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PERCEPTION MANAGEMENT – THE “X” FACTOR FOR PERFORMANCE APPRAISAL

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The case study is about an employee who received an average performance appraisal from her Project Manager. She believed that she worked hard and displayed a consistent performance in her job. She expected to receive an outstanding rating in her appraisal. However, she was in for a rude shock. Her rating fell, and she felt extremely discouraged when she found her Manager had given her an average rating for her work. When she approached her Project Manager to discuss the issue, she was told that she lacked commitment and may look for a “woman friendly job” She understood that her Manager did not rely on data to support his appraisal. She was upset about the comments that he made on her and shared with Mr. Goel, the HR manager of company. After hearing her grievance, he realized that the company is facing more serious issue than a simple perceptual bias in the performance appraisal process.

Keywords: Gender discrimination, Performance appraisal, Perceptual bias, Team, Software company

INTRODUCTION

Goel, the HR manager of E-Solutions, was empathetic when Shreya was sharing her grievance over the performance appraisal given by her project manager. She questioned him the credibility of the established appraisal system in the organization Goel sensed her experiencing disappointment and perceiving that all her efforts and commitments to her project went unrecognized. He showed patience in listening to her and wished her to treat this incident in isolation and advised her to consider it as a part of her learning in organizational life. He gave her reassurance

that he will take all efforts to reduce these kinds of issues in future and advised her not to let this incident to impede her morale. After she left his cabin, he recalled the statement made by Bala over Shreya, “if she cannot spend longer time, she needs to check for a 9 a.m. to 5 a.m. “a women’s job.”

SHREYA

Shreya completed her Computer Engineering in a small town situated in the western part of India. She received a job offer from E-Solutions, a software company, during her final year placement season. She joined E-Solutions’

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Mumbai division as a trainee software programmer. Shreya believed in hard work. She focused on her task-in-hand and kept up a good standard of work. She was equally responsible in diligently reporting her progress to her project manager and completed her assigned work on or before the deadline.

E-SOLUTIONS

E-Solutions, a software company in Bangalore, Southern India was started in early 90s'. With successful businesses, the company grew from a 25-people headcount to a five thousand. They provided clients with Enterprise Resource Planning (ERP) solutions, web solutions, and mobile applications. They developed custom software and social networking applications for their clients.

E-Solutions have a large clientele across domains such as hospitality, engineering, retail, and government agencies. E-Solutions is situated in more than one location in India. They have a global presence and operate more prominently in the USA, United Kingdom, Australia, Canada and Singapore.

THE TEAM MEMBERS

Shreya's team had six members with various Information technology skill sets. All six of them were fresher and recruited as software programmers around the same time as Shreya. The company provided intensive training to the new recruits for three months; and later, deputed them to an ongoing dashboard designing the project. E-Solutions was designing dashboards for a large hospital client in the USA. During the earlier stage of the project, the team reported to their team leader Sakshi. Sakshi in turn reported to her Project Manager Bala. Later, after her

resignation, the team started reporting directly to Bala. As all six of them were new to working in a corporate environment, they experienced performance anxiety and fear of committing mistakes during the initial stages of the project.

THE PROJECT MANAGER - BALA

The Project Manager Bala's relationship with the team members was always formal as he had very little time to know about each of them socially. The dashboard project was divided into multiple components, and these components were given to multiple teams for development. Bala was given the responsibility of handling all the teams simultaneously. He spent most of the time juggling between project meetings. His routine was to schedule meetings regularly in the morning and in the evening. These meetings were held to brainstorm with the team, get updates on the progress and provide feedback.

The Project

The team was involved in developing the feedback component of the dashboard project. They had to design a prototype and create the documentation for their component. The preliminary work of the project focused on defining a set of dashboards as described by the client. The team was given a deadline to study the critical parameters and to identify and define patient feedback metrics, which would then be used to predict hospital staffs' performance. Once the dashboards and associated metrics were defined, the team moved into the development phase.

The team was required to put in a lot of hard work. During the initial phase of the project, they were instructed to prepare reports at the end of each day. The team reported at 10 a.m. and

worked until 8 p.m. They stayed back only when they had any clients' calls to attend.

