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## Managing a Global Team: Greg James at Sun Microsystems, Inc. (A)

Greg James, a global manager at Sun Microsystems, Inc. (Sun), slumped on the edge of his bed in the company's corporate flat in Paris. He struggled to even move after only three hours of sleep.

James had embarked on this unexpected trip from Sun's Santa Clara, California, headquarters six days earlier. With only a few hours' notice, he had set out to meet with his entire 45-member customer implementation team spread across India, France, the United Arab Emirates (UAE), and the United States (US). He had already met with his team members in the US, India, and the UAE. France was his final stop before heading home. For the second time, the team had failed to respond promptly to a customer system outage as required by a service contract agreement. James had begun this trip assuming he would find a swift resolution to the rapidly escalating customer situation that had motivated it. Unfortunately, that had not been the case.

James knew that if he could just make it to the gym, exercise would invigorate him and clear his head: "Five more minutes and then I'll go." Twenty minutes later, still in his room, he grabbed his laptop and launched his e-mail.

### Re: HS Holdings

James scanned his inbox, reliving the events that had plunged him into this predicament. Six days earlier, he had received a string of e-mails, forwarded to him by his team. Rahul Ashok, service manager for the Mumbai team, was in touch with Praveen Devilal (one of Ashok's team members in Mumbai) and Nick Elliott and Robert Chan in Santa Clara to trace the source of the breakdown:

To: Greg James (Global Manager, Santa Clara)  
Fw: FYI in re: HS Holdings  
Date: Mon, 26 May 2008 06:58:40 PST  
From: Robert Chan (Sales Account Manager, Santa Clara Team): *V. Urgent*  
To: Rahul Ashok (Customer Service Manager, Mumbai Team)

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Professors Tsedal Neeley and Thomas J. DeLong prepared this case with the assistance of Research Associates Alison Comings and Patricia Hernandez. Certain details have been disguised. HBS cases are developed solely as the basis for class discussion. Cases are not intended to serve as endorsements, sources of primary data, or illustrations of effective or ineffective management.

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Rahul,

We have a major problem with HS Holdings. Their server went down on Sunday at 23:30 PST, and TIC [Technology Integration Company], their tech support group, called us for help. The issue was at a critical level because their entire system was down for two hours. This was a disaster for their online banking business. They're now struggling to respond to their customers who are furious.

They have a 24x7 Sun software premium—a \$300K service—annual contract, but NOBODY engaged them. They're outraged. They've escalated the matter to Sun's higher management and are threatening a lawsuit because we violated their service contract. We need to find out what happened and respond to their complaints immediately. I've also left you a voicemail and a txt message about this.

Help!  
Robert

Date: Mon, 26 May 2008 19:51:44 IST  
From: Rahul Ashok (Customer Service Manager, Mumbai Team): *V. Urgent*  
To: Nick Elliott (Application Support Engineer, Santa Clara Team); Chan, Robert  
Re: HS Holdings

Nick,

Re: HS Holdings, we have paged the US team three times and left numerous voicemails for the past several hours. We haven't been able to get a hold of the customer either. Pls investigate why the US didn't provide any assistance on Sunday. They should be on call to handle critical issues. We need to revert to the customer and our senior management with an explanation ASAP. Customer threatening lawsuit.

Rahul

Date: Mon, 26 May 2008 11:30:24 PST  
From: Nick Elliott (Application Support Engineer, Santa Clara Team): *V. Urgent*  
To: Rahul Ashok (Customer Service Manager, Mumbai Team); Chan, Robert  
Re: HS Holdings

I checked the system and it shows that HS Holdings' situation was logged in 12 hours ago in the wrong queue for resolution. We did not receive any pages about their system outage because it was in the wrong queue! (It looks like it was the queue that is used to hold issues pending support service account number verifications. The question is who programmed this queuing error? Jamal in Dubai? Praveen in Mumbai?)

Nick

Date: Tues, 27 May 2008 11:36:16 IST  
From: Rahul Ashok (Customer Service Manager, Mumbai Team)  
To: Praveen Devilal (Support Engineer, Mumbai Team); Elliott, Nick; Chan, Robert

Re: HS Holdings

Praveen, no page was received by the US support team. I am trying to understand where the ball was dropped. I understand that US and Mumbai folks have exchanged messages.

Robert, the engineers have restarted the server. But we need to talk to the customer for confirmation that related networks are not affected. We're all on the conference bridge, but the customer has not called in. We left a couple of voicemails at his ext. (45890) to join the conference call. We need him on the line . . .

Thanks,  
Rahul

At the end of the team members' messages was Spurlock's.

Date: Tues, 27 May 2008 08:33:12 PST  
From: Stephen Spurlock (Global Vice President, Santa Clara): *V. Urgent*  
To: Greg James (Global Manager, Santa Clara)  
Re: HS Holdings: Lawsuit?!?

