conflict resolution and problem-solving help Paddy and his EmployPro team resolve the issue at hand. You will be provided opportunities to apply concepts learned in the materials through this choose-your-own adventure case study.

This activity can take up to **3 hours**. The design of the case study does permit stopping and starting points as the case study is broken into four smaller case studies. It is recommended that the "**Outcome"** pages be printed minimally to reduce scrolling through the document. If you have printed the entire case study then pull out the "**Outcome"** section to refer to quickly at decision points. Set aside the "**Answer Key"** for checking your answers when you complete an exercise.

Move to the next page to obtain the Company Background.

Company Background

Small World, International (SWI) is a leader in the health care industry. They pride themselves on hiring the best and brightest to help promote their vision of providing the best care and innovative treatments to the diverse needs of the world's population.

The company has grown by leaps and bounds over the last ten years. They have leveraged the advancements in technology to keep their locations across the world unified. This has helped SWI become a noted principal in being at the forefront of efficient, quality care.

As the SWI continues to thrive they have had a slight increase in turnover throughout their company. Upon receiving back the annual employment satisfaction survey SWI was alerted to an issue that was leading to some of the turnover. In the last quarter a company-wide update that was implemented into the software that maintains employee records, HRWhiz, corrupted an estimated 1500 employee records. These employees paid time off (PTO) was erased. Due to the nature of the update reverting back to a previously saved version of the database would not work. SWI also knew it would take months to research and discover all employees affected by the technical hitch because the current style of paystub did not show the PTO; employees had to call the HR department to inquire about PTO.

To resolve the issue, SWI provided an average amount of PTO to each of these 1,500 employees, no matter the years of service, based on the average PTO across the entire company. In the end some employees benefitted from the situation but others lost out on hard-earned PTO. This created resentment among the employees who lost PTO or perceived a loss. Roughly 200 of all employees affected left SWI due to this particular incident.

Employees who were not affected by the problem noted concern that they too may encounter the same issue in the future if another update is made on the employee database. Employees requested more flexibility to manage and see their employee record including; pay rates, PTO, retirement plans, and health benefits. They also indicated that this particular issue that had occurred and its subsequent handling gave them reservations about the company's appreciation of its employees.

SWI has recognized this issue as a high priority to resolve. They are concerned that this incident could lead to more employee turnover and diminish the company's reputation as a great place to work; impacting their ability to hire the best and the brightest.

Move to the next page to begin the case study.

Case Study – Data Migration Woes

As part of high priority business goals of the Small World, International (SWI) the Information Technology (IT) Departments, Data Development and Administration Division (DDAD) was charged with researching, selecting, and implementing a new Human Resources (HR) Application for the management of employee records, as well as, have the capability to allow employees to view their own employee record.

Employees are being provided the best of all the technological innovations to treat their patients, but not to handle the management of their own employee records. Sometimes it is months before an employee will notice that adjustments they requested to their paycheck, which were submitted on a paper-based form, have taken effect. Recently an update to the system, HRWhiz, corrupted over a thousand employee records. Employee information was erased, creating large discrepancies in employment history and the entitlements that go along with their years of service. The solution to the problem manifested higher rates of turnover in the last quarter as it was not the most feasible approach, in the eyes of the affected employees, to resolving the issue.

With the research and selection process behind them the DDAD division has moved into the initial phase of migrating data from the old HR system, HRWhiz, to the new system EmployPro. The issue of employee file corruption has been a large concern. The team working on the initial data migration comprehends the need to make this data transfer as error-free as possible. They also know that they need to make the time and process to prepare the data for transfer short as it could also potentially corrupt the employees' records. In addition, SWI wants to move forward as soon as possible with the launch of EmployPro software, hoping to appease employees' concerns about how SWI cares for them.

The current issue revolves around the salary data. The EmployPro team comprehends that SWI cannot provide a solution like they did previously for the PTO so they need to make sure that the salary history for employees remains intact during the initial importing of data or they will have to input that particular data by hand. The initial testing of this data migration showed a loss of the current salary for employees that were once part-time that migrated to full-time.

Let's meet Paddy McOak and his EmployPro team. Move to the next page.

