

Practice In-Tray Exercise

Newton Telecom

June 2011

Instructions

Below you will find background information relating to a company. That is followed by the contents of your in-tray and your diary, which already has a number of entries. There is also a blank 'Actions' sheet and a blank 'To do today' list.

You must review each item and then:

- **Briefly describe the actions you would take to deal with each item.**
- **Add entries to the diary**
- **Add important actions to the 'To do today' list.**

Make sure you justify all actions you take. Where you recognise that items tie in together, be sure to make a note of it.

We strongly encourage you to read all of the in-tray items before deciding how to respond to them. Make notes as you go as to how you might respond, but be aware that items that appear later in the in-tray may affect how you respond to earlier items.

You should print out this entire exercise and find a quiet place free of distractions or interruptions to complete it. Make as many notes on the in-tray items as you can think of. In a real in-tray exercise you usually have to talk through your responses with an assessor, or sometimes you simply submit your responses for them to read. If your thoughts and observations are not articulated or are not on the page, you will not get the marks for them!

The scoring matrix at the end of this exercise is a guide only; in real exercises, the assessor will apply a degree of flexibility to these in order to recognise how well you understood and dealt with each in-tray item. There may well be things you think of which are not in the scoring matrix, but that are equally valid if you justify them to the assessor.

The exercise begins on the next page. You should start timing from when you start to read the instructions. You will have **75 minutes** in which to complete the exercise, after which we would suggest you take a short break before returning to look at the answers. Scoring your answer sheet and, arguably more importantly, reviewing your performance and reflecting on what you have learned, is likely to take an additional 20-30 minutes.

- The exercise begins on the next page-

Background Information: Company

You are Chris Carpenter, the Customer Services Manager for Newtown Telecom.

You have just returned to work after a two and a half day unplanned absence prompted by a family situation. Today is Thursday 4th June. It is 9am. In your in-tray are a number of things you had expected to have dealt with by now, plus some new arrivals.

Newtown Telecom is a mid-sized mobile telephone network operator. It has 400 staff, 2 million customers and an annual turnover of £250 million. Newtown Telecom was established ten years ago by local entrepreneur John Dobson, and grew substantially four years ago when the company bought Vista Mobile. Whilst John Dobson is still at the helm, some of Vista's staff remain within the organisation, including Avril Atkins, the Operations Manager and your immediate boss.

Your mantra at the company is 'Customers come first'. That is one of the reasons why you and the company have been so successful. Whilst Newtown Telecom is competitive, it cannot take on the likes of Vodafone and Orange in a price war. Consequently the main market differentiation strategy revolves around providing excellent customer care – and having all calls answered personally, not by a machine.

Background Information: Appraisal Procedure

Newtown Telecom holds staff appraisals twice a year, in June and in December. Here's how the system works:

1. Both the person being appraised (the appraisee) and the person conducting the appraisal (the appraiser) complete the section of the form relating to past performance prior to the meeting.
2. At the appraisal interview, the two views on the standard of past performance are compared and – where they differ – consensus is achieved through discussion.
3. Future objectives are set and training needs discussed and incorporated into the objectives.
4. Following the meeting, the appraiser completes the form and adds his or her comments, then passes it to the appraisee. The appraisee verifies that it is an accurate record of what was agreed at the meeting, adds his or her comments, and signs it, after which it goes to the HR department.

You have three appraisals to conduct, for the supervisors who report to you. (You have completed the paperwork for their appraisals, but not yet for your own.) The supervisors will appraise the team leaders who report to them, and the team leaders will appraise the members of their team. If anyone has a query or a complaint (on any issue, not just appraisals) they should first approach the person to whom they report directly. If an issue fails to be resolved, then it may be escalated beyond that.

