
Name your career development intervention

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Abstract

The first section of the article provides readers with an overview of the most widely used career development interventions including alternative career paths, assessment centers, career coaching/counseling, cross-training, flexitime, job enlargement, job enrichment, job rotation, job sharing, phased retirement, sabbaticals, and temporary assignments. Each intervention is described and accompanied with an example. The second section of the article presents three case studies: When woodworkers won't; How do we keep going from here? and Opportunity in scarce resources. Each case is accompanied with a series of discussion questions and answers. Managers, trainers, and/or consultants can use the article and its case studies to facilitate discussions among employees regarding the potential benefits and drawbacks of various career development interventions.

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Has your organization seriously considered implementing a career development program? If not, perhaps this is a good time to do so. The following description of several, widely-used career development interventions and case studies can be used to stimulate discussion on various career development practices. From these discussions human resource professionals can get a preliminary sense of felt career development needs in their organization. They may even get an idea of what interventions might work and what interventions might fail.

Career development can be described as a process for achieving specific employee and organization goals, including providing career information to employees, helping employees identify advancement opportunities, promoting job satisfaction, and improving employee productivity (Bernes and Magnusson, 1996). Career development activities can help employees identify and understand their vocational interests and strengths, plan and implement career goals, and develop themselves. They help employees answer such questions as; "Who am I?", "How am I seen by my superiors?", "What are my career alternatives and goals?" and "How can I achieve my goals?"

Career development can help companies attract the best employees, as well as motivate, develop, and retain the best workers over time. The benefits of a carefully crafted organization career development system can be a better employee-organization fit, a better employee-job fit, better communications between employees and managers and increased employee loyalty.

Because individual employee career development needs differ and organizations vary in the career development resources available to them, organization career development systems make use of a variety of career development interventions (Schlossberg, 1997). Listed below are some of the most widely used interventions (see Table D). Each intervention is briefly described and potential uses of the interventions are discussed. Finally, three case studies are offered. Readers are asked to identify the intervention(s) they believe to be the most appropriate for resolving the case.

Table I Career development interventions

Intervention	Description	For use with employee group
Alternative career paths	Examining skills and experience to transfer to a new career	Passed over workers, burned out workers, career changers, mid-life employees, plateaued workers
Assessment centers	Activities or exercises used to identify employee potential	Any, but specifically high potential employees, new workers, mid-life employees, possibly plateaued workers
Career coaching	Helping people prepare to switch careers, or helping them get ahead in their current career	Any, but specifically high potential employees, new workers, burned out workers, plateaued workers
Career pathing	Outlining an individual career plan	Any, but specifically high potential employees
Cross-training	Teaching workers several skills so that they may be assigned a variety of tasks or positions	Any, but specifically new workers, high potential employees, semi-skilled workers, technical workers
Dual career tracks	A career path that allows for success and rewards without necessarily being an "upward", or managerial, movement	Technical workers, creative workers, plateaued workers
Flexitime	Allowing employees to vary work schedules to better fit in with personal lives	Pre-retirees, re-entering workers, dual career couples, mid-life employees
Job enlargement	Increasing the number of tasks a worker performs	Any, but specifically high potential employees, technical workers, semi-skilled workers
Job enrichment	Increasing the amount of responsibility and control a worker has over his or her position	Any, but specifically high potential employees, burned out workers, technical workers, plateaued workers
Job rotation	Moving employees from job to job within an organization	New workers, high potential employees, transferred workers
Job sharing	Two employees share one full-time job, including hours, salary and benefits	Re-entering workers, dual career couples, mid-life employees, pre-retirees
Phased retirement	Gradual tapering of work schedules and responsibilities until full retirement is reached	Pre-retirees
Sabbaticals	An extended period of leave	Burned out workers, mid-life employees, pre-retirees
Temporary assignments	Special projects or special assignments	Student workers (interns), pre-retirees, high potential employees, temporary workers, intrapreneurs, possibly career changers

Career development interventions

Alternative career paths

One approach to alternative career pathing involves "incorporating the skills employees already have with what their hearts want to do". It can involve changing career and lifestyles for more meaningful and fulfilling work arrangements (Rhodes, 1995). Creating alternative career paths often involves incorporating other career development interventions, such as flexitime or job enrichment. Workers seeking an alternative career path may find themselves downshifting or moving sideways (Hudson, 1997). Alternative career paths should not be confused with dual career paths, which is described later.

