



Perspectives and personalities: managing two talented individuals in Guyana

On 17 July 2003, Dana Abrams received a five-page memorandum from the Vice-President (VP), Marketing and Sales, which highlighted the problems with one of the marketing officers. The memorandum concluded with a recommendation for Blossom Simpson to be fired. Dana had assumed duty on 1 January 2003 as Chief Operations Officer of the Ballard Group of companies, headquartered in Guyana. During one of her early individual briefings, Ann Wiltshire, the Guyanese VP, Marketing and Sales, advised Dana that she had a human resources problem with one of her marketing officers, Blossom Simpson, a Jamaican. Based on the VP's version and her initial work with the staff, Dana had concluded that it was a matter of differing personalities. Consequently, she had coached them on how to creatively manage their different approaches to work. Dana knew that, as this was her first human resource management challenge since assuming duty, the entire organisation would be carefully observing both her decision and how expeditiously she resolved the conflict between these two highly qualified female staff, with such different personalities. Should she fire Blossom or could she use her personal expertise and experience to suggest another, more developmental way to address the problem?

The context

The Ballard Group of companies had humble beginnings in the timber and longshoring industries in Guyana. Stories abounded about the business acumen and assertiveness of its founder, John Ballard, who had established the first operation in 1935. His foresight, resilience and concern for his employees were legendary.

This case was written by Andrea Watson-James with supervision from Dr Richard Norman from Victoria University of Wellington at the Caribbean Case Course in Barbados, July 2004. It has been prepared as a basis for class discussion rather than to illustrate either effective or ineffective handling of a managerial situation. The case is based on an actual situation but names have been changed to protect privacy, and some new details added.

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The business had grown on the basis of the ability of John Ballard and his son, Storm, to take advantage of opportunities in the market place, helped in no small measure by sheer good luck. They had uncanny foresight and acquired strategic real estate at reasonable prices, which escalated soon after. Over the years, the Group had expanded into rice cultivation and poultry production, established supermarkets in Georgetown and other major towns, and entered the ground transportation sector.

Ballard now boasted its own container yard which, together with its competitive rates, enhanced its port operations and made it the facility of choice in Port Georgetown.

A series of agency arrangements and a joint venture with a premier Barbados company, which had a long history of involvement in the retail business, reinforced the Group's presence in the Eastern Caribbean markets. In addition, Ballard exported lumber and rice to the European Union and to the United States.

In 2001, the current chairman of the Group, Michael Ballard, grandson of the founder, had established an office in Kingston, Jamaica after he married the daughter of a prominent local businessman, whom he had met while studying at University in Florida. Sally Ballard, an economist, had strong views on the future of the Group. She had successfully argued that Ballard needed to have a more global perspective and position its operations to take greater advantage of globalisation. The proposed implementation of the CARICOM Single Market and Economy (CSME) and the Free Trade Association of the Americas (FTAA) were anticipated developments which would create both challenges and opportunities for Ballard.

The Jamaica branch had been established to focus on the markets in the north Caribbean including The Bahamas, Cayman Islands, Turks and Caicos Islands and Belize. The intention was next to target Central and South America, with the Kingston and Georgetown offices playing strategic roles.

Staffing at Group Headquarters

Ballard currently employed 30 staff in its headquarters in Georgetown, Guyana, in addition to the staff assigned to the various facilities.

The culture of the Group reflected its origins and paternalistic past. The staff cohered into a "family unit". Informal social interactions, like family fun days, facilitated the routine functioning at Ballard. The tendency for colleagues to expect to be godparents for their colleagues' children, and the history of employing relatives of staff, meant there were few insurmountable human relations challenges. The company provided good bonuses, book awards, bursaries and scholarships for its employees' children.

Introducing the marketing officer

In October 2002, Blossom Simpson was appointed marketing officer for Ballard's headquarters operations. She had been employed as a marketing assistant by a retail company in the Cayman Islands for several years and had good knowledge of that market. Due to the small size of the department, Blossom had learnt the range of activities from market analyses, to designing and mounting promotions and evaluation

of their results. Her creative marketing programmes had been very successful and she had been the star performer. Encouraged by the positive feedback from her colleagues, she had decided to further her education.

In 2001, she completed her master's degree in marketing at Leicester University in the United Kingdom. Since her return from the UK, Blossom's marriage had ended. Her relationship with her husband had become abusive and their fights had escalated. This stress had a negative impact on Blossom's work. Her friend, Sally Ballard, whom she had known since childhood, had commiserated with her and promised to help her in any way possible.

When Sally heard that there was a vacancy for a Marketing Officer at the Guyana office, she recommended Blossom highly for the position.

Blossom welcomed the opportunity to work in another Caribbean state, particularly one as far away as Guyana. She wanted to distance herself and the children from her ex-husband. It would also be her first trip to the southern Caribbean.

