



**CAREER CLUSTER**

Marketing

**CAREER PATHWAY**

Marketing Management

**INSTRUCTIONAL AREA**

Customer Relations

**BUSINESS SERVICES MARKETING SERIES EVENT**

**PARTICIPANT INSTRUCTIONS**

- The event will be presented to you through your reading of the 21<sup>st</sup> Century Skills, Performance Indicators and Event Situation. You will have up to 10 minutes to review this information and prepare your presentation. You may make notes to use during your presentation.
- You will have up to 10 minutes to make your presentation to the judge (you may have more than one judge).
- You will be evaluated on how well you meet the performance indicators of this event.
- Turn in all of your notes and event materials when you have completed the event.

**21<sup>st</sup> CENTURY SKILLS**

- Critical Thinking – Reason effectively and use systems thinking.
- Problem Solving – Make judgments and decisions, and solve problems.
- Communication – Communicate clearly.
- Creativity and Innovation – Show evidence of creativity.

**PERFORMANCE INDICATORS**

1. Explain the nature of positive customer relations.
2. Determine ways of reinforcing the company's image through employee performance.
3. Reinforce service orientation through communication.
4. Build and maintain relationships with customers.
5. Identify ways to track marketing-communications activities.

## **EVENT SITUATION**

You are to assume the role of sales manager at TRIUMPH AWARDS, a company that provides plaques, trophies and other personalized awards to business clients. The owner of the company (judge) has asked you to determine how to have better relationships with long term clients.

TRIUMPH AWARDS has been in business for over 50 years and over half of its customer base has been clients of TRIUMPH for over a decade. The company started out with door-to-door salesmen that visited businesses and organizations in the region selling contracts to provide the customers with personalized awards, trophies and plaques. Now the sales team recruits and retains business clients through phone calls, emails and the TRIUMPH website.

The owner (judge) noticed that two long-time clients of TRIUMPH AWARDS did not renew their annual contracts. The long term clients have been customers of TRIUMPH AWARDS for over 15 years. The owner (judge) called the clients and found out that both of them had bad experiences with TRIUMPH once or twice in the last year and decided to take their business elsewhere rather than provide feedback to their sales representative.

In looking through client records and other marketing communication, the owner (judge) has learned that once a long-term client has finalized the annual contract with TRIUMPH AWARDS very little contact is made with the client. The sales team feels that long-term clients must be satisfied since they renew every year so they do not need to develop strong relationships with them. They spend most of their time developing strong relationships with new clients.

The owner of TRIUMPH AWARDS (judge) feels that if the sales team would have followed up with the two long-time clients, the mishaps would have been communicated and the relationship could have been resolved. Losing just one long-term client greatly impacts the company's bottom line.

The owner (judge) has asked you to determine how the sales team can have better relationships with long-term clients, even if the long-term clients are not making any changes to their contracts or requesting information.

You will present your ideas to the owner (judge) in a role-play to take place in the owner's (judge's) office. The owner (judge) will begin the role-play by greeting you and asking to hear your ideas. After you have presented your ideas and have answered the owner's (judge's) questions, the owner (judge) will conclude the role-play by thanking you for your work.

## **JUDGE'S INSTRUCTIONS**

### **DIRECTIONS, PROCEDURES AND JUDGE'S ROLE**

In preparation for this event, you should review the following information with your event manager and other judges:

1. Procedures
2. 21<sup>st</sup> Century Skills and Performance Indicators
3. Event Situation
4. Judge Role-play Characterization  
Participants may conduct a slightly different type of meeting and/or discussion with you each time; however, it is important that the information you provide and the questions you ask be uniform for every participant.
5. Judge's Evaluation Instructions
6. Judge's Evaluation Form  
Please use a critical and consistent eye in rating each participant.

### **JUDGE ROLE-PLAY CHARACTERIZATION**

You are to assume the role of owner of TRIUMPH AWARDS, a company that provides plaques, trophies and other personalized awards to business clients. You have asked the sales manager (participant) to determine how to have better relationships with long term clients.

TRIUMPH AWARDS has been in business for over 50 years and over half of its customer base has been clients of TRIUMPH for over a decade. The company started out with door-to-door salesmen that visited businesses and organizations in the region selling contracts to provide the customers with personalized awards, trophies and plaques. Now the sales team recruits and retains business clients through phone calls, emails and the TRIUMPH website.

