

Week 7—Elliott Manufacturing Case Study

Elliott Manufacturing

Elliott Manufacturing is a 60-year old company that produces various lines of furniture for “big box” stores and other home supply stores. They have been the anchor company for a rural region and provided jobs to a large number of employees in the area. They have over 1000 employees; 400 of these employees work “on the line.” The rest are managers, and clerical and administrative staff. Over the last few decades, the company has seen its fortunes fall as manufacturing jobs have been shipped overseas and the demand for well-constructed, durable furniture has precipitously declined.

In an effort to regain its market share, EM recently brought on a team of brash, young managers and consultants to help the company streamline, retool, and become more competitive. This new team worked hard to convince the company scions to mechanize EM’s traditional, manufacturing process by replacing its older, dated equipment with newer, sophisticated computer lathing and monitoring systems. These new systems, often used by EM’s competitors, maintain product quality while increasing output.

This new complex computerized system requires EM employees to master a number of new technology skills. The monitoring systems have sophisticated digitized read-outs and require distributed operational teams to communicate throughout the workday to accurately fine-tune the computers’ settings. Many of EM’s employees have been with the company for 20-30 years and the company is committed to trying to keep on as many as they can during this shift to computerization. On average, the factory workforce is older and, except for some managers, most only have high school educations. Technology use in the company is minimal if non-existent.

The success of the company's transition to these new techniques depends on quickly and efficiently "re-skilling" the current EM workforce. It is expected that a small percentage of workers will opt for an early retirement package, but most will stay on.

EM has hired a team of eLearning experts to work with members of upper level management, human resources, and factory management to design a plan to accomplish this re-skilling of their workforce. The new team of managers and consultants has suggested a plan that incorporates some form of eLearning—self-paced CBT, web-based modules, LMS—in order for employees to get comfortable with technology as well as allow them to have 24/7 access to complete their trainings. This is how their competitors—companies like IKEA—keep their workforce so well-trained. Many members of higher-level management aren't yet convinced this is the way to proceed. Most have little understanding of eLearning and technology and are also convinced that their employees will need a bit more handholding. They prefer more traditional face-to-face trainings, at least at first. Perhaps down the road they can explore some online learning.

The company recently received a quarterly report that showed their earnings significantly down. Again. In response, the stockholders called an emergency meeting, and there is mounting pressure for the company to do something to reverse the downward spiral. If the educational design team EM wants to hire accepts the contract, the company COO would like them to present an outline of their strategy to stockholders at the upcoming stockholder meeting in a month. Square One is a new company, and he believes they desperately need EM's business. He has called the first meeting with the entire design team to discuss EM's situation, answer any questions they have about how to proceed, and see if they are willing to take on this challenge.

Personnel

Barbara Bell: COO. She has been with the company for over 25 years

Vic Layton: newly hired training manager

Mindy Cantrell: newly hired fulltime EM consultant

Diane Pearson: longtime EM factory worker; now a senior floor manager

Square One Educational Design

Square One is a young educational design firm made up of a small, dedicated, and experienced staff, most of whom left other larger design firms to pursue more rewarding and cutting-edge work. Their past work incorporated use of social media tools like Twitter and YouTube, online games, simulations, and tended to emphasize collaborative, synchronous learning as much as possible. The company has tried to only take on clients that shared their enthusiasm for more social, interactive educational designs, but shrinking profits and a competitive climate has forced them to accept more traditional (i.e. boring and ineffective) work. Some of the more idealistic Square One staff have openly and bitterly complained about some of their recent clients. It is just not the kind of work they signed up for.

The upcoming meeting with EM finds the team at a crossroads. While EM is a historically traditional manufacturing company, the new blood they have brought on board may give Square One an opportunity to do some interesting work. However, clearly there are people in the company that may fight this approach. Another factor is the dissension in Square One's own team. A few designers have recently posted their resumés on LinkedIn. The bottom line is this: if they don't take on EM as a client, it may be hard for Square One to make its bottom line.

Personnel

Kim Gordon, President

Kelly Deal, Lead Designer

Tina Weymouth, Instructional Designer

Hope Sandoval, Instructional Designer

Laurie Anderson, Client Services

This is the first meeting between Elliott Manufacturing and Square One Design. The stated goal of the meeting is for the EM team to further elaborate on its training needs and for the Square One team to brainstorm a possible plan for meeting EM's needs.