For example, Janet finds herself plateaued in her current career and experiencing "burn-out". By creating an alternative career path, Janet transfers current skills into a new career, one that in the past was considered only a dream. Janet, along with her employer, may also decide that job enrichment or flexitime may be an option, so that the company does

not lose a valued employee, and Janet does not lose any accrued benefits. Another instance of creating an alternative career path would be a situation where recent graduates have followed their dream in their studies, but are having difficulty finding a job in their specific field. For example, Sandi received a doctorate in environmental science and public policy, and is using her talents and skills at the Smithsonian Institution's Division of Birds to prevent aviation mishaps (Jidoun, 1999).

Assessment center activities

Assessment centers are most often used to identify workers' career potential, or for use in job placement activities, and may be used with either current or prospective employees. Assessment centers are most often used in conjunction with filling professional or managerial positions, although they may be used with other positions as well.

Generally speaking, assessment centers do not constitute an office or physical space in an organization. In most instances, a participant in an assessment center is simply asked to

complete several exercises aimed at measuring higher-level management, problem-solving, and decision-making skills. Several types of exercises may be used, including in-basket tests, leaderless discussion groups, and role-play situations.

For example, Carla is being considered for a promotion in the accounting department of her company. The promotion would include supervising six members of the accounting staff. To partially assess Carla's ability as a manager, she and three other candidates for the position take part in an assessment center. The assessment includes an in-basket exercise on analyzing cash flow, and several role-plays designed to evaluate their effectiveness on giving feedback, praising, and disciplining employees.

Career coaching/counseling

Career coaching frequently involves helping individuals prepare for a career change or helping employees advance in their existing jobs (Nelson, 1999). By focusing on training and developing the skills of their workers, firms can often build employee loyalty (Belk, 1999). While the career-coaching role in organizations most often falls to the immediate supervisor, career coaching and counseling has also become a career in itself.

From the employee's view, career coaching consists of evaluating interests, values, work styles, and skills. From the organization's view, it consists of matching employee talents with organizational needs, recruiting and retaining talent in the company, identifying training and development needs, and assisting employees in specifying and locating new employment opportunities within the organization (Hogan, 1998).

For example, suppose you are a department manager, and Joe comes to you inquiring about other opportunities in the company. You know Joe to be a very conscientious and intelligent worker, and want to make certain he does not look for opportunities elsewhere. Over the next few weeks, you discuss with Joe his interests, education and skills, and how they relate to various positions in your department and others within the company. You identify a job area in a different department which Joe feels better fits his interests and lifestyle, and together you make a plan for some training Joe can pursue while waiting for a position to come open. While you are reluctant to lose Joe, you know that

you have helped him become a more satisfied employee, as well as retaining him as a valued worker for your organization.

Career pathing

Career pathing, also called career tracking, is a process of outlining an individual career plan, usually within an organization. Career pathing is most often used as a part of management training and development, although individuals may develop their own career track, either alone, or in conjunction with a career coach.

Employees follow pre-determined steps along the career path to develop expertise in managing different types of organizational situations (Solomon, 1995) and to reach their career goal. Periodic checks evaluate progress, as well as determining what further training or experience is needed to move to the next step. Career pathing often uses several other career development interventions as part of the process. These include cross-training, job rotation, job enrichment or enlargement, and temporary assignments.

For example, Jim accepted a position as a manager trainee at a well-established printing company immediately after graduation. The printing company was planning to open a new division, and was also at a point where several senior level managers would be retiring within the next five years. As part of the career pathing program, Jim was to be rotated between various departments in the company's six national locations, spending two months at each location. During this period, Jim would be involved in the hands-on work of the company, as well as being involved in managerial tasks and decision making. At the end of the first year, if progress was made as planned, Jim would become one of the area managers of the new division. As other people in the corporation moved into vacated positions, the plan was for Jim to move up also.

Cross-training

Cross-trained workers are taught skills outside their current job assignment so they can be called upon to perform a variety of tasks as the need arises. Many workers and supervisors find themselves cross-training each other, just to make the day-to-day work life manageable. As a career development intervention, however, companies put into place a formal program of cross-training.

Cross-training helps organizations to balance workloads so everyone is busy, and allows the company to respond quickly to employee absences. It also allows employees and departments within an organization to gain a better understanding of the “big picture”, and to improve communications and relations. Employees who are cross-trained are more valuable to the company, and more marketable in the work world overall (Terrel, 1997).

