

Case Study: The escalation



Brief description	Participants practice applying the MBI approach through a case study.
Goals	<ul style="list-style-type: none">• Participants apply the MBI approach using a case study.• They analyse the role and influence of the people involved in the conflict.• They assess the suitability of the MBI approach for the conflict described and determine how it could be structured in concrete terms
Time	Approx.. 90 minutes
Method	<ul style="list-style-type: none">• Culturally unspecific• Distributive/instructive
Material	<ul style="list-style-type: none">• Worksheet.
Implementation	<p>The trainer divides the participants into small groups. They discuss the case study and answer the following key questions:</p> <ul style="list-style-type: none">• Who is involved in this conflict? Which roles do they have? With which powers? What influence do these people have on the course of the conflict? Please develop a visualisation for this.• How do you see the conflict escalating? Please outline this briefly.• In your opinion, when and in which situations would an MBI approach have made sense?• How could the individual MBI phases have been organised in concrete terms?
Notes	n/a
Source	Andrea Voigt



Task

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Please read through the case study and discuss the questions below.

Lou works in Düsseldorf for an international investment bank in a research team that is responsible for the procurement and preparation of market and financial information for the bank's client companies. Lou herself specialises in financial services and has recently been promoted to analyst. She feels very comfortable in her team, the working atmosphere is very good, which has a lot to do with her Local Team Lead Monkonjay. Lou and her colleagues experience her as a very empathetic team leader who gives the team members a lot of freedom in their work, involves them in important decisions, communicates very transparently and is always there when a problem arises.

Lou also likes her line manager Susan, who is based in the New York office. Like Monkonjay, she encourages Lou's professional development and readily listens to her concerns. The two share a friendly relationship that extends to discussing private matters.

Lou's team works closely with another research team that focuses on analysing data that helps client companies to make strategic decisions. She particularly appreciates the collaboration with Peter, a new colleague who, like her, specialises in financial services.

After Peter's team lead resigns, a new leader is appointed to his team. Veronika was headhunted from another investment bank and is regarded as a strategic thinker capable of effectively leading the team and advancing planned projects.

However, it soon becomes clear that the chemistry between Veronika and her new colleagues is not right. Lou and her team know from various conversations that Veronika is a micromanager and closely monitors her team members' every step. In personal conversations, she comes across as very cool and aloof to her team. The team is used to working independently and team members get on extremely well with each other. They also travel together in their private lives and some even spend their holidays together, just like Lou's team.

After some team meetings between Veronika and her team turn into open conflict, senior management intervenes from New York. The two partners arrange for Veronika and her team to have a few meetings with a mediator in order to create a common understanding and agree on binding rules that are acceptable to everyone.

The mediation sessions are unsuccessful. Conflicts in the team persist, the atmosphere deteriorates, and Veronika's team members are less and less interested in their work.

This leads to Peter quitting his job out of frustration. Lou is very sad because she really enjoyed working with Peter but understands his reasons.

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After one of her team lead meetings with Veronika, Monkonjay informs her team that Veronika wants to merge the two teams and take over the leadership of the entire team herself.

Monkonjay's team is horrified. In terms of content, the merger makes a lot of sense because a united team could work even more efficiently, but nobody wants Veronika as Team Lead. Monkonjay herself has already told Veronika in her meeting that she will not give up her Team Lead role, especially because she feels responsible for developing her excellent team further.

In the time that follows, Monkonjay and Veronika's meetings become increasingly frosty. Veronika regularly asks Monkonjay for information on the status of projects and requests key figures from her team, which Monkonjay does not provide. She tries several times to explain the situation on site to the two Global Leads. She repeatedly asks for a joint meeting to clarify the future of the two teams. Both of them play it down, saying that a merger is not yet on the cards and that the teams are still performing well. Monkonjay's impression is that both are trying to avoid open conflict as far as possible.

One day, Monkonjay asks Lou for a confidential conversation and informs her that she will be going to Rio de Janeiro for eight months to establish the new local research team there. She asks Lou if she can imagine taking on the interim lead role during this time. At the same time, she warns that this period could be very challenging because Veronika will likely intensify her efforts to push forward with the merger.

Lou doesn't hesitate for a second and agrees. She is determined to prevent Veronika from becoming the overall team leader under any circumstances. Personally, she has decided to leave the company if Veronika succeeds in her plans.

