

Terry's In-basket

Item 1: Clean clothes

Kansas City regional manager, Steve M., charged \$1 200 for a washer and dryer for office use. A Level Five tornado downed power lines in a residential area where half of his sales representatives lived. Power was out for over a week. Company rules do not allow for the use of company funds for such purchases. He's submitted his expense account for your approval.

Approve Expense Report	Do not approve expense report	Other

Item 2: Going beyond the call

Pauline's crew worked overtime over the weekend on a big customer order. Overtime pay is not an option. Pauline has asked for permission to give her three-person crew an extra vacation day in recognition of their hard work. Since there is no mechanism for this in the company, she asks you to sign their time sheet for their day off as if they had been working.

Sign time sheet	Do not sign time sheet	Other

Item 3: Travel reimbursement

Alicia just returned from a sales trip to New Orleans. While there, she had the opportunity to eat dinner with a top manager who is likely to buy many of Ethi-Tech's products. However the dinner was at a very high-end restaurant and cost \$170 over the maximum allowable per-meal corporate-wide cap for meal and entertainment expenses.

Sign expense sheet	Do not sign expense sheet	Other

Item 4: Marital counseling

Brian has been having some marital problems which he does not want to share with others in the office. He comes to you to ask for three hours off every other week to go to counseling. As the counseling appointment times vary, he asks you to simply state on the common office schedule various types of fictitious off-site meetings with clients.

Change appointment schedule to reflect fictitious off-site meetings	Do not change appointment schedule	Other

Item 5: New policy

On Wednesday Courtney purchased a new digital assistant (\$250) to carry with her on client visits. However, Ethi-Tech recently instituted a new corporate-wide policy, which went into effect over a week ago, that requires prior approval for equipment purchases. Courtney did not obtain prior approval, and told you she doesn't recall hearing about the new policy even though she attended a meeting where it was mentioned. You must now decide if you will go to your boss and seek approval for the purchase.

Seek Approval from Boss	Do not Seek Approval from Boss	Other

Item 6: Personal services

During a recent sales trip to Tijuana in Mexico, Todd enlisted the services of an "escort" to accompany him to a reception hosted by a senior government official. Even though he is unmarried, Todd felt this was necessary to "look the part" and socialize effectively with top managers who would be attending the reception with their spouses. He has submitted a reimbursement form for \$300 for "personal services."

Sign reimbursement form	Do not sign reimbursement form	Other

Item 7: Award approval

One of your sales teams has completed a major initiative and increased sales of Ethi-Tech's products in the Chicago area by 37 percent. For such achievements, Ethi-Tech has an award and sizeable bonus for any team that increases sales by 40 percent or more in any period. You have been approached by the team requesting that you approve the award for them.

Approve award	Do not approve award	Other

Item 8: Phone bill

Company policy states not to use office phones for personal reasons. However, you receive a copy of the office phone bill for one junior manager (a high performer) whose unit clearly violates this policy. When you call the manager to alert him to the violation, he says that "it's no big deal" and that he's seen the division head's secretary chatting with her boyfriend on the phone under the boss' nose. You need to decide if you will approve the phone bill.

Approve phone bill	Do not approve phone bill	Other

Item 9: Upgrade to first class

You are making flight reservations for your next trip to Houston. The reservation agent asks if you would like to receive an upgrade to first class for \$85 since you have qualified due to your recent travels. You could easily afford this out of your own pocket but you are not sure if you should accept, as you have heard other managers at Ethi-Tech discuss how they believe all employees should fly in standard coach seats. You are not sure if other employees will be on the same flight.

Accept upgrade	Do not accept upgrade	Other

Item 10: A new shirt

Raj, one of your best sales people, has sent you a receipt for the purchase of a white dress shirt. Apparently, a very expensive prototype of company equipment leaked carbon dust ink into his overnight bag on a recent business trip and ruined a shirt. Raj was carrying the equipment to show to a customer and you asked that he carry the equipment with his baggage for safety purposes. Company rules do not permit reimbursement for the purchase of clothing.

Tell Raj you are sorry but cannot accommodate his request	Suggest Raj increase the amounts on the expense report for cabs and tips to cover the cost of the shirt	Other

Item 11: Lunch at your desk

In an email from your American sales manager in Venezuela, you read that he is upset about a practice in his office that caused him to lose a client. Apparently, the office staff and any sales managers on the premise eat lunch together and do not answer phones during this time. The lunch hour is really an hour and a half. A client whose IT system experienced a major meltdown was unable to reach anyone during the crisis period, which coincided with a nearly two-hour break taken by the staff last week to celebrate Cinco de Mayo. When the sales manager confronted the staff, they told him this was the custom in Venezuelan offices. The sales manager wants you to issue a policy that limits staff lunch to the 45 minute policy that is in place in sales offices in the States. He also wants you to mandate staggered lunch breaks among the staff so that phone coverage is always available. You realize that socialization is an important aspect of South American culture. The current crew has developed a real esprit des corps and has performed very well in all other ways.

Act in agreement with your sales manager	Suggest the manager give his cell phone number to clients for emergencies	Other

Item 12: Cell phone on hold

You open an email from Carly, an outstanding analyst in your department, who is unhappy that she is not entitled to a company cell phone at her management level. She has been using her own cell phone to contact clients when she is on the road and has been paying for it out of her own pocket.

Issue Carly a phone as an exception	Thank Carly for going the extra mile but make no exceptions.	Other