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12-11-2015

## Competing in the International Collegiate Sales Competition

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WESTERN MICHIGAN UNIVERSITY

COMPETING IN THE INTERNATIONAL  
COLLEGIATE SALES COMPETITION

CHRISTINA COOK

DECEMBER 11<sup>TH</sup>, 2015

## **Abstract**

The following report aims to analyze the process that is involved in competing in the International Collegiate Sales Competition. There will be an overview of the selection process and the competition itself and an analysis of the overall performance at the competition. In addition, there will also be an overview of lessons learned by competing along with general suggestions to future competitors and competition coordinators.

Before examining the details of the competition, this thesis will address the Sales and Business Marketing program at Western Michigan University. In addition, there will be models referenced within Western Michigan University's sales program that will be explained further as they appear. Furthermore, there is an Appendix included within this thesis that will be mentioned throughout the report.

## **WMU's Sales & Business Marketing Major**

The Sales and Business Marketing (SBM) program at Western Michigan University is designed to prepare students to excel in entry-level sales positions, including the framework for future success within management. Led by faculty members including Dr. Jim Eckert, Dr. Steve Newell, Dr. Kelley O'Reilly, and Mr. Bob Samples, the program is exclusive and entails more than a basic sales knowledge, offering a major with a specific focus on selling and sales management.

Students will spend a significant amount of time in the Harold Zeigler Interactive Sales Lab where they are required to apply their sales techniques to role-plays reflecting the current sales atmosphere. Consecutively, Western Michigan University has been recognized as a "Top University Sales Programs" since 2007 by the Sales Education Foundation. The program is also nationally ranked as the number one school on the list of "Top Schools with Specialized Sales Programs" by Study.com.

Graduating students will have over 44 weeks of skill-based sales training that include hands on experience with appointment setting phone calls, sales calls, and negotiation applications (see Appendix A for a document overviewing the SBM program at WMU). According to a survey conducted by the Western Michigan University Career and Student Employment Services, the current placement rate for graduates of the SBM program is 96%.

## **Selection to Compete**

Only six students were selected for the fall 2015 semester to represent WMU in one of three national sales competitions – the State Farm Sales and Marketing Competition, the Russ Berrie National Sales Challenge, and the International Collegiate Sales Competition. A general email was sent out to all of the SBM majors inviting them to schedule an audition for one of these sales competitions.

Students are selected based on a variety of criteria including preparation and work ethic demonstrated throughout their sales courses. The sales professors identify who their strong talent and high performing students are after the start of the fall semester.

The general email sent out to all Sales and Business Marketing majors required that those who audition must have completed the first sales course offered within the program as well as emphasized preference to seniors. A total of eight students auditioned for a spot within one of the three sales competitions.

## **About the International Collegiate Sales Competition**

The International Collegiate Sales Competition (ICSC) is hosted by Florida State University and is held at the Rosen Plaza Hotel in Orlando, Florida. The mission of the ICSC is to "enhance the selling profession by encouraging and developing the critical skills needed by

today's collegiate sales graduates and by fostering best practices among sales organizations worldwide" ([https://www.facebook.com/lcscFsu/info/?tab=page\\_info](https://www.facebook.com/lcscFsu/info/?tab=page_info)).

This was the fourth year since the competition was started, and only Western Michigan University's third attendance. For the first three years, the scenarios were created around the product Tom James Suits. This year, the product for the competition was SalonBiz.

#### About SalonBiz

SalonBiz is a cloud-based customer relationship management (CRM) software that was the first to be designed specifically for the beauty industry. It was created by NeillTSP -an industry leader in providing products and services exclusively to the salon and spa industry - to help those within the industry measure and track performance more efficiently and effectively. SalonBiz is headquartered just outside of New Orleans in Hammond, Louisiana (<http://www.salonbizsoftware.com/about-us/>).

## Competition Scenarios

Competitors are given access to the scenarios roughly one month before the competition. There are four rounds within the competition, however, only the first three scenarios for those rounds are revealed, thus giving those competitors that advance to the final round equal preparation time. The 'international' challenge this year involved a salon and spa located on Melia Varadero Resort in Cuba. Below is a description of the scenario given for Round One (see Appendix B for a full overview of the scenarios given for the 2015 ICSC).

#### Round One Scenario:

The scenario for round-one is a "Needs Identification" sales call, meaning that the purpose of the meeting is to identify the main challenges a prospective customer is facing. The ultimate goal of the round one sales call, in which only 15 minutes is allotted, is for the buyer to accept a second appointment for a customized solution presentation.

In this particular scenario, competitors were to meet with Niki Garza who is the manager of a salon and spa at Melia Varadero Resort in Varadero Cuba. Between email conversations, a meeting was set with Niki while he was in Orlando for other conference meetings. However, it is discovered that Niki is not the decision maker, so the goal is to convince Niki to set another meeting with Rafael, who would ultimately make the decision of whether or not to purchase SalonBiz.

#### Round One Materials:

In order to develop an engaging presentation, the other student selected (Mackenzie Wright) and I made the decision to develop a variety of materials. For the Round One role-play, the following materials were developed: question sheet, company overview, product overview, training, implementation, and security sheet, pricing sheet, and testimonial letter. Each one of these materials were developed to make for a more effective and engaging sales call. The question sheet was used as an outline for

questions that we were going to ask Niki in the role-play. The company and product overview sheets were developed to make it easy for Niki to follow along as we were talking about key points. The training, implementation, and security sheet again created a way for Niki to follow along with key points. Lastly, the pricing sheet and testimonial letter were created in case conversation took a turn in those directions. All of these materials created can be found in Appendix C.

## Judges Performance Reviews

The determination of whether or not a competitor goes through to the next round is based on the judges' scores. There are five judges assigned to a competition room.

Dividing the total points given within each category by the total points possible within that category calculates a percentage. That percentage is then multiplied by the weighted number for that category. For example, taking Judge #1's score of 31 points from the Meeting Opening category (Table 1) and dividing that by the 40 points possible for that category.

### Explanation of Scores

There are seven different categories that judges give points in which each are all weighted differently: Meeting Opening (5 percent), Needs Identification (45 percent), Presentation (10 percent), Overcoming Objections (15 percent), Gain Commitment (10 percent), Communication Skills (10 percent), and Likeable and Trustworthy (5 percent). Each one of these categories has a different set of criteria in which the judges will then give a score of 0 to 10. For example, the "Needs Identification" category has five separate criteria that each receives a point total ranging from 0 to 10 as follows:

- 1) Uncovered decision process (decision criteria, people involved in decision process, potential timing issues),
- 2) Effectively determined relevant facts about company and/or buyer,
- 3) Effectively gained a basic understanding of the prospect's problems and/or challenges,
- 4) Explores the effect of the prospects problems/challenges (implications) and the gains made if the problem/challenge is overcome (need-payoff),
- 5) Summarizes the problems/issues uncovered, gains a pre-commitment to consider the product/service and smoothly transitions to a presentation.

As a result, the total possible points for the 'Needs Identification' category would then be 50 points. Within another category such as 'Gain Commitment,' there are only two criteria measurements, making for a total of 20 points for that category.

