

# UP YOUR GAME: A LEADERSHIP CHALLENGE

## SIMULATION MANUAL



Prepared by  
The Leadership Initiative  
Kenan-Flagler Business School  
The University of North Carolina at Chapel Hill  
*in partnership with the*  
Association to Advance  
Collegiate Schools of Business International



THE UNIVERSITY  
of NORTH CAROLINA  
at CHAPEL HILL



# TABLE OF CONTENTS

|     |                                      | Page |
|-----|--------------------------------------|------|
| I   | Introduction and Simulation Overview | 3    |
| II  | The Coordinator's Role               | 5    |
| III | The Facilitator's Role               | 6    |
| IV  | Simulation Summary                   | 10   |
| V   | Competency Profile                   | 20   |

For ease of explanation and to offer flexibility, this document outlines two roles, one as coordinator and one as facilitator. The two roles may be fulfilled by one or two people. It is recommended the facilitator is a course instructor or an experienced business leader who has a good understanding of the marketing function.

This Simulation Manual has two functions:

1. To help coordinators plan and execute the simulation.
2. To provide guidance to facilitators of debrief sessions.

## THE SIMULATION—WHAT IS IT?

In the **Up Your Game: A Leadership Challenge** simulation, participants complete an individual exercise by responding to emails in a typical work day. They play the role of an associate brand manager in a consumer products company, which will test their readiness to assume more responsibility and demonstrate leadership capability. The simulation poses a variety of organizational, interpersonal, customer and teamwork challenges presented as emails from various stakeholders.

The objective is for participants to address these challenges making the best use of the available time and information. This simulation does not require marketing expertise and is an effective learning tool for pursuing all types of business careers.

For purposes of this exercise, participants are in their first job after graduating with an MBA degree. They have 11 months of experience with no formal authority over their peers. They will encounter realistic work challenges through a series of emails from a manager, peers, the manager's boss and colleagues. Their responses to the emails will test their ability to demonstrate competencies important to effective leadership including:

- Planning and organizing
- Problem-solving and decision making
- Performance orientation
- Teamwork
- Communication
- Managing conflict
- Influence

## WHO WILL BENEFIT?

The simulation can be used to help participants understand some of the competencies important to leadership, practiced in a non-managerial role. The simulation prepares them to be more competitive for positions of greater responsibility. This simulation will work best under one of the following conditions:

- Primarily, it can be used as a stand-alone leadership development activity, for participants with some professional work experience and basic understanding of marketing principles. Students pursuing all types of business careers should be ready to take the simulation after completing a core course in marketing within an MBA program.

- Secondly, it can be used with students who have little or no business experience (for example, in an undergraduate program; or as part of a graduate course in marketing). In this scenario, students with no business experience will need more preparation so they are not overwhelmed by the leadership challenges in addition to trying to understand the principles of marketing. It may work best near the end of the course.

## HOW DOES IT WORK?

The simulation instructs participants to take 15 minutes to read the materials provided and 60 minutes to complete their electronic email responses.

The following post-simulation steps are the most effective way for participants to discuss their responses and reflect on their learning:

- Take 15 minutes immediately following the exercise for participants to reflect on several strategy questions provided in this manual to assist them in preparing for a debrief. Then debrief an additional 60 minutes with a small group of participants and a facilitator (this may be an instructor or experienced business leader.) Instructions are provided on how to effectively debrief the exercise within this document.
- Instruct participants to complete the workbook and meet one-on-one with a facilitator for a debrief, or instruct participants to complete the workbook before the next class session for a discussion of “best practices” and “lessons learned.”

A minimum of 2 1/2 hours is suggested to effectively deliver the simulation and conduct an impactful debrief. It can be effectively used in two class sessions if the post-simulation strategy questions are posed before the second class period.

The key functions of the coordinator include:

- Plan and organize the event.
- Manage the event, including setting expectations.
- Obtain post-event feedback to assist in improving the process.
- Train and provide guidance for the facilitators

## Planning and Organizing the Event

Steps to planning and organizing the event include the following:

- Arrange a method to deliver the exercise. Participants each need a laptop computer and some way of accessing the exercise, whether it is provided to them on the laptops or accessed online.
- The location should allow participants adequate room to work on their laptop without too much distraction from others doing the same.
- Ensure course instructors understand the purpose of the exercise and how it may complement the academic aspects of their courses by focusing on organizational, leadership, personal and interpersonal effectiveness, and that it is NOT primarily an analytical exercise along the lines of a traditional case study.
- Identify facilitators and offer a training workshop, especially if you want to have multiple small group debriefs at one time. Training will help set expectations and increase the likelihood of a consistent and positive learning experience for all participants. More details on training are provided in the next section.
- Ideally, one facilitator would conduct debriefing sessions with groups of no more than 6 to 7 participants to give each time to contribute to the discussion.