SECOND PHASE OF THE PROJECT

As the team was entering into the second phase of the project, workload increased and everyone was put on a tight and crunched deadline. The whole team would reach the office as early as 8 a.m. and leave late in the evening. Since this was the first job for everyone in the team, they were a little stressed out with the new schedules and deadline pressure.

Every morning, Bala allotted the day's task and gave his team members their respective schedules to meet. During late evening meetings, the team discussed their work status and progress with Bala.

During the second phase, the client wanted Bala's team to test two more sub component modules that were developed. Each team member was provided with separate tasks. Bala allotted Shreya and Navneet a module. Hence they both were assigned on common tasks that required similar skill sets and time to complete. Though they were working together on a single module, their work styles and their interaction with their team mates were very different.

SHREYA'S WORK STYLE

Shreya would arrive at the office at 8 a.m., schedule her tasks for the day, check her mails, respond to client mails, chat or have calls with clients, and start working on her allotted tasks for the day. She preferred to work throughout the day with just a couple of breaks in between. Shreya would leave her cubicle only for lunch and tea breaks and would return to work as quickly as possible. All that she wanted was to complete

her work on or before the given deadline. She would join the team for lunch and tea breaks only when she was relatively free. Initially, Navneet and her other team members insisted that she joined them for every lunch and tea break. However, Shreya refused each time. As days passed by, the team members preferred to leave her alone.

While working together on the hospital dashboard project, both Shreya and Navneet were required to have frequent discussions on identifying and defining key feedback parameters. They were five weeks into the project, and both, struggled with medical terminology definition issues more often. Shreya did her best in learning project terminologies, contents, and functional properties. On the other hand, Navneet was very laid-back in his project preparation. During their client's review sessions on defining feedback metrics, they both mutually divided the tasks between them for ground work. Shreya, on many occasions realized that Navneet came for the meetings with very little preparation and never gave a detailed thought to the subject of discussion. Shreya quite diligently updated her client team with the progress. This approach satisfied the client, and they appreciated her work and dedication to the project. She also received appreciation mails from her client for her timely reports and work completion.

Shreya never missed any of her deadlines. She completed her day's task around 8 p.m. and always ensured that she updated Bala of her progress. She would write a detailed mail to Bala on the tasks she had done during the day and the status of each of the sub-tasks. Later, she would assist her team mates, who sought her help during the day. If no one had approached her during the day, she would wrap up her last bit of work and leave for the day. Since, Shreya

stayed in a paying guest accommodation, she made sure that she didn't go late to her residential place.

Rest of her teammates always stayed little longer in the office and offered their help voluntarily to other team members. At the end of the day, they would also go out for dinner either to the office cafeteria or any other eatery in and around the place.

Though Shreya maintained amicable relationship with everyone, her teammates felt that she was not very sociable. On one occasion, Bala walked up to Shreya's desk to seek clarification on one of her tasks and found that she had already left for the day. On enquiry, her team members informed Bala that it was Shreya's routine to leave as soon as her work was over.

Similarly on another occasion, upon receiving Shreya's daily report in an evening, Bala asked her to stay for an urgent briefing. In the intervening time, he received a message from an offshore client who wanted Bala's presence for a video conference. He sent a message for Shreya to wait for their scheduled briefing; he also mentioned that he would return within fifteen minutes after the client's call. However, the call from the client took more than an hour. Shreya waited about an hour and then requested her team mates to inform Bala that she had to catch the last shuttle service to her place and hence could not stay back any longer. When Bala returned after his call, he was annoyed and disappointed to find that Shreya had gone home. Navneet, who was present in that moment, volunteered to take the briefing on behalf of Shreya. Bala left the place responding to Navneet that Shreya's presence was needed for the briefing.

NAVNEET'S WORK STYLE

Navneet also used to reach the office at 8 a.m., schedule his tasks, check mails, and start working. However, he had a completely different work style as compared to Shreya. While working, he preferred to walk around intermittently, meet other team mates, chat, and then return to work. His frequent interactions with everyone gave him an opportunity to get informal updates on each of the team member's work status. He would also make casual visits to Bala's cubicle, discuss his day's work or any issues he was facing and also update Bala on the team's progress. Navneet's informal updates helped Bala be aware of the team's status. He was perhaps the only person in the team whom Bala knew on a personal level. While at a peer meeting, Bala pointed out that Navneet was his "proxy team Manager."

