**Cases for Small Group Discussion**

Case 8–1. Reports and Technology

Jesse Matthews sat in his office with a puzzled look on his face. He had received a Word file from Ellen Linares, a report that was to be presented to upper management in the morning. Ellen’s e-mail message said, “The report is attached. Please let me know if everything is OK before I leave tonight.” The message had been sent at 2:45 p.m. It was now 6:15 p.m., and Jesse was just getting around to looking at Ellen’s attachment.

He opened the Word file. Title page: check. Table of Contents: check. Introduction: check. Table one: uh-oh. Table one looked like a jumbled mess! Jesse clicked at various locations within the table, noticing that the formatting was haphazard and that the alignment was badly out of line. Table two looked worse. All of the pertinent information was there but all jumbled up in no apparent order. Jesse tried opening the file again, with the same results. The rest of the tables were in similar disarray.

Ellen had left work at 5:00 p.m. Jesse tried her home phone, with no luck. He didn’t have her personal cell number. Jesse made a half-hearted attempt at reworking the tables using his word processor’s table functions but only made things worse. He chastised himself for not looking at the report sooner. He was due to present it at 8:00 the next morning, and that was the exact time Ellen came in to work. There would simply be no time for her to try to revise it or to try to recover her originally intended format.

As software packages are updated, the way in which they process documents changes. Ellen had saved the file in an earlier format, although in the same software package, but her tables had slipped in transition. Without the original software version, and perhaps even the same computer on which it was produced, it was unlikely that the updated software could recover the orderly format Ellen originally created.

Case 8-1 Questions

1. *What should Ellen have done in order to prevent this type of issue from arising?*

Clearly, the office’s computer software should all be consistently upgraded so documents can move from person to person smoothly. Second, Ellen and Jesse are working on too short a schedule—Ellen’s last-minute delivery of the report and Jesse’s even later look at it indicate that they need training in time management.

*2. Now that the problem is Jesse’s, what do you suggest should be done?*

The company’s tech support specialists should be contacted in an effort to clean up the report’s tables. Compatible software is essential for efficient collaborative writing. Since the meeting is scheduled for 8:00 tomorrow morning, Jesse should delete the tables from the report, present the rest of the report, and then e-mail the report’s tables to the meeting participants as soon as they have been corrected.

**Case 8-2. Recommendation Report**

You are a middle-level marketing manager in a large wholesale organization. This morning, your boss called you into her office and informed you that 126 cars in the company’s sales fleet were ready for replacement. She asked you to do the research and write a report that would recommend a purchase to replace the cars about to be retired.

Pick four cars that are comparable—for example, the Ford Taurus, the Honda Accord, the Chevrolet Lumina, and the Toyota Camry. In selecting a particular type of car, you might want to make some assumptions about the products handled by your salespeople and whether they carry samples. For the purposes of this report, we will assume you considered other similar cars but the four you choose are the top contenders.

Your next task is to identify the criteria to be used in selecting the car to be purchased. Remember that the quality of your research and report will hinge largely on how thoroughly you identify the relevant criteria to be weighed. Once you have identified the criteria to be used and all subfactors of those criteria, you are ready to begin your research. You will probably find *Consumer Reports* to be an invaluable source of information, but don’t overlook other less obvious sources, such as dealerships.

After collecting and organizing your information, you will be ready to write your report. What format should that report take? Which strategic aspects ought to be considered in determining that format? If you choose to use a formal report format, which prefatory parts should you include? Which subsection should you include in the introduction? How should the body of the report be organized? What will the ending section of the report proper contain?

**Case 8-2 Answer:**

*Students should be aware that this type of report should use a direct, formal format as it is being written for superiors and contains neutral information. This is an excellent exercise as it presents the student with a situation that could be encountered by any one of them during their years following college. Prefatory parts must include a letter of transmittal reflecting the authorization of the senior management official who originally assigned them the responsibility of this report. The introduction should include the methodology used as well as the purpose and scope of the report. The report should be organized to include all of the automobiles considered and tables that report the necessary statistics on each auto to the deciding committee. Conclusions should be presented that will lead management to the same outcome outlined in the student’s report.*

**Case 8-3. Informational Report**

Develop a questionnaire containing at least 10 statements about typical ethical dilemmas faced by businesspeople. Use “agree\_\_disagree\_\_undecided\_\_” as response options. Possibilities might include “It is acceptable for an American businessperson in a foreign country to bribe a public official if that practice is accepted and expected in that country.” Another possibility might include “It is acceptable to give a poorly performing employee a good reference to get rid of him or her.”

At the end of the questionnaire, ask for some demographic information that might make the analyses of your findings more interesting. You might ask for gender, class status, age, business experience (yes or no, and perhaps years of experience), whether or not the respondent is a practicing member of a religious faith, and so on.

Next, circulate the questionnaire randomly on campus, perhaps at malls or at the student union building. Try to get at least 100 respondents. Remember that the larger your sample, the better your findings will be statistically. You might even consider having a ballot-like box with you to assure confidentiality.

After you have collected your data and analyzed your findings, you will be ready to put your information into a report to be presented to your instructor. What format will that report assume? What factors should you consider in determining that format? What parts will the report contain? Will you use the direct or indirect order? On what basis will the body of the report be organized?

An interesting twist on this report might be to circulate the questionnaire to businesspeople. In the demographic section, you could ask for level within the organization, rather than class status. And instead of asking whether they have had work experience, you could ask for years of experience. You might even ask for marital status and whether they have children. Additionally, you could ask for years of formal education.

If it were possible for you to circulate the questionnaire to people on campus and to business people, you might then be able to compare the results overall.

**Case 8-3 Answer:**

*This will be a good exercise for students to do in order to see that there are many factors influencing responses to the questionnaire. Among these are education, age, sex, length of service in an organization, position within the organization, and social status. This report should be presented both informally and indirectly, since its results will probably not be welcomed by management.*