To illustrate this intervention, consider the accounting department where Carla was recently promoted to manager. The department handles a large volume of work, and each of the six employees in the department is assigned to a different function. These functions are: daily data entry of payable invoices; daily customer billing; posting customer payments; posting vendor payments and printing checks; and two people who perform reviews and internal audits of the various journals and ledgers in the department. Carla implements a cross-training plan within the department. Because slow or non-performance in the first four functions could create serious backlogs and cash flow problems if not kept up, Carla begins cross-training across these functions, and later includes the reviewing and auditing functions.

Dual career tracks

Dual career tracks should not be confused with alternative career paths. Creating dual career paths involves preparing employees to succeed and be rewarded without necessarily being on a management or vertical organization career path. In other words, “up” is not considered the only way employees can grow and advance within the company (Schlossberg, 1997). The establishment of dual or multiple career tracks has proven to be an effective way to retain and motivate valued employees (Joinson, 1997).

Management can be an attractive career alternative for many employees, but it is not for everyone. This may be particularly true for many technical or creative workers. The number of people managed often distinguishes managerial levels, but under the dual career track plan, individuals apply their expertise (like managers) to tasks of greater complexity and impact within their specialty field. For example, they may make

recommendations in a wide range of business areas, participate in high level decisions, and act as mentors to other employees (Tucker and Moravec, 1996). The interest in dual or multiple career tracks is likely to grow as more organizations do away with formal management titles and establish team structures (Capland, 1997).

For example, take a look at Kevin, who has been working as an architect with the same large firm for the past eight years. There are few “upward” possibilities, unless you are in one of the administrative areas, such as accounting, or unless you become a partner. When Kevin began work, he was primarily an assistant applying finishing technical specifications to projects (e.g. checking blueprints). Gradually, he was able to let more of his creative talent show, and was assigned as member of design teams and became responsible for increasingly larger phases of various projects. Over the last two years, Kevin has been project director on two different accounts, which involves initial design concept, more contact with the client and builder, and more control over the various phases of projects. Along with this additional responsibility comes more recognition and respect in the firm, as well as more money.

Flexitime

Flexitime is one of the most popular and most widely known career development interventions. Flexitime gives employees the opportunity to balance their work and personal lives by restructuring the typical workday to accommodate individual employee schedules (Arellano, 1999). Arellano also reports (1999) that employers who offer flexitime often report decreased use of paid leave, decreased tardiness and increased productivity. Other benefits for the employer include a low-cost method of providing personal time off and extending service hours without overtime pay (Brown, 1998). This career development intervention is popular with employees who have extended families or young children, who may be facing “burn-out”, and those seeking further education or pursuing second careers.

Flexitime allows employees to set their own schedules, within limitations set by management. For example, workers may adjust their starting and ending times, but are required to be at the office during

management specified core or peak hours. Working four ten-hour days is an example of a compressed workweek form of flexitime. Flexitime may also be combined with other interventions, such as job sharing, job rotation, and phased retirement.

For example, Suzanne recently returned to school to complete her Master's degree. She had full support and encouragement from her employer, who agreed on the flexitime schedule Suzanne proposed. Because the location of the school required an hour commute, Suzanne needed to leave work at 3.00 p.m. on Tuesday and Thursday to attend a 4.00 p.m. class. To complete the 40-hour week, she arranged to start work one hour early on Tuesday and Thursday and to work one hour later on Monday and Wednesday.

Job enlargement

Job enlargement is defined as increasing the number of tasks a worker performs, with all of the tasks at the same level of responsibility, and is also sometimes referred to as "horizontal job loading" (Parker, 1998). Be careful not to confuse job enlargement with job enrichment, which follows.

One such instance involves Lucy, a data entry person in the accounts payable department, who learns quickly and completes the majority of her tasks early. She often seemed bored, and even mentioned to her supervisor that she wished she had a little more variety in the job. After reviewing her work, to be sure it was accurate as well as fast, her supervisor assigned Lucy to help with the customer billing, a function that had much more volume and seemed to always be behind. The intervention helped Lucy gain more skills and make better use of her time. The department benefited also when the customer billing was sent out in a timely manner, reducing overtime and improving cash flow.