- a. Meet in separate teams (EM & Square One) to discuss strategies for the upcoming meeting
 - i. What do you want to accomplish as a group?
- b. Before the large group meeting, discreetly meet with your secret partner and try to forward your agenda
- c. Come together as a large group

Discussion questions

1. What are some different design approaches Square One could take to create effective learning and satisfy the client?
 - a. How would you decide whether to make trainings hybrid or online, synchronous or asynchronous?
 - b. What are some possible training objectives?
 - c. What are some approaches you could take to create effective assessments for the training outcomes?
2. Does taking on another's role and political agenda help your understanding of the complexities of designing effective eLearning? In what ways?

Elliott Manufacturing

Barbara Bell: Chief Operating Officer

You have seen this company through its ups and downs, moving up from the accounting department to Chief Operating Officer during a 25-year career. You believe that it is the traditional—heck, old-fashioned even--ideals that make this company great and set it apart from its competitors. You believe that EM's employees are part of this greatness. Most are dedicated to the company and, although the workforce is quite large, it feels like family.

However, you recognize times have changed and the EM is fighting for its survival. You see your role as successfully steering this company through this change while preserving as many of as its traditional values as you can. The new team you hired is accomplished, but you think they are too often infatuated by anything new and don't have a real appreciation for what the company stands for.

The upcoming stockholder meeting is important. You want to show them the company can be innovative and rise to the challenge of a changing marketplace. But you also feel that the company can only change so much at once. It takes time to turn such a big ship around. And what if you end up facing in the wrong direction? What then?

Secret partner: Diane Pearson

Agenda: Convince Diane to use her knowledge of employees to advocate for face-to-face trainings at the beginning.

Elliott Manufacturing

Vic Layton: New Training Manager

Since day one of your employment with EM, you have had to fight hard against an ingrained manufacturing culture that came to an end for most manufacturing companies years ago. Either these companies went bankrupt, or else they adapted. Surprisingly, EM has been able to hang, mostly because of its well-established reputation and extremely loyal clients. EM's reputation is what attracted you to the company in the first place. That, and the challenge of getting your newer ideas implemented into EM's rickety, dusty, time-consuming manufacturing process. The shift to computerization was a big win for you. And for your team, of course (although you have to admit most of the ideas were yours). But you know its success depends on preparing EM's workforce to effectively adapt to this new system. It would be much easier just to hire new workers. God knows there are enough qualified people in the area in need of work. But you know that that idea is a non-starter. So, it is very important that the educational design team you hire is successful with outlining and implementing a winning plan to re-skill the EM workers. Like the new EM team you are part of, they are young and hungry and may be good allies for you.

Secret partner: Mindy Cantrell

Agenda: Convince Mindy to join you in arguing that without a quickly trained workforce, the EM computerization plan will be unsuccessful.

Elliott Manufacturing

Mindy Cantrell: New Fulltime Training Consultant

From your experience, EM is an anomaly. When you look at the most recent workforce statistics, EM should have been liquidated years ago. You admire upper-level management for hanging on. Clearly, they believe in the company and care about their employees. You just aren't sure they can make the hard decisions they will need to make in order to survive.

You are practical and unsentimental. You know that EM's main competitors are significantly more agile in adapting to the marketplace and have put in place a sophisticated, computer-based training program that provides their employees with up-to-date training. This is essential for EM. The new computerization plan you and Vic designed and had accepted is a start. But the EM workforce just isn't ready. And they need to be. Fast.

Secret partner: Barbara Bell

Agenda: Convince Barbara to see that traditional training techniques won't prepare the workforce in time. Preparing employees for online training is essential.

Elliott Manufacturing

Diane Pearson: longtime EM factory worker; now a senior floor manager

For you, working at EM has always been more than a job. You see what you do as a craft and take great pride in the things you make. So much furniture today is cheap, almost disposable. But EM furniture is long lasting. Many of the pieces you have in your own home you bought 20 years ago.

Computers can't make furniture. At least good furniture. And computers can't replace a good worker. You understand the company isn't doing well and that management has decided on a new way to run the floor, adding computers and sensors and precision equipment. But you worry that the current workforce just won't be able to adapt to these changes. You know these folks. Many are thinking about retirement, not learning brand new skills. The managers they hired don't understand the factory employees. They only see their point of view. You are glad to be asked to this meeting, but you don't really think the COO and the other new managers are going to really listen to you. They haven't so far.