## Managing the Event

Introduce the simulation by providing the following guidelines:

- Although the role of the participant is to play an associate brand manager, the simulation is designed to be an effective learning tool that can be applied to all types of business functions.
- Clarify the purpose of the experience. Are you using it for development only or will a grade be assigned?
- Describe the next steps, post-simulation. For instance, are you using the strategy questions and having a debrief; are they expected to complete the workbook? If so, encourage follow up to be as soon as possible while the details of the simulation are still familiar to the participants.
- Encourage participants to do the best they can within the time they have available and not to spend too much time on any one email.
- Emphasize the importance of reading through all the emails first to identify potential connections.
- There will be a one-hour time limit and there are limitations imposed to ensure participants complete the emails in one sitting. It is critical that participants not “postpone” responding to any emails, as the benefit of the debrief following the simulation will be impacted, including a participant’s ability to prepare for the debrief by reviewing strategy questions.
- Instruct participants on how to access the simulation and begin to review the instructions.
- Answer questions about the process of the simulation but not the content.
- Recommend participants use thumbnails to see all the emails on their laptop so they do not need to continue scrolling through their emails.
- Reinforce the need for participants to maintain confidentiality of the materials in order to ensure others will have the same learning opportunity they are experiencing.
- Keep the exercise on time and manage the next steps, including distributing the questions to be reviewed as part of the debrief session with the facilitator.
- At the end of the event, collect all materials relating to the exercise that have been given to participants.
- Obtain timely feedback from all involved, especially participants and facilitators, to learn what went well and what could be improved.

There are two recommended courses of action to take as you think about facilitating the simulation: Selecting your facilitators and designing a training session, which we have outlined as follows:

- Recruit facilitators who have the skills necessary to be effective with this simulation:
  - Marketing experience or high-level general management experience with a good understanding of the marketing function.
  - Effective communication skills; listens intently.
  - Ability to facilitate and manage a group discussion.
  - Ability to debrief the simulation in a consistent manner and follow the instructions provided by the coordinator or course instructor.
- Require facilitators to complete the simulation, as a participant, before the training session and within the 60-minute time limit
- Sample training session:
  - 30 minutes-Obtain feedback on the experience of taking the simulation as a participant.
  - 45 minutes- Discuss and share facilitator best practices (including the role, techniques, and questions following).
  - Describe how the debrief will work (questions the participants will receive, length of debrief, number of participants, location, etc.).
  - 30 minutes- 15 minutes-Q&A.

During the training, you will want to emphasize the key functions of the facilitator including:

- Guiding the discussion to ensure all participants maximize their learning.
- Creating a climate of openness and mutual sharing of ideas.
- Keeping the discussion focused on the key debrief questions.

The following will highlight the role of a facilitator, facilitation techniques, questions to consider and how to engage the group. Here is what you might emphasize in facilitator training.

## The Role

Your role as a Facilitator is to help participants learn and obtain as much benefit as possible from the simulation. You have a wealth of experience to share, but your primary role is to ask stimulating questions designed to promote participant self-reflection rather than providing answers from your experience, as participants will then look to you for the best answer.

Naturally, they will want to hear how you would have handled the issues they faced in the exercise and sharing your experience would be appropriate at the end of the debrief, or during a one-on-one meeting.

Your objective is to facilitate the learning of all participants and focus on the debrief questions rather than how to respond to individual emails. This means watching the time closely, trying to balance depth of discussion on particular issues against making time to cover all the questions. Similarly, it is important to keep one or two participants from doing all the talking by diplomatically thanking them for their contributions and asking the group as a whole what other ideas they can offer.

You might introduce the debrief session by stating that effective teamwork is not just a matter of contributing content to the discussion but equally trying to draw others out and to support their contributions. Showing leadership in a team context is about bringing the best out of everyone and making everyone feel valued. So, it is important that each participant strives to balance the individual contributor role with the leadership role. The point here is to raise the level of their learning above that of simply solving the content-related problems so that they learn to lead others and how to build team spirit as well.

It is a good idea to ask participants to articulate what they have learned from the discussion, encouraging them to state as many points as possible. If someone points out only negative things, thank the person for being open but respectfully ask whether this participant can also articulate what potential learnings they experienced

## General Facilitation Techniques

Effective facilitation includes:

- Drawing out participants to ensure everyone is involved and talking to each other, not just the facilitator.
- Asking open-ended questions rather than moving a discussion to a solution.
- Creating a safe environment to share ideas and thoughts by ensuring the focus is on the debrief questions without any judgement of the participants.
- Encouraging participants to summarize their own key learning points periodically.
- Allowing for different opinions without forcing agreement.

## Using Open-ended Questions to Draw Out Contributions

Ask open-ended questions that invite wider or deeper thinking. Examples of open-ended questions include:  
[Recommend not using “why” as it may lead to a defensive response]

- How did you arrive at that conclusion?
- What do you see as the main issues?
- Who are the key players involved with the issue you mentioned?
- When did you realize that the issues were related?
- What options do you see for dealing with those issues?
- What obstacles do you foresee and how would you address them?
- What would you have done differently if you had had more time, information, opportunities to speak with certain people, etc.?
- What impact do you think that idea would have on employees, the bottom line, the market, the competition, customers, etc.?

Avoid closed-ended questions — those that can be answered by a “yes” or “no” — they tend to limit open dialogue and sometimes, may be asked to confirm what the initiator thinks is the right answer. Here are some examples of closed-ended questions:

- Were you trying to do X?
- Did you find that a challenge?
- Do you think the manager was right?

Another approach to asking questions is to have participants identify more than one option and making it multi-dimensional. Instead of asking: “What did you think of that exercise?” ask “What are two things you liked about that exercise and two you did not like?” Just asking the general question about what people thought of something can often lead to one-sided answers. Some people will only mention positive things while others will mention only negative reactions. Encouraging people to think in a balanced manner about both sides of an issue can broaden their thinking and help them to move away from black-and-white thinking.