Below, in Table 1, you will observe the total number of points each particular judge gave me within each of the seven categories. You will also see the percentage of the points I earned from each judge within each category. Then, looking to Table 2, you will see a number that is calculated by multiplying the percentage of points earned

from Table 1 by the weighted number in each category. For example, take the points possible from Table 1 and divide that by the total points given from Judge 1 within the 'Meeting Opening' category – 31/40. This will give us the 77.5% also found in Table 1. From there, you multiply that 77.5% by 5 (because that is the weighted score for that category) to get the 3.875 found in Table 2. Adding all of the numbers up from each judge within Table 2 will produce the total points I then received for each judge and the points that were then compared to the other competitors.

Note that scores highlighted in red are the lowest scores given within each particular category and those highlighted in green are the highest scores given within each category.

Table 1

	Judge #1		Judge #2		Judge #3		Judge #4		Judge #5		Total Possible	
	Points	%	Points	%	Points	%	Points	%	Points	%	Points	%
<b>Meeting Opening</b> 5%	31	77.5%	39	97.5%	32	80.0%	28	70.0%	27	67.50%	40	100%
<b>Needs Identification</b> 45%	35	70.0%	49	98.0%	41	82.0%	38	76.0%	36	72.0%	50	100%
<b>Presentation</b> 10%	7	70.0%	9	90.0%	10	100.0%	6	60.0%	7	70.0%	10	100%
<b>Overcoming Objections</b> 15%	21	70.0%	30	100.0%	24	80.0%	15	50.0%	22	73.3%	30	100%
<b>Gain Commitment</b> 10%	17	85.0%	20	100.0%	18	90.0%	10	50.0%	15	75.0%	20	100%
<b>Communication Skills</b> 10%	16	53.3%	30	100.0%	27	90.0%	17	56.7%	23	76.7%	30	100%
<b>Likeable and Trustworthy</b> 5%	19	63.3%	30	100.0%	28	93.3%	15	50.0%	22	73.3%	30	100%

Table 2

	Judge #1	Judge #2	Judge #3	Judge #4	Judge #5
<b>Meeting Opening</b> 5%	3.875	4.875	4	3.5	3.375
<b>Needs Identification</b> 45%	31.5	44.1	36.9	34.2	32.4
<b>Presentation</b> 10%	7	9	10	6	7
<b>Overcoming Objections</b> 15%	10.5	15	12	7.5	10.995
<b>Gain Commitment</b> 10%	8.5	10	9	5	7.5
<b>Communication Skills</b> 10%	5.334	10	9	5.667	7.67
<b>Likeable and Trustworthy</b> 5%	3.167	5	4.667	2.5	3.665
<b>Point Totals</b>	69.876	97.975	85.567	64.367	72.605

### Comments

Judges had the opportunity to leave comments on the scoring sheets for each competitor as well. These too, were also divided into categories. Looking at Table 3, you can see what each individual judge had to say regarding the different categories.

To see the judges' scoresheets for both the comments and the scores, see Appendix D.

**Table 3**

	Judge #1	Judge #2	Judge #3	Judge #4	Judge #5
<b>Meeting Opening</b> 5%	"Great start, but deviated by election question."				
<b>Needs Identification</b> 45%	"Good to pin down time frame. 'Challenges' question scripted. 'Looks like you really just...' minimizes need for product."				
<b>Presentation</b> 10%		"Assertive. To the point. Held buyer's attention."	"Very clear explanation of SalonBiz."	"Rushed. Choppy."	
<b>Overcoming Objections</b> 15%	"Obviously was thrown off by election question - need to stay up on current events! -8 on cloud objection, 2 on 'election' objection. -Nice job on [criteria 1]"	"Well done"			"Spent too long on polit. quest."
<b>Gain Commitment</b> 10%	"Good to persist on meeting time"	"Great job."			"Got apt. time."
<b>Communication Skills</b> 10%	"So..." starts off most sentences, significant distraction."				
<b>Likeable and Trustworthy</b> 5%	"Nice job recovering from election question."			"Q & A session-like."	

## Self-Evaluation of Performance

This section is a general overview of my performance within the Round One sales call at the competition. Included will be techniques that were executed strongly or successes, and poorly or where improvements are needed. Most of the review will be determined either strong or poor based on the teachings of the WMU sales program and Dr. James Eckert's, Associate Professor of Sales & Negotiation at WMU, *Purposeful Selling* book.

### Successes

#### Good Meeting Start Mechanics

It is important to start off any sales call strong. By utilizing what are known as 'Meeting Start Mechanics,' walking into a meeting with a prospect can start off with a professional and strong first impression. These 'Meeting Start Mechanics' include a genuine greeting of the prospect, stating both yours and your company's name, shaking hands, asking to have a seat as well as asking to use



their desk for your materials, and exchanging business cards (Chapter 6 – Starting Strong, page 56).

This is an aspect of the sales call that I did well. I walked into the room confident and then said, “Hi Niki, Tina Cook with Neill TSP. Thanks for having me today.” I continue by asking the buyer, “Can I have a seat?” and “May I use some of your desk as well?” Finally, I made sure to hand over my business card.

#### Strong Use of C-L-A-P Model

For any sales call, utilizing the first few minutes effectively sets up for a positive meeting. The idea is to CLAP for your customer right from the start. CLAP stands for Connect – Logistics – Agenda – Permission. Each one will be discussed below in relation to my performance (Chapter 6 – Starting Strong, pages 53-55).

**“Connect”** is the idea of connecting with the potential buyer through use of building rapport. This can be done a variety of ways and the idea is to reduce social awkwardness and get both parties conversing before diving into the main purpose of the meeting. To connect with the potential buyer in round 1, I said, “So Niki, I understand you’re here for the international trade conference, so is this your first time in Orlando? Are you enjoying it so far?”

**“Logistics”** are used as an easy transition from rapport building to meeting details. There are almost always only two pieces of logistics information to confirm: time frame of meeting and appropriate people present. This was demonstrated in the sales call when I asked, “I understand we still have 15 minutes today is that correct? Is there anyone else that should be meeting with us?”

**“Agenda”** is laying out to the potential buyer what it is you hope to accomplish with the meeting. Another important aspect of sales is verifying that the buyer is satisfied with the plan. For example, within the sales call I said, “So there’s really three things that I want to accomplish today Niki, and that’s really just get a better understanding of the salon that you have at Melia Veradero. Secondly, introduce you to SalonBiz, our product, and how were related to Neill TSP. And then lastly, determine what the appropriate next steps might be. Does that sound okay with you?” This is a quick way to show the buyer you are prepared and have a plan so they know they are not wasting their time.

**“Permission”** is simply verifying with the buyer that it is alright to continue with the next step of the meeting. I demonstrated this when saying, “Okay, so I really just want to begin by asking a few questions, may I go ahead and do that?”

#### Effective Facilitation

Facilitation is necessary to keep the meeting moving forward while making sure the potential buyer understands where the direction of the meeting is going. An example of when I effectively used facilitation throughout the sales call was when I said, “Due to our limited time, I’m just going to focus on those two main areas that you said you really want to focus on, that’s going to be the inventory control

and employee management.” This gave the ‘buyer’ an understanding of where I was taking the meeting and justifying why I was doing so (Chapter 8 – Questioning & Listening, page 70).

