

## **In-Basket Exercise**

### **Instructions**

This is an In-Basket exercise, designed to partially simulate the tasks that a manager is likely to encounter on a daily basis. During this exercise, you will be assuming the new role of Team Leader for one of two East Regional FANatics™ sales teams. FANatics™ was established 2 years ago in the vibrant city of Miami, FL. Since that time, the company has expanded to include 11 full-time employees in the East Coast office (Miami, FL), 11 full-time employees in the recently established West Coast office (San Diego, CA), 9 full-time employees working in our national Customer Service Department (Dallas, TX), and 4 full-time employees working in the Human Resources Department, with 3 stationed in the Miami office and 1 located in San Diego. You will be overseeing a sales team of 4 employees.

**Today is Monday, September 9th. It is 9:00 a.m.** You will be meeting with your four sales employees in an hour and a half (1 ½ hours).

The documents before you contain various email communications which you have received as the new “Team 1 Leader”. These items were originally sent by a number of employees within the FANatics™ Team, with a majority being sent by your immediate supervisor and Manager of East Regional Sales, Victoria Sweeney. You will be in charge of division one, accordingly, all emails are addressed to “Team 1 Leader”.

**Because this is a written exercise, you should respond to everything in writing.** Please indicate the manner in which you would normally respond to the communication (e.g., email or phone call) along with how you would follow up on your actions.

**You will have one and a half hours (1 ½ hours) to complete this exercise**, although you may finish before then. Please remember to respond as you normally would, but in writing.



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From: "Dwayne" <Dwayne@Fanatic.io>  
To: "Team 1 Lead" <Leader1@Fanatic.io>  
Sent: 9/9/2019 7:07:09 AM  
Subject: Welcome!

Good Morning and Welcome!

We are very excited to have you onboard with us at FANatics, I wanted to reach out and extend my welcome! Today may seem like a whirlwind- we have been understaffed the past few months and so things are a little hectic around here right now. As you know, your predecessor Dave left us on September second, so you will find some emails from the last week that require urgent action.

Before you get started, I thought I would give you some basic background info about the company. FANatics was founded by Arya Stone in 2017 when she was living in Miami. She noticed that Miami residents were constantly fanning themselves with whatever they had lying around. Arya introduced the original portable FANatics fan, and it was a quick success across the Miami-Dade county. From that point, Arya introduced more and more fans, and the company took off. Currently, the company has 35 employees providing access to high-quality fans on the East (Miami) and West (San Diego) coast.

Please do not hesitate to reach out if you have any questions!

Here are a few persons of contact you may need:

Tech support- (123) 343-6789, techsupport@fanatic.io

Building Maintenance- (123) 343-6654, maintenace@fanatic.io

Building Security- (123) 343- 8912, security@fanatic.io

Best,

Dwayne Ace  
National Sales Manager  
Fanatic.io  
Phone: (555) 215-4834

William Eddy, Beatrice Demott, Ellie Mcadams, Natalie French



**FANatics**

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From: "Otis" <Otis@Fanatic.io>  
To: "Team 1 Lead" <Leader1@Fanatic.io>; "Team 2 Leader" <Marcia@Fanatic.io>  
Sent: 9/3/2019 8:01:08 AM  
Subject: High Potential Employee

Good Morning!

I wanted to reach out to the East coast team leads- I have a fantastic employee over here who I think would have a real knack for sales- very self-motivated. Has been an employee for just over two years and is one of my best workers. I wasn't sure if any of you were looking to hire someone, but please shoot me an email if you're interested in their info!

Thanks, and talk soon,

Otis Decklan  
National Customer Service Manager  
Phone: (555) 783-6582



**FANatics**

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From: "Colleen" <Colleen@Fanatic.io>  
To: "Team 1 Leader" <Leader1@Fanatic.io>  
Sent: 9/3/2019 8:05:15 AM  
Subject: Expense Reports  
Attachments: Img.1 Img.2 Img.3 Img.4 Img.5 Img.6 Img.7 Img.8

Team 1 Lead,

I just wanted to fill you in with how things have been going on around here. The expense reports for August are due on September 14. I have attached photos of all my receipts from August. Typically I would send them to Dave the first week of the month, and he would get them done before the deadline. Just send the report back to me when you have completed it. Thank you.

