

DEFICIT STRATEGIC PLANNING: THE CASE OF AN AMERICAN PHARMACEUTICAL COMPANY OPERATING IN PUERTO RICO

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BACKGROUND

Puerto Rico is a little industrial giant located in the Caribbean Basin. This island of roughly 3500 square miles and population of 4 million people is a highly industrialized state with an array of industries ranging from high technology manufacturing to services provider. One of the largest industrial sectors in Puerto Rico is the pharmaceutical industry with outbound shipments of pharmaceutical products in excess of the 31 billion dollar mark in FY 2003¹. Twenty five percent of all pharmaceutical products manufactured in the U.S. are shipped from Puerto Rico, and 16 of the top 20 selling prescription drugs in the U.S. are produced in P.R.² Most of the companies come from the United States, although, many European pharmaceutical's are opening operations in Puerto Rico. On 1898 after 400 years of Spanish domination, Puerto Rico became part of the United States of America at the end of the Spanish-American War. The implementation of American business models with the influx of large capital moved the island in a matter of sixty years from an agrarian rural state to an industrialized one, competing in global markets (Scarano, 2008). The first fifty years of American ruling set

¹ This information was obtained from the Puerto Rico Industrial Development Company (PRIDCO) web-page <http://www.pridco.org/> and the web-page of the Government Development Bank of Puerto Rico <http://www.gbd-pr.org/> accessed August 13, 2009.

² Ibid

The information for this project was obtained from MBA students at the Inter American University of P.R. Metro Campus. They offered the information but requested anonymity for themselves and the company they worked for.

the bases for the rapid industrialization that started in 1950 with the Bootstrap Program of the government of the newly formed Commonwealth of Puerto Rico (Cochran, 1959; Ledesma, 1994; Scarano, 1993; Wells, 1979).

Already by 1915 the University of Puerto Rico, and the College of Agriculture and Mechanic Arts were founded as Land Grant Institutions primarily for preparing teachers, engineers and administrators. By 1912 with the same goals in mind the Inter American University of Puerto Rico was founded by the Presbyterian reverend John Will Harris³. In a lapse of 50 years the island infrastructure expanded with the creation of a road system interconnecting the coastal cities with the interior towns, concurrently with the creation of the electric energy, waters and sewer public corporations. The Department of Public Education, as it was known then, opened education to all children of the island and public health services programs improved health and controlled many hazards due to lack of medical and allied health programs. In a nutshell, within fifty years the island was ready to attract a variety of industries as a mean of prosperity. The local government created the Government Development Bank of Puerto Rico and the Puerto Rico Industrial Development Company whose primary mission is to lure industries to Puerto Rico. These two government entities achieved a noticeable success by attracting many companies to the island. A close look of the pharmaceutical industry confirms this postulate (see Table 1).

These two government entities were very successful attracting many important American companies to Puerto Rico in a matter of 10 years, primarily by way of tax incentives followed by the availability of a low cost educated labor force, robust

³ Information obtained from various universities catalogs.

educational system, stable government and sound fiscal policy(Cochran, 1959; Ledesma, 1994; Scarano, 2008; Wells, 1979).

LITERATURE REVIEW AND CULTURAL DILEMMA

In his monumental work, Daniel Wren and Arthur Bedeian (2009), presents chronologically the development and formation of the management thought from antiquity to modern times. His work unfolds the management discipline as a series of accumulated knowledge and experiences in open-ended activities that allows a better use of the resources at hand to organizations. According to Wren & Bedeian (2009), managers operate organizations and make decisions within a given set of cultural values and institutions, with open-system characteristics where managers affect their environment and in turn are affected by it (p. 5). Wren & Bedeian (2009) further states, that the past should be studied as a mean to a logical and coherent understanding of the present, since the present is a synergism of all our yesterdays (p. 4). Management as a human activity is a product of culture, and culture is the total heritage of non-biological, humanly transmitted traits, including the economic, social, and political forms of behavior associated with the human race. "Human behavior is a product of past and present cultural forces, and the discipline of management is also a product of the economic, social, and political forces of the past and the present (Wren & Bedeian, 2009, p.5)." As Wren & Bedeian (2009) concludes, management thought is both a process in and a product of its cultural environment and must be examined within the specific cultural framework where it is developed (p. 11). This management thought obviously includes strategies conception and operations planning.