Blossom was excited at the prospect of working on the new marketing strategies at Ballard's. She hoped that she could replicate her past successes.

Blossom in Guyana

Blossom's new colleagues seemed friendly and made several suggestions to help her and the children get settled. However, Guyana was so different from Jamaica in many respects – the absence of mountains around Georgetown, and no sight of the blue Caribbean Sea. Getting used to being on the continental mainland was going to be a challenge.

After the novelty of settling into her new home had worn off, Blossom quickly became disappointed with Guyana's social and physical infrastructure. She missed the rich theatre and cultural life of Jamaica. The social scene was limited - she kept meeting the same people at most of the functions she attended. Guyana did not have a significant tourism sector. However, there were wonderful eco-tourism locations in the interior, with waterfalls, wildlife, flora and fauna reserves. But those trips were expensive for her family and required travelling in small boats on rivers and in tiny aircraft, both of which Blossom hated. The last thing she wanted was for some aged Cessna to crash through the canopy of the Guyanese rainforest with her and the children aboard, never to be found again!

The Guyanese were also a curious lot. They seemed so complacent. Blossom was always amused when she saw groups of prisoners accompanied on their work outings by a solitary prison officer. There was no way that in Jamaica, ten or fifteen prisoners would comply with those arrangements - they would go AWOL! ¹

While her colleagues discussed and even argued about political and social issues and perceived ills, apparently Guyanese workers took no action except for the occasional

¹ AWOL – Absent Without Leave.

marching and picketing which the Opposition Party arranged to demand or protest against some action by the Government.

The Vice President, Marketing and Sales

Ann Wiltshire was a long serving staff member of the Ballard Group. After completing her degree in economics at the University of Guyana, the Group had paid for her to undertake some focused short courses in a range of areas relevant to its operations, including marketing, sales and professional shipping.

Ann had a reputation for being a hard taskmaster who supported her staff with the inputs and resources they needed to function effectively. She had earned the trust of the Ballard Group and was well respected. While she had a lively sense of humour, Ann was very serious about her work.

Single, Ann lived with her mother who had just celebrated her eightieth birthday. Her life consisted of her work at Ballard's and her mentoring work with young girls currently attending her alma mater, the Bishops' High School.

The first months

During the first few months of her tenure at Ballard, Blossom had been assigned responsibility for supporting the existing marketing campaigns. This allowed her to interact with the various companies and vendors and helped develop her network of contacts.

She was very critical of several aspects of those campaigns and made several suggestions to Ann concerning how they could be enhanced. Ann welcomed these suggestions although she thought some of them required more analysis.

While she enjoyed this work, Blossom was anxious to get her teeth into designing a new marketing plan.

Background to the assignment

Ballard had recently acquired additional lumber concessions in Guyana. Preliminary market studies had indicated that there was growing demand for dressed lumber, particularly locust, which had a finish similar to teak, and plywood in the northern Caribbean and Central American markets. Ballard had relatively low labour and harvesting costs, had recently installed a kiln and negotiated excellent volume freight rates with two of its client shipping lines.

In addition, the Barbados joint venture partner had expanded into the IT sector and had established ABS Computers. Further, there were tremendous possibilities for Ballard to import products from South America, particularly Brazil, to be sold in all its markets. The Governments of Guyana and Brazil had agreed to construct a road linking the two countries across the Takatu River at Lethem in southern Guyana. Currently, there was only a dry weather trail from Georgetown to Lethem.

Ballard wanted to be an early entrant in those markets.

The assignment

On the basis of her experience, Blossom had been assigned the priority task of completing the design of the new marketing plan for the Central and South America. Ann briefed her on the strategic direction, which required Ballard to profile and select local joint venture partners with a complementary mix of products and services.

Blossom was supposed to work with the various managers and the staff of the strategic business units to review preliminary marketing data, to segment and target the individual markets, and to create a comprehensive promotional plan to position Ballard's products. This meant examining the long run opportunities, given Ballard's market experience and core competencies.

Specifically, Ann suggested that Blossom needed to evaluate both the microenvironment in the new markets – the suppliers, marketing intermediaries, customers and competitors; and the macro-environment – the demographic, economic, physical, technological, politico-legal and socio-cultural aspects.

On the basis of the partner selected, Ballard would design a unique marketing strategy and promotion.

When they discussed the assignment and its deadline, Ann advised Blossom that, based on previous marketing initiatives, an indicative budget of US\$350,000 had been assigned for the first year's activities. Blossom's reaction surprised Ann. "US\$350,000? How could you think of a budget before you have seen the plan? I feel constrained already!"