Colleen Kranski  
Sales Consultant, East Region  
Fanatic.io  
Phone: (123) 333- 7878



**FANatics**

William Eddy, Beatrice Demott, Ellie Mcadams, Natalie French

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From: "Ric Ocasek" <Ric@Fanatic.io>  
To: "Team 1 Lead" <Leader1@Fanatic.io>  
Sent: 9/4/2019 4:21:59 AM  
Subject: Stealing my sales

Dave, I need you to deal with your salesperson Colleen. As you know, I'm the top grossing consultant in the East. But everywhere I go, I hear "Colleen, Colleen, Colleen." Last week she snuck a sale right off of my plate, like she has a hidden microphone in my office or something! This isn't the first time it's happened. If I have to hear her name one more time this week, I'm going to go sell adjustable beds with my brother instead. Tell her to step off.

Please let me know when you have taken care of this,

Ric Ocasek  
Sales Consultant, East Region, Team 2  
Fanatic.io  
(123)343-4567



**FANatics**

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From: "Phillip" <Phillip@Fanatic.io>  
To: "Team 1 Lead" <Leader1@Fanatic.io>  
Sent: 9/3/2019 1:43 PM  
Subject: Harassment

Good Morning,

I am writing because I am having some serious conflicts with another employee on our team. Over the past few weeks, Colleen has been consistently rude and disrespectful towards me. I don't know what her problem is! I've been very friendly and all I seem to get is hostility and rude comments in return. I believe that Colleen intentionally delayed providing me with the monthly sales figures in order to make me look bad in front of the team. It is my hope that you will confront Colleen and figure this out.

Phillip Jackson  
Sales Consultant, East Region  
Fanatic.io  
Phone: (123) 333- 9682



**FANatics**

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From: "Victoria" <Victoria@Fanatic.io>  
To: "Team 1 Lead" <Leader1@Fanatic.io>  
Sent: 9/4/2019 8:15:18 AM  
Subject: Too much information

I've had some complaints from several of the workers in the office. They claim that Phillip has been having frequent, loud arguments with his girlfriend on his office phone several times a day. In addition, Phillip has repeatedly been rude to customers during transactions (he has received several complaints within the customer service department) Can you please deal with this?

Thanks,

Victoria Sweeny  
East Regional Sales Manager  
Fanatic.io  
Phone: (123) 333-4834

William Eddy, Beatrice Demott, Ellie Mcadams, Natalie French



**FANatics**

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From: "Victoria" <Victoria@Fanatic.io>  
To: "Team 1 Lead" <Leader1@Fanatic.io>  
Sent: 9/4/2019 4:14:02 PM  
Subject: FWD: Personnel Transfer

Just received this from Dwayne, can you please look into your current numbers and let me know ASAP if we will be able to supplement the West coast team?

Thanks,

Victoria Sweeny  
East Regional Sales Manager  
Fanatic.io  
Phone: (123) 333-4834

*---Forwarded Message---*

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From: "Dwayne" <Dwayne@Fanatic.io>  
To: "Victoria" <Victoria@Fanatic.io>  
Sent: 9/4/2019 3:15:07 PM  
Subject: Personnel Transfer

It looks like we're going to have to move some personnel around to supplement the West Coast region. We like to transfer from within whenever we can, would one of the sales associates on either team consider the transfer? I'm open to other alternatives, we just need to get this resolved quickly, as the West coast sales team is currently over-worked.

Best,

Dwayne Ace  
National Sales Manager  
Fanatic.io  
Phone: (555) 215-4834



William Eddy, Beatrice Demott, Ellie Mcadams, Natalie French



**FANatics**

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From: "Dwayne" <Dwayne@Fanatic.io>  
To: "Team 1" <Team1@Fanatic.io>  
Sent: 9/5/2019 7:47:03 AM  
Subject:

Hello everyone!

I just want to welcome our new Team Lead on the team. They are experienced and professional. You may contact your Team Lead 24/7 at the following phone number and home address:

Applicant XYZ  
(555) -123-4567  
357 Fugazi St  
Narnia, Florida 48724

Dwayne Ace  
National Sales Manager  
Fanatic.io  
Phone: (555) 215-4834



**FANatics**

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From: "Colleen" <Colleen@Fanatic.io>  
To: "Team 1 Leader" <Leader1@Fanatic.io>  
Sent: 9/5/2019 9:12:15 AM  
Subject: Complaint

Team 1 Leader,

This is an email to inform you that I feel uncomfortable with my coworker. I am just fed up! Phillip is constantly making inappropriate jokes towards me and coming on to me in a way that makes me feel uneasy. This has been going on for some time now. I don't feel comfortable about confronting him, however I do feel as though I make it obvious that I am uninterested. The other team members either do not notice it, or just ignore it. I would appreciate if you reached out to Phillip to remedy this situation.