#### Good Use of C-R-C Model

An objection is any concern or issue the buyer may have. The objection I encountered in the sales call arose when I asked, “From what we’ve covered so far, do you have any questions or concerns?” The ‘buyer’s’ response then was, “Yeah. I understand it’s a cloud-based system, but I’m not really familiar with cloud technology, and I don’t really have a lot of time to learn a completely new system. So can you tell me more about what that looks like and what it means to be a cloud-based system?”

The first step in the C-R-C model is to **“Clarify,”** and I demonstrated the clarification through asking, “What’s your exact concern with that? Can you explain just a little more with the complexity?” The ‘buyer’ then gave his response: “It’s just that I’m not familiar with software that’s not on our computer, and I don’t want to have to learn how to navigate through the cloud and find things.”

The second step is **“Respond.”** In order to give a more effective presentation on that point, I pulled out the Implementation sheet and guided the ‘buyer’ through this process as I said, “The great news is that SalonBiz is really easy to set-up. For implementation, it’s only four hours from start to full operation, and we can do that either before or after business hours, so you’re not losing out on business time. Additional things that we offer is 24/7 online cloud support and the great news is that it’s a web-browser, so it’s just going to work like any other website that you might go to.”

Lastly, it is important to **“Confirm”** that the original concern the ‘buyer’ had is no longer an issue. I demonstrated this in the sales call again with a question: “So between all of that, would that alleviate your concern with complexity?” In this role-play, my response had alleviated the ‘buyer’s’ concern (Chapter 10 – Handling Objections, pages 89-92).

### Improvements Needed

#### Poor Handle of Presidential Election Question

As mentioned in the previous section, an objection is any concern or issue the buyer may have, but that does not necessarily mean it has to be about the product. In the competition sales call, I was asked, “What are your thoughts on the presidential election here in the U.S. I mean, who do you think is going to win? A Republican? A Democrat?” I knew in that moment this was one of the objections I would be scored on in this competition.

However, my response to that was, “Oh gosh. I really don’t know as far as that. I guess I haven’t been really keeping up with the race. What do you think? What

are your thoughts on it?" I was completely unprepared for this question, so it caught me off guard. My idea was to ask the buyer about his thoughts so that I was engaging him more as opposed to myself.

What I should have said is, "I would hope that whichever candidate America votes in as President, that candidate would realize it is in the best interest of both parties to continue moving forward with establishing relations with Cuba." A response like this would have promoted good will within the buyer because as stated in the competition scenario for Round One, Niki is hoping to be able to have tourists come to his resort from America and begin generating more revenue.

#### Insufficient Organization of Questions

With a limited amount of time, uncovering the main issues a potential buyer is experiencing is very important. However, this is something I did not execute very well within my sales call. I asked the potential buyer what some of his biggest challenges look like at his salon. He replied with, "The challenges right now are that I have three full time people and then twelve part time people. It's hard to keep everybody on task and know when they're going to show up, and how many people to even bring in based on the customers, so managing that takes a lot of time. Also, making sure the inventory is there. If we need to sell shampoo, conditioner, or whatever, I need to make sure that's all available."

Instead of diving right in to asking questions about his main issues of employee management and inventory control, I ask, "So let's switch gears then – tell me a little bit about your appointment booking process, what does that look like?" This took away from the impact of the issues he stated, as well as took time away from being able to really dig deeper by asking more questions about his core issues.

#### Lack of Confident Language

It is important to demonstrate confidence throughout any sales call. Confidence can be portrayed through body language as well as verbally. Filler words are an example of demonstrating a lack of confidence, if used too frequently.

Throughout the Round One sales call, I said the word "so" a total of 38 times, "uhm" a total of 10 times, and the filler words "you know" a total of 6 times. You never realize how much you say something until you watch yourself on camera. Even Judge #1 left me with the comment, "'So...' starts off most sentences, significant distraction."

If I would have cut out even half of these filler words, this may have left me with scores above the competition. The overuse of filler words is something that I will need to improve on when moving forward with my sales career.

## Lessons Learned from Competing

Competing in the International Collegiate Sales Competition was an incredible learning experience. I believe it gave me a broader perspective of the direction sales interactions can go as well as a few other lessons I learned which are further described below.

### Stay Up-to-Date on Current Events

One of the most important aspects I learned from competing is to enter any sales call with having a general understanding of what is currently happening with that prospective buyer's company, the industry they are involved in, and a general understanding of the current events that may impact that buyer's sales. I realized this lesson when asked the presidential election question during the Round One role-play of the competition. Being up-to-date on current events that are going on within that perspective buyer's industry, or just general current events will give the salesperson more credibility.

### Relaxing for Any Sales Call

There are situations when a time frame is crucial to follow for a sales call. That may mean there is more pressure, but that does not mean to divert away from a confidence demeanor as the sales call will likely divert into situations that put you out of your comfort zone. Do not let that take away from what you know about the sales process and product being sold.

With relaxing comes more energy. The more enthusiastic you are with your sales presentation, the more engaged the customer will want to be. After reviewing the video of my Round One sales call, it was evident I was tense. By being more relaxed, that would have brought out more energy within my presentation, and may have engaged the buyer even more, resulting in higher scores from the judges.

### Success is Subjective

Although I may not have placed as well as I had hoped for, that does not mean I did not have a successful sales call. The 'buyer' I was meeting with agreed to that second meeting in which he did not agree to meet with all competitors. That is why I say success is subjective. The goal of the Round One role-play was to set a second appointment with the buyer, which I achieved. Also, after reviewing the video of my Round One performance from the competition, there were many things that were executed well. Moving forward, I will apply this same idea to future sales calls.

## Suggestions to Future Competitors and Competition Coordinators

This section will highlight a few suggestions for future competitors within the International Collegiate Sales Competition as well as suggestions for those who coordinate the ICSC.

### Future Competitors

**Know the Product & Industry Inside and Out:**

With the particular product for this year's competition, SalonBiz, there was a lot to learn - literally inside and out. There is an external portion to learn about the product which includes company knowledge as well as overall facts about what the product can do to add value to a buyer such as with time savings or security concerns. Because the product is cloud-based, it had an internal part to learn as well. This included learning how to navigate through the software and uploading data for product demonstrations.

As far as the industry knowledge, for whatever scenario is given, think of any possible way the conversation could go. For instance, while this particular scenario dealt with the Cuba relations, I was asked about the presidential election. I was not prepared for this direction of the conversation and should have been. Utilize some of your preparation time to research connections such as these. Coming prepared with significant product and industry knowledge will not only reflect more credibility, but will also allow for a more smooth conversation, ultimately resulting in higher scores and setting you apart from the competition.

**Practice, Practice, Practice:**

There was roughly a month between our first meeting and the competition. Although this may seem like a lot of time, it can be difficult to coordinate a practice schedule with the other student who is selected to compete as well and with the faculty representative/professor who will be the mentor throughout the process.

The majority of our time was spent researching the company and SalonBiz, the product. I wish we would have had more time to do more practice role-plays, but for future competitors, I suggest making sure to do at least ten role-plays start to finish without interruptions. Even when you think you've had enough practice, do just one more role-play before day of the leaving for the competition. The more practice you have, the more comfortable you will be at the actual competition.