Background Information: Meetings

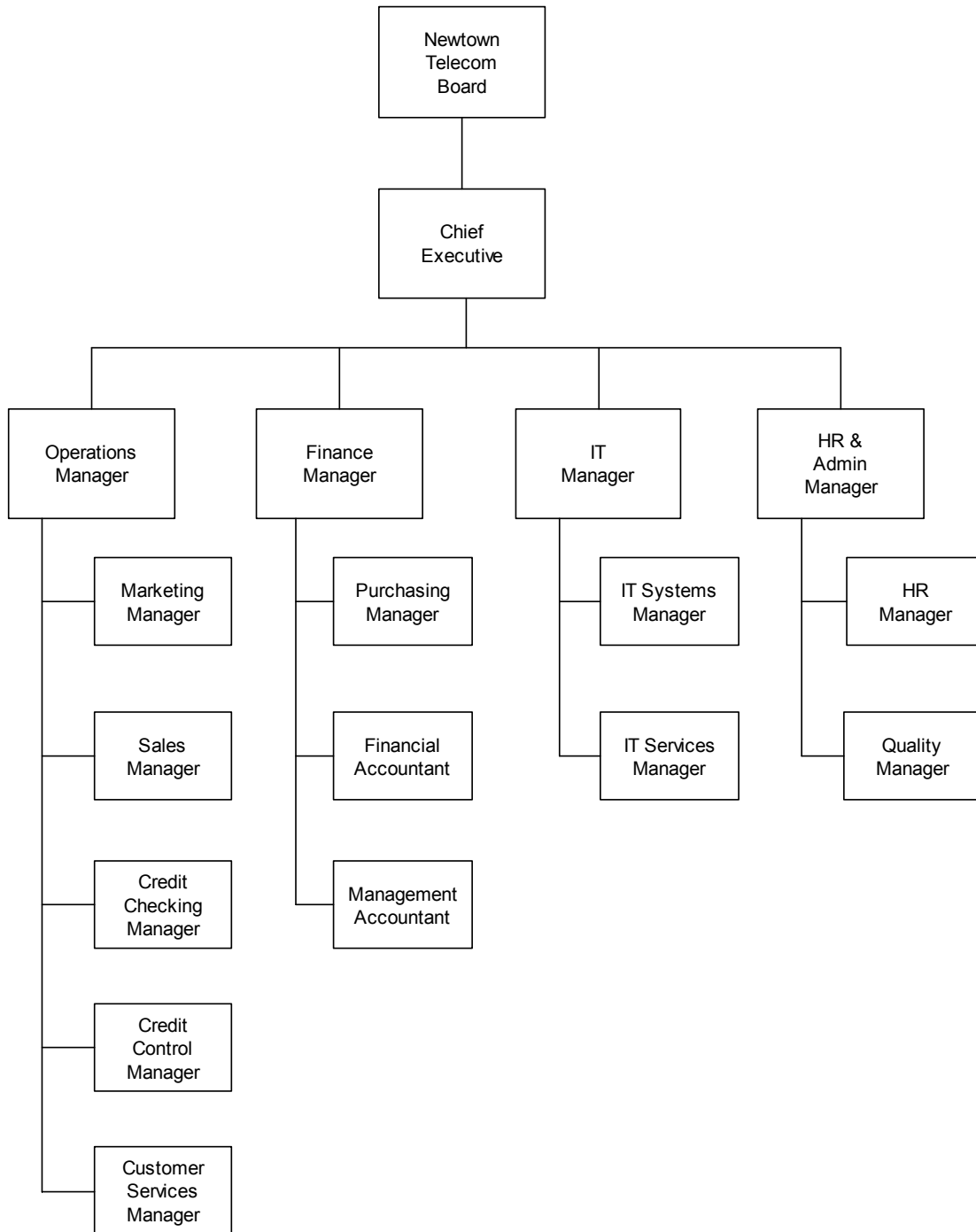
On the first working day of every month, the Operations Manager holds a meeting of all Operations Department Managers. The departments included are Marketing, Sales, Credit Checking, Credit Control and Customer Services.

The Operations Manager issues an irregular 'Operations Update' to all Operations staff when she feels she has something to tell the team. There are usually four or five of these a year.

