

**Leadership Analysis of the
WebSphere Commerce Team Manager**

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This paper analyzes the leadership abilities of the manager of the WebSphere Commerce team within the IBM Custom Technology Center. The author of this paper was part of that team. The names of the manager and team members have been changed in the paper to protect their identities.

The manager's leadership skills are analyzed in terms of Hersey and Blanchard's situational leadership, Goleman, Boyatzis and McKee's emotionally intelligent leadership, and Hon's guidelines for holding meetings that matter. The sections that follow describe the situation and the team, and give specific examples of how the leader applied (or failed to apply) the principles and what happened as a result.

Background

The IBM Custom Technology Center (CTC) is a group of software engineers who provide design and development services to customers who use IBM eServer computer systems. The group is divided into four departments, each managed by a personnel manager. In addition, there are three opportunity managers who are responsible for finding new business and getting customers to sign contracts for CTC services. The opportunity managers pursue contracts with customers based on the technical skills available with the CTC, building project teams using available resources from any of the departments. The teams are brought together for a single project and then disbanded when the project completes. In general, this model has worked well for the majority of the work that the CTC does. Their core competencies revolve around very specialized system-specific software development skills that have been honed over the years.

But some changes in IBM's business model are forcing changes in the CTC business model. More and more, IBM software products are being developed by a single group (IBM Software Group), rather than the system-specific groups. These software products are large, complex, and are not tailored to any one type of system, unlike the older software products. These products are difficult for many software developers and customers to use because they require an entirely different specialized skill set than what was needed in the past to develop customer applications. One such new product is WebSphere Commerce (WC) – a software product used to develop applications for selling goods and services over the Internet.

Setting

To address the growing need for WC skills, a decision was made by the CTC management team to create a team dedicated to developing WC skills and then working on WC contract engagements. When this decision was made, WC already had the reputation of being a feature-rich product with a steep learning curve that required many prerequisite skills beyond the current capabilities of many IBM customers. Being a new product, it was also fairly unstable and not as reliable as most of the software the CTC usually used to create customer applications. This created high demand for WC consulting skills but also created customer satisfaction issues with customers who had already spend tens of thousands of dollars on a product they were unable to use to run their Internet commerce business.

Size of Group

The team consisted of six software engineers and one manager:

- David and James were Senior Software Engineers (Band 9)
- Peter and Mary were Advisory Software Engineers (Band 8)
- Kate was a Staff Software Engineer (Band 7)
- Charles was an Entry-Level Software Engineer (Band 6)
- Jeanette was the Personnel Manager who led the team (Band 9)

Nature of the Task

The team was given the task of developing WebSphere Commerce skills in order to be ready to take on customer contracts by the end of the year (six month's time). They were also responsible for developing a prototype commerce web site under contract for a customer. The contract was being negotiated and was expected to sign within the next four to six weeks.

Relationship of Group Members

Jeanette was the personnel manager for all of the software developers except for Mary. Because of the way teams were traditionally created in the CTC, David, James, Peter, and Mary had all worked in the CTC for at least five years and had worked together before on other contracts. Kate and Charles were relative unknowns in the group, although they knew one another and both had worked for Jeanette from the time she became a manager.

Leadership Description and Critique

Readiness Levels

When the group was first formed, the group's *readiness level* to perform on WC consulting engagements was in the *R1* to *R2* range, as defined by Hersey and Blanchard. Only one person, Kate, had experience with WebSphere Commerce. Her readiness level was an *R4*, in terms of WC skills. She also had strong organizational skills and a positive attitude.

Unfortunately, she had just joined the CTC and only had a total of two years experience in the computer field. She would need to provide some technical leadership for the team, but her leadership readiness was at the *R2* level. Charles was the other junior member of the team. He had less than a year of software development experience but was willing to learn and confident in his abilities, which put him at the *R2* readiness level.

