CASE STUDY #2 **Assignment 2:  Loads of Fun**

Taira (Salmon) Brandt is the 35 year old daughter of Garret Salmon the owner of a medium sized party invitation company “Lots of Fun.” Taira has recently received a degree from UMUC in Business Management and is anxious to take over her father’s company. She is a single mother, very attractive but a little retiring in her manner. She and her father have been planning her take over for several years, ever since her ex-husband left the business after their divorce, an event that did not go unnoticed within the company. Taira has always worked in some capacity within the company but never in a serious leadership role. She is simply known as the “boss’ daughter”. Taira and her father have agreed that she will take over as CEO in the next two months. No one knows of this decision.

Having taken BMGT 365 Taira realizes that she has her work cut out for her if she is to be a good company leader. The first thing she has to do is take stock of the company. This is what she sees. The company has netted 1.5 million in sales for the last two years with no growth rate. Costs have, however, increased by 3 percent. The company produces and sells a variety of invitation styles at different price points but her most popular items seem to be either the “budget” invitations or the “high end” expensive paper products. Her sales people have traditionally only sold to card stores or stationers. The company has never sought to sell directly to the customer. Taira would like to explore the online market for future growth potential. In addition to the new markets, Taira would like to revamp the company image and marketing plans. Taira ’s father the current CEO, was approached by a Singapore firm who would like ‘Invitations Inc.” to go into a joint venture with them to set up a separate web store that will sell invitations to Asia with local stores in Singapore. Taira and her father are uncomfortable with the approach because they lack understanding of the Asian culture but do see a great business opportunity.

There is another issue that is on Taira ’s business agenda. The company is located in Kent, Washington one of the largest lumber towns in the country. Being close to the paper source has saved money in the past for the company but now pressure is on to seek “green” methods of production. A recent article in the Kent County Gazette challenged “Invitation Inc.” to get in touch with their “green side.”

The business side seems solid right now but her father has never really changed things since he started the business forty years ago. He has managed his way to success. Her father… Taira thought is another matter. What is his role going to be? He jokingly says that he wants to go into “semi-retirement” but never really says what that means. In fact Taira’s not really sure that he wants to retire. When she asks him what role he wants his reply is “I have just one request don’t make me a figurehead. I would rather retire completely. You choose the job or have me retire either way I will do what you want. It is your show now sweetheart.” Garret Salmon is an extrovert through and through. He always wants to be near the action and thrives on running the company. His open personality and hands-on style has made the business what it is now. Taira knows this but her role growing up as the “I’ll do any job girl” has made her privy to lots of company gossip. She heard the new middle management staff of which there are three, two men and one woman, say he is nice but too controlling while others like the Vice President and CFO, men who have been with him for the last 25 years, have given up trying to think for themselves and just go with his flow. Where do I put my father? I need to establish myself and my style with these people. I want to make big changes and I have to get them on board. Yet, I don’t want to lose my father’s knowledge and enthusiasm. I don’t want to lose him altogether.

In this assessment, students will read the case study provided. The goal of this assignment is for the students to write a paper which designs a personal leadership plan for Taira Brandt who is about to take over the family business. The plan should address how Taira can facilitate her role as daughter, leader, and change agent to make a successful transition from the boss’s daughter to CEO. In essence how will Taira best use her individual skills to transition to her new role as CEO?

**Purpose:**

Leaders, as discussed in weeks 4, 5, and 6 have a need to develop as individuals in order to be successful relationship builders. The material in these weeks focus on the ways a leader may enhance his or her personality, emotional intelligence, and relationship building skills to engage and motivate employees.

