



CAREER CLUSTER
Marketing

CAREER PATHWAY
Professional Selling

INSTRUCTIONAL AREA
Customer Relations

SALES MANAGEMENT MEETING EVENT

PARTICIPANT INSTRUCTIONS

- The event will be presented to you through your reading of the General Performance Indicators, Specific Performance Indicators and Case Study Situation. You will have up to 30 minutes to review this information and prepare your presentation. You may make notes to use during your presentation.
- You will have up to 15 minutes to make your presentation to the judge (you may have more than one judge).
- Turn in all of your notes and event materials when you have completed the event.

GENERAL PERFORMANCE INDICATORS

- Communications skills—the ability to exchange information and ideas with others through writing, speaking, reading or listening
- Analytical skills—the ability to derive facts from data, findings from facts, conclusions from findings and recommendations from conclusions
- Production skills—the ability to take a concept from an idea and make it real
- Priorities/time management—the ability to determine priorities and manage time commitments
- Economic competencies

SPECIFIC PERFORMANCE INDICATORS

1. Explain the nature of positive customer relations.
2. Demonstrate a customer-service mindset.
3. Reinforce service orientation through communication.
4. Explain the nature of effective verbal communications.
5. Question/Probe to acquire understanding of prospect.

CASE STUDY SITUATION

ANDERSON GARAGE DOORS is located in a city with over 400,000 people and provides both residential and commercial clients with high-quality garage doors. The company has been in business for over a decade and has grown exponentially since it first opened. ANDERSON GARAGE DOORS is known for its quality of product and workmanship.

Given its stellar reputation, ANDERSON GARAGE DOORS receives many lead inquiries. There are phone calls to the company, voicemails after hours, and emails sent inquiring about prices, styles, processes and a variety of other topics. If the prospect calls during normal business hours and a sales representative is available, then the prospect speaks to a live person and a verbal conversation takes place. If a sales representative is not available, the prospect is transferred to the representative's voicemail or can choose to email the representative directly.

At ANDERSON GARAGE DOORS, there is one administrative assistant that answers the telephone and maintains the general company email account. There are four sales representatives that manage the sales process from start to finish.

While the sales representatives have completed several training workshops focused on closing the sale, they have not received any direction regarding lead inquiries. The owner of the company has noticed that while the company receives many lead inquiries through phone calls and emails, a very low percentage of lead inquiries result in sales.

It was determined that it takes a sales representative an average of 4 business days to respond to a lead inquiry. The sales representatives at ANDERSON GARAGE DOORS prefer to respond via email because it is a quicker process than verbally communicating with a lead.

The owner has realized that the main reason leads are not turning into customers is the ineffective and late communication from sales representatives, which provides unsatisfactory customer service.

YOUR CHALLENGE

The owner of ANDERSON GARAGE DOORS wants you to create a process for the company to follow regarding lead inquiries.

The process must include how phone calls, voicemails and emails are to be handled by the administrative assistant and passed to the sales representatives.

The owner wants you to determine how the sales representatives will communicate with the leads, including method of communication, turnaround time and questions to ask that will convey positive customer service.

You will meet with a member, or members, of the ANDERSON GARAGE DOORS sales team to explain the new process.



SALES MANAGEMENT MEETING, 2019

Participant: _____

JUDGE'S EVALUATION FORM

Sample Event

Participant: _____

INSTRUCTIONAL AREA:

Customer Relations

I.D. Number: _____

Did the participant:

		Little/No Value	Below Expectations	Meets Expectations	Exceeds Expectations	Judged Score
PERFORMANCE INDICATORS						
1.	Explain the nature of positive customer relations?	0-1-2-3	4-5-6-7-8	9-10-11-12	13-14-15	
2.	Demonstrate a customer-service mindset?	0-1-2-3	4-5-6-7-8	9-10-11-12	13-14-15	
3.	Reinforce service orientation through communication?	0-1-2-3	4-5-6-7-8	9-10-11-12	13-14-15	
4.	Explain the nature of effective verbal communications?	0-1-2-3	4-5-6-7-8	9-10-11-12	13-14-15	
5.	Question/Probe to acquire understanding of prospect?	0-1-2-3	4-5-6-7-8	9-10-11-12	13-14-15	
PRESENTATION						
6.	Demonstrate clarity of expression?	0-1	2-3	4	5	
7.	Organize ideas?	0-1	2-3	4	5	
8.	Show evidence of mature judgment?	0-1	2-3	4	5	
9.	Overall performance: appropriate appearance, poise, confidence, presentation, technique and responses to judge's questions?	0-1-2	3-4-5	6-7-8	9-10	
TOTAL SCORE						