The other team members had fifteen to twenty years of experience as software developers and team leaders. Two of the team members, David and Peter, were at a readiness level of *R2*, willing to learn but unfamiliar with the new technology. They had been at the *R4* level in their previous assignments. James had a readiness level of *R1*. Although he had strong prerequisite skills and had been at the *R4* level in his previous assignment, he knew nothing about WC and didn't want to be on the team. Mary was at the *R1* level. In general, her prerequisite technical knowledge was not as strong as the others, and she was probably at the *R3* level in her previous assignment. But her customer relationship skills were at the *R4* level.

In general, everyone on the team except for Charles was at an *R3* or *R4* level in terms of their ability to learn new skills on their own. Being self-directed learners was the normal mode of operation in the CTC.

Emotional State of Group

The emotional state of the group was fairly negative when the team was formed. There was quite a bit of FUD (fear, uncertainty, and doubt) surrounding the formation of the team. A number of factors contributed to this:

- The CTC had just experienced the worst financial year in its ten-year history due to changing business conditions.
- With the exception of Kate, none of the team members had a desire to work on WC due to the poor reputation of the product and the known dissatisfaction of the customer set.

- In general, software developers in the CTC were used to working on leading-edge applications that were considered to be “fun” to work on. WC looked to be anything but “fun”.
- The learning curve for WC was steep, and there was very little training available. They needed to become “experts”, at least in the customer’s view, in a fairly short period of time.
- The performance evaluations in the CTC were heavily weighted in favor of those employees who billed the greatest number of customer hours. Because of the complexity and instability of the product, WC often required many hours of effort that could not rightfully be billed to the customer.
- The other software developers, especially James and David, were not convinced that Kate was as skilled as she claimed to be. They also were not comfortable with the fact that they were not the technical experts on the team.
- The model of having a team dedicated to one technology was new in the CTC. There was risk in that their other technical skills would become outdated while they focused on WC. If the contracts for WC engagements did not materialize, the WC team members would be at a disadvantage when competing for billable customer engagements.
- Having a skill set based on a technology coming out of Software Group was a paradigm shift for the group, since all previous skills were based on technology developed by the IBM Systems Group (which was the parent organization of the CTC). The CTC had many contacts within the Systems Group organization, and none within the Software Group organization.

Leadership Style

Jeanette was the personnel manager put in charge of the WC. She was a fairly new personnel manager but had strong technical, organization, and team leadership skills. She had been a manager in the CTC for less than a year but her management skills had been rated highly by her manager, her peer managers, and her employees in her six-month review following her move into a management position.

In general, Jeanette’s dominant leadership style was *affiliative*, using Goleman, Boyatzis and McKee’s definition. This was appropriate, given the low morale of the team when it was first

formed. Jeanette listened to the team's concerns and did what she could to alleviate them. For example, she got agreement from her manager and the other managers in the area that the WC team members would be allowed to log the time spent learning or debugging the product even though it was non-billable time. Because they were taking risks for the organization, she asked that the team members be given "credit" for this non-billable time when the performance evaluations were done. In this way, she was putting more emphasis on the team members' peace-of-mind than the business goals they were usually measured against.

She also let the team members know that she would be willing to handle contentious situations with customers or with the Software Group. Generally, developers in the CTC were expected to handle the customer relationship after the contract was signed. Because she understood that dealing with unhappy customers would add to the stress the team was already feeling, she ended up handing most of the critical customer satisfaction situations, allowing the rest of the team to concentrate on technical matters.

She also allowed a small amount of social time at the beginning of meetings to provide opportunities for the team to chat and get to know each other better. She even scheduled some evenings out as a team to foster communication and team building in a less stressful setting.

