

PIONEER SOLUTIONS GROUP

Cedar Valley Manufacturing

Complete Case Packet

A simulation-based case for applied professional decision-making
Adaptable across disciplines where students make professional judgments with real consequences

Dr. Caryn M. Stanley, DBA, PHR
Associate Professor of Management | University of Wisconsin-Platteville

How to Use This Packet

Faculty note: This packet shows what a complete simulation case looks like in practice. It was built for an HR Management course but the mechanic is transferable to any course where students make professional judgments with real consequences.

This packet contains everything a student would receive across two related assignments for one client company - Cedar Valley Manufacturing (CVM). The two assignments are designed so that decisions made in the first one matter in the second. That is the moving-target mechanic.

What's in this packet

- Part 1 - Classroom Context: How Pioneer Solutions Group (PSG) works
- Part 2 - Client Brief: Who Cedar Valley Manufacturing is
- Part 3 - Supporting Documents: Employee file, incident report, manager's notes, handbook excerpt
- Part 4 - Assignment 1: Near-Miss Forklift Safety Incident (individual inbox email)
- Part 5 - Assignment 2: PIP vs. Coaching Decision (individual inbox email - references Assignment 1)
- Part 6 - Assessment Rubric
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Part 1 - Classroom Context: Pioneer Solutions Group

Faculty note: Students receive this on day one. The consulting business framing replaces the syllabus as the primary contract between instructor and student. It establishes professional expectations before a single assignment is due.

About Pioneer Solutions Group

Pioneer Solutions Group (PSG) is a Platteville-based business consulting and human resources services firm. Founded in 2025 by Caryn Stanley, PSG helps organizations across the Midwest design and implement innovative people strategies that improve workplace culture, strengthen compliance, and drive sustainable success.

Our consulting spans industries such as manufacturing, logistics, healthcare, agriculture, and technology. PSG offers expertise in human resource planning, recruiting and onboarding, training and development, compensation and benefits consulting, employee relations and workplace investigations, and compliance, policy, and safety program design.

Organizational Structure

Chief Human Resources Officer (CHRO): Caryn Stanley (Instructor)

This semester, PSG operates with multiple HR Departments (student teams). Each department:

- Chooses its own name and writes a short mission statement aligned with PSG's values
- Defines strategic priorities that distinguish it from other PSG departments
- Rotates functional roles so every member experiences all areas of HR practice

Your Role This Semester

As a member of one PSG HR Department, you will:

- Respond to workplace scenarios through weekly simulated inbox messages (individual and team)
- Complete HR Work Orders such as job descriptions, training plans, and compensation strategies
- Collaborate with your team to manage HR challenges and report back to leadership
- Rotate roles so you gain experience across all HR functions
- Build communication and problem-solving skills you can carry into any career

Assignment Types

Inbox Emails (Individual)

Every week you will receive an Inbox Email either during or immediately after class. These mimic emails you might actually need to respond to in an HR or management role. Responses should be approximately 200–300 words unless otherwise noted. All Inbox Emails are due Sunday night, 11:59 PM.

Work Orders (Team)

Work Orders are team-based deliverables tied to PSG projects. Unlike Inbox Emails, Work Orders are longer collaborative documents such as job postings, compliance checklists, and compensation philosophies. Work Orders are also due Sunday night, 11:59 PM. Each Work Order has its own rubric.

PSG Communication Guidelines

- **Subject line:** Use the one provided in the prompt
- **Greeting/Closing:** Address the recipient appropriately and sign your name
- **Tone:** Respectful and concise. Avoid slang or overly casual language
- **Format:** Clear paragraphs; use bullet points or numbering if it improves readability
- **Proofreading:** Grammar, spelling, and clarity matter

Part 2 - Client Brief: Cedar Valley Manufacturing

About CVM

Cedar Valley Manufacturing (CVM) is a mid-sized manufacturing and distribution company based in the Midwest with approximately 350 employees. The workforce includes production line workers, forklift operators, maintenance technicians, safety specialists, supervisors, and administrative staff.

Roughly 65% of employees are male, the average age is 34, and nearly half have been with the company for fewer than three years. CVM operates a large distribution warehouse and produces packaged consumer goods for retail and wholesale clients. The company has been under heightened scrutiny following OSHA's recent National Emphasis Program on warehouses.

