

DEVELOPMENT OF A COMPUTERIZED IN-BASKET EXERCISE FOR THE CLASSROOM: ADAPTATIONS AND ALTERNATIVE EXERCISES

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ABSTRACT

The overall purpose of this article is to not only demonstrate how this particular computerized in-basket can be used in a sales management classroom, but to show how instructors can use spreadsheet software to develop in-basket exercises for a variety of marketing classes. Variations on this in-basket and other experiential exercises are presented by the authors.

IN-BASKETS

The traditional training in-basket exercise presents all the messages for the day, and asks trainees to rank the situations in the order in which they believe these situations should be addressed. The trainees are also instructed to be prepared to present and defend the strategies they would use to handle each of these situations. The discussion among trainees provides cross-training that expands the range of strategies considered, and analyzes the advantages and disadvantages of each alternative strategy. The handout in Exhibit 1 can be used as a traditional (non-computerized) in-basket by simply asking students to rank each activity as to the order in which these activities would be addressed and how each activity would be handled.

The addition of an "expert" to this exercise can provide additional valuable insights into the business firm's priorities and culture, as well as additional tactics for handling each situation. This expert rating plus the requirement that the student first rank the items individually, and then as a group, can turn the exercise into more of a "survival game" activity.

BUILDING THE SPREADSHEET

The following steps are required to build the in-basket spreadsheet: (See flow chart in Exhibit 2.)

1. Enter a list of situations.
2. Record expert input.
3. Enter student input.
4. Program Calculation Tables.
5. Program Feedback Table.
6. Program Feedback Table.

CONCLUSIONS

The purpose of this article has been to encourage the development of computerized in-basket exercises for the classroom. The purpose has not been to develop a software package to sell to instructors. The authors see considerable potential in the computerized in-basket exercise as a classroom exercise to promote student learning. The authors see additional benefit when instructors involve themselves in the process of building their own exercise.

APPLICATIONS

The authors are using several variations of the in-basket exercise in their classrooms:

- Random generated computerized in-basket for store management.
- Traditional in-basket for store management.
- Traditional in-basket/"survival game" exercise for future of retailing.

EXHIBIT 1 IN-BASKET EXERCISE

Situation: You are a district sales manager for a national life insurance company. You have eight salespersons (financial representatives) reporting to you. You are the first person at the office at 7:15am. Your secretary (financial assistant) and all other office personnel are due in at 8:00am. The following is a list of situations that face you this morning. In the left-hand margin, rank the items as to which you would handle 1st, 2nd... 20th. Also, place your estimate of the number of minutes each item should require. Be prepared to discuss how each item should be handled.

1. You have a one-hour meeting scheduled with all of your financial representatives at 8:00am in the boardroom.
2. Telephone message on answering machine: John Smith (the richest man in town) "wants to talk about some new insurance."
3. Telephone message on answering machine: Bruce Williams (your neighbor) "wants to talk about some additional insurance."
4. Telephone message on answering machine: Ted Wilson (a person you do not know) "wants to talk about some new insurance."
5. E-mail message on your computer: Betty Burke (your assistant) "Will not be in today because of a sick child."
6. Telephone message on answering machine: Tom Thompson (your boss at corporate headquarters) "Please call first thing when you get into the office."
7. You have a noon lunch appointment at a local restaurant with your director of recruiting and Becky Williams, a senior at State University who is a candidate for a financial rep.
8. Prospect for new clients.
9. Prospect for new financial representatives.
10. Make coffee for you, your office, and your meeting.
11. You desperately want to keep up your exercise routine, and get to the health club next door for your thirty-minute workout.
12. Telephone for appointments for the week.
13. You have a 3:00 meeting with your three new financial representatives to review activity and results.
14. You have a telephone message from your teen-aged daughter "to call her because she has to talk to you about a serious matter."
15. You have an E-mail from your IBM salesperson asking for a meeting today to talk about an opportunity that must be acted upon immediately.
16. The new Fortune magazine rated your company as one of the top ten most respected companies in the USA.
17. You have an E-mail from your top financial representative stating that he got a job offer from a competitor at 25% more than he is making with you.
18. An article comes out in the local newspaper that is quite unfavorable for your company. You were interviewed for this article and your statements were greatly misrepresented.
19. You have a 3:00 meeting with your director of recruiting regarding status of financial representative who are starting their careers with the company.
20. Your spouse is out of town, so you have to pick up your eight-year-old son from school at 2:30 and drop him off to soccer practice at 3:00.

EXHIBIT 2 EXERCISE FLOW CHART