Her leadership style tended to fall into the *S2* and *S3* styles as defined by Hersey and Blanchard. Since the group's readiness level was initially at the *R2* level, it was appropriate she spend her time *selling* the team on developing WC expertise and *persuading* them that they should commit to helping the team meet the goals set by the management team. The *S3* style also was appropriate since most of the team members were previously at an *R4* level and only found themselves at the *R1* or *R2* level because of the task being thrust upon them. Because they were, for a most part, a very experienced software development team, she spent time *encouraging* them and *supporting* them, rather than *telling* them what to do. In general, they knew what they had to do and how to get the skills to do it, so she concentrated more on the *relationship* behavior rather than the *task* behavior.

Changes in Leadership and Readiness

Jeanette's leadership style changed according to the situation as well as in response to changes in the readiness level of the group or individual over time. In addition to the *affiliative* leadership style, she also employed *democratic*, *visionary*, and *coaching* leadership styles when appropriate. She rarely displayed *pacesetting* or *commanding* leadership styles.

Her *democratic* leadership style was apparent in the task-oriented meeting described later in this analysis. She did not dictate what needed to be done or how the team was to accomplish their goals. Instead she allowed the team to develop the appropriate direction for themselves and invited them to participate in the decision-making process.

She displayed a *visionary* leadership style early on when she articulated the long-term direction of the WC team. She worked at persuading team members by explaining the rationale behind the new team in terms of both the employee and the organization's long-term interests. The employee needed to understand that management felt that pursuing WC contracts was a good business opportunity and that the employee could help to ensure that the CTC remained viable by learning to use the WC product so that the opportunity managers pursue those types of customer engagements.

Her *coaching* leadership style was more apparent in her one-on-one dealings with the various team members. She worked with Kate to help her develop her leadership skills, giving her opportunities to lead the team meetings and providing feedback after the meetings. She helped Mary recognize her strength in dealing with customers. Once she was ready, Jeanette also encouraged Mary to take on some challenging technical leadership assignments, boosting her confidence and promoting her long-term profession development.

She also changed her leadership style as the group's readiness level changed. Initially, she was much more involved in day-to-day organization and direction of the team. Over time, she began to *delegate* more and more of the responsibility to the various team members, although she still required regular status meetings so that she was kept apprised of the team's progress and could jump in if the team's readiness level seemed to be slipping from the R4 level back to the R2 or R3 level.

Leader Effectiveness

Overall, Jeanette was a very effective leader of the team. This was evident in a number of different ways. First, the team was successful in meeting management's initial goals, and the CTC soon gained the reputation as an excellent resource for WC skills. Second, Jeanette's effective use of emotionally intelligent leadership paid off in terms of the overall morale and productivity of the team. Even though many of the negative factors surrounding WebSphere Commerce still existed, none of the team members asked to leave the team and be assigned elsewhere. They all started to like their jobs (even James), and other software engineers started

asking if they could join the team. Finally, the other managers and the second-line manager decided that the WC team would be the model for other teams in the area, and asked Jeanette to help them set up and implement similar team structures for other technologies used by the CTC.

Conclusions and Recommendations

While Jeanette and team were successful, she did not always apply the situational leadership principles appropriately. There were some setbacks when Jeanette used an S3 or S4 style of leadership when the group or individual's readiness level was R1 or R2. She also tended to use her affiliative leadership style in some situations where using a more commanding style may have been more appropriate. But, even though these mistakes were made, her overall application of the situational and emotional leadership principles was appropriate. This may have been due, in part, to the fact that Jeanette had recently completed IBM's management training program in which leadership styles and their affect on the organizational climate were taught and practiced. The only recommendation I would make at this point would be for Jeanette to reflect periodically on whether her leadership style is appropriate for the individual or the group at that particular point in time.

Meeting Description and Critique

After the team was formed, Jeanette began to hold weekly team meetings. A meeting notice was sent out for each one which included the topics to be discussed. Some of the meetings were "medium" meetings, primarily for information transfer as the team members began to learn about the WC product. Later meetings were status meetings that had some task-oriented components as the team members helped one another solve problems they ran into when using the WC product. One of the early meetings, however, was strictly a task-oriented meeting (TOM) in which the team had to decide who was going to develop expertise on the various components that made up the WC product. At this point in time, all the team members, including Jeanette, had taken a web-based WebSphere Commerce Overview course – one of the few courses available on the WC product.

