



# Session Builders

---

## ***101 Blue Monday***

### *Purpose/Objectives:*

To instruct a manager how to choose priorities, delegate responsibilities, solve problems, and organize his or her time more effectively and efficiently—this in-basket exercise allows participants to simulate the first 30 minutes of a day at work as a manager of an organization. They are required to go through a series of notes, memos, messages, letters, etc. to rank order and process them in organizing the day's activities.

**Type: Simulation**

**Time Required:** 60 minutes

**Group Size:** 2 to 15

### **Some ways to use this Session Builder include:**

- A reinforcement exercise in a session to build on key points.
- A pre-session assignment to introduce the subject area.
- A learning aid for employees needing individual assistance in a given area.

### Preparation:

- Make enough instruction sheets, calendars, Daily Activity Sheets, and sets of in-basket items for the number of participants in your session.
- Prepare telephone messages on colored paper, and cut messages on dotted lines before assembling in-basket sets. Assemble all in-basket items as numbered, and paper clip each set with the instruction sheet, calendar, and Daily Activity Sheet before distributing to the participants.
- Have plain note paper, pencils, and paper clips available for working out the exercise.
- Have a chalkboard/chalk or flip chart/markers available to use during the discussion period.
- Participants will need at least a 3-foot square table area to use when working on the exercise. Room arrangement should be flexible for group discussion.

### Process:

- Participants can work on this exercise individually or in teams of two. The two-person teams can share knowledge to help each other to complete the goals of the exercise.
- Distribute one instruction sheet, one calendar, one Daily Activity Sheet, and one set of in-basket items for each participant when working individually. When working in teams, give one set of all the preceding items to each team of two participants. Have them read the instruction sheet first.
- Explain the purpose of the exercise—to learn to organize time, choose priorities, delegate responsibilities, and/or problem solve their assignments. This exercise is a simulation of a manager's day on the job after having been out of the office for several days.
- To help participants organize their work, a calendar and a Daily Activity Sheet have been included. All work dates are to be figured based on the days of the month shown. As participants go through their in-basket items, they are to make notes on the items themselves, put scheduled appointments on the calendar and/or Daily Activity Sheet, and note where the item should be sent when they are finished with it. In other words, they are going to be taking whatever action is needed as though they were Pat Ladder. Though items are numbered for reference purposes, this does not necessarily mean order of priority.
- A suggested plan of action for handling the exercise has been included.
- When working in teams, have each team discuss the items and arrive at a mutual decision on how each item should be handled.

- Let them know that they will have 30 minutes to complete the exercise. They should begin immediately.
- You may want to let them know that when the exercise is completed, you will reconvene the group to discuss how the participants have handled the items.
- During the exercise, several problems may surface. Some of these problems might be:

1. Participants may find it difficult to know where to begin.

*Supervisors or managers with very little experience sometimes have trouble knowing just where to start. You may suggest that one way of getting started is to scan quickly through the items to determine which ones can be delegated. Then they can begin to schedule the priority items and put any that are related together.*

2. Participants may spend too much time trying to arrive at a mutual agreement and never get organized enough to start setting up their activities, delegating assignments, and getting the items filed.

*If they are really at an impasse, suggest they flip a coin and move on.*

3. Participants seem to struggle with this exercise.

*Some participants may never have had to organize under pressure. Let them know that you understand it is difficult, but there really are no "right" answers. The exercise is meant to help participants set priorities within the time limit and experience feedback on how more experienced managers may have done the exercise. Let them know that you understand that it can involve more in-depth thinking and work than many other assignments.*

## Discussion:

- You may want to begin the discussion by asking each participant, **What action did you take first?** Why? When working with teams, ask one of the team members to answer for the unit. As you begin to listen to answers, there will undoubtedly be a wide range of differences. Take care to point out that “differences” in handling this exercise do not necessarily mean that some answers are wrong. By listening to others’ reasoning, previously unconsidered avenues for handling the situation may be opened up. This will benefit the entire group.
- Some people will have begun the exercise by simply going through and prioritizing items as #1, #2, #3, etc. and then handling each individual item. Others will have read through each item as it appeared in their in-basket set and processed the items as they came along. Still others will have sorted the items by categories of high, middle, and low priority and then gone back to deal with the items individually within each group, starting with the highest priority items first.
- The participants might find it helpful to evaluate the success of their various methods by looking at several key factors. Below are suggested factors and possible answers from the sample plan of action which might be considered:

### **Was the way I scheduled my time the most cost-effective for the organization?**

*By asking the secretary, Jamie, to schedule appointments, handle tour arrangements, gather materials for meetings, and make Christmas party arrangements, the manager’s costly time could then focus on solving problems and deciding critical issues such as personnel problems, backlog orders, budget problems, etc.*

