

## **TELEMACHUS TECHNOLOGY A NEGOTIATION EXERCISE**

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### **SECRET INSTRUCTIONS FOR BILL MEESE - THE MENTOR**

You are glad that Jack thought of Davis for the presentation in Boston on March 21st. It's important to promote minorities; it just makes good sense in this day and age. Besides, she's a "two-fer" (an African-American and a woman). It would be great to see Davis develop into a success story and, of course, it's always better to train your own talent internally than hire from the outside. Jack and some of his senior consultants think she's got potential; she's got the technical smarts, but she needs to develop marketing skills. You remember her call-back interview with you when she impressed you as someone who could make it. This is a pretty significant presentation to start her out with, but Jack will be there and he can step in as the situation warrants. He may be young, but he is a highly capable manager and is very quick on his feet. (He reminds you a little of yourself as an up-and-coming young executive.) You like the way he moved over to your department and established himself there. His people seem to respect him.

You have been a little uneasy about what you're supposed to be doing in this mentorship program. You agreed to participate when Joe asked you because it was his idea and you know he wants his people involved to make sure it succeeds. But the Manual doesn't give much guidance about what you're supposed to do after you come up with the skills development plan. It's too "touchy-feely". The thought of Tricia Solomon or anyone in Human Resources drafting a mentorship program is something of a joke anyway; what does she know about mentorship (or anything else, for that matter)? How is this any different from what you've always done to help young people succeed? Aren't the Director of Sales and Marketing and half a dozen senior consultants and managers your mentees? Not to mention all the executives at the bank whom you helped get their start? How is this "formal" program different? Of course, you've never had a female mentee and you know an important part of this program is to help minorities get promoted.

Your daughter was bemused when you told her about your assigned mentee. She was home this weekend visiting from college and, as always, asked whether women were "finally making any strides at Telemachus." Her first response was to say that assigning you an African-American female mentee was like putting the Pope in charge of promoting women priests. Then, she gave you a lecture: "All right, Dad. This is your chance to move out of the dark ages. Don't give her your standard lecture on success. Listen to her and find out what she has to say." You really don't think you're as Neanderthal as your daughter makes you out to be. Her parting words - "I'll be interested to see what you've learned when I come home this summer."

Davis has called you off and on without connecting. You probably should have gotten back to her sooner, but you're so busy; it's hard to make time and it's hard to

know exactly what you're supposed to do. It's not as if you have time to do a lot of hand-holding these days.

Then you received Jack's E-mail dated Wednesday, March 7th informing you that he was going to include Davis on the presentation team in Boston on March 21st. That memo gave you the idea of scheduling a dress rehearsal so that you could act like a mentor. As soon as you thought of the idea (on March 14th), you shot a quick message to Jack that simply told him the time, the place and the purpose. Then you sent Shataya the following E-mail:

**Got Jack's message that you are going to take a lead role in the March 21<sup>st</sup> presentation to Boston First . This is a significant opportunity and I want to make sure you are fully prepped. I told Jack I've blocked out Fri. morning (the 16<sup>th</sup>) from 9-11 in the conference room next to my office for a rehearsal. Boston First is no Citibank, but they're moving up on the outside and I'd love to get them in our stable. Boston is one stuffy market - plan to wear your most Brooks Brothersish suit and no braids that day! Looking forward to getting you ready!**

You're happy to give Shataya pointers on her performance. That is something tangible that you know how to do. Besides, you really want to help her to do a good job. You were the one who pushed to let her have a role. You just hope she's got her act together so you can finish by 11 a.m. You've got lots of things to do on Friday.

Maybe, you're old-fashioned, but one thing is clear if she wants to get anywhere. She's got to do something about that hair. It makes you a little uneasy because that's not something you should have to tell her. It might be okay for San Francisco, but clients on the East Coast, and especially Boston, just aren't going to take her seriously. And what impression does it convey about Telemachus?

Well, she seems serious enough so that shouldn't be a problem. Hopefully, she will be fully prepared to discuss the business of Telemachus, who does what, the kinds of projects we get involved in, some figures as to sales volumes and our understanding of the business interests of Boston First Financial Investment. You prepare to support her the same way you prepare to give your own presentations: you print out two copies of your usual nine point checklist of the agenda (with notes tailored for this account) and items that should be addressed. (See Attachment.) Now, you are all set to go into Friday's meeting.

**YOUR ROLE IS TO PARTICIPATE IN FRIDAY'S PREPARATION SESSION.  
PLEASE STAY IN CHARACTER THROUGHOUT THE MEETING.**

**PRESENTATION CHECKLIST FOR BOSTON FIRST (MEESE COPY)**

1. Introduction:  
Brief history of Telemachus  
(Pull up computer file that details company history, structure, background on key people, philosophy, sales volume, representative client list, etc.)
2. Description of Agenda and Process  
Identify topics to be addressed; invite client to add to or delete from agenda; State that Q&A is welcome throughout or at end, depending on their preference; Leave time to brainstorm next steps and action items
3. Presentation Materials  
Have slides in order ahead of time on company format  
(Pull up file with standard format for slides)
4. Demeanor  
Pleasant, confident, knowledgeable, professional, inquisitive, lots of listening, responsive to questions
5. Familiarity with this Account  
(Use the data that Jim O'Brien put together on the bank).
6. Industry Data  
(Get Jim to send over those recent articles on current issues in banking, international and European regulations; laws about information exchange; ISO 9000- the European quality standard that the bank is trying to follow throughout its business, which includes IT)
7. Current Hardware and software specifications for the bank's network (that info is all in Jim's memo).
8. Requirements for the bank's new information system, incl. documentation, new hardware, integration to new software, and user requirements (again, Jim's memo covers all this)
9. Training for Bank Employees on New System  
Pull up current memo on that.

**PRESENTATION CHECKLIST FOR BOSTON FIRST  
(COPY TO GIVE DAVIS)**

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Brief history of Telemachus  
(Pull up computer file that details company history, structure, background on key people, philosophy, sales volume, representative client list, etc.)
2. Description of Agenda and Process  
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