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**Outcomes Met:**

* use leadership theories, assessment tools, and an understanding of the role of ethics, values, and attitudes to evaluate and enhance personal leadership skills
* develop and implement methods for establishing a constructive organizational structure and culture that fosters positive employee and employer relationships
* evaluate the culture and policies of an organization to recommend and implement improvements that support its vision, success, and sustainability
* assess the interactions between the external environment and the organization to foster responsible and effective leadership and organizational practices

**Instructions:**

**Step 1:**Review “How to Analyze a Case Study” under Week 4 Content.

**Step 2:**  Create a Word or Rich Text Format (RTF) document that is single-spaced, double-spaced between paragraphs, 12-point font.  The final product will be between 4-5 pages in length excluding the title page and reference page.

**Step 3:**Review the assignment grading rubric.

**Step 4:**  Follow this format:

* Title page with title, your name, the course, the instructor’s name;
* Introduction paragraph in which purpose of the plan is explained.
* Body Paragraphs:
* Evaluate Taira’s current role in the business;
* Discussion Taira’s  plans for business future;
* What individual Leadership skills does Taira need to accomplish business goals?
* Identify leadership relationship building challenges that are facing Taira;
* Assess the environment for change in her plan.
* Summary paragraph

**Step 5**:  In writing a case study, the writing is in the third person.  What this means is that there are no words such as “I, me, my, we, or us” (first person writing), nor is there use of “you or your” (second person writing).  If uncertain how to write in the third person, view this link:  <http://www.quickanddirtytips.com/education/grammar/first-second-and-third-person>

**Step 6:**  In writing this assignment, students are asked to support the reasoning using in-text citations and a reference list.  A reference within a reference list cannot exist without an associated in-text citation and vice versa.  View the sample APA paper under Week 4 content

**Step 7:**  In writing this assignment, students are expected to paraphrase and not use direct quotes.  Learn to paraphrase by reviewing this link:  <https://writing.wisc.edu/Handbook/QPA_paraphrase2.html>

**Step 8:**  Read critically and analyze the scenario provided under Week 6 Content.

**Step 9:**  Jot down or highlight key facts from the scenario.  Consider making an outline to capture key points in the paper.

**Step 10:**  In your paper, respond to the following elements of leadership and plan design**:**

* Evaluate Taira’s current role in the business and how that affects her leadership potential
* Describe specifically Taira’s business plans now and in the future (e.g. vision and mission, green plans etc.);
* Leader as individual- assessments; style, and ways that Taira can best establish her personal self with the employees;
* Identify the relationship building challenges facing Taira including current management staff and father and ways she can build the relationships to meet her goals;
* Assess the environment for change and how Taira will implement the ideas she has to build her future at the business.

**Step 11:**  Create the introductory paragraph.  The introductory paragraph is the first paragraph of the paper but is typically written after writing the body of the paper (Questions students responded to above).  View this website to learn how to write an introductory paragraph:  <http://www.writing.ucsb.edu/faculty/donelan/intro.html>

**Step 12:**  Write a summary paragraph.  A summary paragraph restates the main idea(s) of the essay.  Make sure to leave a reader with a sense that the essay is complete.  The summary paragraph is the last paragraph of a paper.

**Step 13:**  Using the grading rubric as a comparison, read through the paper to ensure all required elements are presented.

READINGS

<http://ctb.ku.edu/en/table-of-contents/leadership/leadership-functions/build-sustain-relationships/main>

<http://www.bizjournals.com/bizjournals/how-to/human-resources/2013/04/how-to-inspire-your-employees-to-make.html?page=all>

<http://www.kenblanchard.com/img/pub/Blanchard-Building-Trust.pdf>

<http://www.lesaffaires.com/uploads/references/743_why-should-anyone-be-led-by-you_Goffee_Jones.pdf>