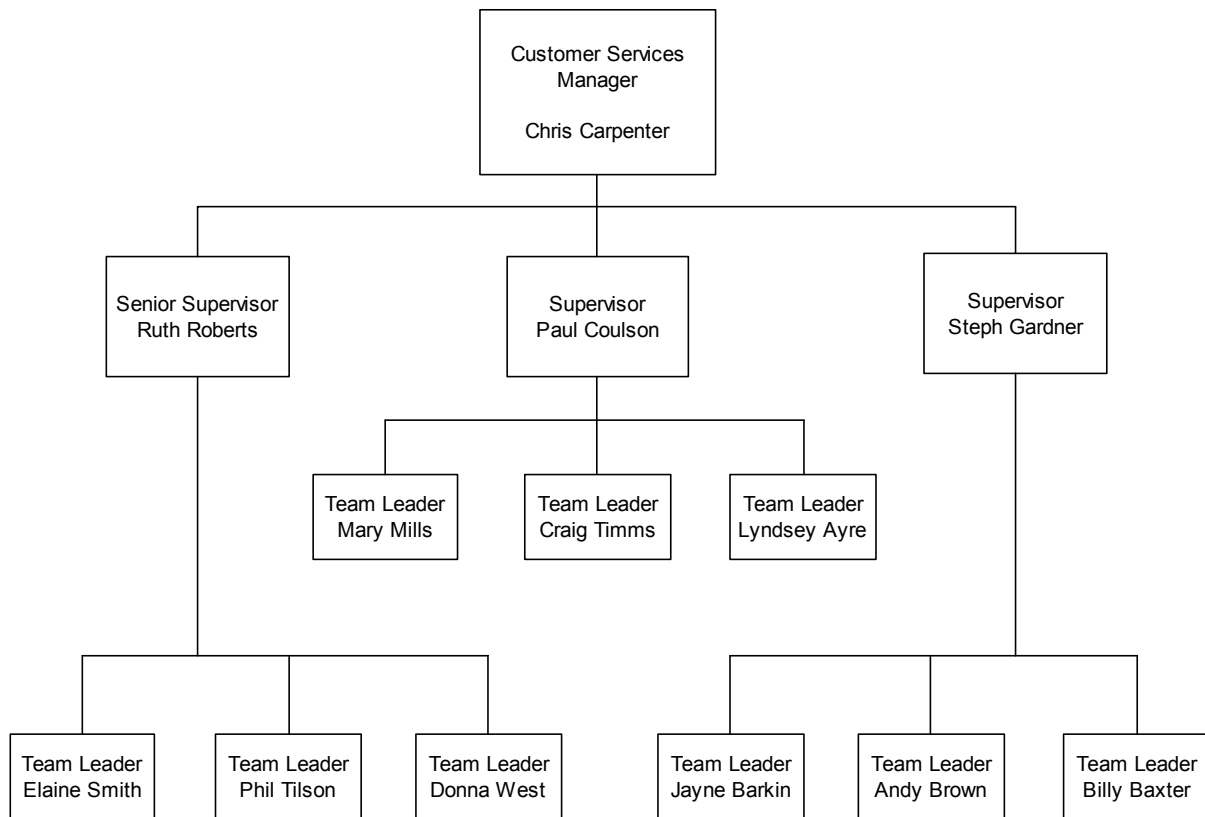
Every Friday afternoon you hold a meeting with your supervisors to catch up on what has happened over the past week and what is planned for the next one. If something is urgent, you pass the information on immediately, if not, it waits until the Friday meeting for dissemination. As a general rule, you compile an agenda for the meeting as the week unfolds. If you are unable to be present your Senior Supervisor leads the meeting. If a Supervisor cannot attend, they nominate a Team Leader.

The QIF, or Quality Improvement Forum, meets every other Tuesday. You like to attend personally, but will send a deputy if you can't make it. The QIF is a responsibility you took on when you were Senior Supervisor and you have continued with it even after your promotion.

Background Information: Company Organogram



Background Information: Your Team



Each Team Leader is responsible for between 6 and 8 staff.

The next 14 items are the contents of your in-tray.