Greg,

Just got a call from HS Holdings' attorneys. They said that their server went down for two hours. Cost them thousands in lost revenue. They are asking us to pay for that loss . . . and they want the \$300K service contract money returned to them. Said it was the second time this has happened. I talked to Rahul, and he alluded to problems with your team . . . Did you know about this? What the hell is going on?

SS

Before James left the office, he asked his team in India to address the technical failure at HS Holdings. He then booked a ticket to India, the UAE, and France to investigate and resolve the issues.

## James's Journey

Though the HS Holdings' system was up and running, the face-to-face meetings with his team had uncovered deeper, more complex, interpersonal issues. James decided to seek counsel from another vice president (VP), Pam Lawry. He picked up his cell phone and sent her a text message: "Can u video chat? I really need 2 talk to u." A few moments later, his cell phone buzzed. He quickly read her response, "B on in 30 mins."

James tried to gather his thoughts. When he joined Sun, one manager had described him as "one of the best hires that I have ever had work for me." When Sun launched the Open Work program that allowed people to work from anywhere, anytime, and anyplace, James had felt as if he were part of the most cutting-edge company in the world. Yet, here he was struggling with his distributed team.

His ruminations were interrupted when Lawry's video call screen popped up. "Hi, Pam."

"What's going on? Where are you?" Lawry asked with urgency in her voice.

"I'm in Paris." James quickly explained his conversation with Spurlock and the HS Holdings incident. "I spoke with Nick Elliott, who's the primary contact for the account. He

worked closely with HS Holdings and TIC, their system integration contractor, to customize our software products for their online banking system (see **Exhibit 1**). I wanted to know why Nick wasn't the first to respond. Nick was mad and explained that no one called him. Even though his cell phone was off, all the engineers have his home number for emergencies. He didn't learn about the problem until the next day. I also spoke with Robert Chan who said that he didn't know about the problem until he checked his e-mail on Monday morning. Both Robert and Nick think that Mumbai dropped the ball. They should have gotten in touch with Nick or resolved the outage themselves."

"So did Mumbai drop the ball? Why didn't they call Nick?" Lawry asked.

"When I was in Mumbai, I talked to Rahul Ashok about it. He said that as soon as Praveen Devilal got the call, he paged the on-call, after-hours US manager three times. In his rush to reach the on-call manager, Praveen used the weekday contact protocol instead of the weekend protocol. He forgot that it was still the weekend in California."

"Do you need to make your protocol procedures more error proof?" Lawry asked.

"Well, it's not just a protocol problem," James said. He thought about the long and revealing conversation he had had with Devilal. "I asked Praveen why he hadn't tracked down Nick directly. He said that in the past he'd felt insulted by Nick. It appears Nick was overheard saying that the Indian team wasn't competent."

"Really?" Lawry asked.

"Yes, the issues are more complex than I realized," James responded. "So instead of calling Nick's home number, Praveen tried to fix the problem with the help of his colleagues in India. He tried numerous times to access the information about the client, but it wasn't in their support queue where all the client requests for help are stored. To make matters worse, the phone number that we had for HS Holdings was disconnected. Praveen and Rahul insisted that the HS Holdings crisis was caused by a queue that was poorly programmed and did not notify the appropriate people in time. And Rahul's team had nothing to do with that queue. Jamal, an engineer in Dubai, programmed it."

James continued:

"There had been some miscommunication between the US, India, and the UAE about what the queue should do. The US wanted to streamline the way that missing account numbers were assigned to projects. They asked Rahul to get someone on his team to program it, but it ended up being done in Dubai. Jamal said his assignment was to create a queue for accounts with missing contract numbers. So the queue he created sends an e-mail to Robert in Santa Clara to fill in the missing contract number. According to Jamal, this queue was not supposed to be used for emergency requests. The Mumbai team is responsible for programming anything that has to do with customer emergencies."

"Why didn't anyone check the queue before it went live?" Lawry said.

"Ahmed Nazr, the manager for the Dubai team, had a second programmer check Jamal's work, and he didn't find any problems with it. But they were both working from the wrong instructions. The queue should've been connected to the support queue that everyone checks regularly, and it should have also sent an automatic page to the managers on call," said James.

"Greg, your team members are all acting like they're on separate teams. . . . But, I still don't get the wrong client phone number part in all of this?" Lawry asked.

"Seems like our contact person at HS Holdings moved departments a few months ago; Nick should have updated the contact number on file, but he figured that anyone who needed to get in touch with them would go through him."

"What a mess! How was Elisabeth Fournier's role in this? Paris is the Customer Advocate for European accounts, right?" Lawry asked.

"I spoke with Elisabeth, and she did receive a call from HS Holdings manager, Michael Thoene, an hour after their server crashed. As you can imagine, Michael was very upset. Elisabeth immediately called Nick and me, but neither of us answered. She then contacted Praveen, who returned Michael's call, but by then Michael was out of the office. Elisabeth had been dealing with angry HS Holdings managers all week, and she was upset that no one in the US had answered her calls on Monday. She said that the Santa Clara team was always the hardest to reach and the slowest to respond."