**Be Confident:**

That moment of walking into the first Round One role-play can be very nerve wracking. It is a completely different environment than what is used to at the sales lab at WMU. This is essentially the first sales call you have with someone who really is a complete stranger, not one of the sales professors, however, this is what the real world of sales is like. Just because it is a complete stranger and a completely different environment, be confident in your ability. There has been a lot of preparation put in so this is the moment to demonstrate that. The sales professors would not have selected a student to compete and represent WMU if they felt they did not have the skills to succeed. Keeping that in mind, maintain confidence throughout the call, no matter how nervous you may feel.

### ICSC Coordinators

**Scoring:**

After reviewing my score sheets from the competition, I realized there was improvements that could be made to how the scoring is conducted. The judges gave me scores resulting in the total points of 64.367, 69.876, 72.605, 85.567, and 97.975 – a range of 33.608. To make scoring more consistent, the highest score and the lowest score should be thrown out. This is how scoring is conducted at the National Collegiate Sales Competition which is hosted in the spring and is a competition that is structured very similar to the International Collegiate Sales Competition. If this was conducted at the ICSC, the range between my scores would have then been 15.691, resulting in a 17.917 reduction of a point gap and allowing for more consistency among the scores.

**Judge Reliability:**

The underlying question is, are the grading standards reliable across all judges? I ask this question because after reviewing my scorecards with over a 30 point gap between the highest and lowest scores given from the judges, it seems they are not all judging on the same standards. This year, coordinators put together a judge training video and posted it on the competition website. However, I do not believe it was mandatory for the judges to watch it.

I believe what should be done to ensure judges have an understanding of the scoring system and what to look for is to have a judges meeting before going into each of their assigned rooms. In this meeting, that judge training video will be shown, and then questions can be asked and answered that they may have. This is a solution that I believe will help keep judges score more reliable throughout the competition.

**Product Overview Sheets:**

Although the ICSC is a competition focused on sales, I believe product knowledge is equally as important. Competitors are given the product and scenarios roughly one month before the competition. This is sufficient time to develop an approach for the sales call as well as necessary product knowledge.

At one point, the ‘buyer’ asked what the headquarters for SalonBiz was. After reviewing competitors’ performances, the ‘buyer’ asked this question to them as well. However, the competitor that beat me out in Round One responded with the incorrect answer. Again, although the focus of the competition is on sales, knowing the correct answer to where the company is headquartered in which you are representing should be necessary to know.

What I believe should be done to help alleviate this issue is to give the judges a sheet while in the room judging the competitors. This sheet will highlight key facts such as headquarters, name of CEO, etc. that may be asked of the competitor. I also believe if a competitor gives the incorrect answer, it should affect their scores for product knowledge.

## **Appendices**



## **Appendix A**

Overview Sheet of the Sales and Business Marketing  
Program at Western Michigan University



## Sales & Business Marketing Program

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### Nationally Known

- Western Michigan University was recognized from 2007-2015 as one of the "Top University Sales Programs" by the *Sales Education Foundation*
- Ranked **#1 in the "Top U.S. Sales Schools"** by *Study.com*

### Great Placement

- Over 100 regional and national employers actively recruiting SBM Program students
- SBM Alumni are creating sales success in over 25 states and most every major metropolitan area in the country.
- Over 94% placement rates at time of graduation

### Great Teachers, Facilities and Student Organizations

- Small class sizes and hands-on, experiential learning (e.g. exams are role-plays not pen & paper)
- All SBM Faculty have real-world experience in sales.
- Harold Zeigler **Interactive Digital Video Sales Lab** – one of the best in the country. This facility is used for sales calls and other real life style activities. All activities are captured on video for student review.
- Sales and Business Marketing Association – student organization with over 140 active members where companies recruit sales students and help educate the students on the sales life after college.

### Great Success at National Sales Competitions

- **State Farm Sales and Marketing Competition** – In 2012 and 2013, WMU had the top individual student and finished second overall as a university in its first year of competing. In 2014, WMU was the university champion.
- **Russ Berrie National Sales Challenge** - WMU students have finished in the top 5 in six of the eight years this competition has existed. 2013 individual and team champions.
- **National Collegiate Sales Competition** -- Finished in the top 10 eight of the eleven times WMU has competed, including five top 5 finishes. In 2015, we finished 3<sup>rd</sup> overall among 67 universities competing and one of our students finished 2<sup>nd</sup> place individually out of over 130 students.
- **International Collegiate Sales Competition** – We will be participating in this competition in the Fall of 2015.

### The Most Comprehensive Sales Curriculum

- **Our SBM major requires the following courses (plus one additional 3 hour elective):**  
 MKTG 2500 - Marketing Principles Credits: 3 hours  
 MKTG 3600 - Professional Selling Credits: 3 hours – extensive use of sales lab  
 MKTG 3710 - Marketing Research Credits: 3 hours  
 MKTG 3760 - Sales Management Credits: 3 hours – extensive use of sales lab  
 MKTG 4100 - Selling Skills Development Credits: 3 hours – extensive use of sales lab  
 MKTG 4600 - Advanced Selling Strategies Credits: 3 hours – extensive use of sales lab  
 MKTG 4700 - Business Marketing Strategy Credits: 3 hours

Students completing the curriculum have **14 Sales Lab experiences** including appointment setting phone calls, multiple sales calls, short topic presentations, interviews and other real life based interactions.

**SBM Students don't just learn about selling, they learn to sell!**



## **Appendix B**

### Fall 2015 International Collegiate Sales Competition Scenario Descriptions



## Fall 2015 Account Situations

**Round 1A, 1B and 1C** – Needs Identification sales call to an International Company, Meliá Varadero Resort, Thursday (15 minute)

**Wild-Card Round WC-A and WC-B** - Needs Identification sales call (repeat of round 1 to an International Company, Thursday (15 minute)

**Round 2** – Sales call to a single large salon, Friday (20 minute)

**Round 3** – Sales call to a small salon, Friday (20 minutes)

**Round 4** – Saturday (handed to each finalist 30 minutes before their scheduled role-play time) – GoToMeeting video sales call to Mele Varadero managing director for final decision (20 minutes)

## Special Note to Competitors:

Just as in a real sales meeting, current events, information found on the web sites of the companies mentioned in the following profiles may be valuable in understanding a buyer's needs and/or presenting a persuasive solution.

For purposes of financial justification of any products or services offered by role-play competitors, the following statistical information is provided. This information does not represent the actual data from any salon or spa and is not indicative of the actual prices, cash flow or profits of salons using any Neill-TSP products or services.

1. For a salon where personal products are sold, below an average of \$4 per customer, the cost of displays, cash flow and labor results in a loss rather than a profit for product sales.
2. A well-managed Aveda Concept Salon will average \$10 to \$12 per customer in product sales.
3. The average service revenue per stylists is \$65 per customer and this does not seem to depend on the type or size of a salon. However some stylists develop a reputation for their skills and will average much higher revenue per customer.
4. Stylists productivity is also highly variable, nationally averaging 20 customers per week with highly motivated stylists averaging as much as 30 customers per week.