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| --- | --- | --- | --- | --- | --- |
| **Criteria** | **Outstanding** | **Superior** | **Good** | **Substandard** | **Failure** |
| **Content: Evaluation of Taira’s Role in Business - Currently** | 1.4 points  Evaluated Taira’s role in a comprehensive manner; used all case facts in the discussion.  (1.26 - 1.4) | 1.19 points  Evaluated Taira’s role generally; used few of the case facts in the discussion.  (1.12 - 1.259) | 1.05 points  Attempted to evaluate Taira’s role but was imprecise and vague; did not relate the case facts to the description.  (0.98 - 1.119) | 0.91 points  Attempted to evaluate Taira’s role but was imprecise and vague; did not relate the case facts to the description.  (0.84 - 0.979) | 0 points  Failed to evaluate Taira’s current role in business in any meaningful way.  (0 - 0.839) |
| **Content: Describe specifically Taira’s future business plans** | 1.4 points  Sufficiently described  Taira’s future business plans using most of the case facts to support the description.  (1.26 - 1.4) | 1.19 points  Sufficiently described  Taira’s future business plans using most of the case facts to support the description.  (1.12 - 1.259) | 1.05 points  Generally Described  Taira’s future business plans using some of the case facts to support the description.  (0.98 - 1.119) | 0.91 points  Attempted to Describe  Taira’s future business plans but used very little of the case facts to support the description.  (0.84 - 0.979) | 0 points  Failed to Describe specifically Taira’s future business plans the in any meaningful way.  (0 - 0.839) |
| **Content: Individual Leadership skills Taira needs to accomplish business goals** | 1.4 points  Comprehensively discussed the skills needed to accomplish business goals using the case facts in the assessment.  (1.26 - 1.4) | 1.19 points  Sufficiently discussed the skills needed to accomplish business goals; mostly related enough of the case facts to the assessment.  (1.12 - 1.259) | 1.05 points  Generally identified the skills needed to accomplish business goals  using  some case facts to support the description; some discussion as to why the skills are necessary.  (0.98 - 1.119) | 0.91 points  Attempted to the discuss the skills needed to accomplish business goals but was imprecise and vague; did not relate the case facts to the assessment.  (0.84 - 0.979) | 0 points  Failed to assess specifically the skills needed to accomplish business goals in any meaningful way.  (0 - 0.839) |
| **Content: Identify and discuss the relationship building challenges facing Taira and the ways to handle them** | 1.4 points  Identified all of the challenges facing Taira; discussed the ways that Taira could handle the challenges. | 1.19 points  Identified most of the challenges facing Taira sufficiently but; discussed most ways that Taira could handle the challenges.  (1.12 - 1.259) | 1.05 points  Identified some of the challenges facing Taira but missed a few key concepts; attempted to discuss a some ways that Taira could handle the challenges.  (0.98 - 1.119) | 0.91 points  Attempted to identify  some of the challenges facing Taira but was imprecise and missed key concepts; failed to discuss the ways that Taira could handle the challenges.  (0.84 - 0.979) | 0 points  Failed to identify any leadership challenges that Taira must face to accomplish her goals in any meaningful way; no discussion as to how to handle them.  (0 - 0.839) |
| **Content: Assess the environment for change** | 1.4 points  Comprehensively discussed the business’ environment for change using the case facts in the assessment.  (1.26 - 1.4) | 1.19 points  Sufficiently discussed the business’ environment for change; mostly related enough of the case facts to the assessment.  (1.12 - 1.259) | 1.05 points  Generally discussed the business’ environment for change but was imprecise; did not relate enough of the case facts to the assessment.  (0.98 - 1.119) | 0.91 points  Attempted to the discuss the business’ environment for change but was imprecise and vague; did not relate the case facts to the assessment.  (0.84 - 0.979) | 0 points  Failed to assess specifically the business’ environment for change in any meaningful way.  (0 - 0.839) |