James and Lawry spoke for some time before ending the call.

"Build consensus," James repeated to himself, "everyone fully engaged," "keep it simple," "manage disparate voices." Lawry's parting phrases ran like a ticker tape through his mind. James was feeling the heat from all corners of the world and from every corner of the organization.

## Greg James

Greg James's early career had been promising. He had earned a bachelor of science in computer engineering from Stanford University, where he was regarded as a star engineer among the technical elites. His computer science professor described James as possessing "an uncanny knack" for solving complex technical problems. He had been sought by preeminent Silicon Valley technology companies, including Sun, which he chose after extensive research. James opined:

Sun was perfect for me because it represented a combination of opportunities that I felt I just couldn't find anywhere else. I had the chance to help define the cutting edge of technological innovation. At the same time, Sun had the stability of a fairly established technology company where I could grow and develop professionally. It felt like it was the best of both worlds.

Within four years, he had risen through development projects to managing a team and budget in the Data Protection and Recovery Department. His team had consistently generated work that received rave reviews from customers. One customer sent James an e-mail praising his team for its "outstanding customer service from the beginning to the conclusion of the installation." Five years after joining Sun, he was one of 50 managers to receive the coveted Sun Outstanding Manager award.

In the pursuit of a growing global presence for Sun, Lawry, the Global Markets VP, had tapped James for a high-profile global team management position geared at implementing the firm's latest enterprise-wide solutions for large *Fortune* 100 companies. This position required a team to implement and maintain systems across several countries. If a multinational organization had 20 sites in Europe, Asia, and the Middle East, it was up to James's global team to seamlessly execute a plan to safeguard the data for that customer at those 20 sites. The Sun team had usually been contacted after the customer's own IT group could not resolve the problem.

## Sun Microsystems, Inc.

Sun Microsystems, Inc., provided companies with complete information technology (IT) solutions that included hardware, software, storage, and services. Espousing the notion that core innovations should not be proprietary, Sun had made its technologies open source. The company's philosophy was that innovation was sparked when people were free to assemble, participate, and create. This, in turn, enabled market expansion, which had boded well for developers, consumers, and Sun.

Sun had originated in a student project at Stanford University. In 1982, Vinod Khosla, Scott McNealy, and Andy Bechtolsheim founded Sun Microsystems, deriving its name from the Stanford University Network (SUN). A year later, Sun signed a \$40 million agreement with Computervision, a computer-aided design and manufacturing company. The company continued developing innovative network technology, as well as personal computers and supercomputers. Sun's ownership of some of the leading products in network computing, namely the Solaris operating system, the UltraSPARC processor, and the Java technology platform had given it an advantage over its peers. As a "systems" company, Sun controlled all of these elements directly, as opposed to leveraging and integrating the parts from other companies (e.g., suppliers of middleware, chips, etc.). In addition, Sun's strategy for forming strategic alliances, even with competitors like Microsoft, had paid off. By 2007, Sun had reached \$14 billion in revenues with approximately 35,000 employees in 47 countries.

### *Competitive Industry*

Sun was in a fast-paced industry that was characterized by high product turnover. Companies not able to keep ahead of the technology curve quickly fell by the wayside. Consequently, industry members had to invest heavily in research and development to succeed in an environment that was rapidly changing in size and capacity. The last few years had been particularly difficult, as profit margins were squeezed from both sides. High input prices were raising the cost of production, and competitors were involved in an intense price war. Loss of revenue had forced companies to look for other ways to slash costs, resulting in outsourcing to Asia, Eastern Europe, and Latin America.

### *Global Talent*

One of Sun's competitive strategies had been to form global teams. By spreading out across the globe, Sun was able to be closer to its customers, have access to a larger pool of talent, and provide service to its customers at any hour of the day.

When Sun was developing or implementing a new product, it had chosen employees to support the product based on talent or leadership rather than on location. If Sun wanted to create a new product, it might find the professionals best suited to lead and conduct the project from diverse countries. Lawry described some of the benefits of having global teams:

Our customers have offices in Asia, Europe, and throughout North and South America. If we are to understand and respond to their needs, we need to have people on the ground in each of these areas. How are we going to get the best people if we try to run three work shifts in Santa Clara? You are not going to get an engineer with 15 years experience to agree to work the graveyard shift, and even if he did, there would be errors and he'd quit after not seeing his family for a few months. Our policy is to follow the sun—teams come online as the sun rises in their region and take over projects from areas where the sun is setting.

These global teams ranged in size and composition, but the majority of them had been structured so that each manager had 11 direct reports. This was in response to Sun's code, called the "Rule of

11," that established a norm that each manager should have direct supervision over approximately 11 employees.