### **Were priority items needing immediate attention handled first?**

*Immediate action was taken to review budget figures, attend the budget meeting, handle backlog problems, and talk with the division head. Meanwhile, future action was being scheduled by the secretary on other critical problems such as terminating the employee and talking about attendance problems.*

### **Did I make productive use of my employees in delegating the work?**

*By having Jamie, the secretary, handle most of the clerical responsibilities, the manager was free to handle the pressing operational and production matters such as the budget review, backlog problems, personnel matters, etc.*

### **Did I allow enough time for adjustments and changes?**

*Time was left open during the first day, both in the morning and afternoon, and also during other days in that week. This allowed for additional action that might come up on the backlog problem, other possible meetings regarding the termination of Bill Nolan, unexpected emergencies, unforeseen meetings with superiors, etc.*

### **Did I communicate my assignments clearly and precisely?**

*By writing notes on the items themselves, Jamie could review what was being requested and what action was being taken. By including dates, times, and places, Jamie was able to handle the requests completely.*

### **Did I anticipate the needs of others when taking action?**

*When asking Jamie to let Linda Stevens know I would be available at 3:00 PM and, if that was not convenient, also at 11:30 AM., I gave Linda a chance to air her problems sooner if necessary. By putting filing directions on the upper right-hand corner of each item, Jamie knew instantly what was to be done with the item after the indicated action had been completed. By making entries on the calendar and the Daily Activity Sheet, Jamie could anticipate how to handle requests for the manager's time and answer subsequent questions for other employees or outside sources.*

- To enhance the discussion, you might wish to ask if there are any members who have had any parallel "real life" experiences. If so, ask how they were handled, what the results were, and whether the person would handle them any differently now. A lively discussion will probably ensue. While this can be a good learning experience, take care to remind the group that no two of these situations are exactly alike and careful consideration must be given each time the situation arises.
- Participants generally feel good about the sharing of ideas that takes place during the discussion section of this exercise. How to handle important items quickly and efficiently is not generally known by new and inexperienced managers; therefore, they often feel they have found some good, usable ideas from their peers as a result of this sharing session.

### Options/Variations:

- This exercise lends itself to being done ahead of time as a pre-assignment and then discussed in class using the method outlined under the Discussion section. The participants will still be able to avail themselves of the feedback offered by their peers while saving the 30-minute preparation time needed when the entire exercise is done in class. However, the disadvantage of this option is that when performing the exercise on their own, participants may not stay within the 30-minute time limit, therefore, missing the principle of learning how to organize quickly.
- When managers are having a hard time learning how to plan their work, this is an excellent learning aid which can be given individually to anyone needing reinforcement in this area. Assign the exercise to the manager needing assistance, and have him or her bring the completed work back to you. Then discuss how he or she handled the items and made the entries on the calendar and the Daily Activity Sheet. Seek to understand why specific actions were taken. However, this method does not allow for feedback from peers.

### Notes:

This exercise provides the best learning experience in a group situation. Seeing how others organize their time, choose priorities, delegate responsibilities, and solve problems can be more fully experienced in a group situation.

Based on a concept created and written by the staff of TRC Interactive, Inc.

©TRC Interactive, Inc.

All rights reserved.

Session Builders is a trademark of TRC Interactive, Inc.

If you have comments or questions about Session Builders, or have exercises you'd like us to consider for future editions of Session Builders, call or write for details:

TRC Interactive, Inc.  
Five Miller Road  
Harrisburg, PA 17109  
1-800-222-9909  
In PA (717) 652-3100



# BLUE MONDAY

## Instructions

For the purpose of this exercise, you are to assume the role of Pat Ladder, Manager, Operations Department, The J. R. Jones Company. As manager of the Operations Department, you report to the Division Head, Kelly MacDonald. The following people report to you:

- Jamie White, Secretary
- Mike Crossman, Facilities Maintenance Supervisor
- Linda Stevens, Property and Supplies Supervisor
- Stan Powell, Security Supervisor
- Jay Snyder, Transportation Supervisor

All are capable people and have been in their respective jobs one year or more. The situation this exercise deals with is as follows:

Today is Monday, December 14. You have been away for several days, so you have come into your office at 8:00 AM (early) to “catch up” and get ready for the day. The normal working day begins at 8:30 AM. Promptly at 8:30, you must leave to attend a training meeting. Therefore, you have only about 30 minutes to organize your work, and you want to get as much done as possible. You do not expect to return to your office from the meeting until 10:00 AM. As you reach your desk at 8:00, you find the attached items in your “in-basket.”

