**Case Study 2: To Be Or Not To Be Promoted?**

The phone rang in Jane Preston’s ofﬁce.

“Jane, this is Dave Pearson. I am happy to tell you that you made the ﬁrst cut for the director of marketing. We plan to have a two- day assessment to determine who the director will be. Congratulations on getting this far. There were many qualiﬁed candidates and we have now narrowed it down to three. Please mark your calendar for Thursday and Friday of next week. We’ll need you the whole of both days.

”As she hung up the phone with the senior vice president of human resources, she reﬂected on how well her career was going. She had been a successful middle manager for the head ofﬁce of a major hotel chain, was well respected by both her peers and those who reported directly to her, and always gave 100%. She was excited about this new opportunity to direct a whole department and to manage a team of marketing professionals. Before she could celebrate, however, she needed to go through the company assessment process designed by the company’s human resource professionals working with senior- level managers to help them assess the shortlist of candidates. She would undergo some role plays, some verbal and mathematical ability tests, an interview, and a personality proﬁle to see if she was suit-able for the position. The selection committee would assess the results of these tests, exercises, and interview, and would evaluate her experience and education in marketing against an “ideal job proﬁle” for the position. She was one of three others competing for the job. Matt Stevenson and Joe Stern had also made it to this ﬁnal step.

Before the two- day assessment, Jane reviewed the position description for the role of marketing director. The position description was written by the HR department. It read:

**Marketing Director**

The position requires the following skill- set and experience. The individual will manage a team of professionals and support staff – six marketing professionals who will each have a set of responsibilities and two marketing coordinator positions. The individual will establish a strategic marketing plan that includes but may not be limited to marketing research objectives, advertising and promotion objectives, and public relations initiatives. The individual will execute the plan with internal marketing resources or outside resources such as advertising and PR ﬁrms.

The person will have deep knowledge of our customers as well as knowledge of our internal structure, especially our major hotel properties. The person should have a track record of successful marketing experience (at least eight years) and experience managing a team. The individual should be a self- starter who takes initiative to plan and execute difﬁcult projects. The person should be able to inﬂuence individuals from various parts of the company to embrace the marketing mission. People skills are a must. The individual will work closely with other senior- level managers.

Jane felt well- qualiﬁed for the role. She had been a marketing professional for nine years. She had handled several individual marketing projects for the company, which included a variety of tasks such as marketing research, advertising concepts, dealing with agencies, customer analyses, hotel promotions targeted at past customers, and contests targeted to the hotel staffs. As a marketing manager, she had successfully managed a team of four people and she felt conﬁdent that she could handle a larger team with broader responsibilities. Her performance reviews had singled her out as a high achiever in the top one- third of managers in the company.

**The Assessment Process**

Jane was not worried about the ability tests; she had done very well on the verbal and mathematical portions of the university entrance tests and taken advanced math courses in university. She was used to interpreting data in her current job where one of her assignments had been a major marketing research project. She had also managed a budget and was comfortable with numbers and balance sheets.

 During another part of the assessment process, four senior- level managers – three men and one woman – interviewed her about her career, her motivations for wanting the position, and her strengths in terms of managing people. Jane talked about her democratic style of management, her ability to help her team work through conﬂicts, and her high standards. In her tenure as a manager, she had an excellent record for retaining good employees. Jane also talked about her track record of success. She had been recognized for her management skills and had produced a marketing campaign that had increased sales of ﬁve of the hotel’s struggling properties. Additionally, she had been nominated for this position by her boss, Fred Markum, who had the highest regard for Jane. Jane felt somewhat uncomfortable with the line of some of the interviewers’ questions. She recalled them and her answers.
Jake Storm, one of the senior vice presidents, had asked her, “How would you deal with some of our opinionated hotel managers, Dan, Mike, or Ross, who think they know how to market their properties better than the head ofﬁce? Do you think you could deal with their personalities?

”Jane replied, “I have never had insurmountable difﬁculty dealing with difﬁcult people. I just keep the dialog going and use facts to support my position. I don’t think I would have any trouble, but if I did I would ask for support from the head ofﬁce to back me up.

”George Montgomery, another senior vice president, had asked, “In this business we sometimes need to take a ﬁrm hand with employees. You have a reputation of being a democratic manager. How do you take a ﬁrm hand with your staff?