Here are some other multi-dimensional questions:

- What are the main opportunities and risks of your proposal?
- What are the costs and benefits of this course of action?

In addition to questions, you can also interject comments that encourage further expansion, such as:

- I see.
- That's interesting.
- And then?
- Anything else?
- Please tell me more.
- Any further thoughts?

Just waiting for a reply and maintaining silence for a few seconds, rather than jumping in with another question or statement, can encourage new contributions from participants. Asking for further thoughts can deepen the conversation and self-learning because it can almost always stimulate further thinking.

## Getting Everyone Engaged

During the group debrief, it is important to encourage participation from all members. Rather than too quickly addressing questions directly to quiet participants, occasionally ask questions such as:

- What do others think about the solution that X has offered?
- What do you see as the advantages and disadvantages of that idea?
- What alternative courses of action can others suggest?

When responding to participant suggestions, it is important to recognize their contribution. Whether there are positive or negative aspects to their ideas, you will want to ask for comments and questions from other participants to see how others approached the issue. If a participant “holds on” to their view, despite other feedback, it may be best to move ahead and note that there will be differences as to how participants view and assess a situation. As a facilitator, you will need to recognize that there are time factors to consider.

When there appears to be unresolved differences, you may want to request that each person articulate the benefits of the other side's perspective and strongly encourage them to elaborate by asking: “Anything else?” You might explain that it is a useful exercise to put the other side's perspective in their own words, as doing so can encourage them to see things differently more readily than when someone is trying to persuade them to their point of view. Again, the time factor needs to be considered.

The debrief is an excellent opportunity for participants to learn how their colleagues approached the simulation and to engage in meaningful discourse. Their learning can be enhanced with your setting expectations around active listening and promoting a safe and open climate — the most critical aspects of your role. The goal is for participants to not only learn from the discussion but to leave with some questions to think about. The participant Workbook was designed as a way for participants to continue reflecting on their experience, after a small-group discussion, with the option for a facilitator to meet one-on-one with a participant to take the learning even further.



## Facilitator Debrief Questions

In order to provide a consistent experience when multiple facilitators are used, you should begin with the recommended questions and then choose from the other options provided, or design your own. This will encourage a more strategic view versus a discussion of individual emails. Explain briefly to participants that your role is not as a lecturer. You are there to facilitate, to ask questions that stimulate them to think and to share their ideas with others.

Recommended questions:

- What single action did you take that you believe will have the most positive impact in your new role in the simulated organization?
- What issue did you find to be the most challenging and thought provoking?
- How did you handle the leadership requests and challenges?
- What do you see as your top three priorities once you are actually on the job?

Other questions to consider, time permitting:

- What were the key features of your approach to this exercise? What do you feel worked and didn't work for you?
- What do you wish you had done differently?
- How did you organize yourself and how did you make use of the time? How could you have done either more effectively?
- How much did this experience line up with what you expect a leadership role to be like? And how did that learning affect your desire to gain such a role?
- What have you learned about yourself from doing this exercise and from the follow up discussion regarding your strengths and development needs?

## A number of issues were identified in this simulation. Here is a summary:

- Safeway, a key retailer, has discontinued stocking your breakfast bars.
- Paul Morin can't complete market research for breakfast bars.
- Opportunities surfaced as a cross-functional team leader and as an informal team leader.
- Sales opportunity in Spain clashes with demand to minimize discounts.
- California sales targets are not a priority for sales manager.
- Strategy suggestions are needed for next year.
- Peers need assistance.

The most effective participants will take some action on all of the issues, making some decisions and asking people to do things, all in a constructive, decisive, but supportive manner. Less effective participants will take little action, tending instead to ask for more information or delaying action for later meetings. The least effective participants will make some matters worse, possibly by taking a heavy-handed, aggressive or abrasive approach, or by showing poor judgment in some of their decisions.

Each email has been copied into this manual for ease of reference. The discussion of each item begins with a statement of the main issue in the email. Then, a few options for dealing with the matter are suggested. There are several ways of being effective and this manual cannot cover all possibilities. Therefore, facilitators should be prepared to discuss other approaches that participants take. The options listed are thus not at all exhaustive. However, they provide a guide to the major issues and some of the more positive approaches to dealing with them that could be taken.

### Email 1 – Losing a major retailer

**From:** Ilsa Fluery, Manager

Hope you enjoyed your week off! Thanks for taking time to get some things going on Sunday before you go to the Strategic Marketing Seminar!

As you know, we have a big push on our breakfast bars for the next two years and we have been advertising them aggressively on the Internet and TV. Unfortunately a major grocery chain, Safeway, has just discontinued them, citing too many brands with insufficient sales. Safeway's new person in charge of purchasing for snack foods, Craig Verma, is a big fan of Nature Valley, Quaker and Safeway's own label brand, so we need to persuade him to buy our product.

You helped develop our marketing plan for breakfast bars this year so I'd like you to email Craig to promote our brands and see if you can set up a meeting for one of our sales people to visit him. Make sure he knows about our advertising campaign and customer reviews, which rated our breakfast bars highest for nutritional value and low salt content. Our breakfast bars are the best sellers among health conscious consumers because they have 10% more fiber and protein than the next best bars. I emailed him myself but he hasn't replied and he isn't returning my phone calls so I'm hoping you can come up with an idea to turn him around. Safeway is obviously a big distributor and we have challenging growth targets for this year and next.

