

# ENVISIA LEARNING INBASKET ADMINISTRATION INSTRUCTIONS

**Step 1:** Remove the **Participant Report Form** Found in each Inbasket envelope.

**Step 2:** Provide a box of paper clips, pens/pencils to each participant and pass out the Hutec Inbasket. *Ask each participant to write his/her name and date on the Inbasket envelope. Ask the respondent(s) to remove all the contents from the Inbasket envelope and locate the Participant Instructions (should be the first thing they find upon opening the Inbasket envelope).*

**Step 3:** Read the following instructions found in the participant inbasket materials aloud:

“For the next ninety (90) minutes you will assume the role of a Manager within the Service Department of Hutec Corporation. You will be provided an in-basket envelope containing several administrative items. Your task will be to act on each item in the in-basket by delegating, making decisions, solving problems, planning meetings, directing discussions with your supervisor and direct reports, asking for information, and exercising control. In-Basket items consist of: Hutec memorandums, reports, notes, letters and telephone messages. You will be provided with all the administrative support necessary to complete this exercise including paper clips and Hutec stationery. You will also be provided will the following material:

- Organizational Chart of the Hutec Service Division
- Reference Calendar for October

You should handle the material in the In-Basket as completely and quickly as possible and to take appropriate actions on all items.

Write down, in the form of memos, letters, notes, etc., everything you plan to do. If you plan to call a meeting or give your direct reports instructions, be sure to write down the specific points you want to cover. You should always take, as much action as you can with the information available to you, but you must avoid making assumptions that cannot be found in the material provided. Do not create or imagine additional details. Preparing a memo specifying a staff meeting time and agenda is an example of an action taken.

Prepare your written memos, notes, letters, and instructions to your direct reports in a manner that they will be able to understand the action you want them to take. Everything you decide or plan to do must be in writing. Although time precludes you from making phone calls, phone calls may be delegated.

To facilitate the in-basket scoring process, we ask that you attach any written memos and letters you prepare to the appropriate in-basket item. Please write down, on your memos and letters, the page number corresponding to the specific in-basket item that you have responded to.”

**Step 4:** Ask the participants to read the “Situation” located on the adjacent page of the Inbasket participant Instructions silently (copy of the “Situation” is below).

### **HUTEC INBASKET SITUATION**

You are District Operations Manager J. Carter. It is 1:30 P.M. on Thursday, October 9. You have just reported for work as the new Department Manager of District A, Production and Manufacturing Division, Hutec Corporation. Your boss, D. Rhodes is presently absent from the company on a business trip and will not return until Friday, October 10 at about 3:00 P.M. You are replacing P. Andrews who departed just before D. Rhodes left. When you reported for work you were informed that you must attend a special management conference being held out of town in place of P. Andrews during the period October 11-17. You must, however, depart for the management conference early Friday morning since the company has pre-purchased airline tickets and has already paid \$2,000.00 for the conference.

Remember, YOU MUST ATTEND THE CONFERENCE. Since D. Rhodes is on a business trip and T. Washington, your Assistant Manager, is working on an off-site project until Monday, October 13, you must take action on the in-basket items before you depart. D. Rhodes' Secretary, S. Little, has informed you upon your arrival that M. Watson, the Hutec Senior Vice President would like to meet you at 3:00 P.M. this afternoon. In the meantime, you have proceeded to your office. You may utilize anything provided to you in any manner you see fit. If you desire to take a break, do so quietly, and do not confer with other participants.

Remember, you have only one hour and thirty minutes before you must meet with the company Senior Vice President. You must accomplish as much as you can since this will be your only opportunity to work on the in-basket. In summary, you are Department Manager J. Carter and it is 1:30 P.M. on Thursday afternoon, October 9. You will have departed for the management conference prior to the return of D. Rhodes and T. Washington. You will not return to your District Office until Monday October 20.

**Step 5:** Make the following announcements before beginning the Inbasket:

- ✓ Remind participants they will have 90 minutes to complete the Inbasket. Announcements will be made when the participant has 60 minutes, 30 minutes and 15 minutes remaining
- ✓ Participants may use either pen or pencil. Extra pens/pencils are available as well as additional Hutec Stationery, if needed, during the exercise
- ✓ Participants may take a break at any time during the exercise but may not discuss the exercise with others
- ✓ Participants may not cancel the business trip as outlined in the instructions
- ✓ Participants can use the Hutec stationery or respond directly on the Inbasket memos

- ✓ Participants should respond in a manner that his/her direct reports, supervisors, etc, will be able to understand
- ✓ Participants should not respond to memos with “imaginary” conversations or meetings that might take place
- ✓ Participants are asked to attach any written memos they prepare to the original inbasket item using the paper clips provided and to write the Inbasket page number somewhere on their memos to facilitate the scoring process
- ✓ Everything a participant plans to do must be in writing—please write as neatly as possible

**Step 6:** Tell the participants they can begin the exercise. Announce when the participants have 60, 30 and 15 minutes remaining throughout the exercise. If you are asked specific questions about how to tackle the inbasket or any item in the exercise, please respond by informing the participant: “You have all the information available to you in the instructions to complete the exercise.”

**Step 7:** At the end of the 90 minutes, ask the participants to stop and place all materials back into the original Inbasket envelope. Pass out the **Participant Report Form** and ask that participants to write his/her name and date on the outside and complete each question. There is no time limit to completing the **Participant Report Form**. When completed, it should be placed in the original Inbasket envelope along with all other materials and turned into the administrator. (*Note: Please announce that the cover page of this form asks for “Age” and “Sex.” These should be left blank as they were originally collected for research purposes and will not be collected in this particular assessment process*).



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