The famous anthropologist, Edward T. Hall (1976), presents clearly how culture conditions the individual to perceive its world and other persons in the world. He further explains the cultural synergism that allows humans to adapt to the environmental changes. For example, he presents how people in England during the early days of the Industrial Revolution, when brought into the factories to work, the first generations of mill hands had to be conditioned to the factory whistle and tight linear-scheduled time. Like all pre-industrial peoples, when they earned enough to cover their needs they would quit and go home, much to the consternation of the owners. As generations passed people got adapted to the new rules of the industrial world such as the whistle and tight linear-schedules (Hall, 1976, p. 5). This form of scheduling compartmentalize, therefore making it possible for the individual to concentrate on one thing at the time (Hall, p. 18). Furthermore, northern European cultures heavily influenced by the cold climate developed linear thinking and linear time as a mean to survive in such harsh environment (Hall, 1976). As they moved into the Industrial Era the concept of tight linear thinking, task oriented and linear monochronic time got imprinted into the cultural values of the Europeans and the Euro-Americans.

Conversely, says Hall (1976), people from warmer climates developed values related to circular thinking, relationship oriented, and polychronic time. As cultures moved into the Industrial Era, some perceived scheduling, compartmentalization and task as necessary assets while the others perceived this type of behavior as a tyrannical violation of the individual and its dignity (p.23). He also presents the process of cultural contexting and the importance of such process to the understanding between individuals within a specific culture. Context as presented by Hall (1976), is a continuum moving

from low to high, where high context is one in which little information is coded into the interpersonal exchange while low context conversely requires mass of information vested in the exchange (p. 91). In other words, words and sentences have different meanings depending on the cultural context they are embedded. He states that the reason “most bureaucrats are so difficult to deal with is that they write for each other and are insensitive to the contexting needs of the public. The written regulations are usually highly technical on the one hand, while providing little information on the other. They are a mixture of different codes or else there is incongruity between the code and the people to whom it is addressed.” Furthermore, modern management methods are less successful than they should be, because as they attempt to explain all details (low-contexting) manager’s fail in their recommendations to take into account what people already know (Hall, 1976). A problem occurs when cultures of different cultural context come into contact primarily in the low context environment such as the industrial world. The United States in accordance to Hall is a low context country, although not as low as Germany or Scandinavia, while the Latin Countries are high context countries.

This takes us to the problem of developing adequate models that will explain cultural behavior. By its nature, models are deficient since they are a representation of a reality that will exclude many ancillary elements for the sake of simplification. Many academicians have attempted to explain cultures by means of clustering countries around a limited amount of elements. Such is the case of the model presented by Geerte Hofstede (1980), in his work titled, “Culture’s Consequences”, where he clustered cultures using power distance, uncertainty avoidance, masculinity-femininity and individualism-collectivism. Hofstede bring more elements to the work already presented by Edward T.

Hall and others, with the only difference that he had the opportunity of surveying individuals from different cultures that worked for the same multinational corporation around the world, which he concealed with the Hermes Corporation name, in reality IBM. Hofstede's model opened a window of opportunity to survey other cultures, nonetheless, the problem basically resided in the selected population of IBM managers and the inferences he extended to the general population of the countries where he surveyed the IBM managers, the result basically represented the culture of IBM managers rather than that of the general population (Hampden-Turner & Trompenaars, 1997). Many researchers have used elements, data and conclusions from Hofstede's work, however, Fons Trompenaars with Charles Hampden-Turner (1998), transcended Hofstede's work with a database representing the cultural variations of the world more accurately not only those of IBM managers and employees.

Although Trompenaars and Hampden-Turner (1998) model is more accurate explaining cultural complexities, Harrison and Huntington (2000) argue that cultural values are the key elements to the progress or stagnation of nations. They basically conclude that the main reason why some countries or cultural groups are more progressive than others is due to their cultural values, since they are the driving force behind the economic apparatus, the political structure, the industrial formation and social performance of a country. Good examples of values related to progress are work ethic, fatalism, government corruption, education, ethnic groups, elites, religion, law enforcement, etc.