| **Critical Thinking/Reasoning** | 4 points  Concepts and ideas are fully developed. Thinking is consistent in accurately interpreting questions and material/provides solid assumptions, reasoning and evaluation with sound conclusions. Reader can easily follow the author's logic and reasoning.  (3.6 -4) | 3.4 points  Concepts and ideas are developed. Thinking is mostly consistent in accurately interpreting questions and material/ provides good assumptions, reasoning and evaluation with sound conclusions. Reader can easily follow the author's logic and reasoning.  (3.2 - 3.59 ) | 3 points  Concepts and ideas are mostly developed but may need clarification on some aspects of thinking, reasoning or evaluation.   Conclusions are drawn.  Reader follows the author’s logic but occasionally there are areas that are unclear.  (2.8 - 3.19) | 2.6 points  Concepts and ideas are not cohesive.   Misinterprets questions or material; ignores or superficially evaluates, justifies little and seldom explains reasoning; draws unwarranted conclusions.  At times, the reader must attempt to determine the author's train of thought.    (2.4 - 2.79) | 0 points  Concepts and ideas are not fully developed or presented in a cohesive manner. Misinterprets questions or material.  (0 – 2.39) |
| **Application of Resources** | 4 points  Arguments or positions are well-supported with evidence from the readings/experience; ideas go beyond the course material and recognize implications and extensions of the material and concepts.  (3.6 - 4) | 3.4 points  Arguments or positions are mostly supported by evidence from the readings and course content; ideas presented demonstrate understanding of the material and concepts.  (3.2 - 3.59) | 3 points  Arguments are more often based on opinion or unclear views than on position grounded in the readings of material or external sources of material.  (2.8 - 3.19) | 2.6 points  Arguments are frequently illogical and unsubstantiated; Limited use of facts in case study and essential information presented in resources; May resort to ad hominem attacks on the author instead of making meaningful application of the material.  (2.4 - 2.79) | 0 points  Arguments lack meaningful explanation or support of ideas.  Does not provide facts presented in case study.  (0 – 2.39) |
| **Attention to Instructions** | 2 points  demonstrated full understanding of requirements responded to each aspect of assignment  (1.8 - 2) | 1.7 points  demonstrated understanding of requirements; missed one minor aspect of assignment  (1.6 - 1.79) | 1.5 points  demonstrated some understanding of requirements; missed a key element or two minor aspects of assignment  (1.4 - 1.59) | 1.3 points  failed to show a firm understanding of requirements; missed two key elements or several minor aspects of assignment  (1.2 - 1.39) | 0 points  did not demonstrate understanding of assignment requirements  (0 – 1.19) |
| **Writing Mechanics** | 2 points  Strictly adheres to standard usage rules of written English, including but not limited to capitalization, punctuation, and spelling.  No errors found.  No jargon used.  (1.8 - 2) | 1.7 points  Adheres to standard usage of mechanics:  conventions of written English, including capitalization, punctuation, and spelling.  One to three errors found.  (1.6 - 1.79 ) | 1.5 points  Minimally adheres to standard usage rules of mechanics:  conventions of English, including capitalization, punctuation, and spelling.  Four to 10 errors found.  (1.4 - 1.59) | 1.3 points  Does not adhere to standard usage rules of mechanics:  conventions of written English, including capitalization, punctuation, and spelling.  More than 10 errors found.  (1.2 - 1.39) | 0 points  Does not adhere to standard usage rules of mechanics:  conventions of written English largely incomprehensible and errors are too plentiful to count.  (0 – 1.19) |
| **APA Style (6th ed.)** | 1 point  No APA style errors; Proper citation of source material is used throughout paper.  Reference titles follow APA with only the first word, the first word after a colon and proper nouns capitalized.    (0.9 - 1) | 0.85 points  Attempts in-text citations and reference list but one or two APA style errors noted.  (0.8 - 0.89) | 0.75 points  Attempts in-text citations and reference lists; APA style errors are noted; inconsistencies in citation usage are noted throughout document.  (0.7 - 0.79) | 0.65 points  Attempts either in-text citations or reference list but omits the other.  (0 - 0.69) | 0 points  No APA style errors including all places throughout paper that source material is used is properly cited.  Reference titles follow APA with only the first word, the first word after a colon and proper nouns capitalized.  (0 – 0.89) |
| **Overall Score** | **Outstanding 18 or more** | **Superior 16 or more** | **Good 14 or more** | **Substandard 12 or more** | **Failure 0 or more** |
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