

TELEMACHUS TECHNOLOGY

A NEGOTIATION EXERCISE

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GENERAL INSTRUCTIONS

Telemachus Technology, Inc. specializes in customizing information technology (IT) systems for large financial institutions. Telemachus analyzes a company's IT requirements and recommends appropriate hardware and software. The company usually arranges for the purchase and installation of the new equipment and then trains company personnel in its use. Currently, many Telemachus clients are moving from a mainframe, or "dummy terminal," environment to networked, client-server systems. One service that many clients find invaluable is Telemachus' regular review of IT systems to incorporate technological advances to meet expanding business needs.

Since its inception in 1988, Telemachus has experienced swift expansion, with a 500% annual growth rate over that period. The company began in San Francisco and subsequently opened offices in Cambridge and Austin. As a result of this rapid growth, the company's management has expanded to four levels: President, Vice Presidents, Directors and Managers. Today, the firm employs a professional staff of approximately 250, with support and administrative staff of approximately the same numbers.

Two years ago, Telemachus began a concerted effort to diversify its staff. The company's professional staff is disproportionately white, with some Asian males, and there are few women or minorities (and no African-Americans) represented in the managerial ranks. An increasing number of Telemachus' largest clients are adopting specific affirmative action goals for suppliers and now require Telemachus to file annual reports detailing the number of women and minorities on their staffs. Women and minorities on client staffs request with increasing frequency that women or minority consultants be assigned to their accounts. Moreover, as a company that sells "state-of-the-art" business practices, Telemachus plans to promote multicultural teams to clients, rather than settling for a company image of merely being reactive to client requests.

Telemachus has implemented its recruitment goals by actively seeking qualified women and minorities in its college and university recruiting program. However, the company never formally addressed the question of specific programs to facilitate promotions of women and minority groups. Instead, training was informally provided by individual departments, as it had been since the company's inception.

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THE MENTORSHIP PROGRAM

During the past year, Joe Banks, the President of Telemachus, began to rethink the company's training methods in light of the rapid expansion. Reliance on *ad hoc* training by senior consultants and managers no longer guaranteed that new hires, and particularly minorities and women, received either general skills training or the range of experience required for promotion within the company. Six months ago, while at the Admiral's Club at O'Hare Airport, Joe ran into an old friend from business school who had become a noted management consultant. Joe had time to briefly share his concerns before his friend's flight departed. His friend told him that other major businesses addressed these same concerns through mentorship programs. Upon returning to San Francisco, Joe immediately instructed Tricia Solomon, the VP of Human Resources, to develop and implement such a program.

Solomon immediately created the Telemachus Mentorship Program which was implemented three months ago. The program applies to all new employees with less than three years experience and has a twofold purpose: 1) to create and maintain a systematic focus on training and, as an intrinsic byproduct of that goal, 2) to assist underrepresented minorities to develop skills needed for promotion. The program assigns a mentor to each mentee and provides a manual containing a checklist to follow. Together the mentor and mentee prepare a skills development plan which they pledge to follow over the next twelve months. Given that Banks had asked all his vice presidents and directors to participate as mentors, Solomon decided that whatever program she implemented would have to be presented in a manual "since it would not be feasible or practical to expect such a high level group of mentors to have or make the time for training meetings."

THE MENTEE, MANAGER AND MENTOR

Shataya Davis is an African-American woman recruited by the company directly from U.C. Berkeley as a consultant in the Department of Training and Consulting Services. Davis impressed the Recruiting Committee with her concentration in C++ programming and client-server networking. This strong foundation of skills came as no surprise given that both her undergraduate and master's degrees were in computer science, the former awarded "with Honors". Davis is highly articulate and generally of quite fashionable professional appearance. Since her high school days, she has worn her long hair in cornrow braids and she occasionally wears professional versions of traditional African dress in the office.

Davis reports to Jack Youngblood, the Manager of Training and Consulting Services, who is Telemachus' youngest manager. He thinks that since her hire, Davis has shown great skill in hands-on design work. He thinks she is relatively inexperienced in interacting with clients at this point, though she shows great promise.