Current Challenges

Perception of HR

Some employees view HR as focused mostly on compliance and discipline rather than as a partner in promoting safety and career development.

Employee Concerns

- Forklift operators and warehouse workers report feeling pressure to prioritize speed over safety to meet quotas
- Newer employees report inconsistent coaching and limited follow-up after initial training
- Long-tenured staff believe younger workers lack the same level of commitment to safety
- Safety committee members worry their reports are not always taken seriously by managers

Retention & Recruitment

CVM faces challenges retaining entry-level workers due to competition from larger distribution firms offering higher wages, signing bonuses, and more predictable schedules. Recruiting skilled forklift operators and maintenance technicians has also become increasingly competitive.

PSG Engagement

PSG is partnering with CVM to:

- Review safety and HR practices to reinforce a culture of accountability and compliance
- Develop stronger safety communication and refresher training to prevent near-miss incidents
- Identify ways to reduce production pressure that contributes to risky behaviors
- Recommend HR and safety committee practices that strengthen fairness, transparency, and employee voice

Part 3 - Supporting Documents

Faculty note: Students receive all supporting documents with Assignment 1. The same documents carry forward to Assignment 2 - students are not given new information between assignments. The moving-target mechanic works because the situation evolves, not because the documents do.

Personnel File: Jake Miller

Position: Forklift Operator (Stand-Up PIT)

Hire Date: 3 months prior to incident

Experience: Previous seasonal warehouse work; limited forklift experience prior to CVM

Education: High school diploma

References: Reported as punctual and hard-working, but sometimes rushed tasks

Training Records

- Completed OSHA-required Powered Industrial Truck (PIT) training and certification at CVM
- Training included: pre-use inspection, safe speed limits, pedestrian awareness, and securing loads
- Signed acknowledgment of training and company safety policies on file
- Passed written exam and driving test

Date of Certification: 2 months prior to incident

Trainer: Mark Delgado, Safety Manager

Informal Coaching Notes

Supervisor: Maria Lopez (Safety Committee)

Date: 1 month prior to incident

Jake observed driving slightly above posted warehouse speed limit. Maria provided verbal coaching, reminding him that safety must take priority over meeting quotas. Jake acknowledged the feedback and said he would be more mindful.

Early Performance Review

Supervisor: Daniel Reyes, Shift Manager

Date: 2 weeks prior to incident

- **Strengths:** Quick learner, reliable attendance, willing to take on extra shifts
- **Areas for Improvement:** Needs to slow down when operating equipment, double-check load security
- **Overall:** Meets expectations, but safety awareness requires improvement

Corrective Action Form (Post-Incident)

Incident: Near-miss safety violation - unsecured load fell near pedestrian walkway

Violations: Exceeding safe operating speed, failure to secure load, failure to wear seatbelt

Corrective Action: Written warning. Required to complete refresher forklift safety training within 14 days

Employee Comments: Jake stated he felt pressured to meet quota and thought the load was fine

Safety Incident Report

Date of Incident: 09/30/2025

Time: 10:15 AM

Location: Main Warehouse - Aisle 4

Reported By: Maria Lopez (Senior Employee, Safety Committee Member)

Employee Involved: Jake Miller, Forklift Operator (3 months tenure)

Type of Incident: Near-miss (unsecured load, pedestrian risk)

Description

While operating a stand-up forklift, Jake Miller was transporting a pallet of boxed products stacked to approximately six feet high. Jake took a turn at a speed above the posted limit, causing the top tier of boxes to shift. Two boxes fell, with one landing within two feet of a pedestrian walkway. Another employee was walking toward the break area at the time but was not struck.

Maria Lopez observed the event, stopped Jake immediately, and pointed out the shifted load. Jake responded defensively, stating he was running behind schedule and believed the load was secure.