## Open Work

At Sun, diverse employees had to work together across multiple time zones and function within their workplace locations. In addition, employees had expressed a need for more flexible work schedules and a better structure for balancing professional and private choices. In response, in 1995, Sun's top management had begun to brainstorm about possible alternatives to its workplace arrangement and had designed and launched an alternative work environment.

The Open Work program combined technologies, tools, and support processes that enabled employees to work from anywhere, anytime, using any technology.<sup>1</sup> According to the findings of one of Sun's studies, roughly 35% of all employees did not use their assigned buildings on a typical workday. By implementing Open Work, Sun reduced its real estate holdings by more than 15% (2.6 million square feet), resulting in savings of nearly a half-billion dollars over the course of 10 years. In 2008, nearly 60% of Sun's employees had participated in the program.

According to Seema Iyer, the Open Work program manager, employees had a choice of flexible work arrangements. When new hires joined Sun, they decided, along with their managers, whether their work was suitable for an Open Work arrangement. The Open Work program consisted of three components. The first was a suite of enabling technologies referred to as "mobility with security," in which people moved between work sites and had consistent mobile access to personal computer sessions. The second involved access to workplaces on a day-to-day basis in spaces that included the Sun campus, a drop-in office, a hotelling site, or a client site. Third, employees worked from home, and, when an alternative space was needed, they used Sun workspaces. Organizational policies like monthly allowances that included Internet, telephone, and hardware for mobile employees and training to work in this environment were in place to support this program.

Iyer noted:

With Open Work, we've dramatically reduced our operating costs, and we pride ourselves for developing an eco-responsible system in line with our "green approach to business."<sup>2</sup> Our employee satisfaction has risen and productivity remains strong. While satisfaction with the program is high, it still has a number of critics who believe that face-to-face interaction is key to innovation.

Sun had set up a suitability assessment for employees who wanted to participate in Open Work. Managers filled out a category assessment survey that polled work patterns, activities, resources, work style, and background (see **Exhibit 2**). Sun examined factors such as the amount of work time spent at different locations, whether the employee worked alone or with others, the need for communication, and whether communication was electronic or in person. The data-collection process also looked at the amount of interaction with other team members and internal or external customers, how frequently he or she worked from home, and whether the employee was a self-starter.

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<sup>1</sup> This and other case details were taken from interviews with the following Sun managers: Seema Iyer, Wajid Jalaldin, Robert Latham, Chris James, Will Rahim, and William Franklin.

<sup>2</sup> Sun estimates that the average Open Worker emits 1.25 fewer metric tons of CO<sub>2</sub> per year compared to a typical employee assigned to a particular location. It is also estimated that each Open Worker avoids 135 gallons of annual fuel consumption (Sun & University of Colorado, 2008).

Sun had established organizational systems, such as training for managers and employees working in global teams, resources for home-based employees, and workshops on Open Work. James's team had completed these training programs and used many of the resources.

## James's Team

### *Recruitment*

Twelve months earlier, James had recruited his 45-person team composed of 7 members in France, 16 in India, 11 in the UAE, and 11 in the US to serve Sun's enterprise customers in Asia and Europe (see **Exhibit 3**). James had been pleased with the ease by which the global team came together:

When I first took this job, I had no idea how to recruit new hires in other countries, but the team came together quickly. We had several engineers in France who were brought in for an unrelated short-term project. Their project was winding down, and I was able to recruit a few of them. Then, I contacted our local human resources team in Mumbai, India, which sent me 75 impressive résumés of graduates from the Indian Institutes of Technology. I traveled to Mumbai for a week and hired 16 people. I did the same thing with the UAE team. I inherited the USA guys from an acquisition of a start-up company, and that worked out well because they already had a history of working together and could be productive relatively quickly.

James had participated in Open Work in his previous management role and had found the work environment beneficial. He hoped to use the program again, so he submitted an application for himself and his team. The application had been accepted, and his team was established with some of the employees being home-based and others using the flexible option.

### *Time Zone and Work*

James had kept in touch with his direct reports many times during the week. He also concluded that the best way for him to keep everyone on the same page was to conduct weekly conference calls with his entire team of 45. He described the calls:

I keep the agenda for these calls very predictable. The night before the call, I send the team a "topics' list" that usually has to do with customer installation schedules, service contracts, and related issues that we must address. We run through the list, and I push for commitments on next steps for every item. These calls can get very technical and drawn out. My role is to make sure that we keep the big picture in mind. And because I understand the meeting time is not perfect for everyone, I try hard to always start and end on time.

James had set the calls to begin at 08:00 Pacific Standard Time. This was 20:30 in India, 19:00 in the UAE, and 17:00 in France. James felt the meeting time was the best choice, given everyone's constraints.