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*\*Disclaimer: Several of the characters in these profiles are real people, however facts concerning their business, their plans or any specific detail described were developed for educational purposes and to facilitate competition at ICSC. While some organizations represented in the profiles are actual companies, the profiles and situations are purely fictitious and any comments or remarks made in this document or by participants during the ICSC do not reflect the views, opinions or facts about any actual organization.*

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## Meliá Varadero Resort – Round 1 and Wild-Card

\*Note #1: Meliá Varadero Resort is real. Material related to this resort found on the Internet may be of use in the following situations. The actual situation and all other persons mentioned in this scenario are fictitious.

### ROUND 1 – NORMALIZING RELATIONS WITH CUBA

It was 6 weeks before graduation when you agreed to start your career with the NeillTSP corporation <http://neilltsp.com/>. Neill-TSP is the collaboration of Neill Corporation and The Salon People. Together they encompass all aspects of the salon and spa industry from stylist training through the Aveda Institutes, distribution of Aveda products, to complete cloud-based management software (ERP/CRM) with Salonbiz.

As part of your training to fully understand this 53 billion dollar industry, your first assignment is to work with a senior account executive and introduce Salonbiz to existing NeillTSP salons. Your territory encompasses Florida and Georgia and you've experienced both success and rejection in your first 4 months.

Most of your day is spent walking into salons where Neill-TSP is well known so there really are no cold-calls. In the several months since you started no one called you to ask to see you so when the gentleman called it was only the first of several surprises. He introduced himself as Rafael Soltero, managing director of the Meliá Varadero Resort in Varadero Cuba. To find their web site you did a Google search of "Melia Varadero".

With only the slightest of a Spanish accent he explained that he might be interested in learning more about Salonbiz. Rafael was also the president of the Varadero Hotel Association and he was interested in a cloud based salon management system for not just his resort but for all the Varadero Hotel Association's hotels and resorts. He explained that with President Obama's initiative to normalize relationships with Cuba, a major U.S. tourist influx is about to happen and he wants the hotels in Varadero to take full advantage of the U.S. dollars about to pour in.

Rafael then asked if Niki Garza, the manager of the salon and spa at the Meliá Varadero could meet with you in Orlando. Niki would be in the United States at an international trade conference. Not knowing if you could sell Salonbiz in Cuba (or if anyone could sell anything in Cuba for that matter) you followed a time-honored rule of sales...you would beg forgiveness later and told Rafael, "YES". There were several email exchanges with Niki to set up where and when the meeting would take place. It became evident that Niki was acting as the gatekeeper and could give you an overview of the salon operation at most of the Varadero resorts but was not the decision-maker. You would have to convince Niki that a meeting with Rafael would be a next step. The meeting with Niki was set (BUT ONLY FOR 15 MINUTES) between Niki's other conference meetings at the Rosen Plaza on Thursday morning, November 5th. Excited about the possibilities you started your research on Cuba, Varadero hotels and the latest on normalizing relations with Cuba.

## Wild-Card Round

\*Note #2: Nothing uncovered by a sales person or said by a buyer in any round 1 role-play applies to this wild-card round. Further, any commitment, promise, agreement to any action by the buyer in round 1 has no bearing on this Wild-Card round. Each round is judged solely on activities occurring in that role-play. The ONLY valid information to be considered is the round 1 information above and the follow.

The meeting with Niki did not happen in the morning. When you got to Niki's door at the Rosen Plaza, there was a note on the door. It stated, "Sorry, I had the opportunity to meet with Penny Pritzker and could not miss it. However I will be available between meetings, this afternoon and I really do need to meet with you. While I am at lunch, I will text you a time we can meet this afternoon, but again it can only be for 15 minutes.

## ROUND 2 – A DIFFICULT SITUATION

When you received the call from Jamie Otero, owner of Applewoods Salon in Weston, Florida (<http://www.applewoodspa.com>), it was more of a shock than a surprise. It seems that Rafael Soltero is Jamie's brother-in-law! Rafael called Jamie and asked why Salonbiz was not being used at Applewoods. Jamie explained to Rafael that Applewoods already did everything that Salonbiz offered. Only six weeks earlier Jamie would not give you even 20 minutes to ask some questions about how the salon was managed. However to please his brother-in-law he was now going to meet with you.

With a little probing during the phone conversation you began to understand why the resistance. It was obvious that Jamie is very proud of the operation at Applewoods. At one point Jamie stated, "I graduated from McCoy College of Business Administration and even took a sales course from Professor Wayne Noll, so I know that business decisions need to be based on ROI. We already have an online appointment booking system written by my nephew, so spending time to learn a new one does not make sense and just cost me money. Let's meet so I can report back to Rafael but there is no way I am going to switch to Salonbiz."

By looking through the notes captured by past NeillTSP account executives, you uncovered the following facts about Applewoods:

- There are eight stylists, and a variety of support staff including specialist for nails, and coloring.
- It was unusual to see any information about salon revenue in the account notes. Owners were highly guarded about revenue numbers but there it was, average monthly service revenue from 8 stylists, \$42,000. It was a note put in not by the last account manager but by Tom Petrillo, president of Neil-TSP!
- From the Neill-TSP Aveda products shipped report you could see an average monthly total billing of about \$5,200. That number was a surprise. It was below average monthly product revenue for a south Florida concept salon of that size. From the way Jamie talked you would think it would be the #1 Aveda Concept Salon in Florida!
- The stylists selling any Aveda product to their client received a 5% commission based on the selling price.
- Applewoods gross profit on product sales after paying stylists' commission was 25% of the selling price.
- There were several account manager notes in the file that were of interest. One noted that every time there was a product training, the same two stylist were always missing. A second note was about several instances where a request was made to overnight product and then a complaint about the cost of FEDEX 10 AM delivery.

Armed with this information you set the appointment with Jamie who would only give you 20 minutes. This was going to be the most challenging sales call of your short career.



## **Appendix C**

Presentation Materials Developed for Round One  
Role-Play

**SITUATIONAL:**

- 1) I understand you're the manager of the salon and spa at the Mella Varadero, correct?
  - a. Responsibilities?
- 2) Tell me a little about the Mella Varadero salons
  - a. # of salons within the hotel association?
  - b. # of service providers?
- 3) Do you have experience with CRM software?

**DECISION LOGISTICS:**

- 1) I know it's still early, but if the decision is made to move forward with purchasing a CRM software for the resorts,
  - a. Will it be just Rafael and yourself involved in making that decision?
- 2) When would you like to have the software implemented?
  - a. Weeks/Months/Year?

**CORE NEED:**

- 1) What are some of the biggest challenges that you currently face and hope to solve?

**PRODUCT:****Appointment Booking**

- 1) Tell me about your appointment booking process?
  - a. Call in? (business hours)
- 2) Do you think customers would like the opportunity to make appointments outside of those business hours?
- 3) If there was a way for those customers to schedule appointments 24/7, do you think you would see increase in bookings?

**Customer Analysis**

- 4) Are you experiencing any issues with customers not arriving for appointments?
  - a. How many times does this happen monthly?
  - b. If there was a system that could automatically remind your customers, do you think this would decrease the amount of no shows?

**Inventory**

- 5) Tell me how you track products coming in out of the salon, what does that process look like?
  - a. How much time spent?
- 6) Do you sometimes find you may have overstocked, or understocked your shelves with a certain product?
- 7) If there was a way to be automatically reminded to order product, is that something you would be interested in?

