

Goldstone needs to clearly define his expectations

[Experience](#)



It is clear from this case study that if Goldstone does not improve his performance he will lose his current management position. This report identifies and analyses the main issues and problems that Goldstone faces in his new role at Bulwark and also provides an improvement plan to lift performance.

Over the period of 6 months since Goldstone accepted the branch management role, it has become evident that there are a number of problems and issues which need to be addressed, centred around his shortage of managerial behaviours (Yukl, 1998).

Goldstone needs to clearly define his expectations of the sales team and then provide the required direction and support to facilitate the team consistently meeting those targets and expectations. Analysis Goldstone took an opportunity to move from a professional sales role into a management position at the urging of his previous manager and in the belief that he possessed the skills and knowledge to be a successful manager. He saw the role requirements from the biased viewpoint of a professional sales representative (Beyer et al, 1997) and once he started in the position was somewhat amazed to discover he was "...so wrong".

This revelation of the role demands, coupled with a shortage of Yukl's managerial behaviours to allow him to adapt, has overwhelmed Goldstone in the first 6 months. It is likely that there was no formal management training program for Bulwark employees as part of an ongoing succession planning process, otherwise Goldstone would have had a more realistic expectation of the role requirements and had knowledge of the managerial skills needed to

lead the sales team. This lack of management training is a shortcoming in Bulwark's succession planning strategy.

From the information provided in the case study it is assumed that the sales team is made up of a number of reps with varying degrees of self efficacy (Bandura, 1997). This is supported by the results of the survey conducted by Goldstone that showed an even 3-way split between satisfaction with his direction, neutral and wanting more direction. It is assumed that those with a high level of self efficacy, most likely developed through experience, are satisfied with his direction or are neutral as they are able to apply behavioural self management (BSM) techniques (Kanter and Schefft, 1988) and therefore feel that they require less direction.

It is this group of reps which have driven the achievement of sales quotas in the second quarter. Those who want more direction are likely to be those who have a lower level of self efficacy and thus an increased need for development and mentoring. Goldstone's inability to recognise the need for coaching and mentoring has resulted in significant problems managing two of his reps, Durkee and Puckett. He has provided Durkee with some support to help him through his personal problems, however has not addressed his performance issues.

Durkee requires some coaching and mentoring to give him the skills to make the sale and build his self efficacy. He is already motivated as evidenced by his long hours and attention at sales meetings. There may be an opportunity to change his role within the sales team to better utilise his strengths to achieve targets and expectations. Puckett also needed some coaching and mentoring to assist in building her sales skills.

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Unfortunately Goldstone's response to her approach for that assistance was to take away her delegated responsibility by completing the task himself which ultimately resulted in her leaving the company. Goldstone is also having problems managing Skrow, his branch's top performer. Goldstone managed the conflict situation at the first sales meeting poorly when Skrow openly criticised the new investment products. It is clear from that incident that Skrow will require some extrinsic motivation if he is expected to sell the new products.

In addition to this issue Skrow's feeling of a lack of equity in his treatment (Steers and Black, 1994) when Goldstone brought over the top performer from Spinnaker and gave him a corner office, may result in a loss in motivation to work at Bulwark. Improvement Opportunities I have identified two specific improvement opportunities to undertake if I was Goldstone. Firstly I would develop and implement a plan to improve my managerial skills and develop the required behaviours.

Secondly, and concurrently, I would develop and implement a management by objectives (MBO) program (Managing People and Organisations, 2006) based on the targets and expectations set by corporate. To develop an improvement plan for my managerial skills I would initially seek some coaching from within the company. MacKinley has shown evidence of his willingness to assist and provide advice and Slake has offered his assistance on more than one occasion. I would arrange this coaching to occur on a regular basis, say 2 hours per week on the phone, and use real life scenarios as the basis for the coaching and advice.

One obstacle that may arise is that MacKinley and Slake cannot provide coaching in all relevant aspects of management behaviour. This could be overcome by using external management consultants to supplement the internal coaching and provide a check that all aspects are being adequately addressed. The success of this coaching program could be measured through direct performance feedback from Ludlow and also utilising surveys of the sales reps to gauge their happiness with specific aspects of my management behaviour.