In – Tray Exercise

Assessor brief

This is a 30 minute individual exercise designed to assess a candidate’s ability to prioritise and delegate appropriately whilst under pressure (time). Candidates are given a series of tasks, messages, letters and other documents and asked to put them in order of priority, with an overview of any action they would take.

You’ll need to make sure you have a suitable room available for this exercise where the candidate will not be disturbed.

This exercise consists of 14 documents which the candidate will need to read and then decide on what action to take and in which priority order.

Provide the candidate with the Candidate Brief below, check their understanding of the exercise and explain that they have 30 minutes to complete the exercise.

At the end of the 30 minutes collect their answers and use the Assessment Sheet attached to assess the candidate against the qualities you are looking for.

This exercise assesses the candidates Planning and Organising.

<table>
<thead>
<tr>
<th>Exercise Timings</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Candidate briefing</td>
<td>5 minutes</td>
</tr>
<tr>
<td>In Tray Exercise</td>
<td>30 minutes</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Materials Required</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Paper/pen</td>
<td>Yes</td>
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</tbody>
</table>
In – Tray Exercise

Candidate brief

You are Pat Jones, recently appointed a Store Manager of a £1.8 million turnover store.

This is your first day at work following a two-week holiday. Today’s date is Wednesday 5th April.

Your administrator has collated the documents that have arrived in the store during your absence.

Your task:

Decide on the order in which you would deal with the items in the folder using the following code:

A = Must do today
B = Would like to do today, time permitting
C = Can be left until a later date

and then in the box provided write the specific action you would take to address that task.

You have 30 minutes to complete this exercise.
**DOCUMENT 1**

**NOTE**

Pat

Someone from the Yateley Hotel called on Friday 31st March. You have booked a room there for your Training Event on 20th April. They said something about overbooking. They need you to call them urgently.

Tel: 01333 222999 – Mr Shah.

<table>
<thead>
<tr>
<th>Priority Order (circle)</th>
<th>Specific action to be taken</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>B</td>
</tr>
</tbody>
</table>

**DOCUMENT 2**

**MEMO**

To : Pat Jones

From : Training Department

Re : Trainee Recruitment

As part of the selection process, potential Trainee Managers need to visit a Store for half a day before they attend an Assessment Centre.

There are two candidates who live close to your store, please could you call to arrange a mutually convenient time for them to visit.

Francis Gray  020 688 9875
Bassima Mughal  020 634 0012

The next Assessment Centre is on Monday 24th April.

<table>
<thead>
<tr>
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<tbody>
<tr>
<td>A</td>
<td>B</td>
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</table>
Dear Madam,

I am writing to express my disappointment at the service I received when visiting your store. I have a 4 year old daughter and a baby of 10 months. As with most children, my daughter does not enjoy shopping, particularly when it involves lots of waiting, which was the case on 30th March when I visited your Store. I arrived in the Store at 10.30am and was not served until 11.40pm. I was not acknowledged by anyone during my wait, and when I was eventually served, my daughter was extremely fretful. I was served by ‘Mandy’ who took one look at my obviously distressed daughter, raised her eyebrows and said ‘I hope you don’t expect me to deal with her while she’s in that state’.

As you can imagine, I was absolutely horrified at this person’s attitude. I asked to speak to the Assistant Manager and told him of the incident. His name was Simon Darby, and he treated me with indifference, offering no apology.

As a life-long Shoe Company customer I was appalled at my treatment. The Shoe Company prides itself on a reputation for being the place to shop for children’s shoes – this experience does not seem to fit in with this reputation.

I will not be rushing into a Shoe Company shop in the near future, and I expect something to be done about this incident.

Yours sincerely,

Mrs Anna Frampton
Dear Sir/Madam

We are newly established charity that works with under-privileged people around the UK. We are now setting up our Christmas Bonanza and would like your help.

We are approaching all local businesses asking them to make a donation, of either products or money, so that we can give a Christmas gift to those most in need in our local area.

If you have any queries please call me on 020 786 2317.

Please give generously.

Yours faithfully

George Grey
Head Fundraiser
DOCUMENT 5

NOTE
30/03/06

Andrew MacGregor called while you were on holiday. He can’t go to the next review meeting on 17/4/06. Can you go in his place? Where do you want the information sent? Can you call him to discuss.

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<td>B</td>
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<tr>
<td>C</td>
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</tbody>
</table>

DOCUMENT 6

E-Mail

To: All Store Managers
From: Regional Support Manager
Re: Celebrating Success Training Events

All Stores have now booked to complete the ‘Celebrating Success Day’ during April 17th – April 21st.

Please could you forward an outline of how you are proposing to run the day and an estimate of the total cost.

To ensure the budget, I require this by Thursday 13th April.

Kind Regards

Diana

<table>
<thead>
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<tbody>
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<td>C</td>
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</tbody>
</table>
DOCUMENT 7

NOTE

4th April – 18:00

Hi Pat

Sorry to leave you a note, but I have just notice that there are two tiles in the front entrance porch, which have started to come up.

You know I would normally sort this out myself, but as I am on a Recruitment Skills workshop for the next two days, I thought I would write this down while it was fresh in my mind.