I should also tell you that I had some dealings with Craig when he worked for another large supermarket chain previously. We seem to have had a personality conflict or something. Anyway, he complained about how difficult I was to contact for marketing-related support so that may partly explain his negative attitude toward our products.

**Issues:**

- Need to capitalize on advertising campaign for breakfast bars.
- Safeway has discontinued carrying the USF's breakfast bars.
- Possible relationship problem between Safeway purchasing manager, Craig Verma and Ilsa Fluery.
- How to overcome Craig Verma's objections and build a constructive relationship.

**Minimal or potentially negative options:**

1. Pass it back to Ilsa to handle, saying that it is her relationship with Craig Verma that needs addressing.
2. Tell Craig Verma that his predecessor liked USF's breakfast bars.
3. Suggest to Ilsa that USF should approach other retailers instead of Safeway.
4. Offer Safeway a significant discount as an incentive.

**More effective options:**

1. Email Craig Verma to sell the benefits of USF's breakfast bars and the opportunity presented by the advertising campaign.
2. Ask Craig Verma about his preferences, seeking to build a relationship with him.
3. Write to Craig Verma offering to meet him as soon as possible, promising to provide the best customer service you can.

Stressing the benefits of USF's breakfast bars might seem to be the logical course of action but might not get very far if Craig feels that USF isn't interested in a relationship with him or making much effort to meet his needs (because of his previous experience with Ilsa). It would be a better idea, as a longer-term initiative, to email Craig stressing your desire to get to know him, understand his needs, and find ways to work together for mutual benefit. Offering a discount would clash with the directive to minimize discounts in order to maintain profitability.

**Email 2 – Market research for breakfast bars**

**From:** Paul Morin, Market Research Manager

Hope you enjoyed your holiday. I heard that you were going to be reviewing some issues this Sunday so I thought I would let you know that the market research you wanted done to help promote our breakfast bars for next year won't be finished by the end of September as you requested. In fact, as I have lost two key people this month, I can't see getting it done before the end of the year at the earliest.

Further, Chris Dolzaki, VP Marketing, has us pretty tied up on a big project for our trail mix line. As you know, he's really into trail mix products himself so he is enthusiastic about promoting them.

Sorry about that!

**Issues:**

- This email poses a problem because of the need for continuous efforts to find new and better ways to market breakfast bars or to find new markets, especially in light of the company's ambitious 5-year growth plans.
- Chris has changed the priority from breakfast bars to trail mix. Has the strategy changed?
- Given the loss of two key people, are there challenges with resources and/or with employee retention?

**Minimal or potentially negative options:**

1. Accept the situation and inform Ilsa what has happened.
2. Tell Paul Morin that you are disappointed that he let you down.
3. Voice concerns to Chris Dolzaki about disrupting the market research department's plans.

**More effective options:**

1. Ask Paul Morin for suggestions on how the original goal can be met.
2. Persuade Chris Dolzaki about the urgency of getting more research resources given the profitability and growth of breakfast bars. Keep Ilsa informed.
3. Ask Chris for suggestions on how to maximize the marketing effort for both trail mix and breakfast bars.
4. You or Ilsa should arrange a meeting with Paul and Chris to discuss ways around Paul's resource constraints.

This is an opportunity to show leadership and influence Paul or Chris rather than simply accepting the situation. Ask for suggestions as a way of engaging Chris and Paul in solving the problem and starting a conversation about it. A positive approach would stress taking advantage of the opportunity rather than voicing concerns about being let down.

**Email 3 – Pricing and suggestions to boost sales**

**From:** Chris Dolzaki, VP Marketing

Good morning everyone! Hope you enjoyed your Labor Day week or weekend!

As you know, we are faced with a huge challenge to make our numbers by the end of the year. We are 8% behind where we should be at this time of year on our sales target, 9% behind on profitability and 11% short on market share to the end of August so we need to pull out all the stops if we are going to achieve our numbers by the end of December. The last quarter needs to be massive for us this year.

I know everyone's doing all they can to boost sales but we can't buy market share if that means missing our profit target. As you'd expect, we're under a lot of pressure from sales to cut deals on big orders with major retail chains but we need to resist the temptation to give more than 5% reductions on our prices, while not alienating our sales colleagues if we can help it. We need them as much as they need us after all! However, we mustn't give any discounts, at all, on orders that are less than \$600,000.

I'm looking for creative suggestions from our associate brand managers on how we can increase our sales for the rest of the year. Please let me have your thoughts by the end of the day on Monday, September 23. Thanks!

We can do it!

**Issues:**

- How to boost sales and get them back on target by year-end.
- How to increase sales while maintaining profit margins.
- How to avoid alienating sales colleagues who want to offer discounts to get sales.
- What creative suggestions can be offered to increase sales?

**Minimal or potentially negative options:**

1. Decide that no reply is necessary until you have time to think about it.
2. Reply by saying that you will give it some thought.
3. Reply by saying that you don't have any ideas to offer because you are so new on the job.

**More effective options:**

1. Ask questions about what is being done now and what other companies are doing; gather facts about market trends or any other information.
2. Make a list of creative suggestions immediately since you will be away next week.

Recognize the implications of this email for the potential deal in Spain, where the regional sales manager says that a significant discount will be necessary to win this business. There is also the connection to the company's stated objective of growing its non-U.S. business significantly over the next 5 years. However, at this stage, it is best not to make any suggestions when considering Ilsa's most recent email requesting a coordinated response from her team as a whole. Still, it's a good relationship-building opportunity and you could reply with enthusiasm that you will give it a high priority and develop some creative ideas.