You noticed that two long-time clients of TRIUMPH AWARDS did not renew their annual contracts. The long-term clients have been customers of TRIUMPH AWARDS for over 15 years. You called the clients and found out that both of them had bad experiences with TRIUMPH once or twice in the last year and decided to take their business elsewhere rather than provide feedback to their sales representative.

In looking through client records and other marketing communication, you have learned that once a long-term client has finalized the annual contract with TRIUMPH AWARDS very little contact is made with the client. The sales team feels that long-term clients must be satisfied since they renew every year so they do not need to develop strong relationships with them. They spend most of their time developing strong relationships with new clients.

You feel that if the sales team would have followed up with the two long-time clients, the mishaps would have been communicated and the relationship could have been resolved. Losing just one long term client greatly impacts the company's bottom line.

You have asked the sales manager (participant) to determine how the sales team can have better relationships with long term clients, even if the long-term clients are not making any changes to their contracts or requesting information.

During the course of the role-play you are to ask the following questions of each participant:

1. How do we make sure we aren't being too overbearing and bothering our clients?
2. Why are long term clients even more important than brand new clients?
3. How can we tell if your ideas are effective?

Once the sales manager (participant) has presented ideas and has answered your questions, you will conclude the role-play by thanking the sales manager (participant) for the work.

You are not to make any comments after the event is over except to thank the participant.

## JUDGE'S EVALUATION INSTRUCTIONS

### Evaluation Form Information

The participants are to be evaluated on their ability to perform the specific performance indicators stated on the cover sheet of this event and restated on the Judge's Evaluation Form. Although you may see other performance indicators being demonstrated by the participants, those listed in the Performance Indicators section are the critical ones you are measuring for this particular event.

### Evaluation Form Interpretation

The evaluation levels listed below and the evaluation rating procedures should be discussed thoroughly with your event chairperson and the other judges to ensure complete and common understanding for judging consistency.

<b>Level of Evaluation</b>	<b>Interpretation Level</b>
Exceeds Expectations	Participant demonstrated the performance indicator in an extremely professional manner; greatly exceeds business standards; would rank in the top 10% of business personnel performing this performance indicator.
Meets Expectations	Participant demonstrated the performance indicator in an acceptable and effective manner; meets at least minimal business standards; there would be no need for additional formalized training at this time; would rank in the 70-89 <sup>th</sup> percentile of business personnel performing this performance indicator.
Below Expectations	Participant demonstrated the performance indicator with limited effectiveness; performance generally fell below minimal business standards; additional training would be required to improve knowledge, attitude and/or skills; would rank in the 50-69 <sup>th</sup> percentile of business personnel performing this performance indicator.
Little/No Value	Participant demonstrated the performance indicator with little or no effectiveness; a great deal of formal training would be needed immediately; perhaps this person should seek other employment; would rank in the 0-49 <sup>th</sup> percentile of business personnel performing this performance indicator.



**BUSINESS SERVICES MARKETING SERIES,  
2017**

Participant: \_\_\_\_\_

I.D. Number: \_\_\_\_\_

**JUDGE'S EVALUATION FORM  
DISTRICT EVENT #2**

**INSTRUCTIONAL AREA  
Customer Relations**

Did the participant:

		Little/No Value	Below Expectations	Meets Expectations	Exceeds Expectations	Judged Score
<b>PERFORMANCE INDICATORS</b>						
1.	Explain the nature of positive customer relations?	0-1-2-3-4	5-6-7-8	9-10-11	12-13-14	
2.	Determine ways of reinforcing the company's image through employee performance?	0-1-2-3-4	5-6-7-8	9-10-11	12-13-14	
3.	Reinforce service orientation through communication?	0-1-2-3-4	5-6-7-8	9-10-11	12-13-14	
4.	Build and maintain relationships with customers?	0-1-2-3-4	5-6-7-8	9-10-11	12-13-14	
5.	Identify ways to track marketing-communications activities?	0-1-2-3-4	5-6-7-8	9-10-11	12-13-14	
<b>21<sup>st</sup> CENTURY SKILLS</b>						
6.	Reason effectively and use systems thinking?	0-1	2-3	4	5-6	
7.	Make judgments and decisions, and solve problems?	0-1	2-3	4	5-6	
8.	Communicate clearly?	0-1	2-3	4	5-6	
9.	Show evidence of creativity?	0-1	2-3	4	5-6	
10.	Overall impression and responses to the judge's questions	0-1	2-3	4	5-6	
<b>TOTAL SCORE</b>						