

FastTrack—Case Study

A Season for Leadership

FastTrack for Emerging Leaders at ZStores—Case Study

Jane Stevens, a ZStores Merchandising Director, has responsibility for the fictional Ladies' Sportswear category, among other things. This case presents some of the challenges facing Jane as she works to handle portfolio planning deadlines, people leadership issues, and the day-to-day job of keeping the business on track. FastTrack program participants take on the role of a coach to Jane. The strength of their analysis, advice, and coaching determines how the case plays out. This case is designed to support the key skills covered in the FastTrack program.

Instructions for Participants

In the First Session. Read through the information in this case. Get a feel for the people in the case and what their strengths and weaknesses might be. Look at their behaviors and compare those to what you learn in the FastTrack program sessions. Your main job will be to give advice and coaching to the leader—Jane Stevens, the Merchandising Director—shown in the case situation.

At Each Session. At each FastTrack program session, you will get more information about the case to continue the story. You will apply what you learned in that day's session to the case situation. You and your cohort team will explain what feedback, coaching, or other advice you would give to the leader in the case. You may also be asked to meet with your cohort team between sessions to work on the case or other program activities.

At the Last Session. In the last session of the FastTrack program, you and your cohort team will receive additional information and then prepare and present a short analysis of the case. This will include recommendations for ZStores senior leaders about the leadership actions you would recommend to handle the issues you found in the case, and your suggestions for increasing leadership effectiveness at ZStores as a whole.

This is all "Set the Stage" material, starting with the big picture, first.

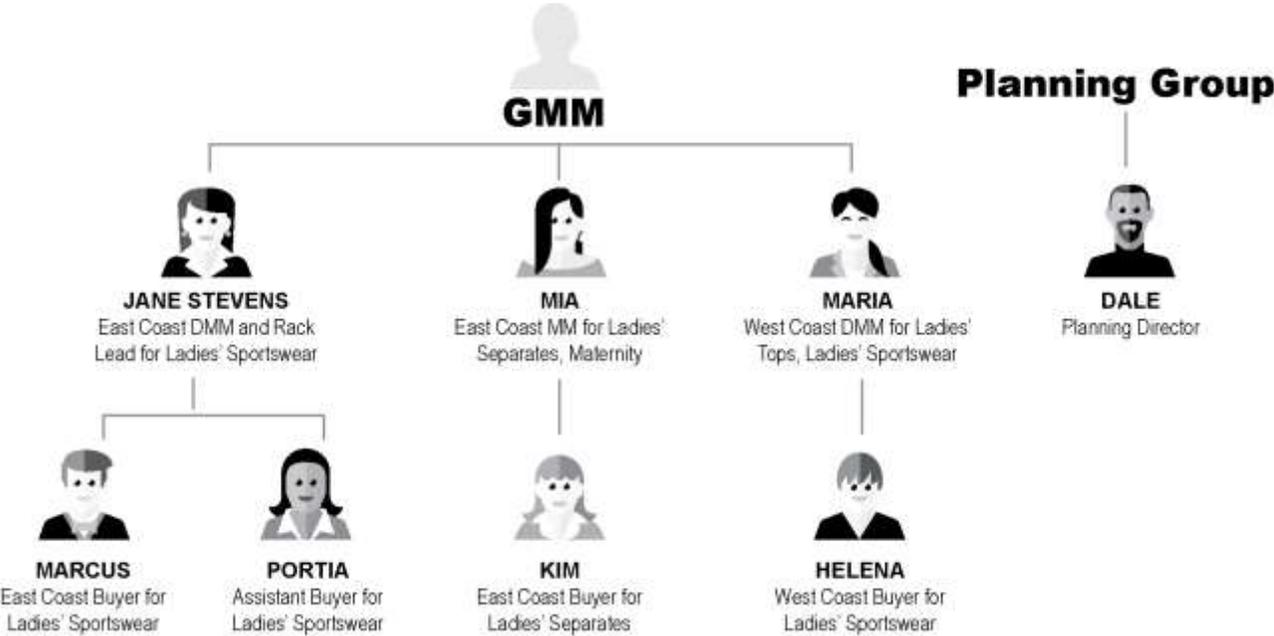
Special notes about the case:

- All characters are fictional. They are written to show certain styles, characteristics, and behaviors that support the learning in the program. Any resemblance to real people is unintentional.
- The reporting relationships and portfolio of categories in this case are not true to real life. The real Ladies' Sportswear category responsibilities would be different than what is shown here. Our intent is to show a generic, fictional view of ZStores, avoiding real reporting structures. We want you to focus on the people leadership issues in this case, and not on the specifics of the business.
- You can assume that other things in this case study situation are similar to other "generic" ZStores situations. Fill in any details you feel might be missing from the case with your own understanding of how the organization works. (Check with your trainer if you have any specific questions.)

