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Growing Managers: Moving from Team Member to Team Leader

Melissa Richardson sat stunned in her office in Phoenix, Arizona, after a disastrous early July meeting with her boss, Beth Campbell. In March, Richardson had been the top Chicago salesperson and a high-potential candidate for management at ColorTech Greenhouses, Inc., a premium grower and distributor of annual and perennial flowers.

Richardson remembered the call she had made to her mother, who still lived in her childhood home on the north side of Chicago. "Mom, I just got off the phone with the southwest regional sales manager in Los Angeles," she had said. "They want me for the sales manager spot in Phoenix!" Richardson had been looking for an opportunity to move up at ColorTech, and her boss had recommended her for the promotion when the position opened. Thirty-two years old and single, Richardson had been excited to show her new team how to break into the top sales ranks the way she had done.

But after only a few short months, she had failed to improve her team's performance and felt like a liability on her regional manager's watch list. Richardson wondered how things had gone so wrong so quickly and what she could do to fix them.

About ColorTech Greenhouses, Inc.

ColorTech was a privately held supplier of annual and perennial flowers to big-box stores (large, no-frills, warehouse-like retail stores) such as Home Depot and Walmart. Within the color industry (the term used to describe growers of the colorful, flowering bedding plants used to create outdoor, in-ground floral displays), ColorTech was well known for its patented hybrid plants and high-tech automated greenhouse operations located primarily in southern North America.

Along with the rest of the industry, the company was facing increased price competition and a downward trend in sales caused by a saturated market and a shift away from water- and maintenance-intensive home and garden improvements. ColorTech in particular was exposed to aggressive demands for lower prices and costly customization from the big-box stores.

Eager to grow revenue, ColorTech had recently purchased a Colombian company specializing in cut flowers as part of its growth strategy to become a strong niche supplier to grocery store chains and independent florists that sold exotic stems in their arrangements.

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ColorTech was also evaluating the acquisition of an Ecuadorian concern as a way to enter the long-stemmed rose segment of the cut-flower market.

ColorTech operated its main U.S. greenhouses in Phoenix, Arizona; San Diego, California; and Columbia, South Carolina. As a supplement to its own operations, ColorTech leased greenhouse space in a few other American cities to handle special orders (including plants that were too delicate to ship long distances) and negotiated distributor agreements with other greenhouses in some northern states that enabled it to offer region-specific and seasonal plants. With a large operation in Nogales, Mexico, its Colombian acquisition, and plans to expand into Ecuador, ColorTech was quickly becoming the largest and most international grower in the Western Hemisphere.

The Phoenix Office

Phoenix was not only the location of ColorTech's corporate headquarters; it was the site of the founders' first greenhouse and, quite literally, was the heart of the company. State-of-the-art in their day, the Phoenix greenhouses still boasted the highest production levels in the company. Thirteen employees managed the automated assembly line-like process that produced geraniums, pansies, and petunias by moving pots on tracks through the greenhouses, starting with seeds and progressing through various stages of fertilizing, watering, potting, and labeling for customers. The shipping area was an energizing riot of flowering color and shouted instructions in Spanish as thousands of color products were packed and shipped to ColorTech customers around the United States.

The six sales staff and the greenhouse administrative workers sat in the company's original offices, which were attached to one of the original greenhouses. Located onsite but detached from the greenhouses, the newer corporate offices had a more formal atmosphere and dress code. Spanish was the default language in the greenhouses due to the high concentration of laborers with ancestry in Mexico and Central America, but during meetings in the corporate offices everyone spoke English, even executives from the Colombia and Mexico operations. In the sales office, English was spoken publicly, but most people spoke Spanish to communicate one-on-one. Many of the greenhouse workers cooked their lunches on a portable grill that, at the direction of management, was kept on the far side of the building complex and out of sight of the parking lots. Sales staff often shared these outdoor lunches with the greenhouse workers, but corporate staff did not.

Getting There

As she prepared to leave Chicago, Richardson juggled her sales manager training courses with packing and saying goodbye to longtime clients in the Chicago area. The latter was no small task, as over the past eight years Richardson had built a substantial client base that had earned her frequent sales awards. In the middle of a wet April snow shower, however, she hugged her mother goodbye and drove toward the interstate that would take her west to Arizona.