This takes us directly to the pioneering work on Puerto Rico performed by Cochran (1959), dealing basically with the same postulates of Harrison and Huntington.

He presents in chronological order the changes in the Puerto Rican society (Cochran, 1959) as a consequence of the American cultural influence since 1898 when Puerto Rico passed from 400 years of Spanish domination to American domination, when Spain lost the Spanish-American War (Scarano, 2008). The American Government instituted a series of changes in line with the cultural heritage of the United States. Those changes allowed Puerto Rico to move into a fast progressive path in a 60 years span. By the beginning of the 20th Century Puerto Rico had no universities and the illiteracy rate was more than 80% (Scarano, 2008). By the end of the same century, there were 2 large university systems, the University of Puerto Rico with more than 80,000 students distributed in 13 campuses and the Inter American University of Puerto Rico with more than 42,000 students distributed in 11 campuses, both systems with academic programs of excellence ranging from associate degrees to doctoral degrees, professional schools such as engineering, law, medicine and architecture.

Many American companies established operations in Puerto Rico transferring technologies and knowledge to their local operations (Agrait, 1994; Ledesma, 1994). Although Puerto Rico already had some industries since the Spanish ruling, such as tobacco and sugar cane processing plants, they were not significant in terms of technology transfer in such a large scale as those produced by the Bootstrap initiative of the Puerto Rican Government (González, 1993; Scarano, 2008; Tirado, 1997). One key element was the fast growth of academic programs in Business Administration at both the University of Puerto Rico and the Inter American University between years 1930 and 1950. This allowed nurturing local talent to serve as managers and administrators in the American factories operating in Puerto Rico.

Those managers and administrators were educated on the principles of Scientific Management serving as change agents towards a new emerging society (Matheu, 1994; Wells, 1979). The main problem was the conflicting cultural bases of the Puerto Ricans and the Americans in the workplace. As Wells (1979) says, your visit to Puerto Rico feels very American; however, the Spanish culture is deeply rooted in Puerto Rico (p.1-20).

The American Governor of Puerto Rico in 1940, Rexford G. Tugwell expressed that many cultural values of the Puerto Rican were barriers to the economic progress of the island, specially “la dignidad del individuo” which is a type of individualism, the man’s watchful guard over his own wholeness or the inner integrity or worth which every person is supposed to have originally and should guard jealously (Cochran, 1959).

Tugwell wrote, that “the Puerto Ricans possess a pride which is almost an obsession and which leads frequently to the substitution of fancy for fact. “Dignidad” was a dysgenic force which ran all through insular life and there was no apparent means of correction” (Cochran, 1959, p. 125). For Tugwell as well as others saw many cultural differences as problems in need of correction with negative consequences from an American perspective.

Nonetheless, many American companies have opened operations abroad with an ethnocentric outlook conflicting tremendously with the local values of the workers. Such is the case presented by Malnight (1995) where the European subsidiaries of the pharmaceutical corporation Eli Lilly were researched to determine if the traditional ethnocentric approach of the corporation changed towards a more geocentric outlook with global competition. The research demonstrated that global competition served as a motivator, depending on the complexity of the operation, towards a more geocentric

pluralistic attitude. It is important to point out that Puerto Rico is host to a very large number of pharmaceutical corporations. Many students of the MBA program at the Inter American University Metro Campus, working for pharmaceutical companies expressed their dislike in regard to an array of management decisions made by their American superiors or counterparts in the United States. Many failed attempts have been made to obtain scholarly research dealing with the cultural conflicts in Puerto Rico. The apparent reason for this lack of research effort seems to be that both contrasting cultures perceive the problem of the cultural biases and prejudice but neither sees a high priority in solving those problems, or they avoid it due to discomfort with the issue.