Job enlargement and job enrichment can both be used with plateaued workers or workers who are experiencing burnout, and with especially high achievers. These two interventions may be used in conjunction with each other, or with other career development interventions such as job rotation and temporary assignments. Both interventions provide the employee with increased skills, making him or her more valuable to the

company, or more marketable in the job search.

Job enrichment

Job enrichment involves increasing a worker's responsibility and control over his or her work, and is also called "vertical job loading" (Parker, 1998). Job enrichment allows you to expand your responsibilities or change your role to develop new competencies without leaving your current position or the organization altogether (*Managing Office Technology*, 1996).

Job enrichment is also used as an effective motivational technique:

According to this perspective, if a job provides a sense of responsibility, a sense of significance and information concerning performance, the employees will be internally motivated to high levels of performance. The key to creating this situation is to enrich jobs so they provide five core characteristics: task variety, task significance, task identity, autonomy and feedback (Whittington, 1998).

Again consider Janet, our plateaued employee who is exploring alternative career paths. To try to retain Janet and her expertise, her manager begins by allowing her to monitor certain duties the department is assigned, and asks her to participate in a focus group developed to advise management on improved communications between departments. Later, Janet is asked to become an advisor, or short-term mentor, to new employees in the department. Janet seems to be more satisfied now, and is proud of her "senior" status.

Job rotation

Job rotation is the systematic movement of employees from job to job within an organization, as a way to achieve many different human resources objectives – for simply staffing jobs, for orienting new employees, for preventing job boredom, and, finally, for training employees and enhancing their career development (Cheraskin and Champion, 1996). Job rotation is often used by employers who place employees on a certain career path or track, usually for a management position, where they are expected to perform a variety of duties, and have a variety of skills and competencies.

Job rotation is often confused with cross-training. While both interventions perform essentially the same service of providing employees with a varied set of skills, job

rotation goes beyond this. Besides being used as a means of management training, job rotation can also be used as a form of job enrichment, by adding increased responsibilities, increasing challenge, and reducing boredom or burnout.

For example, when Jim, the new printing division manager, was completing the job rotation part of his training, he realized how much more interesting this made coming to work each day. Even though he may be assigned a duty that he did not like at the moment, he knew that next week he would be rotating to a different task. Jim also realized that this rotation could be used as a valuable training and staff coverage tool. One of his first big projects was setting up a regular job rotation system within each department at the new division. For example, in the pre-press area, staff members rotated weekly between the functions of design and layout, creating negatives, creating masters, and plate making. Boredom and absenteeism decreased, and jobs were covered when there was an absence.

Job sharing

With job sharing, a full-time job is split between two employees. The two employees share the duties and responsibilities, as well as the salary and benefits of the job. These two employees must also work closely together, and with management, to co-ordinate hours, duties, and communication among themselves and other departments in the organization. Most often, job sharing is used by parents or adults caring for their parents, and affords employees a better balance between their work and personal lives. Employees pursuing further education or a second career may also use job sharing.

Job sharing offers advantages over part-time work in that employees are able to maintain their professional status as well as some of their job benefits. One example of the advantage over flexitime situations is that with flexitime, parents may still require extended day care hours (Brown, 1998). Benefits to the employer include having “two heads instead of one”, retaining valued and experienced employees, and down time due to vacation or sickness is reduced, because the job share partners cover for each other.

For example, Tina and Kim have both recently returned from maternity leave. This is Tina’s second child, and Kim’s third. Both Tina and Kim are upper level administrative

assistants, and both have been considering working only part time to allow them more time to spend with their growing families. However, both are concerned that being part time would only lessen the respect they have earned for their positions, as well as having work pile up during the times they are off. Their supervisor is especially concerned with this last aspect as well. As a solution, with the approval of their manager, the two develop a job-sharing arrangement. Kim will work Mondays, Tuesdays, and five hours on Wednesdays. Tina will work five hours on Wednesday and all day on Thursdays and Fridays. They spend the overlapping hour on Wednesday communicating status of projects and duties. They will each receive half the pay and half the benefits of the position, and both retain their title as senior administrative assistant. The company views them as one staff member.