During the long drive, Richardson had ample time to reflect on the content discussed in her management training courses. As a salesperson, Richardson had not been exposed to many of the management issues, paperwork, and processes covered in the classes. Legal issues related to

human resources had been stressed repeatedly, but Richardson had little confidence in her understanding of the risks and requirements. Fortunately, every manager-in-training had received a business card from the vice president of human resources with the instruction, “When in doubt, give us a shout.”

More frustrating, Richardson felt the courses about leading teams and troubleshooting problems had been of little benefit. She could see that senior managers were trying to help her by sharing stories about their own experiences, but unless her problems were exactly the same, Richardson was not sure how she could apply what they had told her. She had been reading leadership books on her own, however, and had started to develop her vision and ways to share it with her team. She especially enjoyed books that listed hundreds of ideas for motivating teams; she could already picture the Friday afternoon pizza lunches and ice cream cart celebrations she would sponsor when they exceeded their quarterly sales goals.

Based on some conversations she had had with other Phoenix staff in her courses, Richardson decided to brush up on her high school Spanish by listening to Spanish language tapes during her drive from Chicago to Phoenix. It also helped pass the time on the long trip. After three days on the road, Richardson pulled into Phoenix on a sunny 80-degree Friday afternoon. She could not wait for Monday.

A First Look

Literally, Richardson could not wait for Monday. After she checked in with her landlady, Richardson headed directly to the office. She knew Friday was casual day at ColorTech, so her jeans would fit right in. She found the office manager, who showed Richardson her office, directed her to the supply closet, gave her a set of keys, and wished her good luck. Richardson eased into her chair and with a kick of her feet spun herself around, smiling as she rotated a full 360 degrees. Then she left a voicemail message with Beth Campbell, her regional sales manager. Campbell apparently had already left her Los Angeles office for the weekend. Richardson frowned. She had met Campbell only once during her interview in Chicago, and she had hoped to schedule some one-on-one time to get a better feel for Campbell’s management style and expectations.

Richardson took stock of her office and the supplies she would need, made a few notes, and then began to head out the door to start unpacking boxes in her apartment. She would return early on Saturday so that everything would be in order when she officially started on Monday morning.

As she was leaving the office, Richardson took a quick tour of the area where her salespeople worked. It was only four o’clock on a Friday afternoon, but no one was there. Except for the receptionist, the office manager, and a few other administrative staff, the floor was empty. Where was everyone? In Chicago, Richardson worked six days a week and was on call Sundays. Customers could depend on her to answer her mobile phone anytime and anywhere. She wondered what kind of relationship her absent sales team could possibly have with customers and immediately understood why hardheaded bosses held sales team meetings on Friday afternoons. Clearly, this team needed to get into shape.

Sales Team

Richardson spent Saturday arranging the furniture in her office and the items on her desk. She set up folders for each of her team members, which included three account representatives and two store merchandisers. ColorTech store merchandisers supported the account reps for the big-box stores by working closely with customers to ensure that merchandise arrived undamaged, replacement product was ordered when there was damage, and unsold product was shipped back to the greenhouses for possible redistribution or recycling. Store merchandisers often were promoted to become account representatives.

From her predecessor's notes, Richardson assembled some basic information on her team (see **Table 1**).

Table 1: Phoenix Sales Team

Alex Hoffman Account Representative	Age: 32 Length of service: 8 years Sales this year: \$2.11 MM Sales last year: \$1.95 MM Sales previous year: \$1.85 MM
Gregorio Torres Account Representative	Age: 36 Length of service: 12 years Sales this year: \$850K Sales last year: \$950K Sales previous year: \$1.05 MM
Sarah Vega Account Representative	Age: 26 Length of service: 3 years Sales this year: \$950K Sales last year: \$1.10 MM Sales previous year: \$900K
Chelsea Peterson Store Merchandiser	Age: 23 Length of service: 2 years
Nick Ruiz Store Merchandiser	Age: 22 Length of service: 1 year Seeking promotion to account representative

Hoffman was the top salesperson in the company, and he had earned every award and received every perk ColorTech offered. Richardson was not sure how he achieved his sales numbers; his customers had limits on how much product they could purchase in a given season. She figured he must be making phone sales outside his area, something Richardson did to boost her own numbers in Chicago. If that were the case, she had to give him credit for taking that kind of initiative.