Ann had suggested that Blossom should review the technical work her predecessor had done two months earlier, acquaint herself with the preliminary marketing data and formulate suggestions for completing the analyses. It was agreed that, the following Monday, they would discuss Blossom's efforts and the human resources needed to complete the assignment. Once agreed, Blossom would then elaborate her preliminary ideas so that they could be presented to the Board Meeting in a month's time.

The next Monday, Ann met with Blossom to review her effort. Blossom rolled out a flow chart detailing the steps for the design of a marketing plan. She wanted Ann to confirm that was the process she should follow. Then she shared some generic possibilities, which could be pursued.

Ann contained her dismay and then explained as calmly as she could that she had expected analyses based on the data and a preliminary identification of potential partners. In addition, Blossom should have presented preliminary ideas for the marketing and promotional plan for the first year's operations. She indicated that she expected concrete suggestions and proposals, not a conceptual framework.

Internally, Ann fumed as the Board Meeting was now three weeks away and more progress should have been made with the plan. She confirmed that the framework was appropriate but impressed upon Blossom that she needed concrete marketing and promotional inputs! They agreed to meet again that Thursday to discuss Blossom's progress.

During the next few days, Ann could hear Blossom chatting with the staff on a range of subjects, including a play she had seen at the Cultural Centre, her shock at seeing a large frog by her front door and an altercation with her landlord. Ann wished that she would get on with the assignment. Blossom was beginning to irritate her.

By their next meeting, Blossom seemed to be on track and presented several worthwhile ideas for Ann's consideration. But the assignment was one week late! Ann decided that she would work closely with Blossom to ensure that the plan was completed on time. So, she scheduled a series of frequent meetings to ensure progress.

The next week, however, the Chairman asked Ann to attend a meeting in Jamaica with a Costa Rican businessman whom he had recently met. As she was involved with the design of the thrust into Central America, Michael Ballard wanted Ann to be present to meet the potential partner. Ann was away for four days, but she had agreed with Blossom what could be achieved in her absence.

On her return, Ann was surprised to discover that Blossom had not advanced the work as planned. Blossom explained that she had contracted conjunctivitis, which had subsequently affected her son. Ann was disappointed, as she had plans for the forthcoming holiday weekend which she had to cancel in order to ensure that the assignment was completed.

The week before the Board Meeting was frenetic. Blossom and Ann continued to work long hours and Ann took responsibility for the editing of the effort. The final review was scheduled for the week before the meeting to allow time for the circulation of the report to members.

After discussions with Blossom, Ann presented the draft to the Chief Operating Officer, Dana Abrams, who seemed pleased with the work. Ann recommended that she should accompany Dana to Jamaica to the Board Meeting to deliver the plan. Ann also agreed to prepare the PowerPoint presentation overnight for final review.

The incident

When Blossom discovered that Ann had been selected to attend the Board Meeting, she was livid. As soon as she arrived that morning, Blossom went to Ann's office and angrily accused her of being duplicitous.

Ann was taken aback at the vehemence of Blossom's outburst.

Ann, supported by Dana, successfully presented the marketing plan to the Board. When she returned to the office, Ann decided to document the background and details of the incident. Ann's memorandum to Dana is at *Exhibit 1*.

Dana's investigations

Having read the memorandum, Dana reflected on its contents. One of the first activities she had undertaken, when she was recruited from Barbados, was to assess the capacity of the company to move to the next level required by the strategic plan.

During that process, she had paid particular attention to the interpersonal relations between Ann and Blossom. She realised that they were different in a range of ways such as their communication and problem-solving styles.

Dana had spoken openly with her two staff of the perceived differences and had coached Ann Wiltshire that she needed to create opportunities for Blossom to express her different perspectives on work assignments. She had also advised Blossom that she needed to couch her critical comments developmentally as they might result in hostility among the staff.

In her estimation, both women worked hard but with different styles. Ann was known to be a focused, disciplined taskmaster with a proven track record at Ballard. Blossom was talkative and animated and it was not unusual to hear her laughter reverberating in the office. Blossom had openly expressed dismay at how “task-focused” Ann was.

Dana requested a meeting with Blossom to discuss Ann’s memorandum. She was agitated about the matter. Apparently, the memo had come as a surprise to Blossom as, two weeks having passed, she thought that Ann had forgotten about the incident.

At the meeting, Blossom did not dispute the statements Ann had attributed to her in the memo. However, she stated that Ann was too rigid, unwilling to consider new ideas and had possibly been at Ballard for too long.

Dana’s challenge

Dana pondered the dilemma which confronted her. How could she assist in resolving this apparent personality problem, she wondered. Should she support the Vice President’s recommendation? Blossom had come highly recommended. Was this evidence of adjustment problems or of more deep-seated performance issues? Should she fire Blossom or could she use her experience to suggest another, more developmental way to address the problem?