Colleen Kranski  
Sales Consultant, East Region  
Fanatic.io  
Phone: (123) 333- 7878



## FANatics

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From: "Dwayne" <Dwayne@Fanatic.io>  
To: "Everybody" <AllStaff@Fanatic.io>  
Sent: 9/5/2019 9:23:09 AM  
Subject:

Hello team! We are looking for a new company motto. Customers have suggested that "At FANatics, we're fan addicts!" is inappropriate due to the opioid crisis. Do you have any ideas for a new company motto? Let's get this decided quickly so that the company can create a new marketing campaign.

Dwayne Ace  
National Sales Manager  
Fanatic.io  
Phone: (555) 215-4834

William Eddy, Beatrice Demott, Ellie Mcadams, Natalie French



**FANatics**

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From: "Victoria" <Victoria@Fanatic.io>  
To: "Team 1 Leader" <Leader1@Fanatic.io>  
Sent: 9/6/2019 8:11:48 AM  
Subject: Team Meeting

Hello,

I just wanted to give you a few tasks that need to be completed promptly. First, before Dave left, he had not completed the One-on-One meeting with any of his sales consultants. This is a meeting that Team Leads typically do quarterly. Please set up a meeting with each of your consultants to discuss their performance. Also use this time to get to know each member of your team a little!

Second, there is a Sales Conference in Miami, FL, October 16-19. This is an opportunity for any sales consultants. Team members can apply for funding to attend on our company website. This is an opportunity to learn ways to grow their personal sales and deepen their understanding of customer relations!

Victoria Sweeny  
East Regional Sales Manager  
Fanatic.io  
Phone: (123) 333-4834

William Eddy, Beatrice Demott, Ellie Mcadams, Natalie French



**FANatics**

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From: "customer1@yahoo.com">  
To: "Team 1 Lead" <Leader1@Fanatic.io>  
Sent: 9/6/2019 11:45:07 AM  
Subject: Angry Customer

Hello there,

My name is Sarah Smith. I am trying to contact whoever is in charge here. Two times now I have received a defective order. I placed my order with Jeff. I have done plenty of business with this company in the past and prior to this incident, have had no issues. I received the first order on August 20th. Both fans had a missing blade. I put in a return request. The second order I received was on September 4th. In this order I received the wrong sized fans AND they don't seem to be compatible with my outlet. My What kind of company are you running anyway? I am happy to take my business elsewhere. All I want now is just a 100% refund AND I would like to be reimbursed for shipping expenses. I have attached a photo of the costs. Please get back to me at this email or you can call my phone at 573-673-2915.

Oh and my order number is: QZ37037

Sent from my iphone

William Eddy, Beatrice Demott, Ellie Mcadams, Natalie French



**FANatics**

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From: "Mark" <Mark@Fanatic.io>

To: "Team 1 Leader" <Leader1@Fanatic.io>; "Team 2 Leader" <Marcia@fanatic.io>

Sent: 9/6/2019 2:45:51 PM

Subject: Bathroom maintenance

Hey Team Leaders,

I just wanted to let you know the women's bathroom on the second floor has not been cleaned in days. The trash can is full and there are no paper towels. Gross!

Thanks!

Mark Mitchell  
Sales Consultant, East Region  
Fanatic.io  
(123) 333-9001



## FANatics

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From: "Dwayne" <Dwayne@Fanatic.io>  
To: "Team 1 Leader" <Leader1@Fanatic.io>  
Sent: 9/6/2019 2:53:11 PM  
Subject:

I hope you're having a productive first day. We need to establish a new precedent with your star salesperson Colleen. She produces stellar figures, but has a track record of turning expense reports in long after they're due. We still have missing numbers from July and August. In the past, your predecessor Dave has surreptitiously taken on this task. However, because of possible liability issues, we need Colleen to complete these personally and on time. Failure to do so may require disciplinary action, and we need to avoid this if possible.