Phased retirement

Organizations typically devote far more energy to recruiting and retraining than to phasing out workers (Schlossberg, 1997). Phased retirement is one intervention that workers and employers can use at the latter end of the career cycle. During phased retirement, workers gradually taper their work schedules until they reach full retirement. Other career development interventions such as flexitime and job sharing are typically incorporated into phased retirement arrangements. Retirees may work part time and serve as mentors or trainers to their successors. Benefits to employees include a greater sense of control over the transition from work to retirement, lowering the risk of economic insecurity, and more social support (*Worklife Report*, 1997). The employer benefits by retaining valued talent and minimizing labor shortages (Duff, 1999).

For example, consider Bob, who at age 64 is beginning to look forward to retirement. However, he also is concerned with “letting go”, and afraid he might be bored when he retires. And, after 17 years as part of the senior management team, Bob will leave a huge void in the company operations. Bob’s company has a phased retirement plan, and works with him to set up his new schedule. Bob will be involved in selecting his successor, and will work as coach and mentor full-time for a while. After three months, he will scale back to three days per week, then eventually

to two days, and so on until he does not come into the office at all. For another six months, Bob agrees to be available as a consultant and advisor on an as needed basis. The entire phased retirement plan takes place over a two-year period.

Sabbaticals

A sabbatical is an extended leave from work. It can be paid or unpaid, and may or may not include a guarantee of position upon return, depending upon the sponsoring organization. Sabbaticals allow people time for revitalization, and give the remaining employees an opportunity for new challenges and growth (Semas, 1997). Sabbaticals are often viewed as a benefit, rather than a career development intervention. Employees and employers both need to realize the opportunities for both personal and career growth and development. They are often used as a retaining tool for valued employees, and as a way to relieve job burnout, and can even be used as a “trial period” for pre-retirees.

Sabbaticals also promote teamwork because employees must back each other up during times of extended absences. As for customers, comfort levels rise. They know that more than one person can help them. Professionals also realize humility in the recognition that the work world will and can function without them, which in itself can lift many an imagined burden (Howell, 1999).

For example, Sam’s company allows an employee a 12-week paid sabbatical after each ten years of employment. The first and last two weeks may be spent as the employee wishes. During the middle eight weeks of the sabbatical, the employee is required to volunteer at least 20 hours per week with an approved charity organization.

Temporary assignments

Temporary assignments are also known as project work. Working at temporary assignments or on special projects can help employees avoid burnout and can keep plateaued or high achieving employees motivated, giving them the chance to learn more and enhance their skills and experience. Many times, temporary assignments (i.e. project work) can be used by pre-retirees as a part of their phased retirement plans.

Project assignments are different from job rotation in that the temporary/project

assignment usually involves a single goal or target, or special set of circumstances. The work project usually revolves around one certain aspect of the business, and has a finite term, or a definable beginning and end. The current trend, at least in private industry, is to move toward project teams as the preferred management operating structure (Kanouse, 1999).

Returning again to Janet, the plateaued employee, her manager has another solution for increasing Janet’s job satisfaction. Janet knows this department inside and out, and has expertise and knowledge in other areas of the company as well. Because of her enthusiastic participation on the company’s communication focus group, her manager recommends her for a position on the temporary task force created to implement the focus group suggestions. Janet feels not only valued, but also that she is making a significant contribution to her career and the future of the company.

Summary

As organizations continue on into the new century, more companies are realizing the advantages of retaining highly trained and experienced employees. Many have already realized that the cost of recruiting and training a new employee can far outweigh the costs of some career development interventions. That alone could be reason to implement a comprehensive career development program. Overall employee satisfaction, dedication, and loyalty to the company are added benefits. As a final note, employees should remember that they can lobby for some of these interventions, and if their organization is unwilling, some interventions, such as exploring alternative career paths, career pathing and possibly a sabbatical, can be pursued by the employee on his or her own initiative.

Case studies

Case 1. When woodworkers won’t

The Needmore Woodworking Shop is located in the scenic mountains of Needmore, WV. It employs local woodcrafters to produce finely-crafted art objects. The designs are unique and their products are selling well at craft shows across the country. The new Internet site has also boosted business, which is now

the best it has ever been in Needmore's ten-year history.

Needmore is in Hardy County, West Virginia, an impoverished area of the country with a median family income of \$20,745 and a population of just over 10,000. While most people tend to live in Hardy County because they are born there, a few people have immigrated to Hardy County from the Washington DC area, drawn by the spectacular beauty and simple lifestyle of the area. Less than 20 per cent of people over the age of 25 have any education beyond high school, with 45 per cent not having a high school diploma. The skilled labor pool is limited. Most of the woodworking shop's staff was trained on the job to perform the necessary job functions.

