

<b>Title:</b>	<b>Confidentiality Case Studies – Business 2</b>
<b>Type :</b>	<b>Case Study/Forum Exercise/Retreat Exercise</b>
<b>Date:</b>	<b>June 2011</b>
<b>Topic :</b>	<b>Forum Health</b>
<b>Sub-Topic</b>	<b>Confidentiality</b>
<b>Audience:</b>	<b>Forums/All</b>
<b>Categories</b>	<b>Meetings/Retreats</b>
<b>Submitted By:</b>	
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<b>Materials Required:</b>	

## Overview:

Forum Confidentiality as a Success Principle and Forum Norm should be reinforced at every Forum Meeting and Retreat. Use of case studies to illustrate the nuances serves to remind members of the importance of confidentiality for safety and trust in the Forum.

## Description:

This case study is on the topic of business. Read and discuss whether and why there are breaches. Then discuss what the Forum has learned from the case study as teaching devices.

## Case Study:

Sam Pender made what he hoped would be the last detailed presentation on the topic that he and his forum had been sharing ever since he joined YPO. As president of his family company, Sam had never been able to see eye-to-eye with his cousin, Frank, who was an equal shareholder and VP of manufacturing. From Sam's point of view, the company's financial decline during the last few years had been the result of Frank's lack of initiative and his total disregard for quality. From Frank's point of view, the decline was due to intentional, but unidentified actions by Sam to keep the company's value down while the two cousins discussed the possibility of a buyout.

Sam's forum had mentioned a concern that the family conflict created a distraction and lack of focus that would continue to drag the company down. Some of the best employees were leaving and even some of the most risk-averse employees were job hunting in fear that the company would suddenly close or be sold because the two cousins could not reach an agreement on anything, let alone on the buyout.

In this month's presentation, Sam's mood was decidedly upbeat. In two weeks he was scheduled to finalize the buyout that would give him ownership of the company. The price he was paying was more

than he thought was fair, but he felt a premium was necessary to overcome his cousin's belief that the company's problems were a sham designed to deny him the full value of his ownership position.

Getting Frank to the point where he would accept any deal had been a delicate process. Sam was concerned about how long it would take him to turn the company around, but he was energized by the opportunity to focus his undistracted attention on the challenge. He was especially encouraged by the fact that a key employee who had left last year had called Sam the day before to say he would love to have the opportunity to return to Sam's company, assuming that the cousin was gone.

The mood in the forum reflected the change. The entire group felt Sam's enthusiasm. Sam was one of those people everybody wanted to see succeed, and his conflicts during the last few years had been an emotional burden on the entire forum. Feeling that burden lifted boosted each member as the meeting ended.

Two days later, Bill Smithson, one of Sam's forum members, was at the health club working out where he ran into Charlie Lidor, a friend who knew Sam as well. Charlie asked if Bill knew how Sam's business was doing, since Sam had not been the frequent presence at the club that he had been a few years before. Bill said, "I can't tell you anything, but I think Sam's future looks terrific. Maybe if he shows up here you can ask him." Few people outside the company or the forum knew of the family conflict or the impending buyout.

That weekend, Charlie Lidor attended a cocktail party, where he saw Sam's cousin, Frank, talking effusively to a small group. Charlie walked over and said, "Frank, I heard from one of Sam's friends that your business has some great prospects ahead. What's up?" With that the fragile agreement Sam and Frank had crafted fell apart, with Frank totally and wrongly convinced that Sam had been withholding critical good news from him.

***Is there a breach?***

*Yes. Whether it is good or bad news, news is confidential and Bill breached confidentiality when he suggested that to Charlie that Sam's futures look terrific.*

## Leadership

Choose one of the following questions and give each person 2 minutes to respond.

Describe a time that you acted as a true leader. Why did you choose this example?

Describe a time that you acted as a follower. How did it feel? Was it scary? Was it a relief?

What does leadership mean to you?

Give three examples that describe leadership at various levels of a company or organization.

## Strengths

Choose one of the following questions and give each person 1 minute to respond.

What is one of your greatest strengths, and how do you use it in your business (or personal) life?

Name a strength you admire and why you admire that strength.

Describe a time when a strength has turned out to be a weakness.

Describe a time when a perceived weakness turned out to be a strength.