



**CAREER CLUSTER**  
Marketing

**CAREER PATHWAY**  
Professional Selling

**INSTRUCTIONAL AREA**  
Selling

## **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. Maintain ongoing relationship with client.
2. Plan follow-up strategies for use in selling.
3. Explain key factors in building a clientele.
4. Explain the role of customer service as a component of selling relationships.
5. Recognize/Reward others for their efforts and contributions.

## **CASE STUDY SITUATION**

For many decades, GOLDSTAR REALTY has served as one of the top real estate agencies in the community. GOLDSTAR is definitely the largest agency, employing over twenty sales agents. The owner of the agency prefers the sales agents to be called “home locators.”

Many homeowners are choosing to sell their homes by owner or by using realty websites. This has made the market extremely competitive for the six real estate agencies in the community. In an effort to market GOLDSTAR, the owner has promised lower commissions, help with closing costs and free rental of moving vans. While these strategies have increased business by a small margin, the president is still worried about the future.

After every sale, the home locator asks clients to complete a survey. The survey can be completed online or using a mail-in paper form. The survey asks the clients specific questions about the process as well as the home locator’s skills, style and professionalism and asks for further feedback. Among the surveys completed last year, over 92% indicated they were “extremely likely to recommend GOLDSTAR to others.”

The owner of GOLDSTAR REALTY feels that the agency has reached its limit on advertising and marketing strategies and now needs to ask its clients to help with future sales.

## **YOUR CHALLENGE**

The owner of GOLDSTAR REALTY wants you to design a customer referral program for past clients of the agency. The owner wants you to consider how the referral program would work, how former clients would be approached, implementation strategies, different approaches for different types of clients and incentives/rewards for referrals. The owner also wants you to determine:

- Guidelines for determining which former clients are likely to make strong referral sources?
- How can we show appreciation for a referral that does not turn into a sale?
- How will the home locators be trained and motivated to ask for referrals?

You will meet with a member, or members, of the GOLDSTAR REALTY sales team to introduce and explain the referral program.

You will receive 2-3 questions from the judge pertaining to the case situation.



**SALES MANAGEMENT MEETING, 2018**

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

**JUDGE'S EVALUATION FORM**

State/Provincial Event 1

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

**INSTRUCTIONAL AREA**

Selling

Did the participant:

		Little/No Value	Below Expectations	Meets Expectations	Exceeds Expectations	Judged Score
<b>PERFORMANCE INDICATORS</b>						
1.	Maintain ongoing relationship with client?	0-1-2-3	4-5-6-7-8	9-10-11-12	13-14-15	
2.	Plan follow-up strategies for use in selling?	0-1-2-3	4-5-6-7-8	9-10-11-12	13-14-15	
3.	Explain key factors in building a clientele?	0-1-2-3	4-5-6-7-8	9-10-11-12	13-14-15	
4.	Explain the role of customer service as a component of selling relationships?	0-1-2-3	4-5-6-7-8	9-10-11-12	13-14-15	
5.	Recognize/Reward others for their efforts and contributions?	0-1-2-3	4-5-6-7-8	9-10-11-12	13-14-15	
<b>PRESENTATION</b>						
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	
<b>TOTAL SCORE</b>						