”Jane was caught off- guard by the question, but replied, “I ﬁnd that if I set expectations upfront and hold people accountable for results, I don’t need to take much of a ﬁrm hand. My teams have always really wanted to achieve because they know I will recognize them for their hard work both monetarily and in other ways. I try to be fair.

”George continued, “Well, you must have had to discipline an employee at some point?”

Jane countered, “No, I can’t recall having to. Perhaps I’ve had to spend more time training someone who was not up to speed, but I can’t recall having to discipline anyone. I’ve hired some outstanding people and they have performed very well. If you hire the right people and work with them, you don’t have problems.”

Jake Storm asked, “Do you think you could manage a budget worth several million dollars?

”Jane replied, “I do. I have the organizational skills to manage it and I have managed smaller budgets where the same principles apply.

”After the interview, Jane reﬂected that these two senior managers seem to proceed with the assumption that Jane would have problems with the new position. She was worried that they had already formed a negative opinion of her. The other two managers’ questions seemed more straightforward and allowed her to talk directly about her strengths.

The personality proﬁle part of the assessment process did not cause Jane any trepidation. The industrial psychologist who administered the questionnaire told her that they would debrief each candidate on her or his results since they wanted this to be a develop-mental process for the candidates. She had taken many personality proﬁles before, and actually enjoyed learning more about what makes her tick. She answered the questions honestly. The industrial psychologist explained that her strongest dimensions of personality were the following:

• Affiliative (values friends, likes being around people).

• Democratic (encourages others to contribute, is a good listener).

• Data rational (uses data to support views, operates with facts).

• worrying (is anxious when things go wrong, anxious to do well).

• achieving (results focused, career centered).

Her weakest dimensions of personality were:

• controlling (takes charge, directs, supervises).

• Traditional (conventional, uses tried and true methods).

• Tough- minded (thick- skinned, difficult to upset).

• Competitive (wants to win, wants to beat others).

The psychologist mentioned that her weakest dimensions were around the mean for women managers. He explained that he wasn’t surprised at her weakest dimensions of personality because the norms for women differed signiﬁcantly from the norms for men in the following categories: controlling, tough- minded, and competitive. In other words, men see themselves as more controlling, tough- minded, and competitive than women see themselves. He stressed that the questionnaire simply highlighted how individuals viewed themselves and that he was not placing any value judgment on whether some dimensions of personality were better than others. He continued to explain that the importance of using personality questionnaires in an assessment process was to have a clear idea of which personality characteristics are important to do the job effectively. These personality characteristics would have been validated as important for job performance by the actual track record of current or former job holders.

“For example,” he said, “I wouldn’t want to hire a sales person who was not out- going and socially conﬁdent because these are critical personality characteristics common of successful salespeople.”

**Roleplays and Other Exercises**

Jane was asked to react to some company customer data and make marketing recommendations based on the data. This was something that she routinely did in her current marketing role so she felt very conﬁdent about her recommendations.

Each candidate for the marketing role was paired with a senior manager assessor for a role play. Jane was to role play a situation with George Montgomery where she took the role of the marketing director and he played one of her underperforming staff. Her task was to analyze his performance. In the role play, she opened the meeting by explaining the reason for it: to discuss his underperformance in recent weeks. She asked him what he liked and disliked about his job, and whether or not he understood what was expected of him. She also inquired about whether or not he felt he had the training to do what he was asked to do. She was attempting to uncover whether the reason for his poor performance was a lack of motivation or a lack of ability. As George played his role, he was not disclosing anything. Jane found this frustrating because in real situations at work she was able to get her staff to open up and discuss issues. She continued to ask George questions which he refused to answer and ﬁnally she succumbed to telling him that he was underperforming and would have to change. She laid out her expectations for his performance and then closed the meeting. At the end of the role play, she couldn’t help thinking that none of her employees in the past had behaved this way. She felt George had overplayed a belligerent employee and was possibly just giving her a hard time. He played a role that had effectively sabotaged her ability to demonstrate any management skills.

**The Announcement of the New Marketing Director**

Jane eagerly picked up the telephone. She had been waiting to hear the news.

“Jane, this is Dave Pearson. I want to thank you for taking the time to apply for the Marketing Directorship. You performed solidly during the assessment process. We have, however, decided to hire Joe Stern. He is an extremely good ﬁt for the role. We know that you will support Joe in his new role.”

“Thank you for letting me know,” Jane said. She hung up the phone in disbelief. She thought she was the best candidate and had performed extremely well in other marketing roles. She debated whether or not to seek clariﬁcation about why she wasn’t chosen.