See you Friday

Simon

<table>
<thead>
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<tbody>
<tr>
<td>A          B       C</td>
<td></td>
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</tbody>
</table>

DOCUMENT 8

E-Mail

To : Pat Jones

From : Handbag Department

Date : 29th March 2006

The new season’s range is not selling as we expected.

Please can you complete an analysis of the Handbag sales over the last six weeks with details of why you believe the performance has been as it has. We would appreciate it if you could return the information by April 10th.

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<tr>
<td>A          B       C</td>
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</table>
DOCUMENT 9

NOTE

Hi Pat

Welcome back – nice for me to beat you in for a change!

Just to let you know that the Men's Team Leader has called in sick. She’s going to the doctors at 11.00 and will give you a ring when she gets back home.

James
(Administrator)

<table>
<thead>
<tr>
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</thead>
<tbody>
<tr>
<td>A B C</td>
<td></td>
</tr>
</tbody>
</table>

DOCUMENT 10

E-Mail

From : Andrew MacGregor
       Area Manager

To : Pat Jones

Welcome back Pat, hope you had a great holiday.

Just a quick email to let you know that myself and Jenny White the Regional Manager will be visiting your Store for a full day visit on Thursday 13th April.

Look forward to seeing you, and the holiday snaps.

Andrew

<table>
<thead>
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<tbody>
<tr>
<td>A B C</td>
<td></td>
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</table>
DOCUMENT 11

NOTE

Telephone message received from Regional secretary.

To remind you that A MacGregor will be attending a review meeting on Monday 17th April. All Managers are to give their feedback on the following in time for the meeting:

- Progress on the new Managers Performance and Development Review process
- Recommendations for remote stockrooms in Stores with MAT £1.5+.

Feedback required by 12/4/06.

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DOCUMENT 12

NOTE

Pat

Can you call the accounts department when you get back from holiday. There is a problem with the banking from the 31st March. Although recorded on the till summary – the Bank has not received a deposit.

4/4/06

<table>
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FACSIMILE MESSAGE

From : Human Resources Department
       Head Office

To : Pat Jones
    Store Manager

Date : 5th April 2006

For information Please reply Action Required

Re: Marc Campbell

Pat

Marc called while you were on holiday. You recently promoted him to Ladies Team Leader and he wanted to know when his pay increase would go through. We have checked our files and we have not received a change form from you. Please note that the payrun deadline is 5pm today.

Regards

HR Assistant

<table>
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<tr>
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</thead>
<tbody>
<tr>
<td>A B C</td>
<td></td>
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</tbody>
</table>
Dear Pat

It is with regret that I advise you of my intention to resign my position as Stockroom Manager.

I have not been happy in my work for some time, and have not felt that I've been given sufficient opportunity to discuss my concerns with you. Therefore, I have decided to give you one months notice.

As I have 3 days owing to me from Christmas plus 2 days in lieu time outstanding from last year, my last day of work will be Friday 14th April.

Yours sincerely

Eric Murphy

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<tr>
<td>C</td>
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</tr>
</tbody>
</table>
EXERCISE ASSESSMENT SHEET
IN TRAY EXERCISE     STORE MANAGER

Candidate Name:

Assessor:  

Date:

Use this form to assess the candidate against the qualities you’re looking for.

- Note down any positive/negative examples in the space provided.
- Assess how well they’ve done using the quality negative/positive indicators.
  **Note: those listed are only examples of positive/negative indicators. The candidate may come up with other things that give you good or bad evidence for this quality.**
- Give a total score using the scoring key below and note in the space provided.
- Once you’ve scored all qualities, give an overall total for the exercise, and record it in the space provided.

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### SCORING KEY

<table>
<thead>
<tr>
<th></th>
<th>0</th>
<th>1</th>
<th>3</th>
<th>5</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>No evidence of positive indicators and several negative</td>
<td>Evidence of 1-2 positive indicators but also evidence of 1-2 negative indicators</td>
<td>Evidence of a majority of positive indicators and only evidence of 1-2 negative indicators</td>
<td>Evidence of all positive indicators and no negative indicators</td>
</tr>
</tbody>
</table>

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### OVERALL ASSESSMENT

Scores

- Planning & Organising

Total Score

- 

Comments:
**IN TRAY EXERCISE**

**STORE MANAGER**

**PLANNING AND ORGANISATION**
Demonstrates a clear understanding of activities which add value. Plans and prioritises time for those activities (including peak trading periods) which will drive forward and achieve overall business goals.

<table>
<thead>
<tr>
<th>Positive Indicators</th>
<th>Negative Indicators</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Effectively prioritises tasks</td>
<td>• Does not complete the exercise within the timescale</td>
</tr>
<tr>
<td>• Gives clear explanations of reasons for priorities</td>
<td>• No clear reasoning for choices</td>
</tr>
<tr>
<td>• Delegates some of the tasks to other members of the team</td>
<td>• Tries to do everything her/himself and does not delegate</td>
</tr>
<tr>
<td>• Includes team in planning for the Area/Regional Manager visit</td>
<td>• Appears disorganised and unstructured</td>
</tr>
<tr>
<td>• Balances task, people and customer needs effectively</td>
<td></td>
</tr>
<tr>
<td>• Completes the exercise within the timescale</td>
<td></td>
</tr>
</tbody>
</table>

| SCORING KEY | 0 | 1 | 3 | 5 |

Attach the completed In Tray to this sheet for your records.