Item 1

**Distribution: all operations staff
For immediate release**

OPERATIONS UPDATE No.3

Appraisals

By the time you read this, we will be into the summer round of appraisals. Whilst it is the December one that determines your annual salary increase, this one is no less important: please treat it just as seriously. The deadline for holding appraisal meetings is Friday 19th June, and completed forms must be with HR by the following Friday.

Arrivals and departures

A warm welcome to all those who have joined us since the last Update. I hope you are all settling in well and have a fruitful and enjoyable time with the company.

As many of you will know, our Credit Checking manager Charlie Green is leaving us on 19th June. We wish him well as he moves on to pastures new and hope that as many of you as possible will join us in The Oaks after work on the 19th to help give him a rousing send off.

Melanie Young will join us on Monday June 22nd as Charlie's replacement. Please make her welcome.

CBIS

I am delighted to confirm that the new Computerised Billing Information System(CBIS) went live on May 18th. Thanks to everyone who put so much time into designing the invoices and statements, and acceptance testing the system - to breaking point, at one stage! Well done, everyone.

Going the extra mile

I spoke to a customer recently who had called especially to tell me that he was delighted with the service he had received from senior salesman Gavin West. Gavin took the time to find out exactly what the customer needed then put together a bespoke package to meet those needs. As a result of this, that customer recommended us to another local business, and they are now our customers, too. Well done, Gavin, who is also our May salesperson of the month!

**Avril Atkins
1st June**

Item 2

14 Smith Square
Newtown
NT4 3DD

2nd June

C. Carpenter
Newtown Telecom
Connection House
Newtown
NT1 1DR

Dear Chris

Please accept this as one month's notice as I have found another job. I'm sorry to leave, but the new job pays more and with the new baby I need the extra cash.

Yours sincerely,

Jenny Brown

PS I told my team leader (Elaine) and she asked me to write this and address it to you.

Item 3

File Edit Mailbox Message Address Calendar Help

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From: Bob Norris

To: Chris Carpenter

Subject: Audit

Date: 2nd June

Hi Chris

Just to let you know, my team will be conducting a quality audit of Customer Services' systems and procedures on Wednesday 10th June. Maxine Robson and Jason Flynn will be handling matters. They'll be with you all day from around 9.30am.

Regards

Bob Norris
Quality Manager

Item 4

File Edit Mailbox Message Address Calendar Help

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From: Avril Atkins
Subject: Appraisal

To: Chris Carpenter
Date: 27th May

Chris

Your mid-year appraisal is scheduled for 10am on Friday 5th June. Please ensure you have fully completed the relevant parts of the attached form prior to the meeting, which I anticipate will take no longer than an hour and a half. Your thoughts as to where the next 6 – 12 months will take us would also be very useful, so please give that some consideration.

Regards

Avril

Avril Atkins
Operations Manager

Newtown Telecom

Appraisal Form

Date of interview:.....

Name:

Department :.....

Item 4 (attachment)

Performance against objectives set at last appraisal

Objective	Met? Y/N

Item 4 (attachment)

