

# Assessment Tools

Define and solve problems both independently and in teams, using creative problem-solving approaches  
Evaluate situations, make informed decisions, and initiate appropriate actions

## Evidence

Choose one of the following 3 options:

(Note: in order to have the potential for the highest grade level for the critical thinking outcomes you must complete Option 1, plus one of Options 2 or 3):

### Option 1 Reflective Narrative Report

Write a reflective Narrative Report describing your team experience and problem-solving skills. The report must be validated by an individual who has first-hand knowledge of your problem-solving activities and team experience. The report should include:

- Statement of team's goal and purpose
- Statement defining the situation/opportunity
- Outline of the activities and processes
- Statement of the selected action
- Explanation of your role and actions as a member of the team
- Method of evaluating chosen action
- Rationale for chosen action
- Address and telephone number of the person validating the report

### Option 2 Case Study

Read the prescribed case study model, six steps to completing your case study. Complete Case 1, plus one of Case 2 or 3.

#### The Prescribed Case Study Model:

The cases that you will be working on are structured to develop your problem-solving skills using creative and critical thinking. The following is the model you should use to do all of your case studies; criteria for marking your case studies will be based on this model. The model includes six steps as follows:

#### 1. State the Problem(s)

This should be clear, concise and complete. Cases, like real business situations, rarely have one clear-cut problem. Instead each situation will encompass a number of symptoms that are a result of the central problem(s). You must be able to differentiate between the symptoms and the main problem(s). This section of the analysis has two parts-identifying the central problem and identifying the symptoms, if any, that must be dealt with immediately. For example, a symptom may be a high rate of absenteeism, but the central problem might be that the company does nothing to motivate its employees.

#### 2. List all relevant facts available and all assumptions made

Clearly label which is which. In this section, include only the facts and assumptions that have a bearing on your suggested solutions, recommendations, and/or follow-up. Never will all possible information needed to resolve a problem be available in a business situation. Therefore, decisions must be made with the best data available and with logical assumptions to fill in the gaps.

### **3. Brainstorm for possible solutions.**

Be creative. Do not put any restrictions on your thinking; do not at this time do any evaluating of suggestions. Let your imagination go wild. One solution may have several components to it.

### **4. Evaluate Possible Solutions**

Critically evaluate each suggestion for strengths and weaknesses. Look at each suggested course of action and ask a series of questions: Does it agree with the company's mission statement/objectives, etc? How soon will the expected results happen? Is that soon enough? How much will it cost? Does the company have the money? What is the likelihood of successful implementation? Will the employees/management see the benefit to this course of action?

### **5. Make a Decision/Recommendation**

Based on your evaluation, choose a solution and support why you chose it. You should also identify any weaknesses in the plan you have chosen. This section of the analysis should include a detailed action plan for implementation including time lines, who needs to do what, when, where, and how.

### **6. Follow-up**

Document how you plan to measure whether the plan has worked. In other words, evaluate the success of your recommended solution. This should include recommendations on who, when, and how the implemented plan will be monitored to determine if the problem along with any symptoms has been fixed.

#### **Case 1**

Outline all the steps you would take to make an informed decision on selecting a new photocopier (or other piece of office equipment) for an office. List in detail each step followed in the decision-making process from researching various models to why and how you made your selection. Design a model that can be used to assist in the selection of other office equipment.

#### **Case 2**

Miho works hard as an intermediate secretary and welcomes new challenges and responsibilities. She likes to learn. Jean, Miho's office supervisor, called Miho into her office today to tell Miho that a promotion is in the offing. Jean indicates that the information is confidential at this time and will remain so until her own boss, Anna, gets all approvals and formally makes an announcement. It happens that Anna is retiring and will recommend Jean to take her place as Manager of Office Services. Jean in turn has recommended that Miho be promoted to Office Supervisor. Miho is pleased for Jean and is delighted with her own advancement.

As part of her job, Miho must review for accuracy (calculations, mostly) expense requests, among other weekly and monthly reports. A week after her confidential conversation with Jean while processing expense requests, she notices discrepancies in Jean's expense request. She has asked to be reimbursed for meals that were paid for by clients or were part of the conference registration fees. Jean's claim for mileage, in comparison to others, is excessive, and in one instance Miho knows for a fact that Jean did not even take her car but rode with Ken from marketing.

The next day Miho notices Jean and Ken leaving for lunch together and returning over an hour later than was usual. Both had alcohol on their breath. This shocked Miho as company policy specifically states that the consumption of alcoholic beverages during regular work hours is strictly prohibited. Over the week Miho also observed Jean smoking in the ladies' washroom; smoking is banned throughout the building. The following week Jean and Ken went for lunch again; this time they did not return to work for the remainder of the day. Miho knows that Jean and Ken are married and not to each other.