EmployPro Manager's Bio and Managerial Attributes

Paddy, Sr. Manager of DDAD

Paddy has been at SWI for 12 years and has been a part of the DDAD since he first started. Paddy was promoted to a senior management level last year. His responsibilities for leading solution-orientated teams have doubled since he moved from a lower management level. In his former position he was charged with managing the implementation of the solution as opposed to helping select the solution.

Though Paddy believes his managerial style is effective and befitting to the environment he has noted that in his new role his methods are not always yielding the outcomes he desires. He has been taking managerial classes to supplement his years of on-the-job learning to give him a more well-rounded ability to handle his new position.

Paddy feels his managerial capabilities are being tested with this new issue surrounding the data migration of the salary. He is depending on his ability to motivate others and the high tension of the situation to promote success; as he works well under pressure. He knows that his reliably keen eye for quality and consistency will help ensure that goal is met. Paddy is working on keeping his "bullying" management style in check as he wants the team to be successful through their joint efforts and not his aggressive dictating style that crops up when project goals do not align with what he thinks is best.

As part of Paddy's managerial classes he inventoried his managerial attributes as they stand today.

Review the sheet on the next page to get a better sense of Paddy's current management style.

Case Study: Process

Paddy has called a meeting with the team to discuss solving the issue of the salary data not migrating correctly for employees that were once part-time that are now full-time. He thinks it would be good to have a group discussion about the method being used to import the data into the new system.

Marty begins to tell the team that the problem is in the field setup of the new system. He indicates that through his research that he has discovered that the issue is rather common and will be easy to fix. He tells Tom that he can provide the technical documentation he found that discusses the problem and how to solve it.

Lauren catches Marty's enthusiasm and breaks down a plan to implement the change and tasks Marty and Tom to work together to institute the change in the system. She delegates an additional round of testing to go through Gayle on a random set of employees that fit the parameters to the problem.

Paddy is pleased to hear that the issue may not be so hard to solve, but he has reservations about moving to implement the changes based on Marty's initial findings. He thanks everyone for their enthusiasm but reminds everyone that perhaps they should make sure they have all their "ducks in a row" first prior to moving on to solving the problem.

Gayle remains quiet while Marty and Tom insist to Paddy that there is nothing more that needs to be done than to try this solution. Lauren pushes for the solution to be implemented as well, stating, "If it's that easy why make it harder than it needs to be?! My simple two-step testing process that I devised will give us an answer in a matter of hours."

Paddy does see his teams point and ponders moving forward with the solution provided.

Select the most appropriate decision to the situation given and go to the outcome number the decision indicates in the Outcomes section of the booklet (pages 26 - 28).

Decision		Go to Outcome Number:
A.	Paddy agrees to move forward with what the team recommends.	**1.**
B.	Paddy tells the team that this not the best method for moving the project forward. He reminds Lauren she has no authority to delegate tasks and orders Marty to retrieve the documentation that provides a solution. Paddy wants to know how the timeline is impacted if the solution is not right.	**8.**
C.	Paddy tells the team that this not the best method for moving the project forward. He wants to become familiar with the method used to transfer the data.	**11.**

Exercise 2: Charting a Process

Calling upon his managerial classes, Paddy thanks everyone for their eagerness and restates that he thinks that, though this does sound like a good plan, he wants to make sure that they are not missing anything with respects to the importing process. He asks Lauren to document the process that Marty and Tom will explain. He asks Gayle to validate that she too follows the same process.

Marty and Tom provide the following process that they both have followed. Gayle denotes her variance to the process.

Instructions: Document the following process in the flowchart provided. Once you have the process charted answer the questions on the following page. Compare your answer with those found in the Answer Key.