Navneet would also seek team mates' help to complete tasks that he would find difficult to finish. Most days, due to his unstructured style of working, he would stay until midnight to complete his work. Since Bala also worked late, often, Navneet got the opportunity to have dinner with Bala and get dropped at his residence by Bala.

Navneet's friendly approach and sense of humor were looked up by the overworked team to break the monotony at work. Everyone preferred his company and often accompanied him at lunch and tea breaks. Navneet also made sure that the whole team goes together for breaks. This initiative and push from his side brought team members closer.

FATEFUL DINNER

The team spent nearly six months in the project, and it reached final phase in the month of December. Bala thought it would be a good idea

to take the team out for dinner. He called them up for a meeting and extended his invitation to the entire team for dinner on a Saturday. Shreya was reluctant to join as she thought that it would delay her returning home. She reluctantly agreed when invited. However, on the dinner evening, she called Navneet and requested him to inform Bala that she cannot join the team for dinner. Bala and a few other team members were irritated with her for not showing up for dinner. Later, while having a casual conversation around the dinner table, one of the team members mentioned to Bala that Shreya was not very sociable and does not go out for lunch or tea breaks with them. This led through a discussion, and some of them voiced that Shreya preferred to work solely and be left alone, and also that she never volunteered herself for a “buddy’s help” at work and always treated her work as constantly a priority.

THE PERFORMANCE APPRAISAL

At E-solutions, performance of an employee is appraised at two intervals every year – one during mid-year and another during year-end. At E-Solutions, performance appraisals are intended to provide developmental feedback, help employees push harder to achieve goals, and to provide an insight into how their organization perceives them and their work. Project managers evaluated the employees based on the parameters such as approach to work, technical skills, quality of work, handling target, interpersonal skills, communication skills, willingness to develop, personality, code of conduct, and leadership.

At E-Solutions, mid-year appraisal was planned during the month end of December, and everyone was nervously waiting to know their

ratings. Shreya was very confident that her hard work will not go unnoticed. She always kept her work on track and updated Bala on her progress. She believed that Bala would appreciate and give her a meritorious rating. Shreya had imagined a self-appraisal of Level – 1 rating that indicated ‘outstanding performance’.

The time came for her performance results. She jumped at the pop of Bala’s message on her computer screen. She walked up with oozing confidence into Bala’s room. Bala started laying down her strengths. But, in a hurry to know the results, Shreya jumped up and asked Bala her rating. Quite taken aback by Shreya’s urgency, he mentioned that he had given her a Level III. Level III was ‘Satisfactory performance’, which is that she had met expectations, but hadn’t given an outstanding performance. Very disappointed and confused with her rating, Shreya demanded to know the reason. She believed that she was worthy of “Level – 2” rating of “Good performance.” Bala provided her feedback on her work and her attitude towards profession and her co-workers. He clearly laid out her strengths and weaknesses. He mentioned that while her software skills were good, her attitude towards her profession was not up to the mark. And, that needed to change. He also mentioned that she needed to be more dedicated to her work.

Bala explained that he had noticed Shreya leaving office soon, while rest of the team stayed, late and worked on other pending tasks that needed attention. He felt that she did not show involvement like the others did to the project. He drew an example of Navneet and mentioned that he was seen committed in work spending late nights to complete the tasks. He also added that sometimes the company expected its employees to work longer times during project deadlines; if

she cannot spend longer time, she needs to check for a 9 a.m. to 5 a.m. “a women’s job.”

Shreya tried to justify her routine to Bala. She explained why she had to leave early. However, after a while she realized that Bala had made up his mind and felt that further discussion on the issue would strain their working relationship. Finally, she assured him that she will work on the feedback and left the room. She was most disappointed than she had ever been at any point in her life. She also found after a while that Navneet had received Level 1 rating. She felt that it was sheer injustice. Highly demotivated, Shreya felt very detached towards her team, the project, and the organization. When she shared this with one of her team mates, she was told that “sometimes real data does not speak in organizations.”