During the visit prompted by the HS Holdings incident, James learned that he had missed some of the more nuanced considerations of the meeting time. His technical lead in India, Ashok, told James that the Indian team felt as if they were second-class citizens among the larger team. They had fewer agenda items, their concerns were always reviewed last, and they felt consistently interrupted. By being on the conference calls from 20:30 until 22:00, the Indian employees had excessively long days. Beyond that, the Indian team started work very early in the morning (06:30 IST) to get briefed before the US team went offline. James wondered if these concerns were behind his Indian team members' recent feedback on the Open Work environment (see **Exhibit 4**).

The final crucial irritant for the Indian team members was so basic that it had initially escaped James's attention. Ashok explained:

My guys are unhappy about the fact that they are often left to do customer maintenance work. They think their focus should be on initial customer technology customization and innovation. The other teams get the interesting work. But the moment there's a problem, we are the first ones dispatched to put out technical fires. If we are that good, how come we are not good enough to get the creative work?

James knew that Ashok was a highly skilled engineer and manager who got his team working in record time. Ashok was in his eighth year at Sun, and he had spent seven of those years in Santa Clara. He had returned to India because he saw more opportunities there and knew that he could more rapidly advance his career, given the burgeoning technology market in that region. Ashok was on track to manage the entire Asia-Pacific region that included the UAE, and he served as a role model to younger engineers like Devilal.

### *Compensation Mismatch*

James felt each country's team was frustrated for a different reason. The French team had recently voiced displeasure about what they termed "compensation mismatch" between themselves and their American counterparts. Although employee salaries were typically kept confidential, an American team member had inadvertently disclosed his higher salary to his French teammate.

James recalled:

There was an immediate firestorm within the team. The French members did not understand why they were making 30% less than their American coworkers, even though they were trained at the top technical institutions in their country. I tried to explain to them that their salaries were consistent with their local market.

Jacqueline Martin, the technical support manager in France, had responded:

How can I tell my team that their work is valued, when the US guys get paid so much more? My team works 50 hours a week and our schedule is unpredictable. We work from home, but we are never home. My children say that they don't spend time with me because I am always on my laptop or on the phone trying to resolve problems. Just two weeks ago, I had to miss my daughter's recital when I got an urgent message from Ashok. I just don't understand why our work and our time are less valuable.

The Americans had rationalized their pay by opining that the French workers enjoyed job security in a way they could not: France's strict labor laws offered strong protection to its workforce, something the Americans did not have in the event of an economic downturn.

### *Vacation*

The tension between these two teams had carried over to perceptions about time off. When the French teammates took several weeks of vacation due to them by law, the US team complained that they had ended up carrying their load unfairly. James tried to make the situation more equitable by assigning more work to the French group, but he could not advertise that fact. Still, the Americans felt unsatisfied. James could do nothing about the differing regulatory laws among the various countries. He thought that he had explained to his team that they had to accept the country-based benefits differences: "This is part of global collaboration."

## *Perceived Neglect*

James realized that there was equal-opportunity disgruntlement among the subteams. The UAE team also had complaints. After he had pressed Nazr, the technical lead for that site, he learned that the team felt they did not have sufficient face-to-face contact with James, and they were nervous about becoming a subgroup to the India office, which would have placed them even further away from James.

Nazr went on to explain:

The team feels disconnected not just from you, but from the company as a whole. In fact, we all worry that our performance evaluations will suffer because you may not understand the unique culture and business challenges of our Middle Eastern market.

For the first time, James had learned that the team members feared that they would be deemed incompetent because they had consistently missed deadlines that James had set in the last few months. Their culture, however, required extensive—and time-consuming—relationship building before contracts and commitments could be finalized. They often worked at two paces—at their country's pace, and at the company's faster pace with its time-sensitive deadlines.

During his trip, James had been sideswiped by the realization that Nazr's team had strained relations with Ashok's team. As Ashok was preparing to take on responsibility for the region, he often volunteered his experience and expertise. At first, the UAE team had been grateful for his guidance; they did not, however, want to work under Ashok. James had heard from Devilal, who had spent a week in the UAE office:

Rahul sent me to Ahmed's team when they were having trouble setting up a custom application for a client. I really sympathize with those guys—everything takes so much longer, so they have to work all the time to make our deadlines. But it was really uncomfortable to be there, because I know Ahmed and Rahul don't get along. No one talks about it, but I think it's because Ahmed is from Pakistan. I try not to think about those things, but it is a big deal for some people.

## *U.S. Subteam Viewed as "Favorites"*

James had cringed when he was accused of playing favorites with his US team. Members of the three non-US teams had said that they sometimes received e-mail threads following an ongoing conversation between James and the US team. By the time the threads reached them, it appeared as though decisions had been made, and they were copied only as an afterthought. James realized that he had spent more time with the US team: "We do have more of the water-cooler conversations, but I do not understand how that makes me a bad guy. I overheard one of my guys say, 'With Greg, the rich get richer and the poor get poorer.' I really felt the sting of that comment."