Process: Data is exported from HRWhiz on a specified set of parameters. The parameters are: First and last name, Social Security number, year hired, starting salary, position type, salary increases, and current salary.
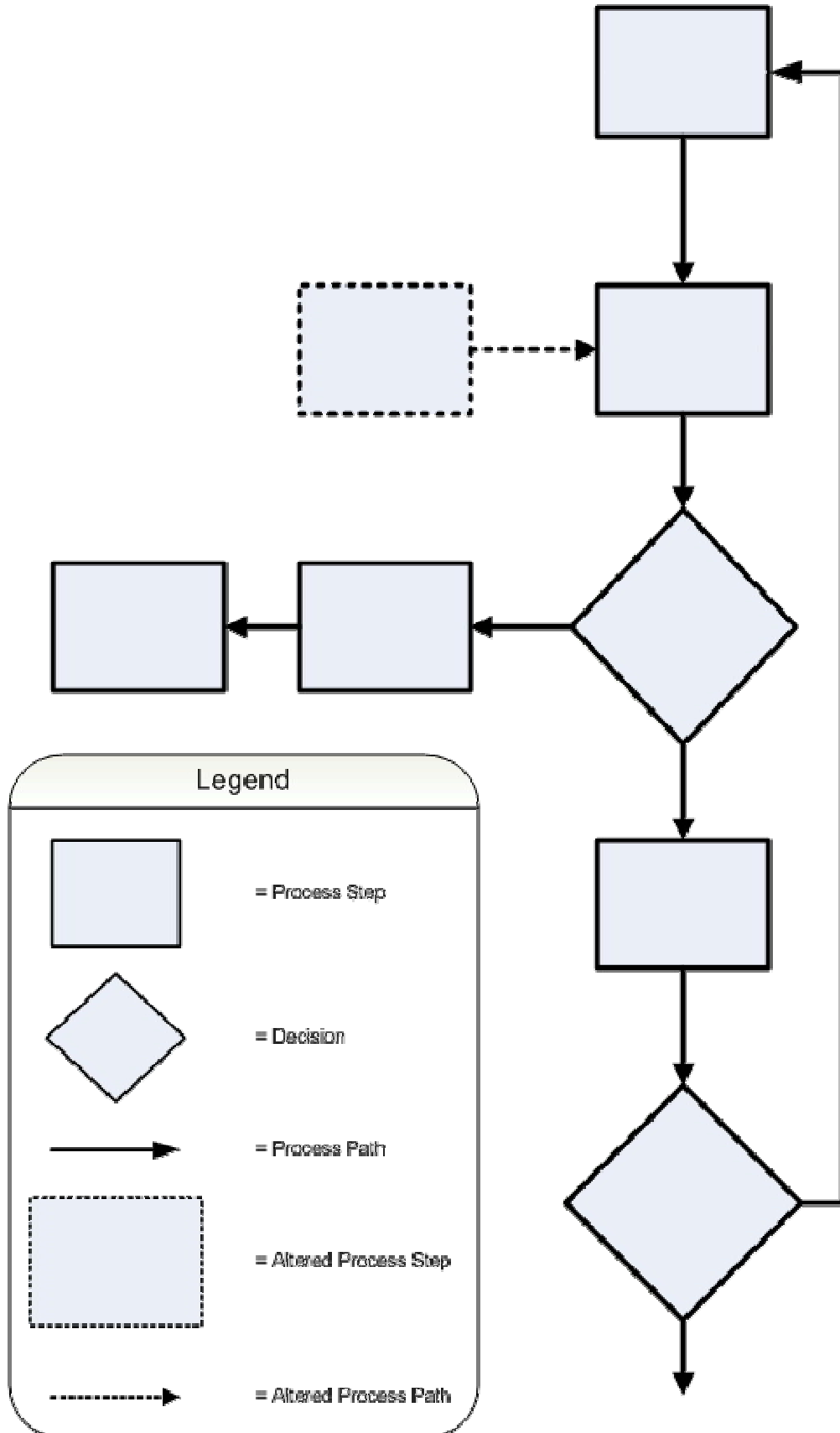
The export is saved to a universal format that is compatible between HRWhiz and EmployPro. Gayle indicates she empties out the Hire Type field because it retains the status of the original position hired, not the current position.

The information is reviewed for field integrity. This means that each field in the export file has an associated field in EmployPro. Tom denotes that with the fields selected there are no changes being made currently to the export file to prepare it for import into EmployPro.

Once the information has been reviewed for field integrity, the data set is imported into EmployPro through the Import Wizard feature.

The data is then called up inside EmployPro for validation that the data transferred correctly.

