

B6731 M3 Assignment 2 Case Study

The bank president has asked you to work with Jeffrey Lay to develop a cross-functional work team where the employees are empowered to research, analyze, and develop new products and services. In addition, the president wants to recruit for this team internally before you can consider external recruitment and selection. Because of the potential earnings from the new products and services, current employees who are selected for this team will earn a promotion and be transferred to headquarters.

In addition, the potential services and products this team could work on include centralized Information to share documents between bank branches, e-banking, cyber cash, self-inquiry facilities where customers can get information without entering the bank, security and fraud detection, and so forth. The team will research and select the new product and services projects working with employees within the bank and other professionals in the banking industry.

This cross-functional work team will require experts from different functional areas who have skills in researching, developing, planning, and implementing projects. Candidates who are good team members with a history of collaboration and sharing are preferred. In addition, select team members who have excelled in their current positions and who are known to be open to innovative ideas and ways of thinking and working.

Jeffrey Lay and you have decided to investigate potential team members and make recommendations for each function as well as team members. You have reviewed performance appraisals and employment information, talked with co-workers and supervisors, and interviewed candidates.

In a meeting where you compared your recommendations, Jeffrey Lay had issues with three of your recommendations and discussed his candidates and issues with this project. Here are your notes on the three candidates:

Aditi Patel requires disability-related absences once or twice a month for doctor's appointments and treatments. She is being fitted for a new prosthesis next week. She has never completed a task late and frequently works extra hours to aid her co-workers. Further, her co-workers talk about her skills as a team member and leader in her twenty years of experience. Further, she is considered an outstanding instructor and course developer with superior performance appraisals and course feedback. She has just received a doctorate, and is further interested in training employees in mentoring customers and educating customers on financial literacy. She has also expressed interest in developing programs for children to learn about money and banking.

Diego Cruz is a Hispanic employee who has been passed over for promotion the previous year. This is the same year that Diego became a citizen. He has received superior

performance appraisals and has successful marketing projects. He has worked in the banking industry for twenty years. His co-workers talk about his attention to detail and research skills as well as his creativity in developing marketing campaigns. Past supervisors say he is a good team member and is well liked by co-workers. On the other hand, his current supervisor does not feel he is a good team member. He has a Master of Business Administration and a bachelor's degree in Marketing. One of his goals is to aid minority businesses to increase their success rate.

Donald Ford has a reputation in the company for being a successful team leader and is well liked by his peers as well as employees. In his fifteen years of experience, his projects are delivered on time and his teams are known to be self-directed and collaborative. His team members and supervisors rate him highly on his performance especially in his decision-making and team development skills. However, he has questioned Jeffrey Lay's decisions in the past and is passionate about ensuring his teams receive credit for their work. He has a master's degree in project management, and has expressed interest in improving team performance and in developing services to aid minority customers.

Jeffrey Lay wants to promote and transfer his mentee, Andrew Fastow, to be the team leader. People in the company know Jeffrey Lay has ensured his mentee and friend got previous projects that led to promotions. In addition, he adds, "I do not want anyone as a team leader who questions my decisions." Further, he agreed Diego is a good employee but adds, "I prefer people who were born in this country" and "his supervisor tells me he also questions decisions and feels he has better ideas." In addition, he expressed concerns about Aditi Patel's disability and feels people who need to take time off for disability related medical purposes should be subject to the same absentee policies as all workers. In addition, Jeffrey Lay explained that anyone can do training and an expert from this function is not needed since this is not important work.

You explain your process of selecting the candidates and the policies, procedures and EEOC requirements that must be followed for Human Resources Jeffrey Lay stated, "We can get around these policies and your legal concerns, I do this all the time and the President does not care." He also explains he does not feel this type of team will be successful and the research and planning for developing new products and services is a waste of time. You agree to research, re-evaluate your selections, and set a new meeting. As you are leaving, Jeffrey Lay reminds you of his position and says, "What I say goes."

When you return to your office, you call your supervisor who asks you to write a recommendation report. This report needs to describe the situation, provides your recommendations, and will be used by Human Resources to aid you in addressing the problems, issues, and dilemmas. Your supervisor and the head of Human Resources will review your report, aid you in managing the situation, and determine a plan of action.