Objectives for next six months

Objective	Deadline/ongoing

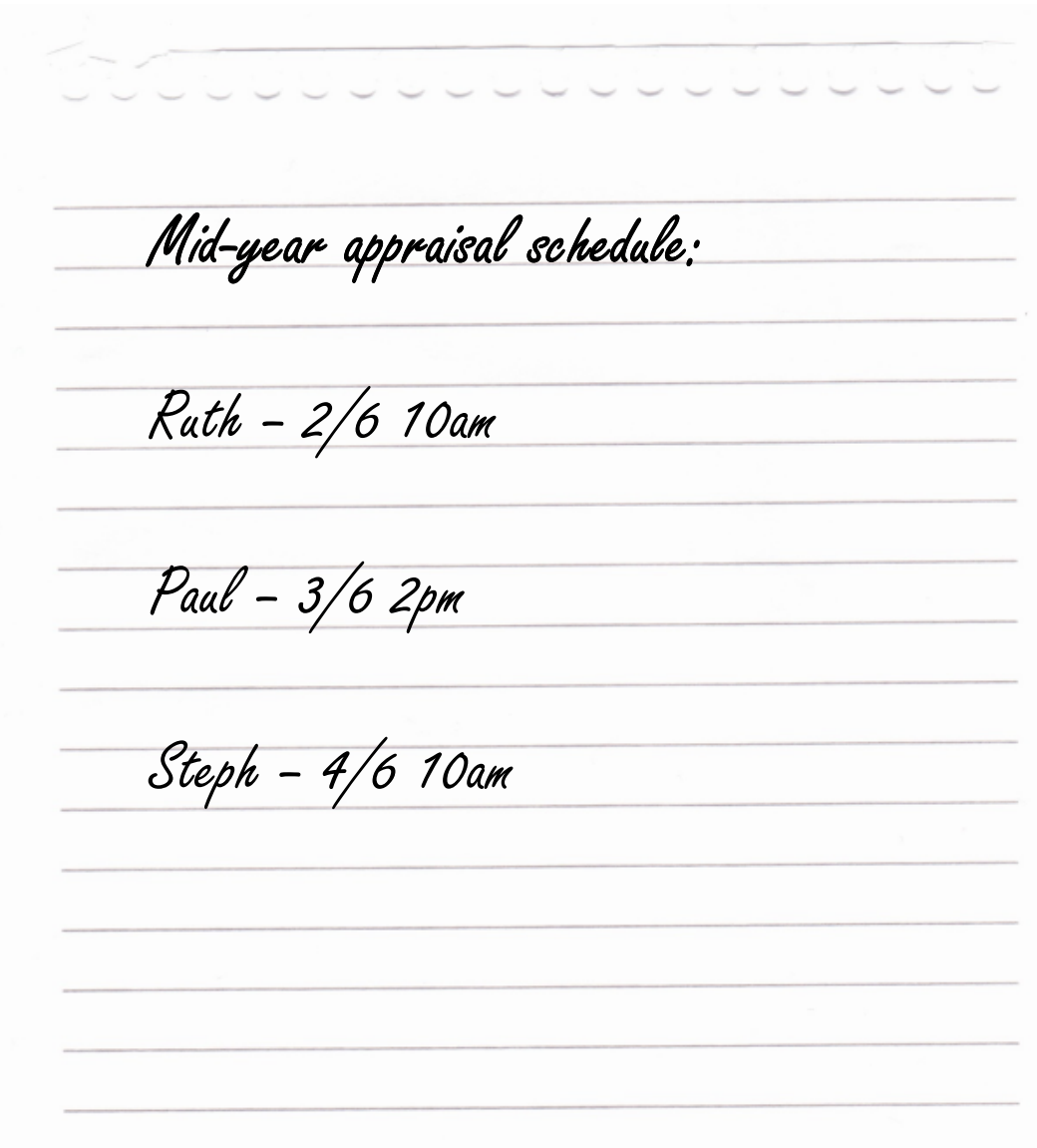
Training requirements identified:

Requirement	Action	Deadline

Item 4 (attachment)	
Grade awarded:	A = Performance well above par B = Performance above par C = Performance satisfactory D = Performance below par E = Performance significantly below par
Manager's comments:	
Signed:	Date:
Appraisee's comments:	
Signed:	Date:

Item 5

Item 5 is an envelope containing appraisal forms which you have completed for each of the three department supervisors. A sheet attached to the front reads:



Item 6

24/5

Memo: To all department managers

Hi All

As you know, since Ian Biggs left us the Intranet has been pretty much left alone. We simply haven't had the resources to do anything with it! Now that the new billing system is up and running and James Mitchell has come on board, we have the capacity to take on its revitalisation as a major project.

With this in mind, I'd like you all to take some time to consider what it is you want the Intranet to do for you and your people. Get as many of your team involved as you think appropriate and make a list of what you – in an ideal world – would like it to include. At this stage, please don't send your list to me. What I would rather do is to run a workshop with one or two representatives from each area and put all the ideas in a pot.