All this passed through James's mind as he ended the video conference with Lawry. He noted the cold comfort of her words:

Global markets are pressuring us to span operations across multiple time zones. There is no going back. You need to figure out how to build consensus. You're not going to be able to get that developer from China and India and Prague all in the same room, and a lot of issues quite frankly are time sensitive. You have to make sure that everyone is fully engaged because you are managing systems for our most important clients.

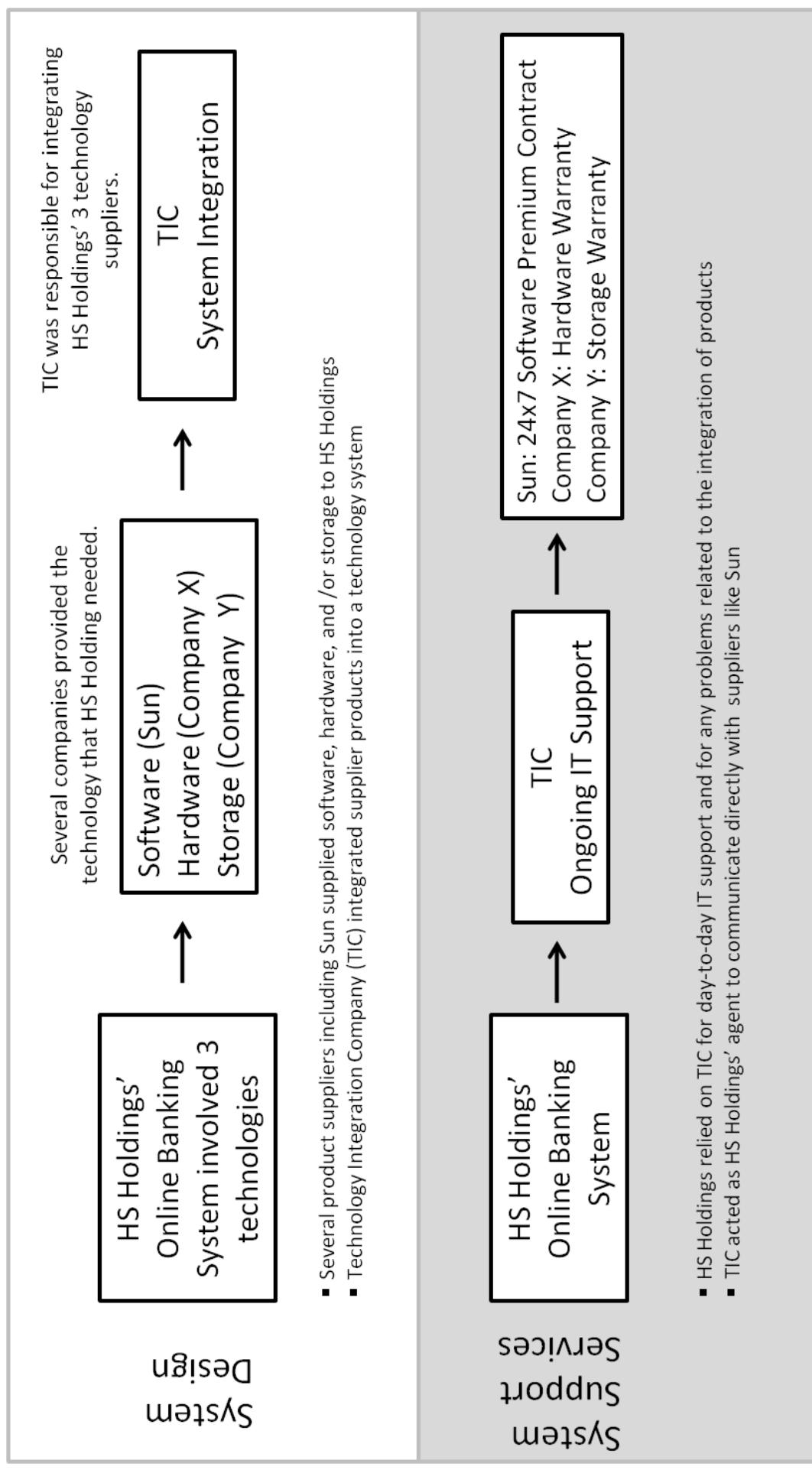
## Moving Forward

James knew that Sun was under tremendous pressure from its competitors and could not risk losing customers. He considered himself lucky to have survived the HS Holdings disaster by averting a lawsuit, but he knew that if he did not find a solution to his team's troubles, his meticulous career planning might fall off course.

James recalled sitting in his boss's office, soon after he had received Spurlock's terse e-mail. He had never seen him that angry. Being on the receiving end of such criticism for the first time was shocking to James. His heart raced as he remembered Spurlock's stern warning: "Fix it. Fix it now. Greg, I want you to tell me your short- and long-term plan to make certain that this never, ever happens again. Something in your process is broken!"