Richardson had no information about Torres except that his sales numbers were low for his tenure with the company and lower this year than last. She made a note to discuss this with him.

Vega was new to sales and had only been with ColorTech for three years. Her numbers were sporadic from month to month and year to year. Richardson was unsure if she just needed more time to build her client base or if something else was going on. Richardson made another note.

Maybe she could give Torres and Vega some Friday afternoon lessons. She smiled at that, remembering the empty office yesterday afternoon.

The sales team was supported by two store merchandisers, Nick Ruiz and Chelsea Peterson. Both appeared to have arrived fresh out of college. Ruiz had apparently expressed an interest in joining the sales team. Richardson liked that kind of initiative and decided she would talk to him to find out more; if he had the right stuff, she would keep him in mind.

First Meeting

Late Sunday night Richardson got a call from her regional manager, Campbell, who said she would be unable make it to Phoenix in the morning and asked if Richardson could introduce herself to her new team. Campbell also said she would e-mail the first quarter sales report to Richardson for her to complete. The report had to be submitted by April 15—in eight days. Although this was not exactly welcome news, Richardson figured she may as well learn how to do the report now and entered the due date into her calendar.

Richardson arrived at the office on Monday morning before anyone else. She wanted to greet her team members individually as they came in rather than show up after some had already settled in at their desks. The first arrival, a neatly dressed man with shoulder-length black hair and a dazzling smile, had a tray of cookies in one arm, a bakery box in the other, and a messenger bag slung over his shoulder. Richardson offered to help him with the door, but before she could introduce herself, he gave her a big smile and said, “You must be Melissa! I’m Gregorio. Hola! Welcome to the Phoenix office. Here, take this box. It’s for you.” Flustered by the unexpected gesture, Richardson took the box and thanked him.

As Torres hurried into the kitchen with the cookies, a man and woman walked in the door. Box in hand, Richardson greeted them. “Hi, I’m Melissa. And you must be . . . ?” “Alex. Alex Hoffman,” said the young man abruptly, with barely a smile. “And this is Chelsea.” “Hi!” said the young woman as they hurried past her to the kitchen. Ruiz arrived a few minutes later and punched in just before 9:00 a.m. The only one missing was Vega.

Wanting to establish some order the office seemed to lack, Richardson popped her head into the kitchen where the team members had congregated and announced a meeting in the conference room at 9:15 a.m. so she could get acquainted with them.

At 9:15, Vega still had not arrived at the office. Torres, Ruiz, and Peterson were sitting in the big leather chairs around the conference table and Hoffman was nowhere to be seen. After a fruitless scan of the floor, Richardson returned to the conference room to start the meeting. “I said 9:15,” she thought, “so we’re starting at 9:15.”

Richardson delivered the short speech she had prepared. She began by explaining her background with ColorTech and then said she had some ideas for improving sales in Phoenix and looked forward to learning what motivated each of them. She ended by sharing her goal to make Phoenix the number one sales office. Just as Richardson finished her speech, Hoffman barged into the room, mobile phone in hand, and noisily took the conference chair closest to the door. Richardson stood with her mouth slightly open as he continued texting on his phone. At that moment, a woman who must have been Vega rushed into the room, obviously having run from

the parking lot. “Are we having a meeting? Sorry I’m late, but the traffic was killer. What did I miss?” She sat down next to Hoffman, looked up, smiled, and said, “Oh! You must be Melissa!”

Before Richardson could respond, a young man in coveralls knocked on the open conference room door. “Melissa Richardson? I’m T.J., the greenhouse manager. Ms. Campbell called me this morning and told me to give you a tour of the operations.”