The meeting is pencilled in for 10am on Thursday 25th June. Hopefully this will give you plenty of time to prepare and to nominate attendees if you can't come along yourself. Please let me know who'll be attending. The meeting is likely to take until around 1pm – there's a lot to discuss!

Regards

Sean Reardon
IT Systems Manager

Item 7

Customer Services Query Breakdown, May:

Source	Number received	Resolved	Outstanding
Telephone	850	745	105
Email	236	188	48
Letter	112	55	57
Total	1198	988	210

Outstanding queries by age and type:

Source	May	April	March	Older	Total
Telephone	105	35	48	12	200
Email	48	15	9	2	74
Letter	57	32	35	27	151
Total	210	82	92	41	425

Hi Chris

Here are May's figures. The older outstanding queries are down slightly on last month, but I'm still rather concerned.

Regards

Ruth

Item 8

Minutes

Operations Departmental Managers' Meeting

Boardroom, 10am Monday 1st June

Present:

Avril Atkins (Operations Manager)
Chris Carpenter (Customer Services Manager)
Charlie Green (Credit Checking Manager)
Bruce Cameron (Credit Control Manager)
Vanessa Harris (Marketing Manager)

Apologies:

Beth Fisk (Sales Manager)

Action

1. The minutes of the previous meeting were accepted as an accurate record.
2. BC reported that the problems with the credit checking system running slowly had been resolved and everything was now back up to speed.
3. CC reported that there was still a backlog of outstanding customer queries, although it was less than last month. AA asked for suggestions that would reduce it further. CC to discuss at the next supervisors' meeting and report back. CC
4. CG reported that collection of current debt was on target, but that there was a problem with accounts outstanding for more than 60 days. AA asked for an investigation to be carried out to determine the root cause. CG
5. VH reported that the summer campaign was underway and exceeding expectations and that plans for the Autumn marketing campaign, to commence in August, were on schedule.

Item 8

- | | | |
|-----|--|-----|
| 6. | AA reported that BF was on annual leave for two weeks, but had submitted sales figures before she left. Sales had exceeded targets for the third month running. | |
| 7. | AA asked if anyone had experienced problems as a result of the introduction of CBIT. No problems were reported. | |
| 8. | AA reminded everyone that Operations were to shortly undergo a quality audit and that Bob Norris would be in touch with further details in the near future. She stressed the importance of compliance with quality requirements and asked everyone to make sure their paperwork was in order. | ALL |
| 9. | AA reminded everyone that the mid-year appraisals were due to be carried out this month and stressed their importance. She asked that she be told if anyone was going to miss a deadline. | ALL |
| 10. | BC said that members of his staff had expressed an interest in the introduction of an 'Employee of the Month' scheme, much as the sales people recognised the sales person of the month. AA said that the idea had already been suggested at senior management level and had been favourably received. AA to pursue and report back. | AA |
| 11. | VH asked for recommendations for a venue for the Christmas party. | ALL |

Item 9

QUERY ESCALATION FORM

Raised by: <i>Lyndsey Ayre</i>	Date: <i>3/6</i>	Time: <i>10.45am</i>
Customer: <i>Mr Thomas</i>	Account number: <i>001234X</i>	
Passed to: <i>Chris Carpenter</i>	Reason: <i>Customer insisted</i>	
Details of query: <i>Hi Chris - Mr Thomas rang in this morning with a query on his bill. He disputes the charge for a particular call. I've attached a copy of his bill with the call highlighted. It's a number he's called before and when I rang it, the person who answered confirmed he was a friend. Mr Thomas says that's all fine, but he didn't make that particular call at that time. I've explained how the system works, but he's adamant he didn't make the call and he won't pay for it and to be honest he started getting a bit nasty about it. When I refused to give in, he demanded to talk to you. I explained you were out of the office, but he still insisted. Please can you call him? I'm sorry about this, I just couldn't get through to him.</i> <i>Lyns</i>		
Action taken:	Date:	Time:
Outcome:		
Further action: <i>Y/N</i>	Details if Y:	

Item 10

1/6

Hi Chris

I've been thinking about ways in which we could help speed up responses to customer letters and emails, and I have a suggestion. You know the team share their 'good' letters rather than always writing from scratch? Well, how's about we use the Intranet to compile a full, indexed, easily accessible standard letters and paragraphs resource? I think the time it would take to compile would easily be saved on the job and it should help us get the query response time down. We could give access to the folks on the phones, too – it would help them give a standard answer. The new people in particular should benefit from it. Let me know what you think!