**Employee Management**

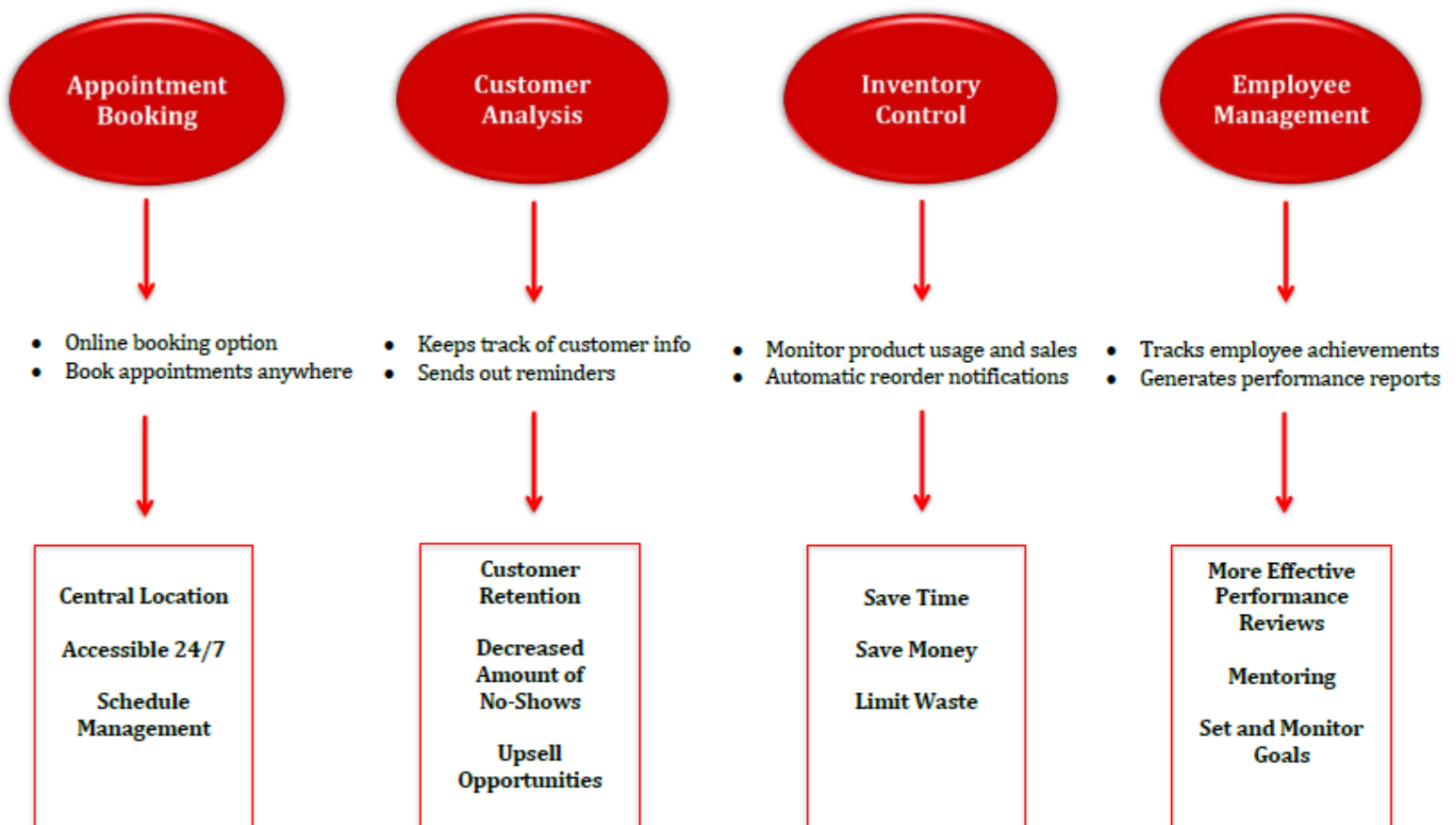
- 8) Do you feel you have a good grasp of your employee's performance?
  - a. Do you know who your top performers are?
  - b. How do you calculate?
  - c. How much time spent?
  - d. If I could show you a system that generated these reports automatically, would you be interested in learning more?



- Vision: to help salons and spas reach their full potential.
- Headquarters in St. Petersburg, Florida
- We are still a family-owned and operated business, and have been for over 65 years!
- Partners with Aveda & Estee Lauder
- 10 salons and spas & 20 cosmetology schools
- The **#1** choice of Salon Today's Top 200 Salons for the past 5 years
- 28 Years of making software



## BENEFIT OVERVIEW





## **Training and Implementation**

### ***Easy to Setup!***

Only 4 hours from start to full operation

#### **We offer:**

- 24/7 Online Cloud Support
- Online Videos to Review What You Learned
- 50 Support Techs A Phone Call Away
- Self-Guided Training Tools



### **Peace of mind**

Rest easy – your data is secure. We handle your back ups and update your system for you too so no need to worry. There are no additional charges, everything is included as part of your subscription.

- Encryption
  - Prevents unauthorized access
- Secure login
- Automatic logout
- Never had an outside breach in our system

To start using the World's Best Salon and Spa Management Software, just choose the flat-rate plan that fits your number of staff.

Basic	Plus	Standard MOST POPULAR	Premium	Enterprise
\$ <b>49</b> Per Month	\$ <b>99</b> Per Month	\$ <b>149</b> Per Month	\$ <b>249</b> Per Month	<b>Call</b>
1-4 Service Providers	5-9 Service Providers	10-15 Service Providers	16-30 Service Providers	30+ Service Providers
<a href="#">START FREE TRIAL</a>	<a href="#">START FREE TRIAL</a>	<a href="#">START FREE TRIAL</a>	<a href="#">START FREE TRIAL</a>	<a href="#">CONTACT US!</a>



## DREAM STATE Salon



1122 Thomasville Rd Suite 6 • Tallahassee, FL 32303 • Phone: 850-224-1814  
E-Mail: Web: [www.dreamstatesalons.com](http://www.dreamstatesalons.com)

Date: 10 July 2015

Neill-TSP  
SalonBiz  
303 South Pine Street  
Hammond, LA  
70403 United States

Dear Ms. Cook:

I wanted to take the time to thank you for the service you have given us this past year. Our salon has seen a lot of improvement over the past few months thanks to SalonBiz! I personally have found that I have a lot more time that I can devote to other parts of running the business, instead of wasting hours on inventory control and keeping track of my employees' schedules. **SalonBiz gets it done in half the time it would take me to do it!** It's all online for me to access, and it's so nice to have that **capability away from the salon**, especially on my mobile phone. Overall, our company has seen an **increase in the products sold** because we are able to access our customers' preferences, and the automatic reorder notifications have been so helpful in keeping stock on the shelf! We're **averaging ten more products a week sold** since we implemented your software.

You know that we used to use Millenium before you came in for a meeting, and I was very hesitant to try SalonBiz because we had success with that software in the past. I'm so glad we switched because although Millenium has a very glitzy look to it, SalonBiz gets the job done more efficiently and provides excellent support that we didn't have with your competitor. With your online booking system, we have seen a **15% increase in the number of appointments we get per month**. Additionally, the email reminders have helped us **decrease the number of no-shows by 20%**.