As you go through the material, take whatever action is needed assuming you are Pat Ladder. Use your own experience as a basis for your decisions. Enter scheduled activities onto the Daily Activity Sheet and calendar as you feel appropriate.

Make notes to yourself or to others by writing directly on the message, letter, or memo or by attaching notes (use note paper provided by the facilitator). Draft or write letters and memos when appropriate. Note any phone calls you plan to make, including information about when you plan to make the call and whom you plan to call. Note follow-up dates where further action is necessary. Write on the items themselves indicating what you want to be done with them, such as “Follow Up 12/15” or “File.”

After the exercise, you will have an opportunity to compare your actions with others in the group.

Remember:

- Put yourself in the position of Pat Ladder.
- Today is December 14.
- You have come in before regular working hours. There is no one else to help or to call.
- You want to get as much out of the way as possible in the time you have to spend organizing.
- Record (make note of) every action you make or intend to make.
- Be prepared to discuss how you handled the exercise with the group.

### November

<b>S</b>	<b>M</b>	<b>T</b>	<b>W</b>	<b>TH</b>	<b>F</b>	<b>S</b>
1	2	3	4	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					

### December

<b>S</b>	<b>M</b>	<b>T</b>	<b>W</b>	<b>TH</b>	<b>F</b>	<b>S</b>
		1	2	3	4	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		

### January

<b>S</b>	<b>M</b>	<b>T</b>	<b>W</b>	<b>TH</b>	<b>F</b>	<b>S</b>
					1	2
3	4	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						

DAILY ACTIVITY SHEET

**Monday, December 14**

8:30 AM	10:30 AM	1:00 PM	3:00 PM
9:00 AM	11:00 AM	1:30 PM	3:30 PM
9:30 AM	11:30 AM	2:00 PM	4:00 PM
10:00 AM	12:00 NOON	2:30 PM	4:30 PM

# THE J.R. JONES COMPANY

## MEMO

**To:** Pat Ladder  
**Date:** December 8  
**Subject:** Mike Crossman

### PERSONAL AND CONFIDENTIAL

In reviewing my records, I note that Mike Crossman reported in as sick on Monday, December 7. This brings Mike's total number of days absent this year to 22. This is beyond the allowance for sick leave; and though he reported off as sick, we cannot pay him for this absence.

Please note that all of Mike's absences, except one, have been on Mondays. This is an indication that perhaps his weekends have been too strenuous.

We will be making a deduction for this missed time in his paycheck scheduled for release Friday, December 18.

Robin Roller  
Manager  
Personnel and Training

RR:aj

# THE J.R. JONES COMPANY

## MEMO

**To:** Pat Ladder  
**Date:** December 7  
**Subject:** Budget Overrun

I'm sure you noticed your maintenance costs are running over budget. Let's get together before the next review meeting. You know how Kelly hates surprises.

Bill Brush  
Manager  
Finance and Accounting

BB: ec

# THE J.R. JONES COMPANY

## MEMO

**To:** Pat Ladder  
**Date:** December 7  
**Subject:** Bill Nolan

### PERSONAL AND CONFIDENTIAL

Bill Nolan's probationary period in this new security position will expire December 16. In reviewing his training record, I have summarized the following information:

- 1) Bill is a considerate man who seems to have gotten along fairly well with his co-workers.
- 2) Though I have had one of my best people working with him to train him, Bill has been a slow learner and makes frequent mistakes. It has taken him approximately twice as long as the average trainee to learn the routine, and the quality of work has been below standard for the position. An example of his mistakes involves documentation of time visits. He has averaged over 10 mistakes a week though he has repeatedly been shown the correct method to use.
- 3) Bill has not been responsive to constructive criticism about his mistakes—he seems not to hear it at all. He has not taken an active part to change his behavior nor tried to improve the quality of his work.
- 4) Bill has been late to work five times and did not give a valid reason for his tardiness.

Therefore, I recommend he be terminated at the end of the probationary period. However, I understand company policy requires that you and I reach mutual agreement on this before the employee can be released

Stan Powell  
Security Supervisor

SP: ei

## WHILE YOU WERE OUT

**To:** Pat  
**Date:** December 10  
**Time:** 4:10 PM  
**Caller:** Mr. Bush  
**Department:** Finance  
**Phone:** Extension 112  
**Message:** Budget review meeting changed to 1:00 PM, Monday, Dec 14!!