Session 1—Setting the Stage

Cast of Characters

Jane Stevens, an East Coast Merchandising Director and Category Lead for Ladies' Sportswear
Marcus, an East Coast Buyer for Ladies' Sportswear, reports to Jane
Portia, an Assistant Buyer for Ladies' Sportswear, reports to Jane
Mia, an East Coast MM for Ladies' Separates, Maternity, is being mentored informally by Jane
Kim, an East Coast Buyer for Ladies' Separates, reports to Mia
Maria, a West Coast DMM for Ladies' Tops, Ladies' Sportswear
Helena, a West Coast Buyer for Ladies' Sportswear, reports to Maria
Dale, a Planning Director



This audience felt that a business school style case was too confusing. We wrote it in a script style, instead. An org chart helped learners understand the players.

More “Set the Stage” material, so that we can put boundaries on new information, and let the learners rely on their existing knowledge to fill in the rest..

What You Already Know

There are some things that you already know about this situation.

- The Portfolio Planning process for the next season is already in progress.
- Category Plans are due in three weeks from the start of this case.
- People are all feeling pressure over the planning deadline.
- This group is not fully staffed. Open positions: 1 Merchandising Manager, 2 Buyers, 3 Assistant Buyers. (One of the open Buyer positions reports to Jane.)
- The GMM has already promoted all associates who could fill open positions. Options are now to recruit from outside the company or develop current associates for open roles.
- There have been plans in the works to implement a system upgrade that will streamline data collection, tracking, and reporting. It is not clear exactly when this will be ready, but it is expected to come soon after the portfolio planning is complete for the season.

As the Curtain Rises



Icons help learners recognize the characters. This is a good technique, but may not be needed for all clients.

Marcus, Portia, and Jane are in Jane’s office comparing notes about Sportswear. Jane invited them in to help Marcus master the art of the big, strategic buy that supports the portfolio plan, and Portia was also eager to soak up some advice. After talking about several different ways that merchants could support the portfolio plan, Marcus wondered about progress against the current planning deadlines.

Marcus: “I can see how these ideas would help, thanks, Jane. But, we have to do all this work to update the plans, too, on top of our ‘day jobs.’ How far are you with the category plan I need to support?”

Jane: “Oh, I’ve got a rough draft for Tops just started and I’m about 40% done with the Sportswear plan. I think we’ve got some cool ideas but I need to check with Maria before I can move it any further. The extra coordination they want now makes it harder—I can guess at the extra detail, but I don’t know where we’re actually going to be able to get the deals we need on this portfolio, yet.” *laughs* “Whatever, we’ll figure it out as we get to it!”

Marcus: “When do I have to roll my Sportswear plan up? You only gave me an initial target date. Has that changed?”

Jane: “No, that date’s still good.”

Marcus: *doesn’t seem satisfied; leans back in his chair with a slight frown and a tight lipped expression*

Jane: *sees his face* “You look frustrated.”

Marcus: “Well, yes. I just want to get it done, but I have to be able to count on the date. There’s so much else I have to do, too.”

Jane: “You’ve got a lot on your plate, and you want firm dates.”

Marcus: *nods*

Jane: “Okay. I’ve got an offer from Dale in Planning to help me run the numbers, but I haven’t been able to schedule a time with him to do that, yet. So, you’ve got time.”

Marcus: *frowns again* “I’m actually more worried about one of my vendors. We upped the order quantity on them, which is good. We have more new stores opening that we have to stock since we made the original deal, and they’re happy to get the business. But, I don’t know that they’ll have enough product to ship on our timelines. The delivery dates are more clumped together, now. I think they might just be saying yes to tell me what I want to hear. Sorting that all out is crucial, but it will leave me less time for my planning.”

Jane: “Can’t you work with the rep and check each planned delivery date with him?”

Portia: *offers* “Or, I could dig into that with him, if you want?”

Marcus: *cuts her off* “No, Portia. The rep doesn’t know you, and I don’t have time to introduce you and get you up to speed on everything that’s gone on with this vendor. It would be faster just to do it myself.”

Jane: *frowns slightly; starts to say something when her desk phone rings. She glances at the caller ID, then picks up the handset* “Hi, Kim! How are things with Tops?”

