

4.1 CASE STUDY

Many Managers, Different Styles

Vanessa Mills was recently hired to work at a branch of Lakeshore Bank as a personal banker. The branch is very busy and has a large staff, including three on-site managers. As a new employee, Vanessa is trying to figure out how to succeed as a personal banker while meeting the expectations of her three very different managers.

Vanessa is paid a salary, but also receives a commission for activities including opening new accounts and selling new services to customers such as credit cards, lines of credit, loans, and stock accounts. Personal bankers are expected to open a certain number of accounts each month and build relationships with customers by exploring their various banking needs and offering services to meet those needs.

Marion Woods is one of the managers at Vanessa's branch. She has worked for Lakeshore Bank for 10 years and prides herself on the success of the branch. Marion openly talks about employees' progress in terms of the number of accounts opened or relationships established, and then commends or scolds people depending on their productivity. Marion stresses to Vanessa the importance of following procedures and using the scripts that Marion provides to successfully convince customers to open new accounts or accept new services with the bank.

As a new banker, Vanessa has not opened many accounts and feels very uncertain about her competence. She is intimidated by Marion, believing that this manager is continually watching and evaluating her. Several times Marion has publically criticized Vanessa, commenting on her shortcomings as a personal banker. Vanessa tries hard to get her sales numbers up so she can keep Marion off her back.

Bruce Dexter, another manager at Vanessa's branch, has been with Lakeshore Bank for 14 years. Bruce started out as a teller and worked his way up to branch manager. As a manager, Bruce is responsible for holding the bank staff's Monday morning meetings. At these staff meetings, Bruce relays the current numbers for new accounts as well as the target number for new accounts. He also lists the number of new relationships the personal bankers have established. After the meetings, Bruce retreats back into his office where he sits hidden behind his computer monitor. He rarely interacts with others. Vanessa likes when Bruce retreats into his office because she does not have to worry about having her performance scrutinized. However, sometimes when Vanessa is trying to help customers with a problem that falls outside of her banking knowledge, she is stressed because Bruce does not provide her with any managerial support.

The third manager at the branch is Heather Atwood. Heather just started at Lakeshore

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Bank within the last year, but worked for nine years at another bank. Vanessa finds Heather to be very helpful. She often pops in when Vanessa is with a customer to introduce herself and make sure everything is going well. Heather also allows Vanessa to listen in when she calls disgruntled customers or customers with complicated requests, so Vanessa can learn how to manage these types of interactions. Heather trusts her staff and enjoys seeing them grow, encouraging them by organizing games to see who can open the most accounts and offering helpful feedback when customer interactions do not go as planned. Vanessa is grateful for the advice and support she receives from Heather, and looks up to her because she is competent and kind.

Vanessa is coming up on her three-month review and is very nervous that she might get fired based on her low sales record and the negative feedback she has received from Bruce and Marion regarding her performance. Vanessa decides to talk to Heather about her upcoming review and what to expect. Heather assures Vanessa that she is doing fine and shows promise even if her numbers have not reached that of a seasoned banker. Still, Vanessa is concerned about Bruce and Marion. She has hardly had more than two conversations with Bruce and feels intimidated by Marion who, she perceives, manages by running around barking numbers at people.

QUESTIONS

1. Based on the assumptions of Theory X and Theory Y, how would you describe each manager's philosophy and style of leadership? In what way do their attitudes about Vanessa affect their leadership?
2. In this type of customer service setting, which leadership style would be most effective for the bank to meet its goals? From the bank's perspective, which (if any) manager exhibits the most appropriate leadership? Discuss.
3. What advice would you give to each of the managers to enhance their leadership skills within the bank?
4. What do you think Vanessa can do to prepare herself for her three-month review?