

Case Study 4:

Know Your Audience

Background

Bridgeport Ltd. is a Canadian marketing strategy firm with its headquarters in Calgary, and satellite offices in Vancouver, Winnipeg, Toronto, and Ottawa. Bridgeport employs 125 people (consultants, analysts, and support staff) in Calgary and 35 people in each of the branch offices. The firm specializes in the development and execution of sales promotion programs for Canadian businesses operating in one of three industries: financial services, specialty retail, and food and beverage service providers. Bridgeport's CEO Jane Feltner founded the company in 1999 with only one partner and two employees and has since grown the firm's annual sales to \$42 million. The company is considering going public by offering shares on the Toronto Stock Exchange.

Current Situation

Before making the decision to take the company public, the Bridgeport board of directors has asked Jane Feltner to prepare a series of research reports that could be used to create a prospectus (a document that details the company's operations, financial situation, and prospects for growth for potential investors). Jane has put together a team of ten people to draft a report on the current operational practices of the company. Four team members are located in Calgary, two in Toronto, two in Vancouver, and one each in Winnipeg and Ottawa. Chen Lee from the Calgary office will lead the project. The team is tasked with producing a formal report on the operational practices of the firm as a whole and for each local office, including customer acquisition, retention, and management strategies.

The Problem

Louise Baxter, the project team member representing the Winnipeg office, has written an email to the CEO expressing dissatisfaction with Chen Lee's leadership of the writing team. She has repeatedly asked for a meeting with Chen to discuss her concerns, but their respective schedules have not aligned. Louise feels frustrated and believes the project leader may be purposefully ignoring her concerns.

Louise has been with Bridgeport for one year and has never met Jane Feltner nor Chen Lee in person. She has communicated with Chen via email and telephone but has had no communication with the CEO. Jane has not been involved in the planning or execution of the report, has not sat in on meetings, nor has she received a progress report. One month into the project, Louise emailed the CEO with her concerns about the leadership of the team (see Exhibit A).

Exhibit A

To: Jane Feltner (CEO Office)
From: Louise Baxter
Subject: Concerns with operations report project team

Jane,

I feel it's my duty to make you aware of the disaster that is the operations report. As you are aware, I am in charge of putting together material for our central Canada client services. I have been collating our T-55 reports and adjusting our client performance parameters accordingly. I have repeatedly asked for a meeting with our supposed project leader, Chen Lee, to review the obvious discrepancies in the alignment of our measurables and our reporting system. I know that you would be as concerned about this as I am.

I am frustrated and dejected more than at any other time in my professional life. Lee ignores my emails and requests. I do not believe he even understands the problem. His leadership skills are nonexistent and are destroying team morale.

I am struggling to coordinate with the other members of the team—I think it may be a better idea if individual reports were created. I don't believe it is possible to write a coherent report with the team spread out all over the country. I don't know where to begin.

I demand that you take action on this problem—it is too serious to ignore. Please email me your plan of action ASAP.

Warmest regards,

Louise

Activities and Discussion

1. Analyze Louise Baxter's email for purpose and scope.
2. What are the positives and negatives of Louise's analysis of her audience?
3. Is the channel that Louise chose for her message appropriate? Explain your answer.
4. Using the analysis you have performed on purpose, scope, audience, and channel, revise the email into an effective communication.