I was concerned about the difficulty transitioning from one software service to another, but your training and support system was so great that **it wasn't complicated at all!** I really appreciate you coming in for a few hours and training my service providers how to use the software, and if we have any questions, all I have to do is call the help line, and someone is there right away to help answer my questions. Thank you for helping our salon become even better!

Sincerely,

Laura Smith  
Salon General Manager

## **Appendix D**

Judges' Assessment Forms for Round One Role-Play



**ASSESSMENT FORM FOR ROLE PLAY ROUND 1A- Needs Identification**Salesperson : Charlana Cook Judge # : 1 Judging Room # 159 Competitor Room # 258

Score each item on a 0 to 10 scale with 10 being the best possible score and 0 the absence of the skill or behavior being evaluated. Use whole numbers only

**5 % MEETING OPENING (Effectively gains attention and builds rapport)**

- 8 Professional introduction  
9 Effectively builds rapport  
8 Salesperson Explains purpose and goals of the meeting  
6 Smooth transition into needs identification

Comments Great start, but derailed by election question**45% NEEDS IDENTIFICATION (OBJECTIVE: Obtain a clear understanding of customer's situation in order to prepare a customized presentation)**

- 8 Uncovered decision process (decision criteria, people involved in decision process, potential timing issues)  
7 Effectively determined relevant facts about company and/or buyer  
7 Effectively gained a basic understanding of the prospect's problems and/or challenges  
8 Explores the effect of the prospects problems/challenges (implication) and the gains made if the problem/challenge is overcome (need-playoff)  
5 Summarizes the problems/issues uncovered, gains a pre-commitment to consider the product/service and smoothly transitions to presentation) - "looks like you are really just..." minimizes need for product.

Comments Good to pin down time frame. "Challenges" question scripted**10% Presentation**

- 7 A brief overview of the company and a potential solution to build enough credibility to gain a second appointment to present the solution

Comments \_\_\_\_\_

**15% OVERCOMING OBJECTIONS (OBJECTIVE: Eliminate concerns or questions to customer's satisfaction)**

- 9 Initially gains better understanding of objection (clarifies or allows buyer to clarify the objection)  
5 Effectively answers the objection - 8 on "cloud" objection, 2 on "election" objection  
7 Confirms that the objection is no longer a concern of the buyer

Comments Obviously was thrown off by election question - need to stay on current events!

Nice job on this

**10% GAIN COMMITMENT (OBJECTIVE: Take initiative to understand where you stand with buyer now and for the future)**

- 8 Persuasive in presenting a reason to commit to another appointment  
9 Asked for an appropriate commitment from the buyer, given the nature of this particular sales call.

Comments Good to persist on meeting time**10% COMMUNICATION SKILLS**

- 4 Effective verbal speaking skills (appropriate grammar and English, minimum "ums", "You knows", etc. and minimized abstract language without explanation: "great," "super," "awesome," etc.)  
5 Effective listening skills (active listening; restated, rephrased, clarified, probed for better understanding, etc..)  
7 Appropriate non-verbal communication (gestures, posture, dress).

Comments "So..." starts most sentences, significant distraction.**5% LIKABLE AND TRUSTWORTHY**

- 7 Clearly knowledgeable/credible about the product, the industry and business in general  
7 Engaging, pleasant demeanor  
5 A flowing conversation rather than a scripted role-play

Comments \_\_\_\_\_

nice job rebounding from election question

## ASSESSMENT FORM FOR ROLE PLAY ROUND 1A- Needs Identification

Salesperson : Christina Cook Judge # : 2 Judging Room # 1259 Competitor Room # 258

Score each item on a 0 to 10 scale with 10 being the best possible score and 0 the absence of the skill or behavior being evaluated. Use whole numbers only

5 % **MEETING OPENING** (Effectively gains attention and builds rapport)

- 10 Professional introduction  
10 Effectively builds rapport  
10 Salesperson Explains purpose and goals of the meeting  
9 Smooth transition into needs identification

Comments \_\_\_\_\_

45% **NEEDS IDENTIFICATION** (OBJECTIVE: Obtain a clear understanding of customer's situation in order to prepare a customized presentation)

- 10 Uncovered decision process (decision criteria, people involved in decision process, potential timing issues)  
10 Effectively determined relevant facts about company and/or buyer  
10 Effectively gained a basic understanding of the prospect's problems and/or challenges  
10 Explores the effect of the prospects problems/challenges (implication) and the gains made if the problem/challenge is overcome (need-playoff)  
9 Summarizes the problems/issues uncovered, gains a pre-commitment to consider the product/service and smoothly transitions to presentation)

Comments \_\_\_\_\_

10% **Presentation**

- 9 A brief overview of the company and a potential solution to build enough credibility to gain a second appointment to present the solution

Comments Assertive, To the Point, Held Buyers Attention

15% **OVERCOMING OBJECTIONS** (OBJECTIVE: Eliminate concerns or questions to customer's satisfaction)

- 10 Initially gains better understanding of objection (clarifies or allows buyer to clarify the objection).  
10 Effectively answers the objection  
10 Confirms that the objection is no longer a concern of the buyer

Comments Well done

10% **GAIN COMMITMENT** (OBJECTIVE: Take initiative to understand where you stand with buyer now and for the future)

- 10 Persuasive in presenting a reason to commit to another appointment  
10 Asked for an appropriate commitment from the buyer, given the nature of this particular sales call.

Comments Great Job

10% **COMMUNICATION SKILLS**

- 10 Effective verbal speaking skills (appropriate grammar and English, minimum "ums", "You knows", etc. and minimized abstract language without explanation: "great," super," "awesome," etc.)  
10 Effective listening skills (active listening; restated, rephrased, clarified, probed for better understanding, etc.)  
10 Appropriate non-verbal communication (gestures, posture, dress).

Comments \_\_\_\_\_

5% **LIKABLE AND TRUSTWORTHY**

- 10 Clearly knowledgeable/credible about the product, the industry and business in general  
10 Engaging, pleasant demeanor  
10 A flowing conversation rather than a scripted role-play

Comments \_\_\_\_\_



**ASSESSMENT FORM FOR ROLE PLAY ROUND 1A– Needs Identification**Salesperson : Christina Cook Judge # : 3 Judging Room # 1259 Competitor Room # 258

Score each item on a 0 to 10 scale with 10 being the best possible score and 0 the absence of the skill or behavior being evaluated. Use whole numbers only

**5 % MEETING OPENING (Effectively gains attention and builds rapport)**

- 8 Professional introduction
- 8 Effectively builds rapport
- 9 Salesperson Explains purpose and goals of the meeting
- 7 Smooth transition into needs identification

Comments \_\_\_\_\_

**45% NEEDS IDENTIFICATION (OBJECTIVE: Obtain a clear understanding of customer's situation in order to prepare a customized presentation)**

- 9 Uncovered decision process (decision criteria, people involved in decision process, potential timing issues)
- 8 Effectively determined relevant facts about company and/or buyer
- 8 Effectively gained a basic understanding of the prospect's problems and/or challenges
- 8 Explores the effect of the prospects problems/challenges (implication) and the gains made if the problem/challenge is overcome (need-playoff)
- 8 Summarizes the problems/issues uncovered, gains a pre-commitment to consider the product/service and smoothly transitions to presentation)

Comments \_\_\_\_\_

**10% Presentation**

- 10 A brief overview of the company and a potential solution to build enough credibility to gain a second appointment to present the solution

Comments VERY clear explanation of Sales Biz**15% OVERCOMING OBJECTIONS (OBJECTIVE: Eliminate concerns or questions to customer's satisfaction)**

- 8 Initially gains better understanding of objection (clarifies or allows buyer to clarify the objection).
- 8 Effectively answers the objection
- 8 Confirms that the objection is no longer a concern of the buyer

Comments \_\_\_\_\_

**10% GAIN COMMITMENT (OBJECTIVE: Take initiative to understand where you stand with buyer now and for the future)**

- 9 Persuasive in presenting a reason to commit to another appointment
- 9 Asked for an appropriate commitment from the buyer, given the nature of this particular sales call.