Shreya felt it was an injustice done to her. While she was observing various criteria for performance evaluation (Approach to work, Technical skills, Quality of work, Handling Target, Interpersonal skills, Communication skills, Willingness to develop, Personality, Code of conduct, Leadership), she felt that except for leadership and interpersonal skills, she deserved to have high scores in remaining parameters. She had client’s appreciation mail for her performance, which was a strong proof for her performance. Moreover, she felt very insulted by Bala’s comment over to find a “woman friendly job” However, she decided to share her issue with her HR without an intention of escalating.

GOEL’S CONTEMPLATION

Goel realized that while his company was in its growth path, there were certain issues need to be addressed immediately without putting in “under the rug.” He understood that the company

needs to take a matured approach in its treatment towards its employees similar to its priorities towards the growth. The company needs to be more mindful and be aware of the symptoms. Goel became aware of the underlying issues sparked, by the by, the statement “a women’s job.” He understood that this issue was far more serious than perceptual biases.

ANALYSIS

Role of Perceptual Factors

The case can be discussed using the perceptual process that influenced Bala to view Navneet and Shreya in a way he preferred to see. Bala’s perception (Slocum and Hellriegel, 2007, pg 340) helped him to select specific information from available data, organize it conveniently, interpret and influence him to respond in a particular way. Based on the information gathered from situations and events, he attempted to make sense of Navneet and Shreya’s behavior and made interpretations. Bala demonstrated his behavioral responses by interpreting the stimuli and organized it conveniently into a meaningful pattern of his choice. It is understood that he reacted in two different and distinct ways through his responses to both. Bala was selective in what he perceived about Navneet and Shreya and tended to filter (Allport, 1993) information based on his preconceived thoughts on both.

The stimuli that Bala observed during certain events involving both Shreya and Navneet helped him develop an impression about them. Bala observed particular stimuli related to Navneet - such as Navneet’s frequent impromptu meetings with him, the habit of updating him about his team’s progress, watching him working late hours, and taking initiative in communicating Bala’s message to Shreya

during her absence and also to the entire team as and when needed.

In the case of Shreya, Bala had registered stimuli - such as, she, not being present at her cubicle when he came searching for her. The other incidents were - Bala being informed by another team member that Shreya has already left for home; Shreya leaving office without waiting to attend the meeting with Bala; and further noted to be absent during team's get-together.

Factors Influencing Bala's Perception

Three important characteristics, as demonstrated by Bruner's perceptual model (Bruner, 1957), can be related to Bala's perceptual process.

Initially, the Bala's perceptions were selective in nature. He did not take the effort to utilize all available cues. He rather focused on the cues that were convenient for him to register. He selected stimuli from the events that were prominent, conspicuous, or extreme with respect to Navneet and Shreya's behavior.

Another characteristic that influenced Bala's perceptual system was the events that consistently occurred with regards to both his team members. Bala perceived Navneet's behavior in a constant positive pattern, while, on the other hand, his perception with regards to Shreya was constantly negative. Both Navneet's and Shreya's behavior influenced Bala's perceptual process in the same way over time and in all situations. Unfortunately, Shreya always found herself under Bala's negative perceptions, and this remained constantly for over a period of time.

The third factor that influenced Bala's perceptual system was consistency. It helped him derive at a consistent picture of both his team

members. He chooses, overlooked, and distorted cues to his convenience and fit them together to form an easily recognizable picture of that particular person. Bala could have noticed and recognized Shreya's sincerity when she consistently updated her daily reports before she left for the day. At the same time, Bala could have questioned Navneet on what made him stay late at work. If he had given more thought or dug deeper to know Navneet's habits, Bala would have found out about Navneet's sluggish pace in completing daily tasks. In this case, Bala did not take the responsibility or the risk of noticing and verifying Navneet's professional habits. Bala preferred to choose the information that was consistent for building his perception. He overlooked or skipped (Borkowski, 2009, pg 557) information that may deconstruct his perception. Probably, he did not prefer to see paradoxes in both. In other words, he did not want to see Navneet as both dependable and as a late or slow performer. In Shreya's case, he did not want to see her as a sincere and also an unreliable person. Ultimately, he wanted to achieve consistency in his perception through distorting cues that are incompatible and by choosing the cues (Johns and Saks, 2010, pg 78) that were consistent with his formed image.

Bala's perception can be explained further through his reliance on external and internal factors. While perceiving, Bala relied on external factors (Slocum and Hellriegel, 2007, pg 343) that were relevant and present within the environment. This apart, he also depended on factors that were internal to himself.