Judith Nine-Court (1994) and Morales-Carrion (1994) present the cross-cultural issues between Americans and Puerto Ricans. They make a dichotomous analysis discussing contrasting and diverging cultural elements, and agree that the success achieved by the interacting cultures has been the willingness to make the operation one of excellence. Nine-Court (1994), uses Edward T. Hall cultural elements and confirms the fact that Puerto Ricans are in the high context side giving high priority to family and relationships oriented. A closer look at her analysis shows that some of the elements that she contrasted can be associated with Trompeenars' (1998) cultural element of ascription vs. achievement (p. 105-122). Ascription explains the use by Puerto Ricans of titles and the vesting of qualities to persons who may not have performed at the high levels expected by Americans who are achievement oriented. When compared to Scaranos' (2008) historical review, both articles agreed that Puerto Ricans have values strongly rooted in the African-Spanish heritage of more than 400 years of Spanish ruling. Otero (1998), presented how the customs and moral values of Puerto Ricans influence industrial

productivity. In his deposition, again, the African-Spanish values outstand as the driving force in the Puerto Rican culture while the north European values dominate the American culture. Nonetheless, after 100 years of American administration, American values are making strong inroads in the local culture. Example of such can be observed in the changes in family structure and the slow movement from formality to informality at work. Although not as crucial as Cochran exposed in 1959, the problem still persists with cultural confrontations and distrust between planners in the USA and operations in Puerto Rico.

THE STRATEGIC SITUATION

The first companies to open operations in Puerto Rico were American companies, all of them with management teams composed by managers from the mainland. Decision making and processes were designed in the mainland U.S.A. and exported to Puerto Rico without much consideration to the environmental problems of strategic planning. First, the economic standing of the island was less robust in comparison to the other 48 states of the nation. Second, the social-demographic composition of the island was diametrical different from the United States (see Table 2). Third, the island political situation was controlled by a Congressional Committee. The legal structure of the island was based on Napoleonic code versus Common Law. Fourth, the technological base was agrarian and far less developed. Fifth, cultures were diametrically in opposition (see Table 2). Suggesting that culture at times is a strong deterrent to the mutual well-being of both the Puerto Rican worker and the multinational enterprise.

Furthermore, globalization of markets is forcing companies to develop strategic plans to stay competitive with the eventual rethinking of old parochial and ethnocentric

attitudes (Nonaka, et. al., 1995). By the early part of the 19 Century, American tobacco companies established in the island encountered many of the environmental problems of strategic management discussed in class.

The cultural problems became more noticeable after the industrial boom of last century 50's and 60's decade (Tirado, 1997; Wells, 1979). Those were the years when workers with an Afro-Hispanic culture and supervisors with an Anglo-Saxon culture came in daily contact, facing an array of problems that can be attributed to the cultural biases and prejudices of workers and supervisors. Nonetheless, with the continuous interaction of the cultural groups a better relationship emerged in comparison to the intolerances of the 50's and 60's. The distrust still exist, and the problems persists due basically to the same factor of cultural myopia from both sides rooted in the ignorance of each other culture.

This work deals with the lack of interest by a pharmaceutical company in assessing the cultural consequences in the execution of the strategic plan for the Puerto Rican facility, and how American managers downplayed the cultural elements of the environment that eventually evolved into an array of problems at all levels.

SITUATION

From the literature review it can be argued that the disparities are not caused by a dichotomy of good vs. bad, but by the socialization of the individual based on cultural differences. According to Haviland (1997), the socialization process pushes the individual to make assumptions. Therefore concludes Harris (1989), the individual work using a deficient cultural referent which in turn reflects in the behavioral pattern and the decision making process. Ash (1946), presented how some central traits that he classified

as cold-warm variables, induced the individual to create peripheral traits or biases to form a dichotomous form of logic. Further research indicates that people form impressions of others on what it is call the Halo Effect influencing the relationship among groups, specially the interaction between culturally diverse groups (Murphy, et. al. 1993; Murphy et. al. 1992). Dovidio (1993) further states that individual's with racist feelings or "deficient cultural referent" hide those feelings in the presence of a normative structure that could clearly identify them as racist or any other non acceptable behavior. Conversely he further states that in the absence of a clear normative structure or condition that could associate them with such negative behavior, the person allow the biases and prejudices to control the actions.