The lack of face-to-face interaction with his teams in France, the UAE, and India was a problem, and he wondered whether he should increase face time by traveling to every site on the first and third weeks of the month or do the opposite and reduce face-to-face interaction with everyone, including the US team. James also considered conducting multiple all-team meetings throughout the week to increase communication across cultural and national boundaries. He questioned whether his problems were with the larger structure of his team. He also had doubts about whether his customer demands were even suited to the number of team members and the Open Work environment. He wondered, most of all, if he had mismanaged the team. What could he do differently moving forward?

## Exhibit 1 HS Holdings' Online Banking Implementation and Support



Source: Case writer.

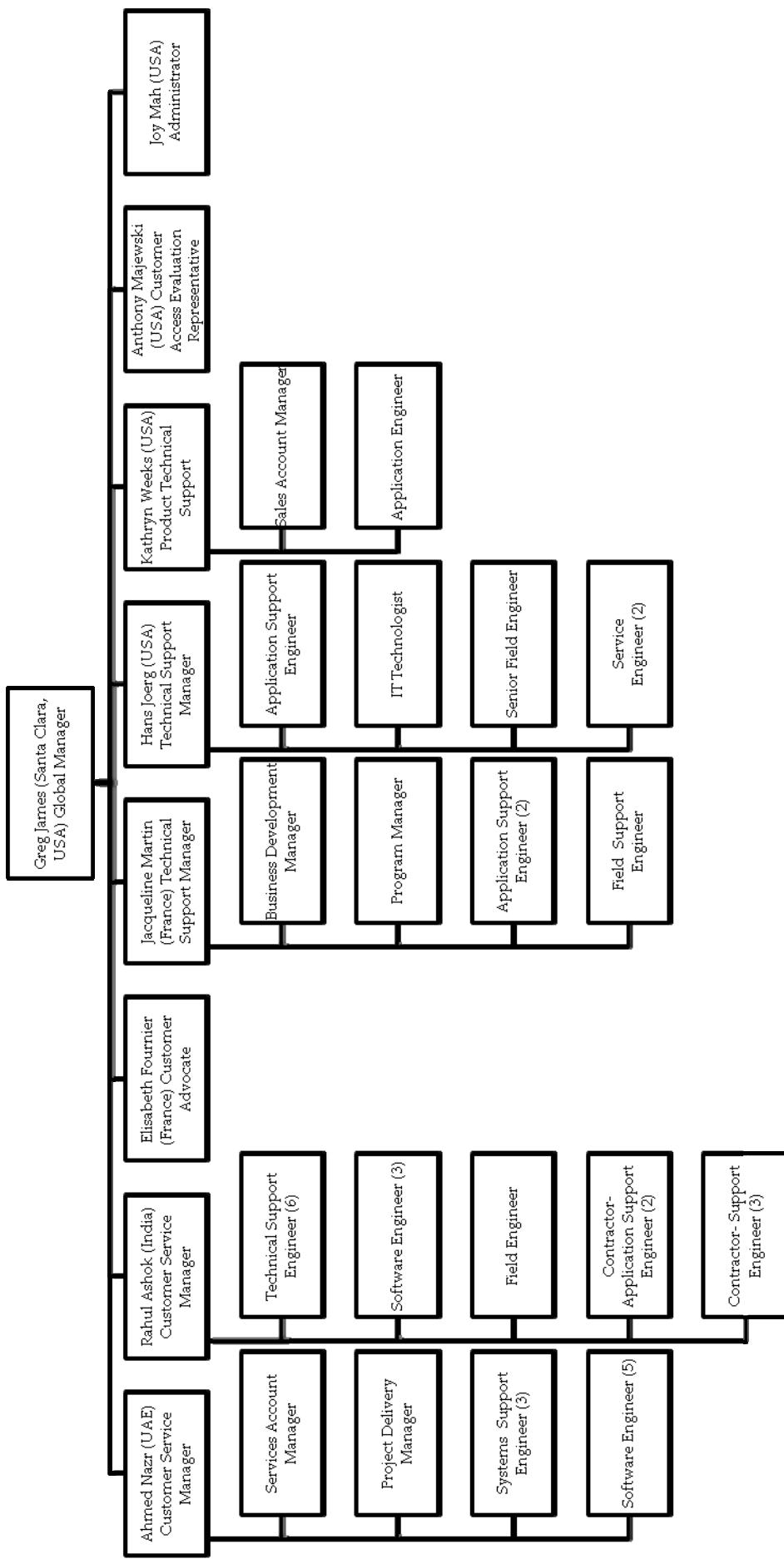
## Exhibit 2 Sample Open Work Suitability Survey Questions