Exhibit 1

MEMORANDUM

FROM: Vice President, Marketing and Sales

TO: Chief Operations Officer

COPIED: Marketing Officer (Ms Blossom Simpson)

DATE: 17 July 2003

SUBJECT: *Report of Incident involving the Marketing Officer*

1. The purpose of this Memorandum is to document an incident involving the Marketing Officer on Thursday, 3 July 2003. In order to provide an appreciation of the context of the incident, I have provided some background. I have also presented a recommendation for the resolution of the situation, which is submitted for your consideration and action.

Background

2. Since her arrival in Guyana, Ms Blossom Simpson, Marketing Officer, appeared to have difficulties adjusting to the new environment. I recognized that she had no previous experience in Guyana and tried to assist her in various ways.

3. It is obvious that we approach our work from different perspectives. On several occasions, Ms Simpson shared insights that were different from mine. Consequently, I valued her inputs when offered.

4. However, Ms Simpson is very outgoing and spends a lot of valuable time chatting with the staff about a range of matters. Often, I could hear her in the corridors when I am trying to focus on work.

The incident

5. When I briefed you about the preparation of the marketing plan, I had mentioned some of the challenges Ms Simpson experienced meeting deadlines. I shall not repeat those here.

6. On Thursday 3 July 2003, Ms Simpson entered my office and much to my horror, launched a vehement oral attack, which is précised below. She stated that:

- As we had collaborated on the preparation of the marketing plan, she was angry that she had not been selected to attend the Board Meeting in Jamaica;
- I had cleverly stage-managed the final review meeting with her and had decided to prepare the PowerPoint presentation in an effort to ensure that I, not she, would be considered to attend the Meeting;
- I often said that I prefer to operate in an open communication environment, but that I was duplicitous;
- I was so insecure that I was trying to prevent her from attending the Board Meeting; and
- She has no respect for me, professionally or personally, and no confidence in my ability to supervise her.

7. I stood transfixed, trying to calm myself in the face of her outburst.

8. When Ms Simpson paused for breath, I discussed outlined the chronology of the events leading to the selection of the team to the Meeting. In addition, I advised her that:

- I could not understand why she was so worked up about the matter and cautioned her not to raise her voice;
- There were several times during my tenure at Ballard when I thought that I should have represented the Group at meetings and assignments overseas but that management decisions were made to the contrary. In those circumstances, I did not orally attack my supervisor; and
- I resented the derogatory comments she had made, without first seeking to ascertain the facts.

9. I could not explain the origin of her anger. In order to defuse the situation, I left my own office.

10. Later on Thursday, 3 July 2003, Ms Simpson came to my office for a scheduled meeting. Before addressing the substantive work matters, I thought that I would try to resolve the matter. Specifically, I asked why she thought that I would be insecure as we were at different levels in the Group and not in competition with each other. Continuing in her aggressive tone, she said that she did not know, but that I always seemed to want to analyse events at a deep psychological level.

11. I also cautioned her that she had spoken to me in a manner that it would never cross my mind to speak to my supervisor. Ms Simpson responded dismissively that this was 2003 and that slavery had been abolished, which communicated to me

that she thought that her behaviour was appropriate and that she could speak to me that way.

12. In a further effort to communicate that her behaviour was unsatisfactory, I reminded her that as professionals, we needed to hone our conflict-resolution and problem-solving skills and function in a more collaborative fashion. I advised her that I was giving her an oral warning and that if she behaved in that manner again, I would be forced to communicate, in writing, the inappropriateness of her behaviour. She replied that I should feel free to write to her and indeed, would prefer it if I would.

13. Ms Simpson having stated her position on the matter, I proceeded to discuss the Group's work.

14. I have not discussed the matter further with Ms. Simpson, partly as she reported sick for three days last week.

My reactions to the incident

15. In my opinion, relationships are built and sustained on the basis of respect, which is a precondition for successful interactions. As evidenced by her statements, Ms Simpson's respect for me personally and as a professional has fallen. Further, her responses communicated to me that she thought her attitude was appropriate in the circumstances.

16. I must admit that Ms Simpson's problem solving and conflict resolution approaches, the level and vehemence of the abuse she hurled at me, and her attitude when I told her such behaviour was inappropriate, scared me and in my opinion, militates against our continued relationship.

Recommendation for Consideration

17. I am submitting the following recommendation for your consideration and decision as appropriate:

- Ms Simpson's services should be terminated and immediate efforts made to find a suitable replacement; and
- There are several good resumes on file, which had been submitted in response to our last advertisement for the position of Marketing Officer. Subject to your approval of the above recommendation, I propose to take immediate action to fill the position with a suitable candidate.

18. Submitted for your urgent consideration and action.

ANN WILTSHIRE