This brings the central problem between American managers and Puerto Rican workers, where both groups have a strong set of dichotomous values (refer to Table 1) that are in opposition to each other, and they come in contact in the workplace. In the presence of a strong normative structure forbidding racist behavior both groups way around is by hiding the real feelings towards each other. This kind of behavior hides deeply any dangerous behavior restricting itself within the boundaries of the accepted behavior, therefore, avoiding any labeling that could lead to legal hazards or a damaging reputation. It could be hypothesized that culturally diverse workers in Puerto Rico tend to hide their biases due to normative structures of the organization where they work, in this case a pharmaceutical operation. It can also be hypothesized that strategic planning is affected by the distrust between Americans and Puerto Ricans.

DISCUSSION

There's some evidence of this last assertion with the statements from Cochran's (1959) work where he says that Americans working in Puerto Rico openly expressed their perceived superiority over Puerto Ricans. However, it can be also hypothesized that the distrust diminishes with the continuous interaction and knowledge of each other culture.

It is evident that the people of Puerto Rico has adopted many habits and cultural traits from continuous interaction with the United States, nonetheless, they are affected by the parochial factor caused by the physical isolation from other countries and cultures. Many Americans live and work in Puerto Rico and many Puerto Ricans are educated in the United States. This continuous cultural interaction with Americans since 1898 has allowed the coexistence of both cultural referents in the workplace. Although the American's have adopted a more universal posture towards other cultures because of the pluralistic society and the international preponderance of the Nation, many American managers lack the cultural sensitivity or knowledge to work with contrasting cultures the distrust and racist behavior are far from being eradicated in the workplace in Puerto Rico by both groups.

The pharmaceutical operation in this paper prepared a strategic plan for the Puerto Rico operation without taking into consideration opinions or recommendations from the local management team. The operation is notorious for a broken communication channel between local and mainland management. Previous two plans failed to take into account the concerns or recommendations to improve productivity using local consultants and other resources available from nearby universities. The main concern of the mainland

strategists was the need to boost reduction of costs resulting from what they perceive as a lack of proper utilization of quality control tools. The American inspectors concluded that workers rejected the introduction of new improved methods and complained about the lack of respect for their efforts to boost productivity using local talent. The workers also considered the rigorous use of complex mathematical tools as a waste of time and the long hours of training as unproductive and detrimental to morale.

Local managers have had a long fight with mainland managers in regard to offering training in English for workers which are not fully bilingual, eventually resulting in the lack of acceptance of any new initiative that they don't understand. Local management proved that using local talent improved acceptance and participation of workers. They also outlined that consultants from the USA were more expensive and added more costs to the local operations. Furthermore, they argued that a local consultant which offered the Failure Mode Effects Analysis and the Statistical Process Control trainings in Spanish was 50% inexpensive and far more qualified than the American consultant⁴. Mainland managers responsible for the planning and decision stressed that the consultants from the USA were more capable than the local ones. It turn out that the American consultants were less academically prepared and had much less experience than the local ones (see Table 3).

Those employees that were trained in Spanish using local consultants implemented the newly acquired knowledge and tools faster with less complaints. It seems that the knowledge was acquired much faster and the employees felt less fearful of exposing themselves as ignorant or less capable due to their lack of understanding of the

⁴ The source of information, MBA students working for the pharmaceutical did not provide the cost of each consultant due to a confidentiality policy in regard to costs.

English language. Production in the areas of these workers was 15% higher in a three month period while other similar areas maintained a modest increase of 2.5%.

These figures were presented last November to the director in charge of strategic planning in the United States and after many debates they agreed first to include Puerto Rican management in the strategic planning process, second, they agreed to use local talent as recommended by local management and to utilize external resources when the local talent could not cover the demanded request. Finally they agreed to produce a strategic plan covering the idiosyncrasies caused by the cultural differences.

