

# **CASE STUDY - ARAVALLI HILLS PROJECT**

## **SALES PROBLEM**

### **BRIEFING NOTE FOR 'PRODUCTION MANAGER'**

You work for an engineering company which manufactures a range of valves used in the process industry.

You are an experience,ambitious, production manager. Originally, you qualified as a chartered mechanical engineer but, having recognised the growing importance of electronics and information technology, you have been taking further courses with the Open University.

Recently, the company has started to manufacture under licence a range of electronically controlled valves. You believe that they can be manufactured more cheaply than mechanically controlled valves in current use by the process industry. They should also prove more reliable in operation.

There are problems with the final assembly and delivery schedules of these new valves. This is mainly because the electronic control units used in the valve are imported from the USA.

The workforce is highly skilled in the manufacture of mechanically controlled valves. Unfortunately, they do not have sufficient understanding of electronics and the higher standards of assembly and quality control needed. Quality is therefore a major concern to you.

Another problem is the attitude of supervisors and their staff. These people are familiar with the

production of mechanically controlled valves, which are relatively easy to manufacture, assemble and check. There is also considerable pride in the craft skills being used. You would like to introduce 'multi-skilling' for selected technical staff to improve productivity. It is also essential that a better system of quality assurance is introduced, as soon as possible. Unfortunately, there is a reluctance to change the style of supervision and working practices. The supervisors, in particular, are not helping you to make the changes you wish to make.

Continue to develop this role, using you own experiences and opinions in considering the situation from the person's point of view.....

## **SALES PROBLEM**

### **BRIEFING NOTE FOR 'SERVICE ENGINEER'**

You work for an engineering company which manufactures a range of valves used in the process industry.

Your service sector is a rural one with only a few customers spread over a large area. A considerable amount of your time is wasted travelling from one customer to another.

You are responsible for servicing the company's full range of valves, including the newly introduced ones that are electronically controlled.

The company arranged a short course on these valves for its service engineers. You attended the course with a background in electronics, you have found the valves easy to service. At least they would be if the company offered proper planned maintenance programmes for customers. You spend most of your time 'firefighting', dealing with breakdowns and trying to cope with a shortage of spares.

The main problem is that most of the customers have no experience of sophisticated electronics. Their maintenance staff have no knowledge of electronics so that they call you out for minor faults or damage to the valves done when attempting repairs.

Another problem with these new valves is that they are unreliable, compared to the mechanical valves they are intended to replace. In your opinion, this is caused by poor quality control in the production department and the inability of customers to carry out routine, planned maintenance.

You feel the situation has been created by the company's sales people hard selling the valves to glib customers, promising all sorts of so-called 'benefits' without recognising the maintenance problems.

Continue to develop this role, using your own experiences and opinions in considering the situation from this person's point of view....

## **SALES PROBLEM**

### **BRIEFING NOTE FOR 'SALES MANAGER'**

You work for an engineering company which manufactures a range of valves used in the process industry.

The company has a major share of the national market for these valves, and has also a significant share of the international market. New technological changes to both valves and their industrial use are threatening the company's business. You are worried about the apparent complacency and inertia.

You have recently been appointed to the post having previously been a successful Senior Sales Representative. You have no experience of managing people.

The company has recently introduced a new type of electronically controlled valve. Although there might be some initial teething problems, this is the first of what is likely to be a new generation of valves for the process industry. You are aware that market trends indicate a decreasing demand for the older type of mechanically controlled valves. You estimate that the company's major competitors have a 12 month's lead in developing these new products.

One of your sales representatives has a poor sales record compared with others. You have also had complaints from contacts in the process industry.

You have decided that this person needs training and as a result of looking through trade journals, you have spotted a short course run by a reputable firm of sales training consultants. You have requested that a place be booked on the next course and sent a memo to the person concerned to inform him/her of your decision.

Because of complaints from the sales representatives about dealing with customer queries and orders, you have decided to issue all sales representatives with a new portable computer. This will be equipped with a modem and an E mail link to the Sales Office. This will enable them to communicate better with the sales support staff.

Continue to develop this role, using your own experiences and opinions in considering the situation from this person's point of view.....

## **SALES PROBLEM**

### **BRIEFING NOTE FOR THE 'CUSTOMER'**

You are a long term customer of the valve manufacturing company. The company has a high reputation for its engineering and the quality of its products that are in wide use in the process industry.