Richardson sighed. The interruption only added to her feeling that this meeting had been a weak introduction to her team, but a part of her welcomed the excuse to disappear. Before she left she told the team she would work her way across the floor later in the day to find out more about their work and their expectations from her as the new sales manager. Richardson thanked them for their time, and as she walked out the door with T.J., she heard Torres saying something terse to Vega in Spanish. Vega replied in an equally curt tone. Richardson felt the tension in the air as she walked out of the room.

Getting to Know the Team

It took longer than an afternoon for Richardson to meet with each member of her team. Due to her own phone meetings with personnel and a mountain of paperwork (“Why didn’t anyone tell me I would spend so much time on paperwork?” she thought), Richardson had to settle for meeting with everyone over the first week.

Alex Hoffman

During her meeting with Hoffman, Richardson felt a continuation of the dismissive attitude she had noticed on Monday. Regarding his sales, if she read him right, Hoffman loved the annual and perennial color business but had no interest in selling cut flowers. In frustration, he told Richardson, “So you’re asking me to call on every little mom-and-pop florist shop to sell them, what, a couple thousand a month in stems? You’ve got to be kidding! Why don’t you just let me deal with the real customers?”

Gregorio Torres

Richardson’s meeting with Torres was no more successful, but for different reasons. Torres seemed uninterested in discussing his sales performance, but he was enthusiastic about sharing his ideas for a new website to manage customer service, especially for the small florist shops ColorTech was targeting with the new cut-flower business. Richardson had to admit that Torres had some creative ideas for servicing scattered, low-volume florists that might be customers someday, but she needed him to be making sales now. When asked why he felt his sales numbers were so low, he shrugged. “I’m just not a hard-sell kind of guy,” he answered. “I keep getting in trouble with the greenhouses for the orders I’m taking. They are so rigid in there. I keep getting caught between customers who are trying to meet demand and that archaic greenhouse operation that can change course only with three months’ advance notice!”

Nick Ruiz

From the moment Ruiz met Richardson, he wanted her to know he would do whatever it took to get into a sales position. His attitude proved refreshing to Richardson after her discussions with Hoffman and Torres. Ruiz knew a lot about the product from his conversations with customers. In addition, being on site with the Phoenix greenhouses gave him first-hand knowledge about the operation that account reps in other locations could never match. During breaks he often could be found in the greenhouses, following workers around and asking them about their jobs. Before the end of their short meeting, Ruiz presented Richardson with his resume and a letter explaining why he would be a great fit for sales. Richardson left the meeting with a desire to tap into this young man's energy and drive.

Chelsea Peterson

Peterson, by contrast, was openly hostile to her new boss. Richardson tried to keep her composure but finally had to be quite direct. "Look, I'm not sure what's going on," she said. "We only just met, so why are you so upset with me?" Through clenched teeth, Peterson answered, "I know you've been talking to Nick about promoting him to account rep. I've been here six months longer than him." "I didn't know you were interested in a sales position," Richardson replied, trying to sound calm. "I didn't know there was an opening!" Peterson exclaimed. "A position isn't open right now, but if you're interested, why don't you put together your resume, and you can be considered should something come up," Richardson responded, trying to defuse the situation. "I would think you of all people would want to give this opportunity to another woman," retorted Peterson. And with that, the meeting was over.

Sarah Vega

It took Richardson a few days to pin down Vega for a meeting. Richardson could not help thinking of a butterfly whenever Vega came into a room. She arrived late and flitted about before sitting down, only to begin fidgeting again after a few minutes. Vega's approach to her job seemed equally scattered. Her messages piled up at the reception desk. Her product knowledge was deep in some places and almost nonexistent in others, and she seemed more interested in the text messages that were constantly coming in to her phone than in the career advice Richardson was trying to deliver.

By Friday, Richardson was weary and her enthusiasm had waned a bit. So far, she had seen more challenges than positives in her sales team. She made a few notes on each person and added them to her files (see **Table 2**).