It seems from the literature review and the case information that as people obtain more education, are more in cross-cultural contacts and the markets globalize more, organizations will be forced to productively utilize all their resources, specially the human resource, as a mean of competing. This will necessarily demand the elimination of cultural barriers and distrust among culturally diverse people interacting in the workplace and the involvement of all management in the strategic planning process even if they are culturally different. The case in Puerto Rico is not an isolated one and many MBA students in the Inter American University working for American, European and Japanese operations complaint on the lack of participation they have in the strategic planning and decision making process. They further complaint that the lack of participation in the planning process result in the sub-utilization of resources, increase waste and duplication of effort.

Table 1**Major Pharmaceutical Operations in Puerto Rico**

- Abbott Laboratories
- Allergan Inc.
- Amgen Inc.
- Astra Zeneca Plc
- Aventis
- Baxter International Inc.
- Becton Dickinson & Co.
- Biovail Corporation International
- Bristol-Myers Squibb Company
- Clairant
- Cardinal Health Inc.
- Ceph International Corporation
- Eli Lilly and Company
- F.H. Faulding & Co. Ltd
- Glaxo SmithKline
- ICN Pharmaceutical Inc.
- Ivax Corp.
- Johnson & Johnson
- Knoll B.V.
- Merck & Co.
- Monsanto Company
- Mova Pharmaceutical Corp.
- Mutchler Chemical Company Inc.
- Mylan Laboratories Inc.
- Novartis Consumer Health
- Pfizer Inc.
- Procter & Gamble Company
- Schein Pharmaceutical
- Schering-Plough Corporation
- Watson Pharmaceuticals, Inc.
- Wyeth

Source: PRIDCO (<http://www.pridco.com>)

Table 2

American and Puerto Rican Values

American	Puerto Rican
North European, Euro-American Culture	African-Hispanic-Arab Culture
Work-oriented Culture	Family-oriented Culture
Low Context, explicit	High Context, implicit
Confrontation, aggressiveness	Reticence, Indirection
Tasks and Rules	Relations and Face Saving (“dignidad”)
Individualism	Familism
Self-motivation	Family-motivation
Perfunctory in relationships	Intimacy in relationships
Informality at work	Formality at work
Comfort	Style
Liner and sequential time	Circular and synchronic time
Fast Changes	Slow Changes
Time is a Commodity	Time is a Process
Monochronic Task Orientation	Polychronic Task Orientation
Serious and Intense	Happy-Go-Lucky and Relaxed
Celebration of Effort	Celebration of Life
Achievement	Ascription

Adapted from Nine-Court (1994); Nichols and Associates Washington, D.C.; Trompenaars et. al. (1998).

Table 3**Comparison of Consultants Qualifications**

Case One

American Consultant	Puerto Rican Consultant
B.S.Ch. Eng. University of Michigan M.S. Ch. Eng. University of Illinois	B.S. Ind. Eng. University of Puerto Rico B.S. Ch. Eng. University of Puerto Rico M.S. Ch. Eng. University of Puerto Rico M.B.A University of Chicago Ph.D. Ch. Eng. University of Illinois
12 years experience in the chemical industry	23 years experience with pharmaceutical processes
Monolingual	Fluent in English, Spanish and French

Case Two

American Consultant	Puerto Rican Consultant
B.S. Math and Statistics University of Texas Austin M.B.A. Operations Sam Houston University Texas	B.S. Industrial Eng. University of Puerto Rico M.S. Industrial Eng. Case Western University M.B.A. Operations Research Sloan School of Business MIT Ph.D. Operations Research Stanford University
8 years of experience as consultant in Operations Management and Productivity	17 years of experience as consultant in Production and Operations Management
Fluent in English and German	Fluent in English and Spanish

Case Three

American Consultant	Puerto Rican Consultant
B.B.A. Industrial Plant Management	B.B.A. Human Resources University of Puerto Rico M.B.A. Industrial Plant Management Inter American University of Puerto Rico M.B.A. Human Resources Management Inter American University of Puerto Rico
10 years experience as consultant in Human Resources Development	13 years experience as consultant in Human Resources Productivity Improvement and Development
Fluent in English, Spanish and Portuguese	Fluent in English and Spanish

(This information was available from an MBA Student at the Inter American University of Puerto Rico)

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