Youngblood reports to the Director of Training and Consulting Services, who in turn reports to Bill Meese, VP of Sales and Marketing. Youngblood is a white male who received an M.B.A. and a master's degree in computer science from UCLA. He was

hired directly after his graduation. Just six months ago, Youngblood was promoted to the manager's position from a senior consultant position in another department. Upon his promotion, he began to work more closely with Bill Meese. This manager's position is considered a "plum" assignment because Meese is Joe Banks' "right hand" man.

Meese is a white male in his early 50's who was recruited into the company at its inception. He gained most of his experience as an executive in a large New York financial institution. Meese attended Phillips Exeter Academy and then went on to earn an undergraduate degree in Economics from Princeton and an M.B.A. from Wharton. He is thought of as one of the top rainmakers at Telemachus, primarily due to his long-standing contacts within many leading financial institutions.

Telemachus had not developed its mentorship program at the time of Shataya Davis's hire. Three months ago at the program's inception, Tricia Solomon notified her of the implementation of a mentorship program and the assignment of Bill Meese as her mentor. Davis had met Meese briefly when she interviewed for the job, and had been at several meetings and social events where they spoke, but still does not know him well.

Since she started at Telemachus, Davis's work has been in the implementation of networked, client-server systems for West Coast clients. She feels that Youngblood has supplied excellent training in implementing new information technology systems. Davis has interacted with clients during the installation of new systems (particularly in working out glitches), but has not served as the principal client contact on any project. She has noticed that her two male counterparts, both of whom started when she did, have been asked to participate in several client presentations and meetings, while she has not.

CONTACTS UNDER THE MENTORSHIP PROGRAM

When Davis and Meese were advised of their mentorship assignment, they also received copies of the Telemachus Mentorship Program Manual. The manual instructed them to meet and prepare a skills development plan. Meese's secretary called Davis, the day they received the information, to schedule a meeting for them to develop this plan. They met a week later in the conference room next door to Meese's office. Following the manual guidelines, they completed a skills development plan which they both agreed to implement over the next twelve months.

At the outset of the meeting, Meese informed her that he had "looked her up". He had reviewed her resume and talked to the Chair of the Hiring Committee about her references. He complimented her on their favorable comments. During the meeting, he talked about his philosophy on success. "One should be, first and foremost, from day one, a marketer." He told Davis that she needed to be prepared to seek client contact and to sell her services and expertise. He was generally impressed with her technical experience to date, but said that the company needed to provide her, and she needed to gain, experience in marketing the company's services, closing sales and interacting with clients as the firm's direct contact. He told her that he would begin by instructing Youngblood to be on the lookout for opportunities for her to participate on teams making business proposals to clients. He also suggested she might look into joining

Toastmaster's International to gain experience in making presentations. He said that when he got done working with her she would be "one hell of a marketer".

Immediately following the meeting, Meese E-mailed Youngblood and told him that he should plan to give Davis experience this year in winning accounts. He copied Davis on the E-mail. Youngblood, when he saw her later that day, told her that that would be one of his priorities for her in the future. Since receiving the E-mail, three months ago, Davis has had no contact from Meese until today. She called his office twice about four weeks ago, but he was in New York. She left voice mail messages which he never returned. She left another message two weeks ago and called again last week, but decided against leaving a fourth message.

THE CLIENT PRESENTATION

Telemachus has been actively soliciting Boston First Financial Investment Corp., a rapidly expanding financial institution, which does business in the Northeast and in European markets. The head of the Cambridge office of Telemachus was able to arrange a meeting with representatives of Boston First in mid to late March at the company's headquarters in downtown Boston. Jack Youngblood was asked to lead a team from the San Francisco office. The head of the Cambridge office also plans to attend. After the meeting had been set, it occurred to Youngblood to include Davis as part of the presentation team, and inform Meese of this decision.

When he learned of Davis' participation, Meese decided that he could assist his mentee by critiquing a run-through of her presentation.

YOUR ROLE WILL BE FURTHER EXPLAINED IN YOUR SECRET INSTRUCTIONS.