The company has started to manufacture a new range of electronically controlled valves. When the company's sales representative told you about them, they appeared to be an attractive alternative to the valves you have been using. You agreed to purchase some of these valves you have been using. You agreed to purchase some of these valves to replace old, but still serviceable mechanical valves – a decision you now regret.

The underlying problem is that the valve use 'state of the art' electronics. Unfortunately, you and your staff don't understand the technologies being used.

Your staff have had problems installing and maintaining the new valves. When you first experienced difficulties the sales representatives didn't seem to understand your problems or even the practical, operational and maintenance of the valves. The company's Service Engineer is helpful , but is often not available. The delays are costing you money.

You cancelled an order for a further delivery of the electronically controlled valves, but they still delivered them. The valves have since been returned but the company's credit control is now hassling you about non payment of their invoice.

In the past you have been very satisfied with the company's products and support services and have been a regular customer. This recent experience of being encouraged to purchase a new type of valve, and then to find it unreliable and difficult to maintain, has resulted in the decision to look elsewhere for a vale supplier.

Continue to develop this role, using your own experiences and opinions in considering the situation from this person's point of view.....

## **SALES PROBLEM**

### **BRIEFING NOTE FOR 'SALES REPRESENTATIVE'**

You work for an engineering company which manufactures a range of valves used in the process industry.

Your sales sector is rural with only a few customers spread over a large area. You have worked for the company for a number of years and your background is mechanical engineering.

The company has recently started to manufacture, under licence, a new range of electronically controlled valves. This has created problems for both you and your customers. The electronic technology used in the valve is new 'state of the art' and neither you nor your customers have an up to date knowledge of electronics.

Your boss, the newly appointed Sales Manager, has annoyed you by sending a memo saying that you have been nominated for a 'Customer Oriented Selling Course' run by a well-known firm of sales training consultants. You did a similar course years ago.

You are experiencing poor support from the sales administrative staff. One example is the difficulty of communicating with the Sales Office. You have mentioned this to the Sales Manager who has decided to issue all the sales representatives with a portable computer. This is intended to improve communication with the sales office by means of a modem and e-mail. In your opinion, communication is only part of the problem and the computer will make very little difference.

Continue to develop this role, using your own experience and opinions in considering the situation from this person's point of view.

## BRIEFING NOTES FOR CHIEF CONSERVATOR OF FORESTS

You are a senior officer belonging to Indian Forests Service assigned to the Department of Forests and Watershed of the state government. You are Head of Department and in-charge of the Aravalli Hills Project. The following facts are relevant to your role.

You are based at the state capital, some 100 km from the Aravalli Hills.

Your immediate subordinates include Conservator of Forests, Divisional Forests Officer and Chief Account Officer based at headquarters.

Deputy Conservator of Forests looks after the administration with the help of Divisional Forests Officer and other staff. There is also a Chief Accounts Officer responsible for finance and accounts of the project.

The Field Project Officer acts as the link to lower level functionaries involved in the project, such as technical experts, foresters and forest guards. Also, he or she liaisons with the Village Project Committee, which represent the local community.

The project is of 5 years duration and you are completing the second year.

The only target the state government sets is to spend the allocation of funds. This is something that is always left to the last moment due to a ban imposed by the government as a part of its austerity measures. No other, more specific targets have been set.

The existing Project Evaluation System does not provide sufficient, accurate information about the progress in the field. Reporting is late and incomplete. It needs improvement as a matter of urgency.

There is a departmental training centre at the state capital, but it runs training courses only for state officials.

You observe that there is a lack of leadership, any sense of personal responsibility and lack of teamwork.

Initial surveys, the basis for implementing the project, are done badly by the subordinates of the Field Projects Officer.

You are finding it very difficult to get the village community involved in the project, and the field-based members of staff do not seem too keen either.

The Field Project Officer attempts to implement a policy of People's Participation, but has no experience or training in the techniques needed to change from a regulatory system. This applies to the field's staff, generally.

Please find free to add colour and relevant detail to support these facts.

## BRIEFING NOTES FOR FIELD PROJECT OFFICER

You are the 'on site' officer, in day-to-day charge of activities. Your boss is the Divisional Forests Officer based at the district headquarters. You live in the Aravalli Hills area. The following facts are relevant to your role:

You are a specialist in watershed construction. Your role and that of your staff has never been clearly defined.

It is difficult to speak to the local community as they speak in a local dialect and many are illiterate.

The social forestry approach, involving people's participation in development and decision-making may be good in theory but difficult to implement in the field.