A position at Needmore Woodworking is considered an extremely good job in the area. Salaries, benefits, and working conditions compare favorably with those at other local businesses. As an added plus, the commute is manageable, a short distance on US Highway 55, which is passable in all but the worst weather conditions. An unusual aspect of the business is that the shop's owner, Wright Masters, holds a more enlightened management view than most area employers. He believes in knowing his employees and their needs and goals, providing continuous training on new equipment and designs, and recognizing the strengths and accomplishments of his staff.

Despite his nurturing qualities, Wright often finds himself frustrated by the staff's lack of dedication to the business. It seems that, among the Needmore Woodworking staff, it's "always something". Either Billy, the cut man, has to take his wife (who doesn't drive) to the clinic to see about her back problems or Bobby, the sander, has to spend three days rebuilding the transmission on his pickup and cannot get to work. Even Betty, the bookkeeper, is frequently out because her grandma needs help on her "bad" days. While it is true that one of the reasons people love the area is its relaxed culture, there are deadlines to be met. When a shipment of jewelry boxes needs to be in Maryland by the next weekend for the annual Sugarloaf Craft Festival, no money is made if it arrives after the show.

On the job, Wright's staff is a hard-working, conscientious group. He has selected them because they are among the most reliable

workers in the area. It is well-known that to keep your job at Needmore Woodworking, the weekend party has to stop in time to get a good night's sleep Sunday night. From the limited workforce in the area, Wright has managed to assemble the best possible staff. Yet, he cannot seem to impress upon them the need to be at work when big deadlines approach. Most staff members average only four days a week on the job.

Discussion questions

(1) Which CD intervention could Wright use to motivate his existing staff so that they will be more dedicated to showing up for work, and how?

Flexitime would be an excellent solution to Wright's problems. This could take the form of varied start and end work times or compressed workweeks. This would allow employees time to take care of personal business, while Wright still has staff available to meet the deadlines.

(2) Is Wright expecting too much from his staff? Why, or why not?

No, he is not expecting too much from his staff. All employees should be made aware of the importance of reliability when hired. They should also be made to realize that missed deadlines eventually lead to missed paychecks.

(3) Should Wright look for other staff, perhaps importing them from the Washington DC area? Why, or why not?

No. If he imports staff, he runs the risk of driving up his labor cost, and alienating the community he has worked so hard to become a part of. At the very least, bringing in staff from outside the area should be a last resort.

(4) What other CD interventions could be used to reorganize or redesign the jobs to improve the reliability of the staff?

Cross-training and job sharing would also be good solutions. Cross-training would allow the work to be done in case of an absence, and job sharing would allow all positions to be covered, while employing more of the available work force, a positive image builder.

(5) Is this problem unique to remote, impoverished areas, or is it more widespread?

Unfortunately, it is more widespread and not unique to remote and rural areas. Employers can reduce the negative impact of these problems by being more flexible in their

scheduling, and allowing the use of modern CD interventions.

Case 2. How do we keep going from here?

Industrial Forms & Labels, Inc. (IFL) is a small, independently-owned distributor of custom produced business forms, labels, and related products such as barcoding supplies and ribbons. The owner and president, Dave Olivetti, began the business in 1971 with his wife, after spending eight years as a sales person with a regional, direct selling printer of similar items. IFL is now WNC's oldest and largest independent distributor of business forms, labels and related products.

Independent distributors in this industry serve as middlemen and liaisons between end-users of products and the manufacturers of those items. Unlike the large, nationally owned direct-selling companies, the independent distributor has a choice of which company manufactures the products they sell. Service to the customer soon became the major selling point of IFL.

As Dave Olivetti developed his relationship and influence with contacts and resources on the manufacturing end, his reputation for a high level of service to customers naturally grew. It soon became known that IFL could get an order priced, produced and delivered in less time than those larger national companies took to just prepare the job quote.

As the company grew, as well as Dave's family, Anita Jolsen was hired as an office-administrative assistant in 1981. Her duties included not only administrative tasks, such as customer billing, but also internal customer service. She soon became more of an inside salesperson, and these customer contacts often left the administrative duties behind. A new staff member was hired, Constance Woodbury, who continued the dual job descriptions of administrative assistant and customer service, while Anita became the company's first full-time outside sales representative, other than the owner.