Monkonjay and Lou discuss the new development with the team. While the members are disappointed that Monkonjay will be absent for an extended period, they are very supportive and pleased that Lou will act as interim team lead. Monkonjay, in turn, promises to remain accessible to everyone even while in Rio.

The following period becomes very demanding for Lou. In addition to her tightly scheduled work, she now has regular meetings with Veronika. Veronika immediately demands that Lou provide her with the desired team information, which she had previously requested from Monkonjay. However, Lou declines, asserting that Veronika is not in a position to access that data. This is further complicated by the company's strong hierarchical structure. As an analyst, Lou is two career levels below Veronika, who was hired as a manager. Veronika makes this hierarchy clear in one of their following meetings by stating that she will prevent Lou's next promotion if she continues to refuse providing the information. Lou chooses not to comment on this.

During regular meetings with the two Global Leads, Lou updates them about these discussions. Both Leads reassure her, explaining that Veronika doesn't actually mean what she says.



Only Lou's line manager, Susan, understands the pressure Lou is under and consistently supports her. Susan tries unsuccessfully to persuade the Global Leads to have a clarifying discussion involving all parties.

A few weeks later, Veronika offers Lou a position in her team and a rapid promotion, citing Lou's excellent work. Lou is initially speechless. She cannot comprehend why Veronika employs this "carrot and stick" strategy, believing that threats or rewards would sway Lou. Finally, Lou graciously declines the offer, stating that she feels very comfortable in her current team and has no intention of leaving.

Shortly before Monkonjay returns from Rio, both research teams receive a surprising invitation from the Global Leads to come to Düsseldorf for a two-day discussion on merging the teams. Veronika is naturally present, while Monkonjay joins remotely from Rio.

Leading up to this meeting, Monkonjay, Lou, and the entire team engage in intense discussions. They decide to support the team merger but oppose Veronika assuming overall leadership. Lou also has many conversations with colleagues from Veronika's team who are extremely skeptical about the upcoming meeting.

At the start of the meeting, the atmosphere is tense. The Global Leads warmly welcome everyone, briefly outline the agenda, and ask each attendee to give a brief statement on the team merger. Veronika begins with a plea for consolidation, citing potential synergies that could result. She claims to have already devised a strategy for the team's success in the coming years.

Lou speaks next. She keeps her statement brief, acknowledging the challenges discussed previously regarding the merger. She personally believes it could be beneficial but expresses a desire to retain Monkonjay as the team lead. Monkonjay echoes similar sentiments in her statement.

Following this, a member of Veronika's team stands up to give a statement. He declares: "Personally I no longer trust Veronika. Successful collaboration with her is impossible, and a merger under her leadership will fail. Therefore, I advise against it."

He sits back down. The room falls completely silent. Lou can hardly believe her ears. Did that just really happen?

One of the Global Leads clears their throat and asks the next team members for their feedback. One after another, they stand up and express their lack of confidence in Veronika. Lou's teammates, as agreed, state that they support the merger but prefer Lou or Monkonjay to remain as team lead. The Global Leads visibly become uneasy, while Veronika remains outwardly composed in her seat.

After all team members declined to be led by Veronika, the Global Leads made a decision: They temporarily halted the meeting and planned to hold discussions first with Veronika, followed by Monkonjay and Lou.



Later that afternoon, Lou was in her office when Veronika came in and politely asked if Lou had a few minutes. Lou agreed. Veronika sat down and explained that she had noticed Lou's strong standing among her team colleagues during the meeting. She suggested they could discuss how Veronika could achieve a similar rapport. Lou was at a loss for words. How could this be? After all this time, after months of disagreements and conflicts? She composed herself and said very kindly, "Of course, Veronika, we can definitely do that."

There was no further meeting between the Global Leads, Monkonjay, and Lou. The next morning, both teams received an email from the Global Leads: They had mutually agreed with Veronika on her departure from the company, effective immediately.

Lou immediately called Monkonjay, and both were overjoyed. They spontaneously decided to celebrate together that evening. The joy was immense.

- Who is involved in this conflict? In what roles? With what authority? What influence do these individuals have on the course of the conflict? Please develop a visualization for this.
- How does the escalation of the conflict unfold in your view? Please outline this briefly.
- In your opinion, when and in which situations would an MBI approach have made sense?
- How could the individual phases of MBI have been concretely implemented?

Write down your results.

Source: Andrea Voigt