Miho is losing sleep at night. What should she do?

### Case 3

Kuldip, a branch manager of a savings and loan institution, has two very unhappy tellers in her office. She knows that, to the client, the teller represents the company itself; therefore, this situation needs to be dealt with immediately so that client service is not jeopardized. Both women are livid, and the atmosphere in the office is tense to say the least. Kuldip wishes to be fair, and she decides to have each employee state the situation as she sees it. This way she hopes to get a total picture of the situation.

Judy has been a teller in the bank for three years. Until four weeks ago she was head teller, but because of her upcoming marriage and relocation, she relinquished her position to Bik Yu, a young woman Judy's age, 25. Bik Yu has worked at the savings and loan bank for two years, one year less than Judy. The rationale behind the job switch was that it would make the transition period following Judy's departure easier if she could train her own replacement, thereby giving the replacement time to learn her new responsibilities under the knowing eyes of an "old pro." In fact, the idea of stepping down was Judy's.

Although both women are efficient and competent, they have far different temperaments. Judy is relaxed and laid back. She never stood over the tellers while they balanced, or barked out orders, or went into a tizzy when something went wrong. If someone had a question, she answered it patiently. If someone occasionally needed to run an extra errand during the lunch hour, it was okay with her. Bik Yu, on the other hand, is energy plus, a real dynamo. She requests that the other tellers come in an extra ten minutes early every morning to be sure everything is shipshape. If they fail to come in early and if later they happen to run out of deposit slips, coins, or suckers for the children, they are in deep trouble. Bik Yu reminds the teller by words and actions that she has "told him/her so." It's not that Bik Yu is a domineering taskmaster. She is really just a hard worker who wants all others to be hard workers, too.

The other tellers, especially Judy, resent this sort of management style, and matters came to a head the afternoon before, at closing time. The bank had closed for the day, and the tellers had balanced their machines and were preparing to leave. Judy was in a frantic hurry since she had to meet with the photographer about wedding photos. As she was leaving, Judy heard Bik Yu say, "Hey, Judy, check the vault!" Angry about Bik Yu's recent treatment of her and preoccupied with her meeting with the photographer, Judy retorted, "Check it yourself! It's your job!"

Bik Yu was flabbergasted by Judy's angry response. She claims that she asked Judy whether she had checked the vault, not ordered her to do it. Bik Yu remembers her comment being, "Hey, Judy, have you checked the vault?" and can't believe that Judy got so angry and upset. In fact, Bik Yu sees checking the vault as something only she, Judy, or Kuldip can do and feels that it was a compliment to Judy to be asked.

What should Kuldip do now?

### Option 3:

Respond to each "what if" question.

### Question 1

A week ago, Mrs. Ida Irate ordered No. 456 file folders from the stationery supply store for which you work. She was promised they would be sent by courier the next day, but she still has not received them. (You happen to know that the sales representative who took the order has been fired for incompetence.) How do you handle Mrs. Irate's complaint?

**Question 2**

You work for Abaca Travel Agency. A customer, Mr. Ray Chan, purchased an airline ticket by telephone from your agency; but when the ticket arrived, it was made out to the wrong destination. You handle the call from this rather annoyed customer. How do you handle it?

**Question 3**

A student from the local high school comes to your reception area, asking your firm to sponsor an ad in the yearbook. You know that it is not usually company policy to make such sponsorships; however, you also know that your firm likes to be seen as a good corporate citizen in the community. What would you say to the student?

**Question 4**

Mrs. Clements, a client, is waiting to see Mr. Cormick. Mr. Cormick buzzes and asks you to collect some papers from his office. Mrs. Clements is blind. How would you let her know that you are going to be out of the reception area? What would you do when you returned?

**Question 5**

Your manager, Mr. Baines, has taken the afternoon off to play golf. You receive a telephone call from Mrs. Johansen, the company president. She needs to speak to Mr. Baines immediately and demands to know where he is. How will you handle the call?

**Question 6**

You are managing a very busy switchboard at Arnold Life Insurance Co. when Mrs. Slowpoke calls. She has some questions about her insurance policy, but she has trouble getting to the point. Help her identify her problem so that you can correctly route her call and get back to the other calls you have waiting.

**Question 7**

You are at the reception desk, greeting clients, answering phones, but also attempting to finish word processing a report that has a deadline an hour from now. Mr. Jovial is waiting for his appointment and chattering away to you. How do you handle this situation?