As the company continued to grow, several outside salespeople and inside customer service people were hired. The majority of the current staff has been hired since 1993, and now includes four inside sales support persons, an administrative assistant, and a warehouse/shipping and receiving person. All but one of the inside sales support persons have backgrounds in this industry, either from

the manufacturing or distributor side, in both sales and customer service.

The role of general operations management fell to Constance. This role included support staff supervision, software system administration and training, managing customer promotions and events, occasionally assisting the owner's wife with various bookkeeping duties, as well as implementing the human resource functions in the growing company.

Until three years ago, the company did not have much success with the full-time sales representatives hired. Most were impatient with the amount of time required to develop long-standing accounts in the industry, and expected quick sales and commissions. The latest salesperson was hired in 1996. Matthew Guttridge was a "right-sized", high-level purchasing manager from one of IFL's largest customers. Matthew brought 25 years of business expertise and contacts to IFL, and was not just interested in making a fast dollar. Because of the rapid growth of the company, but lack of full-time salespeople, the maintenance of many "house" accounts fell to the only other long-term employee available – Constance Woodbury. Needless to say, Constance now has a job that has been "over-enlarged".

Dave Olivetti realizes what is about to happen, so an additional inside sales support person is hired. This person also has considerable experience in the industry from a customer service position at a manufacturing plant. A full time bookkeeper that also has experience in HR functions is also hired. These two employees take away much of the overload from Constance. She is now left with the more manageable duties of maintaining "house" accounts, customer promotions, including the company newsletter, and computer network maintenance and training.

The problem now remains in the sales department. Anita and Matthew have brought many new and large accounts to the company, making the need for the additional people mentioned earlier not only necessary, but possible. However, both Anita and Matthew are over 60 years old. Both are looking towards retirement in the next five years. Both salespeople currently find it very hard to "let go" of some of the responsibility involving "their babies". Dave, at age 55, has already begun a semi-retirement, remaining as support and advisor only, and focusing on

financial management of the company. He has no children who are of age or interested in taking on any part of the business. Constance has made it known to Dave that she is not interested in a full-time sales position, and in fact is pursuing further education in another field.

Discussion questions

(1) *What career development/career management intervention would be most helpful to this company?*

Phased retirement would allow the retiring sales people to gradually turn over accounts, train new or existing personnel on the particulars of those accounts, and also allow customers the comfort of a gradual change.

(2) *What is the best way to implement phased retirement in this situation? Should the implementation be different for Anita than for Matthew?*

It should be determined first who will be taking the place of the salespeople, whether they come from existing inside sales support personnel, or from outside hiring. Given the company's history with sales personnel, and the experience of existing customer service personnel, the new people will most likely come from inside. An agreed upon time-line between Dave Olivetti and each salesperson should be set. Once implemented, the phased retirement should cover no less than one year. It should begin with smaller accounts, and gradually grow into the larger accounts.

Anita and Matthew may decide on different time-lines, and this will be the main factor, along with the size and number of accounts each person has to deal with, in determining the difference between each phased retirement plan.

(3) *What are some of the steps that need to be taken to ensure that the phased retirement plan is successful?*

In advance, all parties involved should be included in any planning sessions. This would include Anita or Matthew, Dave Olivetti, and the successor. All compensation plans must be agreed to up front. Any questions regarding the addition of new customer service people should be addressed if the successors come from inside the company.

(4) *Why do you think Anita and Matthew are finding it hard to let go of some of their duties and responsibilities?*

This is not just a money question. These are accounts that each person has spent years developing, and they have even forged some personal friendships along with the professional ones. There will naturally be some emotional ties. This, plus the normal transition from full-time work to retirement, is never an easy one, and requires much support on the part of co-workers.

(5) *What is the best way to make Anita and Matthew feel more comfortable with this process?*

- If they want to retire, this is a much better way than simply cutting ties with only a month's notice.
- Even if their successors are not chosen from the current customer service people, these people will likely still be there to support the accounts. They are as familiar with the technical details and "nuts and bolts" of the accounts as the salespeople, and will be the customers' tie to the retiring salesperson and the company.
- They will be involved in turning over "their babies", and can watch and supervise and mentor the new relationship.
- Anita and Matthew need to be assured that their contribution to the company will not be forgotten.
- No one says the personal relationships have to end, just because the professional one does.