Table 2: Phoenix Sales Team—Additional Information

Alex Hoffman Account Representative	Likes color industry, unclear about ColorTech (or me) Go-getter, top seller, driven by commissions Resistant to selling new stem products
Gregorio Torres Account Representative	Seems to like the company, but not closing sales Ideas about customer service website Understands products and customer service, but does he understand greenhousing?
Sarah Vega Account Representative	Unfocused, distracted by events outside of work? Uneven sales performance, often late or absent May need training
Chelsea Peterson Store Merchandiser	Negative interactions are the norm Interested in sales position when open, but no experience, skills
Nick Ruiz Store Merchandiser	Enthusiastic, knowledgeable Ready for sales position when open (see resume in file) Knows greenhousing from the ground up

The deadline for the quarterly sales report, April 15, was Monday, and she still did not know where to get many of the numbers, even though she had the last report as a reference. It looked as if her plans to bike and hike over the weekend would have to take a back seat.

Problems Emerge

Sales Report

The quarterly sales report was an exercise in frustration. Richardson spent hours working on it over the weekend but finally had to give up because some of the numbers on the previous report made no sense. She faxed what she had to Campbell first thing Monday morning. The phone rang almost immediately. Without even saying “Good morning,” Campbell started in. “You’re using last quarter’s report as a reference? Do you know why your predecessor left? He was fired for falsifying his reports!” Richardson wondered why that bit of news had not been shared with her before she had been assigned to do the report or even had accepted the job. Rather than challenge Campbell, however, she apologized. “I’m sorry, I had no idea,” she said. “I can still work on this. The deadline’s not until five o’clock.” Campbell replied, “Never mind. I’ll do it myself.” And then with a little impatience in her voice, she added, “You should start thinking about your monthly report, which is due in three weeks.” Richardson started to ask if they could review it together before the May 6 deadline but Campbell cut her off, saying, “I’ll e-mail the form and you can start getting acquainted with it now.”

Greenhouse Woes

In late April, a fungus infected one of the greenhouses in the Colombia cut-flower facility, resulting in the need to destroy the stock inside it, disinfect it, and start over. The result would be

weeks of delay in orders to new customers, most of them small florists. Richardson's sales team could not afford to lose these hard-won new accounts, so she looked for help in filling the affected orders; her team might have to absorb the added cost of placing rush orders, but heroic efforts could save the accounts. Richardson's hopes rose when she heard the Nogales manager had connections with local cut-flower providers in Mexico, but those hopes were soon dashed when she was told the export paperwork alone would take weeks, and even that was possible only with personal attention the manager did not have time to give. For Richardson, the most frustrating part of the problem was that the delivery date was still a few weeks in the future; it was as if she were watching an automobile accident in slow motion and could do nothing to stop it. Unable to think of a viable alternative, Richardson made the difficult phone calls to her team's new customers and attempted to make good by offering discounts on future orders.

HR Challenges

When she had a moment to spare, Richardson tried to work with her team members. But Hoffman almost never came into the office and never answered his phone, so Richardson had to contact him by sending e-mails and leaving voicemail messages. When he learned about the fungus problem in Colombia, he seemed almost smug and his tone of voice seemed to say, "I told you so!" The Colombia fiasco seemed to have deflated Torres more than ever, and Richardson could not find a way to motivate him.

A call from personnel informed Richardson that Vega was missing a day of work almost every week for some reason—a dentist appointment, a sick day, and so on. Richardson had learned that Vega lived with her extended family just outside of Phoenix, and she suspected Vega might be staying home to help care for her cousin's baby. Richardson did not think that qualified as family leave, but she made a note to confirm it with personnel.

Surprise Customer Visit

Just when Richardson thought she could not manage one more challenge, a regional buyer for Home Depot made a surprise site visit to the greenhouse. Everything was fine until he noticed that the product was being put in the wrong pots—each big-box customer received plants in plastic pots that showed its unique bar codes for price scanning and inventory management. This mistake would mean the team would be charged for emergency repotting costs as well as discounts offered as compensation for delayed delivery if they did not act quickly.

Richardson called on her team to show up at the greenhouse the next Saturday morning to help repot plants. She thought it would be a team builder, but it turned into another failure. Torres and Ruiz arrived early, ready to work. Vega, as usual, was late and came dressed in a business suit. Hoffman and Peterson never showed up. Richardson's mood darkened as Vega, Torres, and Ruiz fell into an easy Spanish banter with the greenhouse employees. Despite her efforts with the language tapes, she could not understand a word. Her team members seemed to be bonding with each other, anyway. Richardson smiled ruefully; she never imagined that being promoted to sales manager would result in her being up to her elbows in dirt on a Saturday.

