This deck highlights my personal takeaways from Sameer’s workshop. It is created solely for my own benefit (I learn best when I write things down). I am very happy to share with other Haas faculty, but the content is confidential and should not be shared with students or any faculty outside of Haas.

Dan Simpson
April 22, 2016
Sameer B. Srivastava Example Case Teaching Prep Sheet for Amelia Rogers Case (CTE Workshop on April 21, 2016)

### Other Case Characters
- **Guy Johnson** – Muffler World marketing director
- **Dave Burns** – creative director on the account
- **Sally Tassani** – founder and CEO of TC
- **Jim Paglia** – CEO / EVP; Roger’s boss
- **Robin Sparkman** – prior account director for Muffler World
- **Mary Stewart** – Account Exec (Roger’s subordinate)

### Student Calls
- **Cold call – Students with experience in industry:**
  - xxx

### Board #1: What is the Context

**Strategy:**
- Integrated marketing communication; need to coordinate activity / decisions across departments
- Trying to professionalize from an entrepreneurial base

**Challenges in Strategy Implementation:**
- Organizational structure: separate departments w/o P&L; account direct leads team (but w/o reporting relationship)
- Tension: provide high touch / customized services to clients but also manage costs (resources stretched thin)
- Division of responsibility between Tassani (bus dev) and Paglia (internal operations)
- Paglia as central actor: “creative clearinghouse”

Note: Potential for political conflict rising: (1) resource scarcity increasing, (2) level of interdependence across units increasing; (and (3) diversity of perspectives increasing (e.g. old blood versus new blood)

**Muffler World Account:**
- High stakes client; opportunity to go national
- Transition from Sparkman to Rogers

Presenting Problem: Free standing insert (FSI) with illustration proposed by creative team; initial interest by Johnson but then cold feet; Burns then calls Johnson directly; Johnson calls Rogers to complain. Rogers calls Burns – hears voicemail recording.

### Board #2 / Pasture #1: What should Rogers do?

- Leave voicemail for Burns?
- Meet on-on-one with Burns? Push Burns to stop calling client? Ask Burns why he thinks this is important?
- Involve Paglia?
- What to say to Johnson?
- How to involve Sparkman and Stewart?

In this case, Sameer often do a role play, with students playing Burns and Sameer playing Rogers. Helps make the situation more real.

### Effective discussion technique is to have “anchors” – students with different points of view. Be sure they talk to each other versus talking to prof.

Always have students put themselves in the position of a case character (often the protagonist). The student comment should be first person (“we should do . . . .”) versus third person (the person in the case should do . . . )
Board #3 / Pasture #2: Assess Roger’s sources of power early in her career

- **Personal:**
  a) Relevant knowledge / skill; has been account supervisor before
  b) Attention to detail
  c) Effective communicator: “hub of the wheel”
  d) Direct / willing to challenge
  e) Has insight into the creative process and good judgment

- **Positional:**
  a) Account Director for Muffler World – supposed to be single point of contact for client
  b) Responsible for three other accounts (resources)

- **Relational:**
  a) Personally recruited by Sally Tassani
  b) Has a solid relationship with Jim Paglia
  c) Has a good working relationship with Burns (though there are tensions at times)
  d) Has access to Sparkman and Mary Stewart

Board #4 / Pasture #3: Who are Rogers’ potential allies? What resources does she have to potentially exchange with those allies for support? What would an alliance with Sparkman / Stewart / Burns look like?

**Sparkman:**
- **Gives:** (1) advice about how to be general purpose Account Director; (2) advice about how to navigate Tassani; (3) (potential) access to other accounts in the portfolio; (4) network – introductions to Tassani and Paglia; (5) success on Muffler World so Sparkman is not pulled back into the account
- **Gets:** (1) insight into Muffler World organization; (2) perspective on whether Johnson can be influenced and, if so, how, (3) knowledge about how advertising in automotive industry works

**Stewart:**
- Similar to Sparkman but can also give mentorship / development on transitioning to Account Director role + opening up one of Rogers’ own accounts

**Burns:**
- **Gives:** (1) another opportunity to make his case to Johnson; (2) support for his team; (3) insights about how to be more effective / influential with Johnson (by bringing together Sparkman and Stewart)
- **Gets:** (1) commitment to stop calling the client now; (2) commitment that he will involve Rogers earlier on when a situation like this arises again.
Sameer Srivastava Example of Amelia Rogers Case Board Work Done Before Class Begin (CTE Workshop on April 21, 2016)

### Context
1. Tassani Corp integrated marketing communications firm
2. Organized into functions; no one dept. owns the P&L
3. Account director role: integrator of team, but no formal authority
4. Tension: creatives operate by “Buffet mentality” but need to manage costs
5. Tension: maintaining entrepreneurial culture vs. professionalizing
6. Muffler World account: high stakes
7. Free Standing Insert controversy
8. Burns calls Johnson
9. Johnson calls Rogers: “I am not going to take Burns’ call”

### What should Rogers do? (Board 2)

### What are Rogers’ sources of power? (Board 3)
- **Personal**
- **Positional**
- **Relational**

### What would an alliance look like with . . . (Board 4)
- **Gives**
  - Sparkman
  - Stewart
  - Burns
- **Gets**
These notes attempt to document some of the comments Sameer made during his workshop, and are largely focused on areas where I personally need to improve. His slides remain the main source his content.

1) Always clarify learning objectives for every class, including (1) objective for the class, (2) connection to prior classes, and (3) new points being made.

2) Begin and end the class with a few slides. The opening slides should cover the roadmap for the course and how this class session fits into the course roadmap; closing slides summarize the key takeaways from the class session.

3) Sameer always has a case or a simulation in each class, keeping lecture content to a minimum.

4) Visuals can be powerful tools for clear communication.

5) Sameer often uses self-reflection worksheets in class, which are very effective to help deepen the thinking on a topic. (Examples on the following page)

6) Self-reflection worksheets also serve as “time accordions”. If the pace of the class is faster than anticipated, the self-reflection worksheets can slow it down. If the pace is especially fast, the self-reflection work can be followed by dialog with neighbors on the topic, before having the dialog with the entire class. If he is running late, he still hands out the self-reflection worksheet to help students internalize the content, but he asks students to do it on their own at home.

7) Sameer is highly directive in keeping the discussion focused. If a student goes off on a tangent, Sameer will sometimes being it back to the subject by pointing out “that’s not the question I asked”, or if appropriate “that’s a good observation but we will cover it a bit later in the class. Let’s come back to it then.”

8) If a student fumbles an answer, it often helps to ask if someone else in the class can help them out.
Self-Reflection Worksheet on Push / Pull Tactics (Amelia Rogers Case)

Name: ___________________________

Think back to a time when you tried to use push tactics to influence someone and did not get the result you were hoping to achieve.

In that situation, what would it have looked like to use pull tactics instead? What, if anything, might have prevented you from doing so? How effective do you think pull would have been relative to push?

Self-Reflection Worksheet on Teaching Cases

If you have experience teaching cases, what challenges and dilemmas have you encountered in teaching using the case method?

If you have not taught cases or used cases only sparingly, what has kept you from making more extensive use of case method teaching?

(On back of page, so it can be completed after the initial discussion)
What, if anything, will you do differently in teaching cases in the future? If you have not taught using the case method before or have used it only sparingly, are there topics that you think might be worth trying to teach using the case method?