(6) *What about Dave? After coming to terms with the sales department dilemma, where should his next focus be?*

Dave's next focus should be on another form of succession planning. He needs to come to terms with what is going to happen in ten to 15 years when he is ready to completely retire. A few of his options are: one of his children may have a change of interest and decide to join the family business; he can search elsewhere in the family for a successor; he can look at the option of selling the company; or he can plan on making some of the employees partners and have a management team in place and ready to go when he retires.

Case 3. Opportunity in scarce resources

Tom Harris is an agriculture agent with the North Carolina Cooperative Extension Service in Adams County. He has been with

the organization for three years and his areas of responsibility include livestock, row crops, pesticides, and community resource development (CRD). He is a hard worker and really loves the agricultural side of his job, but he is not as enthusiastic about the community resource development aspect of the job.

Tom is excellent in designing and working with agriculture programs, but he has to be prodded by his supervisor to do the community resource development work. This work involves meetings, seminars, and working with volunteers to help solve local community problems, and requires a great deal of diplomacy and networking. Tom feels that this part of his job involves too much baby-sitting of the volunteers, and that the groups he works with seldom accomplish more than talking about problems and planting a few shrubs to beautify the community. Tom does not see how this work has any benefit for the community, and he only does the absolutely essential work in this part of his job. One of Tom's favorite lines is "this would be a great job if only I could get rid of the CRD responsibility".

Jennifer is the Adams County extension director, which makes her Tom's immediate supervisor. She came to her current position from the community development area of extension. Jennifer is very pleased with Tom's work in general, but she is beginning to be concerned with his lack of enthusiasm for community development work. Some of the volunteers she worked with in the past have mentioned to her that they have a hard time tracking Tom down when they need help, and his indifference to the program is beginning to cause discontent among that clientele. Jennifer has spoken with Tom on several occasions about the importance of community development work, but her comments seem to fall on deaf ears. Jennifer does not want to lose Tom as an employee, since the agriculture clients really like his work, but she cannot allow the current situation to continue. She has thought of taking back the CRD work herself, since it helps build rapport with community leaders, which she needs as a director, but the county commissioners are not willing to fund Tom's position as a solely agricultural job.

Eric Nelson is a county extension director in Cobb County, which borders Adams County. He is currently having difficulty in accomplishing the agriculture work in his

county. Owing to the small size and population of Cobb County, the county commissioners are reluctant to fund a full-time agriculture position there. Eric is the only person on his staff with agriculture training, and he is constantly pressed for time, since he must do the agriculture programming in addition to the administrative tasks for his county. The amount of work to be accomplished is too great for one position, but the commissioners do not feel that there is enough agriculture industry in the county to fund another full-time position, and Eric cannot get approval to hire a part-time agent. This situation is causing public relations problems for Eric, since the local farmers do not feel that they are getting enough response to their needs, while Eric is also constantly behind in completing the administrative work accomplished because he is attempting to keep his farm clientele happy. Eric wonders if the state's new program of hiring cross-county agents could help him. He is planning to bring up his problem at the next western district county directors' meeting.

Discussion questions

(1) *Which CD intervention will successfully resolve this case and why?*

A form of job enlargement could work in this case. Jennifer and Eric could share Tom's position for the agriculture work, and Jennifer could split the CRD responsibility between the other agents, or Jennifer could take it on herself, which she has shown interest in.

(2) *Is there another CD intervention, or any type intervention, that can solve the issues in this case?* Mentoring or coaching might also be useful in this situation. If Tom could be given a model to follow, he might realize the value of his CRD responsibilities.

(3) *Should Tom be fired in this situation?*

No, such a drastic step is not warranted. Tom should be utilized in the area of agriculture for both counties, which will solve two problem situations, and make a more satisfied employee.

(4) *What role should networking play in this case?*

Jennifer and Eric should utilize networking in their director's meetings to explore a common solution to both their problems. Talking with each other and their peers in the bi-monthly director's meetings could help them come to a

viable solution, or gain new insight into their problems from other directors that may previously have encountered the same type of situation.

(5) *Will upper management involvement be needed to solve this case? If yes, what should that involvement be?*

Yes, upper management will need to be involved. Their role will be supporting the innovative solutions that Jennifer and Eric may come up with. They may also be needed to help present the case to the county commissioners, who usually want to deal with top people in an organization, and whose approval is needed for the budgeting process.

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