**Email 4 – Leading a cross-functional team**

**From:** Luis Cabral, Associate Brand Manager

I left you a phone message today, but thought I should email you as well.

Ilsa asked me if I would like to lead a cross-functional team of specialists to look at redesigning some of our breakfast bars to cut costs. The team will include people from manufacturing, purchasing and someone from Jake Fong's design department. Our design people have some new ingredients in mind to replace the peanut butter, honey, sweetener and milk powder we are currently using. Lower cost ingredients would improve profitability but we need to watch the brand image, which is very high on quality.

Ilsa says it would be good for my development but she said I could ask you to do it if I didn't feel that I could lead such a project. As I have only been on the job 6 months, I'd rather learn from your experience for now.

Please let me know as soon as possible if you'd like to do it. The first meeting is Monday, September 23 at 1 p.m. I think it's going to last all afternoon. If you think you could lead this important project, you'll need to draft an agenda for the meeting as soon as possible. If you send me your agenda, I'll see that it gets distributed first thing this Monday as you're away all week at the Strategic Marketing Seminar.

I'm sure you'd be good at leading this project.

See you after you get back from the seminar. Hope you enjoy it. I'm looking forward to attending it next year.

Many thanks!

**Issues:**

- Lack of confidence in Luis Cabral to show leadership in this situation
- Opportunity to rise to a significant leadership challenge and make a good impression
- Request that you draft an agenda when you lack knowledge or information.

**Minimal or potentially negative options:**

1. Reply by saying that Luis should lead the team as he was asked to take on this responsibility and that you are too busy.
2. Ask Ilsa for advice on what to do.

**More effective options:**

1. Accept the opportunity and ask Luis to communicate your willingness to participate and ask him to gather all the background information he can to help you prepare.
2. Develop an agenda for the first meeting with general headings such as design options, cost, quality, risks, opportunities and alternatives.
3. Develop an email for Luis to forward to all participants asking them for their input in planning an agenda for the first meeting.

This is an opportunity to assume a leadership challenge, bearing in mind that you could lead this team with little experience, primarily by taking the role of organizer, facilitator and coordinator. You could be effective by asking good questions of the participants rather than doing this on your own. Ilsa already knows that you could be taking this role, but it's important that she understand your workload, since you are taking on an added responsibility.

**Email 5 – Meeting to review sales ideas**

**From:** Ilsa Fluery, Brand Manager

You got an email from Chris asking for our creative thoughts on how we can make our numbers by the end of the year.

Chris has asked you to send in your ideas independently but I'd like to develop a coordinated brand management response. I would therefore like the three of you, or at least two, to meet with me Monday, September 23 at 2:30 p.m. It shouldn't take more than an hour to pool our best thoughts.

Please send me your ideas by Friday the 21<sup>st</sup> so I can begin reviewing them before our meeting on the 23<sup>rd</sup>. Even if all of you can't make the meeting, I still want really compelling, fresh ideas from all associate brand managers.

Also, next month we'll be presenting our strategy suggestions, for next year, to Chris. I would appreciate it if you would take a look at our numbers and give me your thoughts on what you think our focus should be for next year.

Thanks!

**Issues:**

- This meeting clashes with the first meeting of the cross-functional team that you have been asked to lead.
- This is an opportunity for you to get exposure to strategic thinking, have some influence over next year's plans and make a positive impression on Ilsa.

**Minimal or potentially negative options:**

1. Ask Ilsa what you should do.
2. Advise Ilsa you can't attend because of the cross-functional team meeting that is expected to last all that afternoon.
3. Use the meeting time conflict as a reason to refuse to lead the cross-functional team.

**More effective options:**

1. Ask Ilsa to reschedule her meeting or reschedule the other meeting.
2. Indicate that you can't attend Ilsa's meeting but offer to send her your ideas in advance of the meeting.
3. Persuade Luis Cabral and Erin Riggs to attend Ilsa's meeting since she stated that she would be happy if at least two of you attend.

Ideally, you want to attend both meetings, so rescheduling one of them might be a good option, provided that you do so in a positive way. Explain the benefits of being at both meetings rather than just pointing out a conflict in your timetable. Although important, the first cross-functional team meeting is perhaps less urgent, so you might suggest that you want time to meet each of these team members independently in order to develop the most efficient possible agenda. Also, this situation can be seen as an opportunity to show leadership to Luis and Erin to ensure that they both attend Ilsa's meeting. You also could offer to meet with Ilsa separately to review your suggestions, thus gaining some benefit of exposure to her thinking and ensuring that she appreciates the merits of your ideas.

**Email 6 – Sales opportunity in Spain**

**From:** Fernando Gomez, Regional Sales Manager, Spain

I don't think we've met as I was recently promoted to a regional sales management position for Spain.

I have a big opportunity for a \$500,000 breakfast bar sale to Carrefour. As you know, they are one of the world's largest supermarket chains, based in France with operations primarily in Europe, the Middle East and South America. Carrefour hasn't carried any of our healthy snack lines before so this is a great opportunity for us to expand our presence outside the U.S.

I spoke to your manager, Ilsa Fluery, to see what sort of discount we could offer them and she said that you are in charge of pricing for breakfast bars. I don't believe that we will get this business unless we can offer them 10% off of our price.