Cheers

Steph Gardner

Item 11

21 Armour Avenue
Newtown
NT2 7DE

Customer Services Manager
Newtown Telecom
Connection House
Newtown
NT1 1DR

1st June

Dear Sir or Madam

I just wanted to tell you how pleased I was with the help your staff member Jenny Brown gave me when I rang up about my bill last week. I didn't understand it at all and I was worried because it was so expensive, about twice what I normally pay. Jenny was very patient and explained it all carefully. There was a mistake and she got that sorted out for me as well. She even rang me back so I didn't have to worry about the cost of the call!

We got it all sorted out in the end and I've been telling all my friends if they want a mobile phone they should come to you. When you're older, things can be confusing and not everybody takes the time to explain like Jenny did. She's a credit to your organisation.

Yours faithfully

Marjorie Potts

Item 12

File Edit Mailbox Message Address Calendar Help

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From: Bruce Cameron

To: Chris Carpenter

Subject: Customer Queries

Date: 3rd June

Hi Chris

I wonder if we can get together for a chat about outstanding customer queries? I recently crunched the numbers and around 10 per cent of our old unpaid accounts are down to payment being withheld due to outstanding queries. Some of these are substantial amounts. I'd like to explore the options to try to reduce the figure. Let me know when you're free. If it helps, I can do either the afternoon of Wednesday 10th or the morning of Thursday 11th.

Thanks!

Bruce Cameron
Credit Control Manager

Item 13

Chris

Dave rang - said it was
Important. Please r/b ASAP.

ta,

Becky

Item 14

PHIL'S PHONES

4HIGH STREET
NEWTOWN
NT12DF

Newtown Telecom
Connection House
Newtown
NT1 1DR

26th May

Dear Sir or Madam

It's been six weeks since I saw a sales rep from your company. I know I'm not your biggest customer, but I have bought stock regularly – and signed up new customers to your network – for five years now.

If I don't get a visit in the next two weeks, I'll assume you no longer want my custom and take what's left of your stock out of the shop.

I hope to see someone by 9th June.

Yours faithfully

P Majors

Diary:

Mon 1st June 10am Ops monthly meeting	Tues 2nd June 10am Appraisal RR	Wed 3rd June 2pm Appraisal PC	Thurs 4th June 10am Appraisal SG	Fri 5th June 10am Appraisal with Avril 3pm CS meeting
Mon 8th June PC hols 1 week	Tues 9th June 4pm QIF	Wed 10th June	Thurs 11th June	Fri 12th June 3pm CS meeting
Mon 15th June RR hols 2 weeks	Tues 16th June	Wed 17th June	Thurs 18th June	Fri 19th June 3pm CS meeting
Mon 22nd June	Tues 23rd June 4pm QIF	Wed 24th June	Thurs 25th June	Fri 26th June 3pm CS meeting
Mon 29th June CC hols 2 weeks	Tues 30th June	Wed 1st July 10am Ops monthly meeting	Thurs 2nd July	Fri 3rd July 3pm CS meeting

To Do Today

(For each in-tray item list here only those tasks which you must attend to today.)

Item 1	
Item 2	
Item 3	
Item 4	
Item 5	
Item 6	
Item 7	

Item 8	
Item 9	
Item 10	
Item 11	
Item 12	
Item 13	
Item 14	

Actions sheet:

Item	Action to be taken:
1	
2	
3	
4	
5	

6	
7	
8	
9	
10	

11	
12	
13	
14	

End of practice in-tray exercise

Download the answers and candidate guidance from the members' area.