Kim: *on the phone* “Going okay, but Mia is tied up and I can’t get any answers on getting this buyer pack together. When is that really due?”

Marcus and Portia: *both settle back into their chairs to wait for Jane. Marcus starts looking over the figures again*

Jane: *starts to click through email messages on her computer, trying to find the most recent messages about the deadlines* “Uh, let me check, but I think it’s next Tuesday for the first draft. I need it to roll up for the Tops category plan. I can take it sooner, if you can get to it, though.”

Kim: *makes a dismissive noise* “Yeah, maybe. I’m on a plane in half an hour and I can work on it on the flight. What do I do if I don’t have all the details? Estimate?”

Jane: “Sure, that will work. Just throw in comments where you need to, and I can work with that this round. I have to get some coordination calls set up to cross-walk the plans, but... I’ll get to it.”

Jane: *finds the message she was looking for, then answers Kim’s question* “Yeah, next Tuesday.”

Kim: “Yeah, okay. Maybe you can make my boss, Mia, schedule the calls. She is up to her neck in the planning details, but I can’t get an answer from her while she’s buried in it all. I’ve had to handle a couple of her vendor calls, too.”

Jane: *wondering if she should do anything with Kim’s last comment* “Ah, okay.”

Kim: “Never mind. I’ll get you the draft. Got a plane to catch. Later.” *hangs up*

Jane: “Well, at least that was quick!” *turns back to Marcus and Portia, then her mobile phone buzzes with an incoming text. She reads it and groans.*

Portia: “What?”

Jane: “It’s Maria. She’s running late for the Ladies’ Sportswear category call I scheduled. But, she’s got the numbers we need, so I can’t do anything more without her.”

Portia: “So..., we just wait for her? I’m on that call, too. Is there anything I can help with?”

Jane: *grins apologetically* “Can you tap dance and kill time for 15 minutes?”

Marcus: *stands up* “Well, I’ll get on to the next thing while you two figure out what to do with that call. Let me know when I can get a look at the category figures so I can roll my pack up for you.”

Jane: “Thanks, Marcus. We’ll get to it....” *shrugs* “Soon.”

Case Study Worksheet – Foundation Skills Review

Use the information you have available to discuss and answer these questions in your cohort teams:

- What overall leadership strengths or weaknesses did you see Jane demonstrate?
- What do you think Jane's self-talk was in this situation?
- What use of listening skills did you see in this situation?
- What agreements were made? What missed opportunities for agreements did you see?
- What feedback or coaching would you give Jane?
- What feedback or coaching would you give other associates?

The actual worksheet was formatted to match the participant workbook style. This just shows the content.

Session 1 – Behind the Scenes (for Trainers only)

Facilitator Notes for Session 1

What overall leadership strengths or weaknesses did you see Jane demonstrate?

- Look for: Jane is developing her associates, specifically around mastering the big buy and buying to support the assortment plan.
- Look for: Jane seems to have some difficulty with organization and communication of dates and details; she does not have the answers people need and it appears that she has not kept a clear stream of communication open to the people who need it.
- Look for: Jane allows herself to be pulled from listening (attending) by calls and texts. She did not respond to Marcus' abrupt dismissal of Portia's offer to help.

What do you think Jane's self-talk was in this situation?

- Something like: "There is so much to get done, but we can get through it. We will just 'wing it' when we need to." This has mostly supportive elements to it, but may not be helpful to other members of the team or the people she manages.

What use of listening skills did you see in this situation?

- Look for: Jane attended, restated, and questioned when she noticed Marcus frowning. She did not help Marcus resolve his concerns, though.
- Look for: There were some opportunities for restating and questioning that were missed, like with Kim on the phone.

What agreements were made? What missed opportunities for agreements did you see?

- Look for: No agreements were made. Depending on style, preference, and facilitator thoughts, there may or may not have been missed opportunities for agreements in this very short scene. (You can prompt the participants to suggest where agreements might be helpful.)

What feedback or coaching would you give Jane?

- Look for: difficulty staying on topic, attending to the people she is with rather than picking up the phone, improving communication, improving organization, giving Marcus feedback when he cut off Portia, acknowledging positive intent of the development she wanted to provide.

What feedback or coaching would you give other associates?

- Look for: Marcus—While it isn't specifically his job as a Buyer to develop Portia, the way he dismissed her offer of help demonstrated low versatility and sensitivity. This may have been a missed opportunity for delegation.

The facilitator gets a set of debrief questions and a "what to look for" success guide for each part of the case.