I made it clear to them that this would only be an introductory offer. They have assured me that, if sales go well, they would double their order for next year and introduce it in some of their stores in France.

I need your reply urgently as they want to get stock into their stores by the end of September.

Hope to meet you soon! Thanks for your help in landing this order!

**Issues:**

- Great opportunity to grow the business in Europe and elsewhere outside the U.S.
- Problem with the requested discount in light of Chris Dolzaki's directive to limit them.
- Need for an urgent decision and reply.

**Minimal or potentially negative options:**

1. Reply that the discount isn't possible or that it must be a lower amount, simply repeating Chris Dolzaki's policy directive.
2. Forward the email to Ilsa for her attention.
3. Advise Fernando he will have to wait until you gather more information or until you return from your weeklong seminar.

**More effective options:**

1. Ask Fernando what he can do to get the business without a discount. Engage him in planning an approach based on product features and benefits compared to competing products.
2. Reply by requesting that Fernando reflect on the need to maximize both sales and profitability. Encourage him to sell the customer on the benefits of USF's breakfast bars and the marketing support you will provide.

This leadership opportunity addresses the question of how to sell Fernando on doing what's best for the business as opposed to passing along information about company policy. It is a matter of encouraging him to do his best to convince the customer purchase USF's breakfast bars without a discount, but leaving the door open for a small discount as a last resort. It's not about telling him what to do but rather persuading him to think about what is best for the business. To influence him, praise his efforts, and stress how important this business is to the company's plans, and that he has your full support in landing this sale. Show that you appreciate his position; sales people are motivated to increase sales and sometimes they can give less thought to profitability.

**Email 7 – Erin Riggs asking for help with marketing campaign**

**From:** Erin Riggs, Associate Brand Manager

Ilsa asked me today to develop a new marketing campaign for our salt-free, shelled sunflower seeds. As you know, this is my first job and I've only been here 3 months, so I haven't done this before. She said I should ask you for help as you did such a good job on the campaign for breakfast bars.

What help can you offer me? I really need to get started next week but I understand you're at some course all next week. Is there anything you can suggest to get me started? Can you spend a couple of hours with me early the week you are back in the office, preferably Monday the 23<sup>rd</sup> or Tuesday at the latest?

I want to do a good job on this but I really need some help from someone with a little more experience than me.

See you.

**Issues:**

- Problem with the brand management team being short-staffed with only inexperienced people available who need to rely on you for help
- Opportunity to show some leadership and practice leadership skills
- Question about why the company is losing people and having trouble retaining experienced staff. How effective is Ilsa at managing people?

**Minimal or potentially negative options:**

1. Advise Erin that you are too busy and to ask Ilsa instead or someone else.
2. Offer to meet with Erin and to work together on this project.

**More effective options:**

1. Make some suggestions regarding your approach but don't get further involved, offering only to review Erin's progress part way through.
2. Reply in a manner that might help to boost Erin's confidence, perhaps saying how you learned starting with no experience and not being afraid to learn from mistakes.



From a leadership perspective, the question is how to help and support Erin, without taking on direct responsibility, which is how you would handle a similar leadership challenge. You might make some suggestions to get Erin started and offer to review progress at an agreed date, at which time you will provide feedback and further suggestions. To help boost Erin's confidence, provide moral support and encouragement, rather than doing the work yourself.

## Email 8 – Boosting sales in California

**From:** Ilsa Fluery, Brand Manager

Sorry to bombard you with so much when you're away but I got some sales figures for our breakfast bars in California. We are 12% behind our target for the year-to-date in California and we need to do something fast if we are going to turn this around before the end of this year. The sales manager for that region, Sylvia Palumbo, will be in our office the week of the 23<sup>rd</sup>. Please arrange a meeting with her as a matter of urgency that week to brainstorm what can be done to get our numbers up for her region.

Thanks,  
Ilsa

cc. Sylvia Palumbo

PS. Sylvia emailed me saying:

*I appreciate your concern regarding sales of breakfast bars in California but I'm going to be extremely busy the week I'm at headquarters, especially in meetings with Chris Dolzaki to explore some ideas he's got for ramping up our trail mix sales in my region.*

*Our trail mix line is not doing as well as we'd like in California because the competition is incredibly fierce, especially among health conscious snackers, our target market. Unless there is a really compelling reason to meet with Alex Carson the week I'm in headquarters, I'm afraid I'm just going to have to let breakfast bars take care of themselves for the rest of this year in my region.*

### Issues:

- California is a big market and the company has advertised the product there, so the firm needs to capitalize on this investment.
- Problem with Sylvia Palumbo having no time to meet and not seeing breakfast bars as an immediate priority
- Question as to why the company is pushing its trail mix in California if the competition is so fierce for that product and it's not doing well generally. (See the figures provided earlier in email #3.)

### Minimal or potentially negative options:

1. Insist on taking a few minutes of Sylvia's time; perhaps imply that you would take the matter to Chris Dolzaki to resolve.
2. Confront Chris or Sylvia with the argument that there is no sense in pushing trail mix in California when breakfast bars present a much better opportunity.

**More effective options:**

1. Work at influencing Sylvia by stressing the importance of her region to the future of the business and offering to speak with her on the phone. Stress the value of the breakfast bar business and the opportunity presented by the advertising campaign.
2. Offer to meet her for breakfast or fly out to her location, thereby showing your enthusiasm and determination to succeed while acknowledging that she is very busy and that her time is important.