Dwayne Ace  
National Sales Manager  
Fanatic.io  
Phone: (555) 215-4834

William Eddy, Beatrice Demott, Ellie Mcadams, Natalie French



**FANatics**

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From: "Victoria" <Victoria@Fanatic.io>  
To: "Team 1 Lead" <Leader1@Fanatic.io>  
Sent: 9/9/2019 8:47:02 AM  
Subject: Team Dinner

Hope your first day is going well! We typically hold an Employee Appreciation Dinner at least once a year, unfortunately, due to inclement weather, we were forced to cancel last year's. Employees seem to really enjoy these dinners, so if you could figure out the logistics and coordinate with Marcia that would be fantastic.

Thanks,

Victoria Sweeny  
East Regional Sales Manager  
Fanatic.io  
Phone: (123) 333-4834





**FANatics**

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From: "Victoria" <Victoria@Fanatic.io>  
To: "Team 1 Lead" <Leader1@Fanatic.io>  
Sent: 9/9/2019 7:12:02 AM  
Subject: FWD: Annual Bonus

Could you please figure this out and get back to me??

Thanks,

Victoria Sweeny  
East Regional Sales Manager  
Fanatic.io  
Phone: (123) 333-4834

*---Forwarded Message---*

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From: "Dwayne" <Dwayne@Fanatic.io>  
To: "Victoria" <Victoria@Fanatic.io>  
Sent: 9/3/2019 2:10:58 PM  
Subject: Annual Bonus

The 10% annual bonus for the top salesperson on Team 1 was not dispensed for the 2018 year. Payroll needs the information next Monday, if you could let me know which of the employees will be receiving the bonus, that would be great.

Thanks,

Dwayne Ace  
National Sales Manager  
Fanatic.io  
Phone: (555) 215-4834

William Eddy, Beatrice Demott, Ellie Mcadams, Natalie French



**FANatics**

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From: "Dwayne" <Dwayne@Fanatic.io>  
To: "Team 1 Lead" <Leader1@Fanatic.io>; "Team 2 Leader" <Marcia@Fanatic.io>  
Sent: 9/9/2019 7:47:03 AM  
Subject: Ollie's Opportunity

Hello everyone!

Ollie's warehouse stores corporation is considering buying our "Hurricane 40" line of fans to cool their warehouses. They want to schedule a meeting in late September to evaluate the prospective business relationship. We will be including a top salesperson from each East coast region team, who will henceforth will be required to collaborate in maintaining the Ollie's business relationship, sharing all commissions. It's absolutely imperative that we have a smooth, professional showing with lots of good vibes, and a strong future relationship with this client. Let's win this contract!

Dwayne Ace  
National Sales Manager  
Fanatic.io  
Phone: (555) 215-4834



**FANatics**

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From: "Marcia" <[Leader2@fanatic.io](mailto:Leader2@fanatic.io)>  
To: "Team Leader 1" <[Leader1@Fanatic.io](mailto:Leader1@Fanatic.io)>  
Sent: 9/9/2019 9:50.51 AM  
Subject: Dinner

Team 1 Leader,

Hope your first days here at Fanatic are going FANTastic. My day could definitely have gone better. One of my team members honestly just gets on my nerves. Today she brought a tuna sandwich for lunch and now the whole office smells like fish. She is a great saleswoman, but I'm not so sure how much longer I can handle her!

Also, I know we want to coordinate for the team dinner. I wanted to let you know of some dates that do NOT work for me and my team. September 27th and 28th I will be out of town. Also one of my team will be having surgery late October. So it would be ideal to get it scheduled before then.

Marcia  
Sales Consultant, East Region, Team 2  
Fanatic.io  
(123)343-4567

## September 2019

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1	2 Dave's Last Day	3	4	5	6	7
8	9 Your first day	10	11	12	13 orientation	14
15	16	17	18	19 Mark: asked off 19-24   ----->	20 4-5pm Yearly <b>mandatory</b> sales training for all employees ----->	21  ----->
22  ----->	23  ----->	24  ----->	25	26	27	28
29	30					

## October 2019

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
		1	2	3 Virtual meeting with Dwayne on Team performance as a whole	4 Team Leads and Managers Virtual Staff meeting	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		



# Organizational Chart

FANatics Sales Department  
At FANatics, we're fan addicts!









