The following story is true. I experienced this where I work, at a property-casualty insurance company’s corporate headquarters. Read this case study, and then follow the instructions at the end.

My employer’s CEO asked me to hire a teacher to teach several division vice presidents how to accurately conduct customer research by performing statistically valid surveys.

I hired Mark Roth [name changed here, to protect Mark’s privacy], who was very well known in business and academic circles for performing customer research and for teaching customer research methods. I hired him to hold five full-day training sessions, which would be mandatory for the division vice presidents at my company. My company’s CEO told the division vice presidents that their attendance and participation was mandatory.

On the day of the first training session, Mark was nervous and distracted. He was disorganized. He appeared to be sweaty and his hands were shaking.

Half-way through the morning training session, during a 10-minute break, various participants quietly mentioned to me that they thought the training was disappointing. I agreed. The remainder of the day’s training was terrible. Mark became even more disorganized and all participants felt as if their time was wasted.

That evening, I called Mark and told him that I was terminating his contract and that he should not return to teach any additional classes. He was very upset and said several times that he had an explanation for why he had performed poorly. But I did not want to hear any explanation. I terminated his contract. I hired another trainer to complete the training sessions, and the new trainer worked very well.

A few months later, Mark Roth invited me to meet for lunch. Mark said the lunch was an opportunity to discuss what had gone wrong and how he hoped to work with me in the future. I agreed to meet for lunch.

During the lunch meeting, Mark told me why he had performed poorly in the training session. The day before the training session, Mark had told his girlfriend, his parents and his siblings that he was planning to undergo medical treatments and surgery for a transgender transformation from the person the world new as a man to the person who Mark said he had always been from birth: a woman.

Mark explained that the personal stress of making that announcement just the day before the training had caused him to perform poorly in the training session. He told me that he was already undergoing hormonal treatments and was scheduled for several types of surgery within the next few months.

By the end of that year, the consultant who we all had known as Mark Roth had become Mary Roth. I heard from various other people who were clients of Mark’s that Mary Roth was performing excellent work for them, and that the transition seemed to have gone smoothly.

A few years later, I needed to bring in a consultant to work on a customer research project with the very same division vice presidents who had had the bad initial training session with Mark Roth, and who had completed their training with another consultant after I terminated Mark’s contract.

I knew that the best person to hire for the project was Mary Roth. I also knew from seeing Mary Roth around town a few times following the gender transformation that despite having long hair and despite wearing makeup, it would be relatively easy for anybody who had known Mark Roth to recognize Mary Roth as very visually similar in many ways to Mark Roth.

I faced a conundrum. Out of respect for the vice presidents who I would be involving in the project with Mary Roth, should I tell them that they might become aware that Mary Roth is the personal who they had worked with in the training session that had gone wrong? Would making some sort of prior disclosure to them prevent any potentially stressful or embarrassing situations for them or for Mary when Mary would meet with them? Would a disclosure of this type be helpful and respectful toward Mary, or would it be harmful, or worse, an invasion of Mary’s privacy?

Assignment

1. Write a memo, or letter, or e-mail, or a plan an outline for a face-to-face discussion. The audience for the written document, or face-to-face discussion if you decided against writing, is the people who studied customer research with Mark, telling them that you are hiring Mark again, to work with them on a customer research project.

In the communication, consider whether you should acknowledge the problems encountered in the past with Mark, and state your confidence that those problems will not occur this time.

Consider whether to mention that undisclosed temporary personal issues had caused much stress to Mark and resulted in the prior problems.

Consider whether to announce the change in Mark’s gender since his last appearance at the company.

2. Write a separate communication describing this situation to your boss. Consider covering the same or different ground compared to the communication to the members of Mark’s training class.