Case Study for Incident Report

Below is a short case study and considerations that provide information from which you will develop an incident report template. After creating the template, write one paragraph of the body of a memo to Arctic Blast Heating and Air Conditioning employees in which you explain why you are creating this procedure and how you expect your employers to use it.

New Incident Reporting Procedures for Arctic Blast Heating and Air Conditioning

Case:

Since you founded Arctic Blast Heating and Air Conditioning five years ago, you have seen your company grow exponentially. During the first year, you did everything—you answered the phones, managed the books, and performed all of the HVAC work that came your way. Now you have 28 employees—three people who manage the clerical side of the business and five crews of five HVAC technicians. As the company has grown, your role has changed drastically. Rather than doing all of the work yourself, you now spend most of your time managing your crews of technicians and corresponding with your clients.

As soon as your business began to grow and you found yourself having to delegate responsibilities rather than doing everything yourself, you found yourself spending more and more time “putting out fires” at work. Just this week, you have had to deal with three such situations. On Monday, Meredith Owens verbally assaulted one of your crews because they badly damaged two shrubs when they installed a new heat pump in her home. That same day, while you were at a jobsite, another client—George Sherouse—came into your office in a rage because he received a bill for services that was higher than the estimate he received before the work began. Yesterday, the problem was not with a client, but one of your technicians: Kevin Day never came back to work after his lunch break.

All of these day-to-day problems eat up your time, and you have decided that you want to try to find a new, better way to deal with them. As a first step, you want to establish an efficient way for your employees to inform you of any problems that they encounter. What you envision is an incident report template that is broadly adaptable to the purposes of both your technicians and your office staff. Once you hammer out the details of this report template, you know you will need to educate your employees on why you created this form and how you expect it to be used. You know that this form will not solve problems all by itself, but you do think it will allow you to spend your time finding solutions rather than just trying to understand what went wrong in the first place.
Considerations:

1. Think about the stakeholders in this case. How do you think they would react to a new incident reporting policy? What steps do you think you would need to take to make the new procedure a success?

2. Think about the circumstances in which the employees of Arctic Blast Heating and Air Conditioning would use the incident reports that you are planning. Do you think that you should provide the report template to them as an electronic form or as a paper form that they can fill out by hand?

3. You want to use one form for all of your employees, but your employees do very different kinds of work. How do you think you should go about designing a form with such wide applicability? Would such a form need more or less structure? Do you think that creating a form like this would require any research?