Roles of the Leader

Prior to the meeting, Jeanette met with Kate and asked her to create a chart for the team meeting that contained a list of the various components of WebSphere Commerce. Next to each component there was a space for the name of the person who was to become the Subject Matter Expert (SME) for that component. She and Kate discussed the skills or knowledge that various

team members might have that would be useful in understanding the different components of the product.

She played the role of “facilitator” in the task-oriented part of the meeting. Because she wanted commitment from all the team members as to what areas of expertise they would pursue, she did not dictate who was to become an expert on the different components of WebSphere Commerce. Instead, she worked with the team to create a plan for how the team would ensure coverage of the key components of the WC product. Occasionally she slipped into “boss” mode, but that usually was to get the meeting back on track if the discussion went off course.

Application of Hon’s Task-Oriented Meeting Model

Jeanette generally followed the steps in Hon’s model for leading task-oriented meetings:

1. Goal Setting – Jeanette started the meeting by stating that they needed to coordinate their education efforts to ensure they had coverage for all the components of the WC product. If she had stopped here, she would have been following Hon’s guidelines by defining the bounds of the discussion and could have *solicited* goals from the team. But she continued by stating that she felt it was impossible for any one person to be an expert on the entire product, which was different from how the software engineers had operated in the past. This could have inhibited further discussion as to whether individuals needed to specialize in one area of the product or if there was another solution. Fortunately David and James, the senior software engineers, were not intimidated by her statement, and proceeded to argue for the need for “generalists.” Kate, who had worked on WC projects in another organization, countered with how they had used “specialists” who were experts on one particular component of the product. So despite Jeanette’s communication of her goal for the team, the open exchange of ideas occurred which ultimately led to the *dedication* of the group to the goals.
2. Information Gathering – The goal setting discussion led directly to the information gathering step of the meeting. At this point, Jeanette requested that Kate display the chart she had created with the various components. The team members verified the *completeness* of the chart based on what they knew of the WC product. Some suggestions were made as to the granularity of some of the subject matter areas, and Kate updated her chart accordingly.

3. Problem Solving – As the meeting moved into the problem-solving phase, the discussion of “generalists” versus “specialists” continued. The problem of what expertise was needed was really identified in the goal setting and information gathering phases. A partial *solution* had already been generated by Kate and Jeanette in their earlier meeting, but additional ideas came up and were discussed at this phase. In the end, the team decided to add a row to the chart for a WebSphere Commerce generalist who understood the “big picture” and could answer almost any general question regarding the features of WC without getting into the nitty-gritty technical implementation details. The team also decided to add another column to the chart for the “Backup SME”. During this phase of the meeting, Jeanette did not say or do much, except to refocus the discussion when it got off track or to give Kate a nod to confirm that something should be added to the chart. In this way she was *coordinating* the problem-solving of the group.
4. Decision Making – This was not a separate step in the process, like the Hon model suggests. Instead, decision making was taking place during the problem-solving phase and during the action pathing phase. Here Jeanette did not *consult* the group about which decision to make. Instead, she treated the decision-making phase more like that of a peer TOM in which she *facilitated* the decision-making resulting in the group’s *compliance* with its own decision.
5. Action Pathing – The closest the meeting came to the action pathing phase described by Hon was when the team began to fill the slots on the chart with names. Jeanette took a group action-pathing approach and asked the team members volunteer to be the SME or backup SME in one or more of the areas. She *delegated* the action-pathing decisions to the team and only intervened when it became apparent that James was not volunteering for anything (he was still exhibiting some unwillingness). She suggested to him that he take one of the “generalist” slots, *leveraging* the fact that James had been one of the team members arguing for the need to have generalists. He somewhat reluctantly agreed to become a WC generalist.
6. Coordinating – Only a small amount of coordination happened at the meeting, even though Hon describes this step as crucial. . At one point the discussion turned to getting the product installed on some computer systems so that the team members