Flowchart:

Legend

☐ = Process Step

◇ = Decision

→ = Process Path

⬚ = Altered Process Step

- - -> = Altered Process Path

Project Summary Report

The next day after the meeting Paddy visits Tom, Marty, and Gayle respectively at their cubes. He inquires to how their work is going and if they need any additional resources or assistance. They all decline indicating that they have clear picture of what they are doing and have been working on their tasks without a hitch.

Later in the day Paddy returns for another round of cube visits. Tom and Gayle are not at their cubes; Marty is, but he is leaving for a meeting over in the HR Department to discuss the documentation needed for EmployPro. Paddy inquires why Marty is taking time away from the high priority tasks to work on something that is not relevant to moving the data over to the new system and rolling it out on time. Marty states that Lauren has requested that he sit in on a meeting about documentation of processes for EmployPro. Paddy tells Marty that his responsibility is to the problem at hand and that he must stay and complete his tasks. Paddy sternly states that Marty is to tell anyone asking for his expertise over the next two weeks to come see Paddy. Paddy mutters that he will attend the meeting and speak with Lauren.

Three days later the EmployPro team has still not reconvened to discuss progress. Paddy has been around but not in his office. Tom, Marty, and Gayle go to Paddy's office in hopes of meeting with him for a few moments to discuss next steps. Luckily Paddy is there.

Marty and Tom tell Paddy that they need to work with Lauren to obtain a new sample data set but she has been non-responsive to their requests. Gayle tells Paddy that she has emailed him documentation on the process for validating the data with the Job Position Code and Benefits information. He needs to review the draft of the documentation and provide any edits. She told him that if he edits the script today that she will turn it around for distribution for tomorrow morning.

Paddy indicates that he will speak with Lauren about the data set and informs Gayle that he will have the document ready for her by lunch.

The following week Paddy calls a status meeting. During Gayle's status updates she inquires to where the documentation is that she emailed last week and if he had reviewed this file or the new documentation document she sent at the end of last week. Paddy answers by saying he will get on it after the meeting. Gayle offers to sit with Paddy and go over the documentation files as she has the final process drafted. Paddy accepts.

Two days later all high priority tasks are complete. During the status meeting Paddy charges Marty, Tom, and Gayle to work with Lauren to finish updating the data in HRWhiz and to perform a large-scale export and import of data into EmployPro. Lauren inquires to what the larger change management plan looks like as her manager is inquiring about what responsibilities will be impacting Lauren's job in the HR Department. Paddy denoted that there was no larger change management plan, as those are only needed in emergency situations.

Excited about the ability to get ahead of schedule on the next tasks Paddy dismisses everyone with a quick thank you and jokes that he will see everyone at their cubes in a few hours.

All that goes well ends well, or so we think. Let's take a look at Paddy's managerial progress on the next page by answering some questions.

Exercise 6: Assessing Paddy's Managerial Attributes Answer Key

1. **Did Paddy learn to subdue his aggressive tendency throughout the issue?**
   No, in the beginning Paddy did better at handling situations that were not going the way he intended them to. By the time they were resolving the problem Paddy had reverted back to being more aggressive with how he handles situations.

2. **Did Paddy truly leverage the change management methodology to the benefit of the problem?**
   No, Paddy again made an effort to use the change management process to help him determine responsibilities and communication methods, but he did not follow through on them. Paddy also has not fully grasped the idea that change management plans are not just for emergencies, that they can encompass large projects such as the data migration from HRWhiz to EmployPro.

3. **How could Paddy improve his communication methods with email?**
   Paddy could reduce his amount of visits to the cubicles and begin using email to make the inquiries that he does, especially if they are not high priority. Paddy could also task himself a goal everyday of responding to a certain amount of emails. As he reaches his goal he should change the amount of emails he responds to until he creates a habit of responding in a more timely fashion.

4. **Where did Paddy create the potential for conflict?**
   Paddy created a potential issue of conflict when he did not permit Marty to work with Lauren.

5. **Which managerial attribute would improve Paddy's relationship with his team?**
   The managerial attribute that would improve Paddy's relationship with his team would be motivation. Paddy did not encourage or thank the EmployPro team for working as hard as they did on resolving the issue at hand.