Violations Identified

- Failure to secure load properly (boxes not strapped/wrapped)
- Exceeding posted forklift speed limit
- Failure to wear seatbelt while operating forklift

Immediate Actions Taken

- Maria Lopez instructed Jake to stop forklift operation immediately
- Load was re-secured before continuing
- Jake was verbally reminded of the safety policy
- Incident escalated to shift manager and HR for formal review

Recommendations

- Jake Miller to complete mandatory forklift safety refresher training within 14 days
- HR to issue a formal written warning and place in personnel file
- Safety Committee to conduct a refresher toolbox talk on load securement and pedestrian safety

- Management to review production quotas to ensure safety is not compromised by unrealistic expectations
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Manager's Notes: Cedar Valley Manufacturing

Production Quotas and Pressure

Several employees, including Jake Miller, have expressed that they feel pressured to meet daily and weekly production quotas. The quota system was implemented last year to keep pace with increased demand from retail clients. While the quotas are achievable, many workers say the pace creates tension between productivity and safety. Forklift operators report that they sometimes cut corners to avoid falling behind schedule.

Safety Culture

Maria Lopez, a respected senior employee and member of the Safety Committee, is viewed as a credible voice for safe practices. However, she and other committee members have raised concerns that safety recommendations are often acknowledged but not consistently enforced by supervisors.

Prior Complaints and Observations

- At least three informal employee comments have mentioned the conflict between meeting quotas and maintaining safety practices
 - Maria Lopez previously coached Jake Miller for driving too quickly through warehouse aisles
 - A supervisor noted in Jake's early performance review that he is reliable and hardworking but needs improvement in slowing down and following all safety checks
 - HR is aware of OSHA's increased scrutiny of warehouses and wants to avoid penalties
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Employee Handbook Excerpt: Forklift & Warehouse Safety

The following policies apply to all employees operating powered industrial trucks (PIT). These rules are based on OSHA standards and CVM safety procedures. Failure to comply may result in disciplinary action, up to and including termination.

General Requirements

- Operators must complete CVM's OSHA-compliant forklift training and maintain valid certification
- Operators must wear a seatbelt whenever the forklift is in operation
- Daily pre-use inspections are required before operating equipment
- Operators must obey posted warehouse speed limits (5 mph in aisles; 3 mph near pedestrian zones)
- Loads must be secured with shrink wrap and/or strapping when stacked above shoulder height
- Pedestrian right-of-way must always be observed

- Supervisors and Safety Committee members may stop equipment use at any time if unsafe behavior is observed

Progressive Discipline for Safety Violations

- **First offense:** Verbal warning and coaching
- **Second offense:** Written warning and mandatory refresher training
- **Third offense:** Final written warning or suspension without pay
- **Fourth offense:** Termination of employment

Serious violations that endanger others may result in immediate written warning or stronger action depending on severity.

Part 4 - Assignment 1: Near-Miss Forklift Safety Incident

Faculty note: This is the first inbox email students receive for the CVM client. The decision students make here - particularly around discipline - becomes the anchor for Assignment 2. Students do not know that when they complete this assignment.

Email Prompt

From: Daniel Reyes, Shift Manager, Cedar Valley Manufacturing

To: PSG Consultant

Subject: Near-Miss Forklift Safety Incident

Good morning,

Yesterday, we had a near-miss safety incident in the warehouse involving Jake Miller, a new forklift operator. Jake was transporting a tall load when he took a turn too quickly. The load was unsecured and two boxes fell, with one landing close to a pedestrian walkway. Thankfully, no one was injured. Maria Lopez, one of our senior employees and a member of the Safety Committee, stopped Jake immediately and filed an incident report. During the investigation, we confirmed that Jake was not wearing his seatbelt, was exceeding the posted speed limit, and had not properly secured the load. Jake defended himself by saying he was behind on his quota.

Given OSHA's current emphasis on warehouse safety, we need PSG's support to address this issue quickly and appropriately. We are concerned about both Jake's behavior and the broader perception that production quotas push employees to cut corners.

Please review the attached documentation and respond with your recommendation.

Student Task

After reviewing the attached documentation, respond with a professional memo addressed to CVM's HR Director. In your memo, answer TWO of the following questions:

- What immediate disciplinary action should be taken with Jake? How should HR ensure accountability while reinforcing fairness?
- What corrective actions (such as training or coaching) should be implemented for Jake and for other operators?
- How should CVM address employee concerns about production quotas creating unsafe conditions?
- What is the role of the Safety Committee in this situation, and how should they communicate the incident to the rest of the company?
- What updates to CVM's safety program would you recommend to prevent future incidents?