The two important external factors that influenced Bala's selective perception were contrast and repetition. Navneet was positively perceived as he was an extrovert compared to

his other team members. Moreover, his familiarity and proximity with Bala and the rest of team mates were viewed as an additional advantage. Bala also perceived him to be more available than the rest of the team members. While in the case of Shreya, her absence, especially when the rest of the members were available, became a disadvantageous factor in perceptual formation. Another influencing factor to be mentioned is the repetition. A repeated occurrence of an incident is more likely to be noticed than a single occurrence of the same incident. Incidents of Shreya's repeated absence was more prominent to Bala and caused to be another major influencing factor.

Bala was also influenced by factors like personality and motivation, which were personal and internal in nature. As a Project Manager, Bala could have taken an effort to be conscientious before forming perceptions on his team members. He was impulsive while forming an image on both Shreya and Navneet. He appeared to be careless and irresponsible while giving a shape to Shreya's professional image keeping in mind the events that didn't please him. He did not bother to examine the reason behind Shreya's absence. If he had been more conscientious, he would have scheduled a one-on-one meeting, talked to her, confirmed the reasons for her repeated absence, and then organized his perceptions. Another important internal factor that influenced his perception on Navneet was motivation. He perceived Navneet to be efficient and helpful. He was impressed with Navneet's nature of volunteering to do tasks, and the habit of updating him on the day's tasks as well as on the team's progress. Therefore, there could have been a motivation for him to overlook Navneet's habit of working late hours

and failing to enquire the reasons behind this habit.

The above said factors could have resulted in Bala forming certain perceptions about Navneet and Shreya and in viewing both differently. Moreover, Bala's perception resulted in a response that could have developed attitude or feelings towards both.

Factors influencing Attribution

While a perceiver makes attributions about a person's behavior, she, or he infers that the behavior was a consequence of either dispositional (internal) or situational (external) factor. In this case, Bala attributed Shreya's behavior, primarily, as a consequence of disposition. He attributed Shreya's absence and unavailability to her personality and also characterized her as insincere.

He failed to attribute that the behavior could be a consequence of a situation. He had also ignored to relate the external environment factors that were responsible for Shreya's behavior, and the point that she could not have had control over those factors.

Bala judged Shreya's motivated behavior based on his own perceived cause of events without looking into the actual events. Bala's attribution was determined by three factors namely (a) distinctiveness, (2) consensus, and (3) consistency.

In Shreya's case, Bala perceived her behavior to be under her control. He specifically registered her non-availability to be distinctive compared to the rest of the team members. Whenever Bala wanted to meet her officially, she was not present. Her absence during the team dinner too contributed to his belief that Shreya was insincere.

He perceived that this behavior could have been managed by Shreya appropriately.

Shreya's absence was very conspicuous to Bala. He also had noticed that she was absent at the work place while rest of the team members were still present. On the first occasion, when he went to meet Shreya, he found that she had left for the day while other team members were still at office. He also noticed that this was not a one-time affair, and she had left for the day most times. This contributed to his attitude formation. He found that there was a low-consensus in her behavior compared to the rest of her team members. He ignored to realize that there could be a chance of an external situation that was causing her to leave office early.

In addition to the above factors, he also perceived consistency in her behavior. He noticed her being not available at office on more than one occasion. The more consistent her behavior was, the more he preferred to attribute it to personal or internal nature of Shreya's.

It can also be noted that Bala had the tendency to underestimate the external factors while making his judgment. There seemed to be a systematic fundamental attribution error¹ or biases that had distorted Bala's attribution towards Shreya. Though he knew his team members at an official level, he never took an interest to know them at a social level. If he had been aware that he was developing a negative attribution towards Shreya, he could have attempted to understand the reasons that were causing her unavailability during the times she was expected to be present in the office. He could have also discussed the issue with her and found ways to reschedule meetings as well as to condone her. Instead, he attributed all the causes of her behavior to internal factors than external.