Comments \_\_\_\_\_

**10% COMMUNICATION SKILLS**

- 9 Effective verbal speaking skills (appropriate grammar and English, minimum "ums", "You knows", etc. and minimized abstract language without explanation: "great," "super," "awesome," etc.)
- 9 Effective listening skills (active listening; restated, rephrased, clarified, probed for better understanding, etc..)
- 9 Appropriate non-verbal communication (gestures, posture, dress).

Comments \_\_\_\_\_

**5% LIKABLE AND TRUSTWORTHY**

- 10 Clearly knowledgeable/credible about the product, the industry and business in general
- 9 Engaging, pleasant demeanor
- 9 A flowing conversation rather than a scripted role-play

Comments \_\_\_\_\_

**ASSESSMENT FORM FOR ROLE PLAY ROUND 1A– Needs Identification**

Salesperson : Christina Cook Judge # : 4 Judging Room # 1259 Competitor Room # 258

Score each item on a 0 to 10 scale with 10 being the best possible score and 0 the absence of the skill or behavior being evaluated. Use whole numbers only

**5 % MEETING OPENING (Effectively gains attention and builds rapport)**

- 7 Professional introduction
- 7 Effectively builds rapport
- 7 Salesperson Explains purpose and goals of the meeting
- 7 Smooth transition into needs identification

Comments \_\_\_\_\_

**45% NEEDS IDENTIFICATION (OBJECTIVE: Obtain a clear understanding of customer's situation in order to prepare a customized presentation)**

- 8 Uncovered decision process (decision criteria, people involved in decision process, potential timing issues)
- 8 Effectively determined relevant facts about company and/or buyer
- 8 Effectively gained a basic understanding of the prospect's problems and/or challenges
- 8 Explores the effect of the prospects problems/challenges (implication) and the gains made if the problem/challenge is overcome (need-playoff)
- 6 Summarizes the problems/issues uncovered, gains a pre-commitment to consider the product/service and smoothly transitions to presentation)

Comments \_\_\_\_\_

**10% Presentation**

- 6 A brief overview of the company and a potential solution to build enough credibility to gain a second appointment to present the solution

Comments 'Rushed'; 'choppy'

**15% OVERCOMING OBJECTIONS (OBJECTIVE: Eliminate concerns or questions to customer's satisfaction)**

- 5 Initially gains better understanding of objection (clarifies or allows buyer to clarify the objection.
- 5 Effectively answers the objection
- 5 Confirms that the objection is no longer a concern of the buyer

Comments \_\_\_\_\_

**10% GAIN COMMITMENT (OBJECTIVE: Take initiative to understand where you stand with buyer now and for the future)**

- 5 Persuasive in presenting a reason to commit to another appointment
- 5 Asked for an appropriate commitment from the buyer, given the nature of this particular sales call.

Comments \_\_\_\_\_

**10% COMMUNICATION SKILLS**

- 5 Effective verbal speaking skills (appropriate grammar and English, minimum "ums", "You knows", etc. and minimized abstract language without explanation: "great," super," "awesome," etc.)
- 5 Effective listening skills (active listening; restated, rephrased, clarified, probed for better understanding, etc..)
- 7 Appropriate non-verbal communication (gestures, posture, dress).

Comments \_\_\_\_\_

**5% LIKABLE AND TRUSTWORTHY**

- 5 Clearly knowledgeable/credible about the product, the industry and business in general
- 5 Engaging, pleasant demeanor
- 5 A flowing conversation rather than a scripted role-play

Comments 'Q & A session-like'



**ASSESSMENT FORM FOR ROLE PLAY ROUND 1A- Needs Identification**

Salesperson : Christina Cook Judge # : 5 Judging Room # 259 Competitor Room # 258

Score each item on a 0 to 10 scale with 10 being the best possible score and 0 the absence of the skill or behavior being evaluated. Use whole numbers only

**5 % MEETING OPENING (Effectively gains attention and builds rapport)**

- 7 Professional introduction  
7 Effectively builds rapport  
7 Salesperson Explains purpose and goals of the meeting  
6 Smooth transition into needs identification

Comments \_\_\_\_\_

**45% NEEDS IDENTIFICATION (OBJECTIVE: Obtain a clear understanding of customer's situation in order to prepare a customized presentation)**

- 8 Uncovered decision process (decision criteria, people involved in decision process, potential timing issues)  
7 Effectively determined relevant facts about company and/or buyer  
7 Effectively gained a basic understanding of the prospect's problems and/or challenges  
7 Explores the effect of the prospects problems/challenges (implication) and the gains made if the problem/challenge is overcome (need-payoff)  
7 Summarizes the problems/issues uncovered, gains a pre-commitment to consider the product/service and smoothly transitions to presentation)

Comments \_\_\_\_\_

**10% Presentation**

- 7 A brief overview of the company and a potential solution to build enough credibility to gain a second appointment to present the solution

Comments \_\_\_\_\_

**15% OVERCOMING OBJECTIONS (OBJECTIVE: Eliminate concerns or questions to customer's satisfaction)**

- 7 Initially gains better understanding of objection (clarifies or allows buyer to clarify the objection).  
7 Effectively answers the objection  
8 Confirms that the objection is no longer a concern of the buyer

Comments spent too long on product quest.

**10% GAIN COMMITMENT (OBJECTIVE: Take initiative to understand where you stand with buyer now and for the future)**

- 8 Persuasive in presenting a reason to commit to another appointment  
7 Asked for an appropriate commitment from the buyer, given the nature of this particular sales call.

Comments got a lot from

**10% COMMUNICATION SKILLS**

- 8 Effective verbal speaking skills (appropriate grammar and English, minimum "ums", "You knows", etc. and minimized abstract language without explanation: "great," "super," "awesome," etc.)  
8 Effective listening skills (active listening; restated, rephrased, clarified, probed for better understanding, etc.)  
7 Appropriate non-verbal communication (gestures, posture, dress).

Comments \_\_\_\_\_

**5% LIKABLE AND TRUSTWORTHY**

- 7 Clearly knowledgeable/credible about the product, the industry and business in general  
8 Engaging, pleasant demeanor  
8 A flowing conversation rather than a scripted role-play

Comments \_\_\_\_\_

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