Session 2–SOCIAL STYLE

The Interim Planning Meeting



The Session 2 part is included here to show how the focus of the case changes to match the session topic, while still advancing the same story.

There were only ten minutes left in the meeting, and the group still had not come to agreement. Jane had called an interim meeting with Dale, the Planning Director, and with Mia and Maria to coordinate the category plan for Ladies' Sportswear. In order to hit the planning deadlines, Jane wanted to get the strategies finished by the end of this meeting. They had gotten stuck on one of the proposed strategies. Maria wanted to include a strategy of maximizing growth in coordinated tops, bottoms, and separates. Jane thought that was a good idea, but Dale and Mia weren't convinced that there was enough data to prove that coordinates were a growing trend. Mia pointed out that this might also mean that they would be buying more from fewer vendors, which could increase risk.

"What we really need here are good ideas, and this is a good idea!" Maria argued over the speakerphone. "I tell you these kinds of pieces are selling together on the West Coast side of things."

"I'm sorry, Maria?" Dale broke in, "but I'm just not seeing that in the data I have."

"That's because you don't have the data! I'm seeing it in what's moving, and in the market trends!"

"Mmm," the Planning Director nodded as he paused for thought. He acknowledged, "You know, a gut feel is okay, if there are data to back it up. It's just that I don't see how you're going to get that big a lift in comp while keeping down the price. I think we're missing information here."

Mia worked in a comment softly before Maria could protest again. "We will have to put down some numbers and work to achieve the plan. This isn't that big a difference from what we did last season. It's just putting more focus on it, really. The extra sales data I've been keeping informally does back up the trend. I would like more time on this trend, myself, though, before I make a decision. I guess my question is can we can get the product portfolio we need to do this strategy without reducing the number of labels we have in the category? I thought diversifying vendors was important at the big picture level, too?"

"Well, it's not like we've heard a better idea," Maria said sarcastically. "Let's go with it and make the numbers fit however we can. People are going to love this! If anything, I'm being conservative on the growth potential!"

"All the numbers need to balance, Maria," Dale reminded her. "And, it has to be achievable."

"Wait, wait, wait!" Jane interrupted. "Now, we're back to the same thing all over again. Maria, you are convinced this is the right strategy for this category, and that we can work out the details. Dale, you want the data to back up what you see is a stretch strategy. Mia, you're wondering if we we're considering all the right things. And I like this focus, but I have to make sure that we come out of this meeting with agreement, too!"

Case Study Worksheet – Social Styles

Use the information you have available to discuss and answer these questions in your cohort teams:

- What is your read of the Social Styles of the people in this situation?
 - Jane
 - Dale
 - Maria
 - Mia
- What feedback or coaching would you give Jane to ease style-based tension in this situation?

Session 2 – Behind the Scenes (for Trainers only)

Facilitator Notes for Session 2

- What is your read of the Social Styles of the people in this situation?
 - Jane: Expressive
 - Dale: Analytical
 - Maria: Expressive
 - Mia: Analytical
 - **Also:** Ask about possible styles of **Marcus** and **Portia** from the first part of the case, as a discussion point. This can help contrast with the Expressive and Analytical styles shown in this example.
- What feedback or coaching would you give Jane to ease style-based tension in this situation?
 - Look for: Acknowledging Maria’s ideas and contributions; may want to help get a reality check for her (and Jane) on how this would work
 - Look for: Acknowledging Dale’s concerns about the lack of supporting data for the trend, and for his position that the details have to add up; give time or offer to circle back to him with more data and details as they are developed
 - Look for: Acknowledging and addressing Mia’s concern about “getting it right” with the big picture that she is trying to reconcile with what she is seeing in the strategies.

Style Key:

Jane Stevens (Expressive), an East Coast DMM and Rack Lead for Ladies’ Tops and Ladies’ Sportswear

Marcus (Driver), an East Coast Buyer for Men’s Sportswear, reports to Jane

Portia (Amiable), an Assistant Buyer for Ladies’ Sportswear, reports to Jane

Maria (Expressive), a West Coast DMM for Ladies’ Tops, Ladies’ Sportswear

Helena (Expressive), a West Coast Buyer for Ladies’ Sportswear, reports to Maria

Mia (Analytical), an East Coast MM for Ladies’ Separates, Maternity

Kim (Driver), an East Coast Buyer for Ladies’ Tops, reports to Mia

Dale (Analytical), a Planning Director

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And so on, for the rest of the FastTrack program sessions.