Craig Gregersen Case Study

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Identification of Key Stakeholders

Craig Gregersen is our case’s proverbial main character as the instructional design contractor brought in by The Electron Corporation’s Safety Committee to design a company-wide safety training. Elated at first by the prospect of using both his law and instructional design degrees, Craig is now struggling with his next move after speaking with a variety of players in different parts of the company with terribly contrasting viewpoints that collectively have set him further back than his starting point, while simultaneously taking up valuable time of his tight delivery timeline.

Stan Neuhaus, a senior design engineer, and Louise Masoff, the training project manager, are both partnering stakeholders in the effectiveness of the training as members of Electron’s Safety Steering Committee, and also the face of their client. They initially gave Craig the direction to work with various departments to create a training that fits everyone’s needs, and then gave him a really tight timeline and limited access to resources. As time progressed and the scope expanded with every encounter, Craig’s most recent conversation with Louise left him under the impression that “he had been handed what many in Electron had probably already known was an instructional design minefield with no readily acceptable solutions” (Dundis, 2014, p. 207).

Stan also acted as a subject matter expert for the engineering team. His recommendations to create company-wide standards in design and engineering were in almost direct conflict with those from Richard Mull, the assigned contact for the company’s legal team who is both a subject matter expert, and in a way, also a client as the desired end result of this training is to avoid lawsuits related to product safety issues. Each time one of the two gave opinions and
strong advice on how to proceed, the other contradicted it, leaving Craig essentially nowhere to go.

The audience for this training is intended to be all of the employees of The Electron Corporation in all sixteen of the countries in which they have manufacturing plants and employees in many other counties too to further their understanding of product safety concerns, the legal concerns surrounding them, and how both relate to their role in the company. The clients are the company (and the members of the Safety Steering committee as mentioned above) obviously, but also are the general public that may be put in danger due to product safety concerns if potential issues are ignored or skimmed over.

**Key Design Challenges**

Craig’s first key design challenge is in the analysis stage of this project. He’s been given too few resources to proceed successfully into the design portion of this project at this stage. The contacts he’s been given all have completely different and conflicting agendas, and he’s not been granted any sort of authority at this point to move forward with anything other than taking the old and reportedly ineffective course created by the legal team in recent years and “jazzing it up somewhat” (Dundis, 2014, p. 205). This one and only currently feasible solution is a bad one for several reasons though, with it only representing one piece of the company’s varied interests that is uninterested in possible or even probable safety concerns unless there are potential litigious consequences, and too being a poor reflection of Craig’s abilities that might shed a poor light on his new consulting business in the future.

Craig’s other design challenge, assuming he can overcome the steep hurdles in the analysis stage, has to do with the design phase of the instructional design process. His current marching orders confine him to a one day, one size fits all training course, which he is tasked
with designing in a very short timeframe. This time constraint is a serious barrier to successful design considering the complexity of the subject matter and audience combination.

With far reaching product liability concerns ranging from numerous sets of international laws, a wide array of stakeholders in the company’s various departments with seemingly few common ties or directions from the top, new products moving into new consumer segments that are essentially unknown territory for the company, and known possible safety issues, there are many case specific issues to consider on top of the design issues. In addition to these that were stated, safety issues that don’t become legal concerns could also become marketing concerns that could be equally as or even more detrimental to Electron that those of a litigious nature.

**Prioritizing the Issues**

While the client, who is ultimately the Electron Corporation in this case, and their stated objectives often top the list of priorities in instructional design, some overarching concerns can outweigh those. In this case, creating a training that may meet the immediate needs of the client may reasonably cause serious public safety issues, and that must top the priority list. Based on the information Craig currently knows, in order to put public safety first, he needs to prioritize the negotiation of appropriate resources, including time and access to decision makers along with other partners inside the company that help him unravel some of the mystery inherent in the complexities of this project in order to solve both of his major design issues.

**This Week’s Readings and My Own Experience**

The easiest answer in this case does indeed seem to be to follow Richard and ultimately also Louise’s suggestion to essentially rerun the training that legal created in previous years. From my own experience, I immediately recognized that this was an issue that ran deeper than anything a simple and short training could remedy. I’ve often had clients who have requested
training on things that can’t entirely, or sometimes at all even, be fixed in the classroom. It’s at these times that I set down my developer hat and jump into root cause analysis to make operational suggestions before proceeding. And the times earlier in my career that I followed the client’s wishes even when I had a hunch training wasn’t the answer, I ended up being burnt by it in the end when I was called upon to question why the training didn’t fix the issue.

The readings offered another glimpse into the depth of Craig’s concerns in this case. As eloquently put by Frisque, Lin, Kolb in their 2004 Performance Improvement Quarterly article, “performance improvement professionals serve a vital role in providing individuals with tools and strategies to assist with complex ethical decision-making frameworks” (p. 30). Many of the issues in this case are indeed ethical ones, and it is indeed Craig’s job to ensure those ethical discrepancies are ironed out prior to any sort of training development should commence. The International Society for Performance Improvement (ISPI) has published a Code of Ethics for those in our roles in which several of the examples of ethical behavior could be directly violated if Craig doesn’t address some of the main concerns in this project. As instructional designers, we cannot simply be order takers; it is our job to be a partner in the process and consult where we see potential issues with a proposed plan. Designing a training that you don’t believe in is akin to promising results may not be able to deliver on. Turf wars, such as between the various departments at Electron, should also be avoided. And if Craig can’t get these issues worked out, he should inform his client that he doesn’t have the expertise to finish this job and resign (ISPI, 2002).

**Recommended Solutions**

My first recommendation for Craig is to schedule a meeting with the Safety Steering Committee and lay out all of his concerns to them as a group. If they are receptive and have the
autonomy to either help him work through them to make hard decisions and find the necessary resources to move forward, or else involve higher level management that can, then he could fight his way through the aforementioned minefield through this avenue. If this isn’t possible through them, then Craig could try to engage senior leadership on his own with his very serious concerns about his project.

If none of the above is possible, another option would be to walk away from the job. This would be a hard decision to make for someone who is trying to prop up a new consulting business and who is looking to have an experience like he’d initially hoped this one would be to showcase in his portfolio, but for both the ethical reasons outlined above, and for the fact that his own business would take a hit in some way if a major product safety issue arose after his training, if he is unable to work through the safety issues, resources constraints, and deeper seeded issues in a company in which there is little or no formal and managed communication evident between divisions, Craig must walk away from this job.

I would offer the former of these two proposed solutions as the one Craig should take as his next step. It obviously would be best for all parties involved if everyone could come to the table and make the right decisions to put some training together, or to find another way to get everyone onto a similar and safe page. If this isn’t possible though, the second solution is seemingly Craig’s only end game, based upon the presented facts.
REFERENCES

