IN-BASKET EXERCISE

You are to read the situation described below and the three numbered in-basket items that follow. Then respond to the 3 multiple-choice questions that follow the in-basket materials.

Scenario and Background
Assume that you are Casey Jones, a District Sales Supervisor in the Sales Division of a major pharmaceutical company.
You supervise a staff of three Sales representatives, each of whom leads a professional team that includes two assistant representatives. Your immediate supervisor is the District Manager of the Sales Division, Terry Gibson. The Sales Division also includes two other Supervisors and their staffs.
Your Sales Representatives and their assignments are:
Scott Bailey, Sales Area One
Jesse Taylor, Sales Area Two
Shawn Richard, Sales Area Three
Scott is your most experienced and competent employee. Jesse was transferred to you from another Sales District about one year ago. And Shawn is your newest employee who is very competent, but still is working on being an effective team leader.
It is Monday morning, April 12, and you have just returned from a one week vacation. The numbered items that follow represent the contents of your in-basket. These include memos, letters, and other information that came in while you were on vacation. Your plan for the morning is to review and take action on your in-basket items. In about an hour, you will go to the first of several meetings that will consume the remainder of the day.

Interoffice Memo #1
Date: Tuesday, April 6th
From: Scott Bailey
    District Sales Representative, Area One
To: Casey Jones
    District Sales Supervisor
    Northeastern District
Subject: New Hires Training Program
Before you left, you approved the idea I had for the new training program and told me to proceed to order the new assimilation computers. However, the computer company, Technologies Expanding, assured me that they would arrive in time for our new hires to begin training. As you are aware, the training begins in one week, but I have not received the new computers yet. The customer service representative told me that the company has been having difficulties getting their orders out and could not guarantee that the computers would be in on time.
There is another company that can supply our computers, but the cost would be an additional $8,000. I recommend that we order from the other company, and begin training on the old computers while we wait for the new computers.
Although the new hires will not work on specific training for two weeks, we can at least start them on the product information part of the course.

**Interoffice Memo #2**

Date: Thursday, April 8th  
From: Terry Gibson  
District Division Manager  
To: Casey Jones  
District Sales Supervisor  
Northeastern District  
Subject: New Company Policy  

Beginning, May 1st, there will be a new policy, which requires all Sales Representatives to have their clients fill out and sign the Form 2030. This form is for our inventory purposes. We had discussed using this form a couple of months ago and at the time found it to be quite tedious. But as our business is expanding and we are moving to other parts of the country, we need a more efficient way to keep track of what we are selling.

Our next inventory will be on May 30th. These forms must be filled out no later May 15th so we can have the information to have a successful inventory. I know this is short notice, but it shouldn’t take long to go through your records of what your representatives have sold in the last six months. If you have any further questions or need any assistance you can contact my Administrative Assistant, Aaron Daigle, (x3632), who is collecting all the information.

**Interoffice Memo #3**

Date: Monday, April 5th  
From: Jody Rogers  
Assistant District Sales Representative, Area Four  
To: Casey Jones  
District Sales Supervisor  
Northeastern Division  
Subject: Area Team Four  

I am requesting an assignment to a different Area Team. I have been working on Shawn Richard’s team for the past six months. I realize that Shawn is a new employee and has only been in his position for seven months, but he does not handle leadership in a professional manner.

He is not organized, and I feel that Dale Stevens and I are the ones who are compensating for him. He does not delegate responsibility and cannot manage the travel schedule, the appointments, or the distribution lists. I have tried to help him get organized while Dale helps with the arrangements, but our efforts have not helped. He cannot seem to manage his time effectively, which leaves his assistants, Dale and I, to keep our area serviced.

How am I ever going to move up professionally and to show my talents if my work is suffering due to Shawn’s inability to manage his team?

**In-Basket Questions**  
(3 questions)

1. Which of the following is the most appropriate action to take in response to the issue of the training schedule in Item #1?
A. Allow Scott to proceed with the training on the old computers and then interrupt training when the new computers arrive.

B. Delay the training till the new computers arrive.

C. Let the students finish the course with the old computers without the interruption of the new computers, and the next group of students will begin training with the new computers.

D. Cancel the training altogether until the issue with the computers has been resolved.

2. Which of the following actions will have the best resolution to the problem with Technologies Expanding?

A. Cancel the order with Technologies Expanding and proceed with the new order.

B. Contact the president of Technologies Expanding and demand a discount because the company did not meet your expectations.

C. Cancel the order and have the old computers updated.

D. Call the customer service representative manager to verify the accuracy of the information Scott received and discuss your situation and the options that are available to you.

3. What would be the best action to take in response to Jody’s complaint? (Item #3)

A. No action is required because Jody tends to exaggerate.

B. Tell Jody that it is important to be supportive of each other and you will enroll her in a teambuilding course.
C. Move Jody to Scott’s team so she can help with the training.

D. Look into the matter and see if there is evidence of Shawn’s behavior described by Jody, and also talk with Dale to gain further insight into the issue.

**In-Basket:**

1. **C** – The students will get the training they need to perform the duties of the job without the interruption of the installation of the new computers.

2. **D** – By calling the service manager you can get a better idea of exactly what the situation is and what options are available to you before you cancel the order.

3. **D** – You first need to determine if there is a valid complaint and if Shawn’s behavior reflects Jody’s complaint before you take any action.