**Email 9 – Request to act as an informal team leader**

**From:** Ilsa Fluery, Brand Manager

As you know our two senior associate brand managers, were promoted last month to regional sales manager roles and we are really short staffed at the moment. For budgetary reasons, we will be hiring new graduates to replace them rather than experienced people.

Because I'm out of the office so much, I need someone to be an informal team leader for our newer staff. I know that Erin and Luis have only a few months less experience than you but the little extra time you've been here seems to have made a big difference to your confidence.

I was meaning to sit down with you before you left to talk about this but I was just too busy. I know that Erin and Luis already look to you for advice and support so I want you to be a little more proactive in helping them. Not only are they lacking in confidence, they don't get along very well. Both are a little too competitive and they don't share information or help each other if they can avoid it. As a result, there is no real teamwork in the office at the moment.

I would appreciate it if you would email them with your thoughts on how they can work together more effectively as a team. Also, please set up a meeting with them for some day as soon as possible after your return to discuss how the three of you can support each other and the two new associate brand managers who will be joining us in a couple of weeks.

This is an informal role for now but it would be great for your development and your future career!

Finally, please suggest a time to meet with me early the week you are back in the office to discuss this idea in more detail. Please copy me on the email you send to Erin and Luis.

Thanks a million! Enjoy the Seminar!

**Issues:**

- You are again being asked to show leadership. The issue for you is whether you would expect or want to be thrust into a leadership role so early in your career.
- Why doesn't Ilsa hire more experienced staff to assume this role?
- Why isn't Ilsa showing this kind of leadership herself?

**Minimal or potentially negative options:**

1. Reply by saying that you are concerned about being asked to be involved in another leadership challenge and want to focus on brand management for now.
2. Voice concerns that that this isn't your job and that someone else should do it.
3. Email Erin and Luis telling them that Ilsa said they aren't working very well together and that she asked you to work with them.

**More effective options:**

1. Ask to meet with Ilsa and emphasize that you are willing to accept the role but that you want to divide your time between leadership and brand management work for the near future.
2. Email Erin and Luis, requesting a meeting to discuss how the team could help and support each other better, and request that they bring suggestions for discussion.

Meeting with Ilsa is a reasonable compromise, as you might influence her to grant you some control over your time and career progress.

By asking Erin and Luis for suggestions on how the team can work together more effectively, you are engaging them in solving the problem and increasing the likelihood that they will commit to proposals that would be considered. Involving people in developing a plan is one of the best ways of influencing them to accept it. This is an opportunity to make a positive impact on everyone in your team.

**Email 10 – Website updates**

**From:** Denise Hanna, Design Manager, Interactive Communications

I trust you enjoyed your week off.

As promised, we will complete the changes that you and your team requested for the breakfast bar section of your website on Monday September 16. You said that it was critical that the changes be ready to go live by noon on Friday the 21<sup>st</sup>.

Can you review the changes no later than 5 p.m. on Tuesday the 18<sup>th</sup> to give us time to make any further changes or fix any errors before Friday’s launch? I’m bearing in mind your need to get the details right on these changes because of the trouble caused by errors made on previous changes. Thanks! It’s been a pleasure working with you!

**Issues:**

- Need to do an effective job on the website, as this section of the site is your responsibility to manage.
- You have no time to review the changes because you will be away that week.

**Minimal or potentially negative options:**

1. Reply saying that you will try to fit it in during the week you are away.
2. Ask Ilsa to do this for you.

**More effective option:**

1. Request that Erin or Luis follow-up on this task in your absence; provide encouragement to take a different role, which will provide a development opportunity.

This is an opportunity to delegate to Erin or Luis and to practice your leadership skills. Rather than just asking for their assistance, you have a chance to motivate them by stating how this gives them an opportunity to take more responsibility, learn new skills and to have input into an important marketing tool. The point is to sell it to one of them rather than simply telling one of them to do it.

A competency is a group of skills and behaviors which contribute to performance. The competencies listed below are important factors of success as an associate brand manager, and the behaviors and skills listed relate to the simulation.

Participants will be asked in the Workbook to read the description of the competencies and performance indicators listed below and then self-assess their level of performance.

**Problem-Solving and Decision Making** – Identifies core issues of problems; sees full complexity of issues and interrelationships among them; develops logical, well-thought-out solutions. Difficulties might indicate that under certain circumstances, you might not consider the full range of issues when making decisions under time pressures.

| Positive indicators of my performance   | Negative indicators of my performance   |
|---|---|
| <ul style="list-style-type: none"> <li>• sees connections among issues</li> <li>• develops in-depth solutions</li> <li>• identifies underlying trends or themes</li> <li>• makes clear, firm decisions</li> <li>• tackles tough issues</li> </ul> | <ul style="list-style-type: none"> <li>• deals with issues independently</li> <li>• requires more information than needed</li> <li>• focuses mainly on symptoms</li> <li>• hesitant to make firm decisions</li> <li>• avoids dealing with tough issues</li> </ul> |

**Performance- Oriented** – Pursues challenging targets with determination to achieve results; not easily defeated; displays a sense of urgency and tackles obstacles with energy. Difficulties might indicate that under certain circumstances, you need to develop more confidence in dealing with unfamiliar issues.