could begin to get some “hands on” experience. Charles volunteered for this task since he had volunteered to become the SME on WC installation and configuration. A *milestone* of having WC installed on one system by a certain date was agreed to. But no checkpoints were set up for any of the other activities. At this point, no one knew how long it would take to develop expertise in any of the areas since they were just in the early stages of determining what skills and knowledge they needed to acquire. But weekly team meetings were being held, which by default served as checkpoints for Jeanette to monitor the team’s progress.

Conclusions Regarding Hon’s Model

In the CTC, the majority of the team meetings and/or project meetings are TOMs, even though most people in the CTC have probably never heard of Hon or his guidelines for meetings that matter. That is not to say that there are no unproductive meetings at IBM – we have our share of “muster” and “medium” meetings, some of which are supposed to be TOMs. But the software engineers in the CTC are driven by results. There is very little tolerance for meetings that waste hours that could have been spent doing billable work for a customer. Most meetings take as little time as possible and are as productive as possible. Otherwise people simply stop attending (except for the quarterly area meetings held by the second-line manager who requires everyone be in attendance).

Hon’s guidelines are very effective for running productive, task-oriented meetings, but they do not need to be followed to the letter in order to be successful. Much depends on the style of the leader and the readiness of the followers. For example, Hon’s guidelines for leading subordinate TOMs states that the leader should solicit the goal perceptions of the subordinates in order to achieve dedication to the goal. Jeanette did not do this, but the desired result was achieved anyway. Because her dominant leadership style was affiliative, she did not intimidate the team members or stifle the exchange of ideas, as may have happened with a leader who had more of a commanding leadership style. The fact that the subordinates were experienced software developers accustomed to managing their own projects and associated skill development (an R4 readiness level) gave them the confidence they needed to suggest alternative solutions to Jeanette’s stated goal.

It is also not necessary to include all of the steps in Hon’s guidelines in every meeting. In this particular case, the coordinating step that Hon indicated was crucial was not undertaken in

this particular meeting. It was being addressed in other ways, implicitly through the regularly scheduled team meetings and explicitly in future meetings in which Jeanette and the team developed schedules to determine whether or not they would be ready to take on customer contracts in the original time frame set forth by the management team.

Probably the most useful and important element of Hon's model is the productivity matrix. Even if a leader is experienced in getting results in one type of task-oriented meeting, those same skills do not necessarily apply to the other types of TOMs. Not all TOMs are successful, but more would be if the leader understood the posture he or she had to assume in order to achieve the desired result. Too often, a leader is accustomed to achieving results leading subordinate TOMs, but fails when leading peer or superior TOMs because he or she does not change his or her actions to achieve the desired results.

Summary and Conclusions

Because Jeanette was an effective leader, she served as an example of how situational leadership, emotionally intelligent leadership, and effective meetings can be used to turn a potentially negative situation into a productive and positive one. While some of her leadership abilities were innate, it is felt that her success was also due in part to her management training and her conscious effort to apply what she had learned in that training.

Because I have gone through management training at IBM, there were not a lot of new insights gained, but this exercise confirmed and illustrated many of the things I had learned in those training sessions. Being forced to reflect on and analyze a leadership situation was valuable to me and made me realize that I don't go back and intentionally reflect on how I am applying the principles I learned in my management training. In future leadership situations, I believe I will be more intentional in evaluating the readiness levels of the followers and work to ensure that I am changing my leadership style appropriately, not relying on my default or dominant style.

The priority matrix from the Hon reading was something that was new to me. I will use that to help guide my TOMs in the future. The different postures for the different phases and types of TOMs will be very useful in helping me achieve the results needed from different groups in different situations.