Expectations

- 200–300 words, professional tone
- Address the recipient appropriately and sign your name
- You may need to do a bit of additional research

Part 5 - Assignment 2: PIP vs. Coaching Decision

Faculty note: This assignment explicitly instructs students to consider their response to Assignment 1. A student who recommended a written warning in Assignment 1 now faces a situation where Jake has made some progress but still has issues. The question is whether their new recommendation is consistent with - or a defensible departure from - what they said before. This is the moving-target mechanic made visible.

Email Prompt

From: Caryn Stanley, CHRO - Pioneer Solutions Group

To: PSG Consultant

Subject: PIP vs. Coaching Decision

We've got a gray area situation with one of our clients, Cedar Valley Manufacturing.

Supervisor notes show that Jake Miller has made some progress since his last safety issue but still falls behind on documentation and communication. His work quality is fine, and he's reliable, but he gets defensive when corrected.

The site manager isn't sure whether to move him into a Performance Improvement Plan (PIP) or keep working with him through coaching and feedback. Please consider your response to Assignment 1 when responding.

Student Task

Please send a short (1 page or less) response outlining:

- The difference between a PIP and coaching
- Which approach you'd recommend for Jake and why
- What steps the manager should take next (timing, documentation, tone)

Be specific and practical: think like an HR advisor, not a compliance officer.

Part 6 - Assessment Rubric

Faculty note: This same rubric is used for all inbox email assignments. The rubric does not change - the cases do. Accountability comes from the scenarios, not from reinventing assessment criteria each week.

Total Points: 30 | Three criteria at 10 points each

Criteria	Best (10 pts)	Better (5 pts)	Good/Developing (2 pts)
Content Accuracy & Relevance	Thorough, insightful, and directly connected to HR principles	Addresses the question with clear, relevant points	Responds to the question but is surface-level or vague
Reasoning & Justification	Strong, evidence-based justification that anticipates impact	Provides logical reasoning and some supporting examples	Minimal or general explanation
Professional Communication	Highly professional; polished structure, clear tone, error-free	Organized, mostly professional, minor lapses	Basic organization, some casual tone or errors

Part 7 - Faculty Notes: The Moving-Target Mechanic

What the mechanic does

In Assignment 1, students make a disciplinary recommendation about Jake Miller. Most will recommend some form of written warning, corrective action, or coaching - reasonable responses given the documented violations.

In Assignment 2, weeks later, students are told Jake has made some progress but still has issues. They are explicitly instructed to consider their Assignment 1 response. Now the question is not just 'what should happen to Jake?' but 'what should happen to Jake given what I already said?'

This is where professional judgment becomes visible. A student who recommended a written warning in Assignment 1 and now recommends a PIP without acknowledging the escalation needs to explain why. A student who recommended coaching in Assignment 1 and now recommends a PIP because the situation has materially changed is demonstrating exactly the kind of contextual judgment the mechanic is designed to surface.

What to look for when grading Assignment 2

- Does the student reference their earlier recommendation?
- If they changed course, do they explain why the situation warrants it?
- If they stayed consistent, do they show it was a reasoned consistency rather than repetition?
- Does the response reflect the full picture - Jake's progress, his defensiveness, the documentation gaps?

Why this works across disciplines

This case happens to be in HR, but the mechanic works in any course where students make professional judgments. A business strategy course could use evolving market conditions. A nursing course could use a patient whose situation changes between clinical encounters. A law course could use a client whose circumstances shift between consultations.

The core requirement is: decisions made earlier in the course must matter later. The instructor's job - supported by AI tracking tools - is to make sure they do.

A note on AI and tracking

The first semester this simulation ran, student decisions were tracked manually. That is unsustainable at any real class size. The AI Decision Record Framework (a separate document in this resource set) describes how to use AI to build and maintain a Decision and Development Record for each student - so that when Assignment 2 arrives, you know exactly what each student said in Assignment 1 without reviewing thirty submissions from memory. The AI keeps the record; you do the grading.