Richardson heard the phone ringing from the hallway as she made her way back to her office at three o'clock that afternoon. When she answered, she heard Campbell say, "Oh, you're there. I was going to leave you a message to remind you that you need to get your monthly report in on

Monday. And don't forget, you need to submit your team's monthly expense reports on Monday, too." More paperwork. Staring at the dirt under her fingernails, Richardson took a deep breath. "Monday. Right," was all she had the energy to say. "Is everything all right?" Campbell asked. "Fine. Everything's fine," said Richardson in the most professional tone she could muster.

Events Lead To A Crisis

Sales Take a Hit

Sales results were down for the rest of May and June, in part because Colombia had struggled to get the greenhouse fungus under control and also because the big-box stores seemed to be heaping more and more demands on all growers, ColorTech included. Richardson was working twelve-hour days, six and sometimes seven days a week. She felt most of her time was spent babysitting her team: Hoffman's sales continued to be strong, but he would not share information if Richardson did not specifically ask for it; Torres continued to whine about his web-based customer service project while his sales numbers slid; Vega had a great May, but her June sales were down 50 percent; Ruiz was starting to test Richardson's patience with his perky inquiries about a sales position; and Peterson mostly pouted. Richardson's team hated paperwork as much as she did, so she asked Torres to do some of his colleagues' reports for them in order to meet their deadlines.

Campbell Visit Part 1: A Cryptic Message

Campbell made a visit to the Phoenix office in early June, which Richardson suspected was to make sure the monthly sales report was going to be done on time. They sat down together to review the report, and Campbell corrected some of Richardson's mistakes. It was an uneventful meeting, and when it was over Campbell left Richardson with the advice: "Keep your eyes on the prize."

New Customer

At the end of June, Richardson closed a big client. She had met the regional buyer for Lowe's during a trip to Chicago, where she learned Lowe's was interested in a new southwestern supplier for annuals and perennials. She arranged a meeting in Phoenix and closed the deal after Lowe's had a tour of the greenhouses. She was also now working with a large grocery chain to switch its cut-flower business to ColorTech. Richardson asked Torres to meet with her and the buyer. After that meeting, Torres was more energized than she had ever seen him; he was full of ideas for servicing this demanding, detail-oriented type of customer.

Campbell Visit Part 2: Crisis

When she visited again in early July, Campbell did not even mention the new Lowe's and grocery chain customers. After reviewing the monthly sales revenues and expenses, Campbell asked Richardson what she was doing to address performance issues with her team, as sales

figures were below last year's. After listening to Richardson's explanations about the Colombia greenhouse problems and the big boxes' increasingly idiosyncratic demands, Campbell pushed her chair back and asked, "Is there something you need to tell me about Chelsea Peterson?" Before Richardson could figure out why she was being asked about the store merchandiser, Campbell shared that she had received a call from ColorTech legal the previous day informing her that someone claiming to be Chelsea Peterson's attorney had called to ask about ColorTech's gender diversity record.

Richardson was shocked. A couple of weeks ago, Peterson had finally submitted a resume, but she had failed to include a cover letter. More important, she lacked the experience and enthusiasm for a sales position, and she had continued to be just barely civil to Richardson. And with sales down, there was no chance of adding an account rep. Richardson had explained to Peterson why she was not ready for a sales position and suggested some ColorTech training courses Peterson could take to prepare herself. Peterson had left the meeting angry and had not raised the topic since. Now it seemed she had hired an attorney—because she was denied a position that did not even exist.

Conclusion

After Campbell left that afternoon, Richardson sat in stunned silence. She thought back to her naïve dreams of Friday pizza lunches and ice cream cart celebrations. Not only was there no money in her budget for parties, her team had not earned those kinds of rewards—nor had even acted like a team. She had had such high hopes for making a difference in Phoenix. "What's wrong with them? What's wrong with *me*?" Richardson thought. "I wonder if I could go back to Chicago. Maybe my old boss would take me back." She heaved a big sigh and asked herself, "What do I do now?"