***Norristown High School***

PO Box 785  
Norristown, NJ 07165

November 30, 2007

Kelly MacDonald  
Engineering Division  
The J. R. Jones Company  
15 Miller Road  
Harrisburg, PA 17109

Dear Ms. MacDonald:

As we discussed in our ongoing program of career education, we try to give students a first-hand look inside a variety of business firms and government agencies. We very much appreciate your willingness to have a few students visit your facility for a tour.

The best date for us would be December 18. Our school schedule is somewhat restricted, so please call me by December 9 to let me know if this date is convenient.

Thank you so much for your cooperation.

Sincerely,

George Barclay  
Counselor

GB: jo

## TIME MANAGEMENT

### Some Tips

1. Make daily "To Do" list/priorities.
2. Set time limits/deadlines.
3. Schedule routine work and interruptions.
4. Make phone calls before 9:30 AM and after 3:30 PM.
5. Don't wait "on hold."
6. Sort mail by priority.
7. Handle each piece only once.
8. Use phone instead of letter/memo.
9. Use conference calls instead of meetings.
10. Hold meetings just before lunch.
11. Holding meetings standing up.
12. Make meeting agenda decisions (not topics).
13. Use "tickler file."
14. Use the "circular file."
15. Go to lunch at 1:00 PM.
16. Find and use your "best time."
17. Avoid temptation to procrastinate.
18. Learn to say "no."
19. Don't take work home at night.
20. Keep work area neat.

*ITEMS TO BE SCHEDULED NEXT WEEK*

- A. Talk to Linda about backlog of supplies.
  
- B. Meet with Harry Cochran, Production Manager, to schedule use of equipment for supply handling.
  
- C. Check on overdue monthly reports.
  
- D. Notify section supervisors that Performance Appraisal Reviews are due in by December 28.
  
- E. Call Burt and Harry about table arrangements for the Christmas party on December 19.

# BLUE MONDAY

## Sample of Suggested Plan of Action for Exercise

<i>Item</i>	<i>Make following notations on Memos/Letters/Messages/Etc.</i>	<i>Make following notations on Daily Activity Sheet/Calendar (DAS)</i>	<i>Place item in designated place</i>
1	Put telephone message together with <b>this</b> memo. Write on memo: "Jamie: Pull personnel records on M. Crossman."	DAS, under 10:15 AM.: "Call Crossman; bldg. estimates; set appt. for 12/15 on attendance."	Put telephone message and memo in Outbox.
2	Clip Telephone message and memo together. Write on memo: "Jamie: Call Brush and make appt. to meet in my office at 10:30 AM today; get expenditure log ready."	DAS, under 10:30 AM: "Brush—Budget Review Mtg.—here"	Put telephone message and memo in Outbox.
3	Write on memo: "Jamie: Call Stan; make an appt. to meet here at 9:00 AM 12/15; pull Nolan's file and put on my desk."	On calendar under 12/15: "9:00—Powell—here" On DAS, under 4:00 PM.: "Review Nolan's file"	Put memo in Outbox.
4	Write a note to Jamie: "If Ms. MacDonald calls, let her know that I'll be in at 10:00 AM and will call her then."	DAS, under 10:00 AM: "Call MacDonald regarding telephone message."	Put telephone message by phone; put note to Jamie in Outbox.
5	Write a note and attach it to telephone message: "Jamie: Call Linda and let her know my first available time is 3:00 PM today—If not okay, have her come here around 11:45 AM."	DAS, under 3:00 PM: "Stevens backlog mtg.—here"	Put note in Outbox. Put telephone message in work to be processed today.
6	Write on letter: "Jamie: Call G. Barclay after planning a tentative tour schedule: 10:00 AM to 12:00 noon, with lunch in the cafeteria for 12/18. Let him know I will get back to him with details. Find out what his tentative plans are. In upper right-hand corner, mark 'F!' 12/15."	On calendar under 12/18: "Barclay—School Tour—10:00-12:00 w/lunch"	Put letter in Outbox.
7	Mark In upper right-hand corner: File—Time Mgmt.	On calendar under 12/30: "Look into time analysis chart for measuring time usage."	Put in Outbox.
8	A. Write the following note on list opposite each corresponding entry: (Add a note asking Jamie to handle these):  B. "Call H. Cochran and set up a meeting for Wednesday at a time convenient for him, preferably in AM."  C. "Call supervisors with late reports and get feedback why they are not in."  D. "Call supervisors and remind about Pen. Appraisal reviews."  E. "Make table arrangements for Xmas party. Give me results."	On calendar under 12/16: "Cochran Equip. Mtg.—here"  On calendar, under 12/18: "F!) Monthly Reports."  On calendar under 12/18: "PA Reviews due."  On calendar under 12/15: "Call Harry and Burt about Xmas party."	Put entire list and note in Outbox to be processed by Jamie.