| Positive indicators of my performance  | Negative indicators of my performance  |
|--|--|
| <ul style="list-style-type: none"> <li>• takes initiative and responsibility</li> <li>• proactive and took appropriate actions</li> <li>• conveys a sense of urgency</li> <li>• challenges objections with tenacity</li> </ul> | <ul style="list-style-type: none"> <li>• delays action for further information</li> <li>• calls for meetings rather than action</li> <li>• seeks boss's advice excessively</li> <li>• does not challenge objections</li> </ul> |

**Planning & Organizing** – Approaches issues in an orderly systematic fashion; uses time and other resources efficiently; shows awareness of key priorities and bigger picture. Difficulties might indicate that you have challenges with how you plan and organize under time pressure and in unfamiliar situations.

| Positive indicators of my performance  | Negative indicators of my performance   |
|--|---|
| <ul style="list-style-type: none"> <li>• covers a number of issues in one email</li> <li>• creates plans and agendas for future</li> <li>• sets timeframes for actions to occur</li> <li>• indicates follow-up steps after return to office</li> </ul> | <ul style="list-style-type: none"> <li>• misses key priorities and interconnections</li> <li>• spends too much time on details</li> <li>• makes no plans for meetings or other actions</li> <li>• does not mention time frames</li> </ul> |

**Teamwork** – Proactively involves others in plans, invites input; encourages collaboration with colleagues; promotes joint ownership, team spirit and uses of “we” language instead of over emphasizing “I.” Difficulties might indicate that you can work well as an individual contributor but need to learn how to be more inclusive and collaborative with your team.

| Positive indicators of my performance   | Negative indicators of my performance  |
|---|--|
| <ul style="list-style-type: none"> <li>• regularly asks colleagues for input</li> <li>• suggests working together on issues</li> <li>• uses praise and other supportive language thus valuing others</li> <li>• regularly uses “we” instead of “I”</li> </ul> | <ul style="list-style-type: none"> <li>• issues requests in a one-way fashion</li> <li>• stresses own need to get things done</li> <li>• adopts an adversarial tone</li> <li>• conveys an “us vs. them” outlook with “I” language</li> </ul> |

**Communication** – Expresses self clearly; specific and concise; seeks to understand the views of others; reaches out to people to get to know them and to build working relationships and structured communications logically. Difficulties might indicate that your communication style might be affected by time pressures or other issues and that under these circumstances you might focus more on the task than on relationships.

| Positive indicators of my performance  | Negative indicators of my performance   |
|--|---|
| <ul style="list-style-type: none"> <li>• concise, confident and clear emails</li> <li>• sticks to the point, few digressions</li> <li>• conveys a willingness to listen</li> <li>• suggests spending time with people to get to build relationships</li> </ul> | <ul style="list-style-type: none"> <li>• uses vague language</li> <li>• offers too much detail</li> <li>• too brief, thus unclear</li> <li>• demanding, one-way tone</li> <li>• overly focused on task rather than relationships</li> </ul> |

**Influence** – Helps others understand your point of view, often convincingly; assertive in a diplomatic, sensitive manner; shows leadership by striving to influence the course of the business; and takes the initiative to get “buy in” from key stakeholders. Difficulties might indicate that you need to learn how to consider the needs of others when trying to influence them.

| Positive indicators of my performance   | Negative indicators of my performance  |
|---|--|
| <ul style="list-style-type: none"> <li>• confronts objections assertively but diplomatically</li> <li>• makes definite suggestions to gain support</li> <li>• doesn’t hesitate to contribute ideas</li> <li>• takes opportunities to show leadership</li> </ul> | <ul style="list-style-type: none"> <li>• takes “no” for an answer</li> <li>• confronts objections aggressively</li> <li>• hesitates to offer advice</li> <li>• adopts a deferential tone</li> <li>• depends on others for support</li> </ul> |

**Managing Conflict** – Addresses conflict confidently and in a timely manner; defuses emotional tension; shows respect and takes ownership by using “I” statements. Difficulties might indicate that you approach conflict as something to avoid; view it as personal and allow emotions to take over; and/or see the other person as an adversary.

| Positive indicators of my performance  | Negative indicators of my performance  |
|--|--|
| <ul style="list-style-type: none"> <li>• seeks to understand the needs of others involved</li> <li>• engages stakeholders in the search for mutually satisfactory solutions</li> <li>• manages own emotions and has a calming effect on others</li> <li>• understands how to gain agreement</li> </ul> | <ul style="list-style-type: none"> <li>• delays action on conflict or shows a lack of confidence in approach</li> <li>• ignores needs of others, focuses only on own needs and solutions</li> <li>• loses control of own emotions</li> <li>• assumes that others will buy into resolution</li> </ul> |

UNC Kenan-Flagler Business School and AACSB wish to provide you the support necessary to be successful using this simulation as an effective learning tool with business school students. If you have feedback or questions regarding the content of the simulation, please direct them to:

Peter Romanella  
 Associate Director of Leadership Development and Lecturer, UNC’s Kenan-Flagler Business School  
[Peter\\_Romanella@unc.edu](mailto:Peter_Romanella@unc.edu)

or

Mindy Storrie  
 Director of Leadership Development, UNC’s Kenan-Flagler Business School  
[Mindy\\_Storrie@unc.edu](mailto:Mindy_Storrie@unc.edu)

Direct feedback and questions on downloading the simulation to: [simulation@aacsb.edu](mailto:simulation@aacsb.edu).