**Work Preferences & Characteristics: Please check (✓) the description that best captures you and your work situation.**

- I am good at planning and organizing my work so that it can be done effectively from any location.
- When I am away from the office environment, I find it difficult to motivate myself to set my own goals and accomplish them.
- I have the self-discipline necessary to work productively in an unstructured work setting like my home.
- The office environment is not an important source of social contact for me.
- I would miss people or feel isolated working by myself at home.
- My coworkers accept and respect those who do not come into the office every day (i.e., work from home, etc.).
- The ability to work anytime, anywhere is very important to me.
- I need flexibility in my workplace choices as a way of balancing my work/nonwork needs.
- I prefer the stability of using the same office space on a routine basis, rather than choosing where I work each day to suit my work needs.
- I often travel to customer, partner, vendor, or other non-Sun locations as part of my work.
- My work has discrete time lines and milestones that can be quantified, measured, and monitored.
- I always make sure my manager, coworkers, and/or customers know how to quickly find or reach me, no matter where I am working.
- Information sharing and knowledge exchange occur informally, through direct person-to-person contacts on the job.
- Much of my dealings with coworkers and customers involve communicating electronically using phone, e-mail, or other online technologies.
- Most of the in-person interaction I have with others at work is impromptu, informal, and spontaneous.

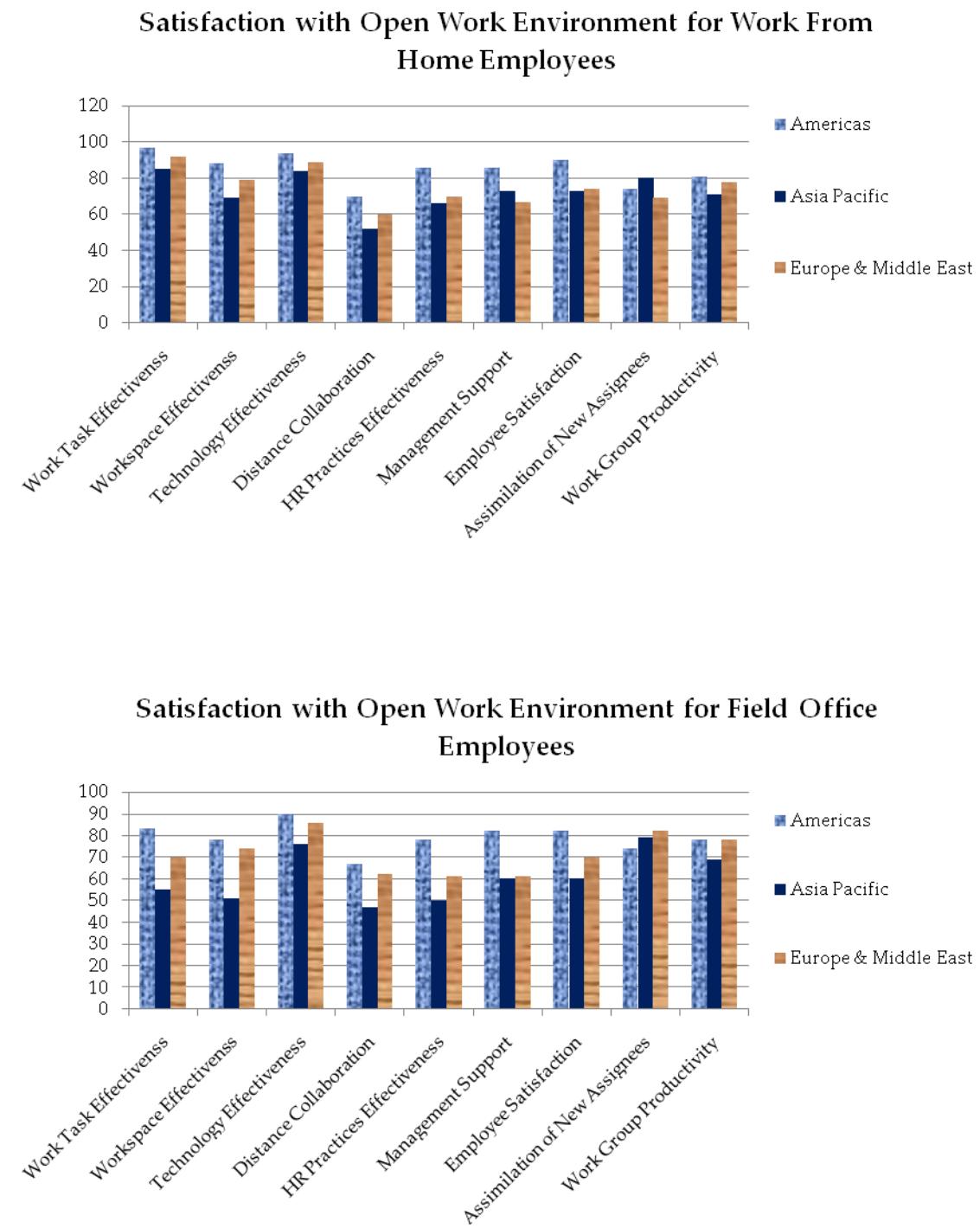
Source: Company.

### Exhibit 3 Organization Chart for Greg James's Team



Source: Case writer.

**Exhibit 4** Surveys of Satisfaction with Open Work for Greg James's Team



Source: Case writer.