Mental Shortcuts

Based on perceptual realities, judgments are made through mental shortcuts such as heuristics². Bala could have applied some shortcuts in judging both Navneet and Shreya, which can be discussed as follows:

In the current case scenario, Bala was primarily influenced by one important characteristic, which is availability. Bala judged both Navneet and Shreya assuming availability. Navneet always seemed to be available even during times his presence was not required. In the case of Shreya, she was unavailable whenever she was needed. This has resulted in a Halo effect that influenced Bala to be biased in his evaluation. In others words, perceiving both Shreya and Navneet on one important or noticeable character would have helped him draw a generalized impression on both. Bala evaluated Navneet as sincere and Shreya as an insincere personality solely assuming 'availability'. The Halo effect could have blinded Bala to other attributes that also could have been examined before forming a falsified impression over Shreya and Navneet. Bala thus failed to guard himself against the Halo effect in rating Shreya's performance. He singled out one trait and used it as the basis for judging Shreya's performance.

The incidents those occurred with respect to Shreya could have appeared as a Bala's self-fulfilling prophecy. The incidents were occurring in consistent with Bala's expectation, and it proved to be accurate for Shreya. They gave the impression as if it went accordingly as expected and also primarily due to her personality. The above shortcuts could have helped Bala in interpreting and evaluating both Shreya and Navneet.

The Role of Impression Management

Navneet exemplified himself through his extrovert behavior with the rest of the team members. With respect to Bala, his behavioral approach seemed more subtly tactical. The approaches and means that Navneet adapted appeared to have captured the attention of Bala as well as influenced his perception positively towards him. Navneet created and sustained a positive impression management (Ivancevich Robert Konopaske and Michael Matteson, 2012, pg 105) to gain Bala's attention and influence over him.

It can also be noticed that Navneet engaged in impression management techniques like ingratiation, self-promotion, and exemplification to influence Bala for perceiving him positively (Wei-Chi *et al.*, 2005).

Navneet created an image of an informal information provider to Bala. His approach proved successful when Bala mentioned to his peer that Navneet was his proxy Manager, and that he was as an unofficial team leader. Navneet also managed to project himself as a sincere person who worked late hours. But, he did this without revealing the real reason for staying late.

Navneet, in various occasions, positioned himself to be viewed positively by flattering Bala. He presented himself by doing a few tasks above and beyond his call of duty. Navneet's presence in the office during late hours also created an image that he was a very sincere worker. It can furthermore be considered as a method of self-promotion to impress Bala.

Navneet's approach proved very fruitful in impression management. He could interact at a social level with everyone in the team and more importantly with Bala. He was also effective maintaining the impression he created with Bala.

It can in addition be noticed in this case that Bala was, in fact, taken to the impression that was created by Navneet.

There was a difference between Shreya and Navneet in impression management. Shreya was less concerned about impression management and was not aware of how others would perceive her professionally, including her boss. On the other hand, Navneet was shrewd in understanding the influence impression management would create in organizational behavior.

Gender Stereotype and Discrimination

Bala could have been influenced by his social construct of how a woman should behave, and what kind of traits and characteristics would be appropriate and inappropriate for a women employees to display while working on the job.

Bala's statement on Shreya to look for a "women's friendly job" can be inferred that he believed the job is meant for men whereas women who do not exhibit the men's characteristics are incompetent and should look for other jobs. He was taken over by the stereotype-consistent (Welle and Heilman, 2007, pg 238). View on Shreya and arrived at a conclusion that she was inadequately possessing essential attributes to perform in male-gender type jobs. This could be viewed as formal discrimination (Welle and Heilman, 2007, pg 238) as Bala either strongly believes that the job is meant for men or gender types the job for men. He formed the perception and expectation accordingly on Shreya. He must be viewing that Shreya was having fewer performance abilities for the job what he believed as male-gender type job. This could have influenced his judgment while conducting the performance evaluation on Shreya.

With respect to Navneet, Bala gave him a high rating to his behavior in the team and was perceived more positively by the other team members; while Shreya was downgraded and perceived negatively for not exhibiting the team nurturing qualities. A non-display of nurturing behavior could be a prescriptive stereotype on women. As a consequence, dispensing a judgment and giving a poor rating based on stereotype could be a formal discrimination on Shreya. It is also important to note that the stereotyping was not only done by Bala; a few members on the team could have contributed to it. Another vital data for the case to note is that the team consist of both male and women members, and one of the women members played a role in reporting the Shreya's behavior to Bala. Therefore, it can be inferred that the gender discrimination could be an organizational issue.

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