Secret partner: Vic Layton

Agenda: Try to convince Vic that EM employees aren't ready to rush too fast into technology training. She needs to start slow.

Square One

Kim Gordon, President

You left Tellier Designs three years ago to start Square One. It was your dream. After years of creating boring, mostly repetitive online trainings at the behest of clients who didn't understand good learning design (and wouldn't listen when you tried to tell them), you finally established enough of a reputation to launch your own firm. You convinced Kelly and Hope to join you and after a lean first year, things took off. Laurie came on board to take over luring exciting new clients. Then Tina was hired to help with all of the new business.

The last year has been rough. You are sure Hope is still miffed at not being chosen to be Lead Designer, but while she is probably more skilled than Kelly, you think she is just too rigid and idealistic for that responsibility. Her attitude has rubbed off on Tina, who is fairly new and works closely with her. Laurie is clearly frustrated by Square One's selectivity. She has said more than once that Square One is not in position to pick and choose clients.

It is a fine balance to establish a reputation as a company that does innovative work while also paying the bills. You have to find a way to stand out. You think the EM contract might be just what Square One needs. Hopefully you can convince them to take some risks with their training plan. But even if they don't, EM is a client you can't afford to lose.

Secret partner: Tina Weymouth

Agenda: Convince Tina that despite Hope's attitude, this contract would really be a huge benefit to Square One.

Square One

Kelly Deal, Lead Designer

After seeing an early copy of the EM project prospectus from Kim, you couldn't stop thinking of the many ways Square One could build an innovative training plan for EM. You think the technologically inexperienced EM workforce can be easily trained. You've done it before in a former job at a power plant. Those employees were excited to learn to use computers. And they wanted to keep their jobs. It's a win-win!

You seem to be the only person excited about the potential contract with EM. Everyone else, especially Hope, seems to only see the downside, but you feel this is the kind of opportunity Square One has been waiting for. You would share your thoughts with Hope and Tina, but they are too cozy and you're not sure you completely trust Hope. Perhaps you will talk to Kim and help make her more enthusiastic. You know the responsibility of running the company is weighing on her.

Secret partner: Laurie Anderson

Agenda: Convince Laurie to help you counteract any of Hope's negativity

Square One

Tina Weymouth, Instructional Designer

As the newest member of the Square One team, you feel you have the most to lose if the company doesn't take on EM as a client. You're pretty sure you'll be the first person they'll cut if things don't get better. Hope is clearly disillusioned and actively looking for other work, so you try to encourage her bad attitude. While you'd like to do more "cutting-edge," innovative work, you like the job at Square One overall. Pleasing the client is enough for you. You don't understand why a client needs to please Square One.

Secret partner: Hope Sandoval

Agenda: Convince Hope that this meeting with EM is just more of the same old boring design crap they've been doing for over a year now.

Square One

Hope Sandoval, Instructional Designer

Creating Flash-based multiple-choice tests for a large, commercial janitorial supply company was not what you had in mind when you became a part of the Square One team. That is the kind of work you hoped to leave behind. Why bother? That kind of thing may make the company THINK it is offering training, but you might as well do nothing.

Your portfolio is looking thin because you are embarrassed by some of the work you've had to do over the last year. You figured that by now you'd have a few more game-based trainings and simulations to show off, instead of these boring hacks you've been asked to create.

And now the client that is going to put Square One back in the black is a 60-year old furniture manufacturing company? Whose president is in his eighties? Kim is kidding herself when she thinks this is any different from the kind of work they've been getting recently.

Secret partner: Kelly Deal

Agenda: Convince Kelly that the work Square One has been doing is not what they all had signed up to do. How will they convince future employers that they do innovative work with projects like this?

Square One

Laurie Anderson, Client Services

EM is a big feather in your cap, although no one at the company acknowledges it. It could be a big and much-needed contract and you think an opportunity for the team to design a project that will get people's attention. It has been a tough year for you, navigating the ideals of the team (which you admire and share!) while also trying to land solid, paying work. Often these two things don't align. But the last few lean months have brought Kim around to reality. You are hopeful, unlike unhelpful Hope, who you think is too negative. She is having an effect on the rest of the staff.

The meeting with EM is important. The team needs to build a convincing case for some of their more innovative ideas. If they get EM's buy-in, then perhaps it will help rejuvenate the Square One staff. It doesn't hurt that they will land a big, well-paying contract either.

Secret partner: Kim Gordon

Agenda: Convince Kim that this is the contract that Square One has been waiting for.