Your staff does not understand the concept of establishing an ecological balance, and fail to see the broader aims of the project.

It is difficult to get your staff and villagers to draw up effective 'micro plans.' Usually there is a dispute between them.

The women in the village are very shy and difficult to deal with.

No women representatives are involved in the project committee.

The Nursery, where plants and tree seedlings are grown, is a major concern. Most of the people working there are women and children. They don't understand what they should do.

There is nobody available who knows how to organise on job training.

The training courses being run at the Department's training centre are too general and not relevant to the situation being faced in the Aravalli Hills. Management at the training centre do not seem interested in your requests for assistance. Neither does your boss.

The professional staff for the project comes from a variety of disciplines. They spend far too much arguing and critiquing.

Communication with headquarters in the state capital is very difficult. You have a telephone in your office, but no fax or computer facilities-and the post takes 4 or 5 days.

Your family has refused to move to the area, and you are keen to arrange a transfer to be near them.

The project really needs to be managed better - by you, your boss and your subordinates. Also, most importantly, by the village community.

Please feel free to add colour and relevant detail to support these facts.

## BRIEFING NOTES FOR LEADER OF PROJECT COMMITTEE

You are a farmer living in the Aravalli Hills. Your family has lived in the area for generations, and you are a respected member of the community. You volunteered to serve on the Project Committee and have been elected as its leader. This committee represents the people living in the project area, and acts on their behalf. These people are classified as beneficiaries, i.e. people who are either employed on the project or who will benefit from its completion. The following facts are relevant to your role:

You know concepts of Social Forestry and People's Participation.

Staff of the Department of Forests and Watershed Development do not appear to understand their role in promoting people's participation. They continue to take all major decisions themselves.

You feel that staff of the department considers village people to be ignorant, uneducated and unable to appreciate what is being done for them. You consider the staff lack understanding of the local society and often arrogant in their dealings with them.

Departmental staff fails to appreciate that the project is for the benefit of the local community. Too much money is spent on offices, salaries, transport and visits.

Village people need firewood, so they cut trees to take to their home. There have been angry disputes between villages and Forest Guards about cutting trees for firewood. Whose trees are they?

The department is supposed to train beneficiaries to enable them to take over the project. This is not being done. You suspect that departmental staff are reluctant to trust local people, or they are fearful of losing their jobs once the project has been completed.

The local culture is that women can only be trained by other women and not by men. Unfortunately, staff of the department is predominately male. They are unacceptable as trainers for the female workforce working on the project, e.g. in the nursery.

Children are employed in the project along with their mothers. It is difficult to stop this, as mothers cannot come and leave their children alone at home. There are no crèche facilities available to them. People often complain that they are poorly paid.

Some plants and trees being grown are of foreign origin and may not be suitable. Workers are not shown how to do their jobs properly and are accused of having a 'poor attitude.' The percentage of seedlings successfully transplanted is low. However, nobody seems to care.

Meetings of the project committee are not regularly held.

Departmental staff is supposed to help farmers draw up 'micro plans' for their land. But no such plans are drawn up. Please feel free to add colour and relevant details to support these facts.



## **BRIEFING NOTES FOR PROJECT MANAGER -WORLD BANK**

You represent World Bank and work in its Office in the state capital. You have with you an Assistant Project Manager. The project is one that your agency is keen to support because it is for the benefit of a rural community. The following facts are relevant to your role:

Your agency supervises funds for the project, allotted by the World Bank. This is done in association with the Department of Forests and Watershed Development of the state government.

You work in close collaboration with the Chief Conservator of Forests.

On a personal level you like the Chief Conservator of Forests and have a high regard for his or her professional competence in the field of rural development.

Generally, the calibre of executive staff is less than satisfactory.

The project is falling behind schedule and nobody seems particularly concerned.

Progress reports are usually late and of a poor standard.

You have found it difficult to get the Chief Conservator of Forests to recognize the importance of setting targets and ensuring that they meet them.

Generally, you have found it difficult to work with people who lack the understanding and skills needed to manage projects such as this one.

You have heard rumours that some funding has been 'diverted' to other departmental undertakings.

You are under pressure from head office to get results. This is worrying you as failure to achieve the expected results can have serious consequences for your career prospects.

Unknown to the state government, you have been told that unless satisfactory results are achieved soon, the agency will withdraw funds.

Six months has been mentioned as the time remaining in which to achieve satisfactory results.

Please feel free to add colour and relevant details to support these facts.