Partnership Selling

A ROLE PLAY/SIMULATION FOR SELLING TODAY
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Introduction

Salespeople today are working hard to become more effective in such important areas as person-to-person communications, needs analysis, interpersonal relations, and decision making. This role play/simulation will help you develop these critical selling skills. You will assume the role of a new sales trainee employed by the Park Inn International Convention Centre.

PART I
Developing a Sales-Oriented Product Strategy will challenge you to acquire the necessary product information needed to be an effective sales representative for the Park Inn (see Chapters 6 and 7). Your sales manager, T. J. McKee, will describe your new trainee position in an employment memorandum. Your instructions will include the study of materials featured on the following pages and role playing the request made in a T. J. McKee customer service/sales memorandum.

PART II
Developing a Relationship Strategy is another major challenge in personal selling. An employment memorandum will inform you of a promotion to an account executive position. A sales memorandum will inform you of your assignment to accounts in a specific market segment. Part II also involves a role play on the development of a relationship with a new customer in your market segment (see Chapters 3 and 10). Your call objective will be to acquire background information on your new customer, who may have a need for your services.

PART III
Understanding Your Customer's Buying Strategy involves a needs analysis role play (see Chapters 8 and 11). You will again meet with the customer, who has indicated an interest in scheduling a business conference at your convention centre. During this meeting you will acquire information to complete Part IV, which involves preparation for the sales presentation.

PART IV
Developing a Presentation Strategy will involve preparation of a sales proposal and a portfolio presentation (see Chapters 11 to 15). This section also involves a third role play with the customer. During the role play you will reestablish your relationship with the customer, present your proposal, negotiate customer concerns, and attempt to close and service the sale.

Throughout completion of the role play/simulation, you will be guided by the employment and sales memoranda (from the sales manager) and instructions and additional forms provided by your instructor.

As you complete this simulation activity, note that the principles and practices you are learning to use have application in nearly all personal selling situations.
General Instructions for Role Playing

OVERVIEW
The primary goal of a simulation in personal selling should be to strike a balance between just enough detail to focus on the process of selling and not so much as to drown in an ocean of facts. Either too much detail or too little detail can develop anxiety in role play participants. Partnership Selling is designed to minimize anxiety by including only the facts needed to focus on learning the processes involved in high-performance selling.

Some anxiety will occur, however, because you are asked to perform under pressure (in terms of building relationships, securing strategic information, changing people’s thinking, and getting them to take action). Learning to perform in an environment full of genuine but non-threatening pressure affords you the opportunity to practise your selling skills so that you will be prepared for real-world selling anxiety.

The following suggestions for role playing will help you develop the ability to perform under stress.

INSTRUCTIONS FOR SALESPERSON ROLE PLAYS

1. Be well prepared with product knowledge.
2. Read information for each role play ahead of time.
3. Follow specific instructions carefully.
4. Attempt to sense both the context and the facts of the situation presented.
5. Conduct a mental rehearsal. See yourself successfully conducting and completing the role play.
6. Be prepared to take notes during the role play.
7. After the role play, take note of your feelings and mentally put them into the context of what just occurred.
8. Be prepared to discuss your reaction to what occurred during the role play.

INSTRUCTIONS FOR CUSTOMER ROLE PLAYS

1. Read the instructions carefully. Be sure to note both the role play instructions and the information you are about to share.
2. Attempt to sense both the context of the buying situation and the individual facts presented in the instructions.
3. Let the salesperson initiate greetings, conversations, and concluding actions. React appropriately.
4. Supply only the customer information presented in the background description.
5. Supply customer information in a positive manner.
6. Do not attempt to throw the salesperson off track.
EMPLOYMENT MEMORANDUM 1

To: New Convention Sales Centre Trainees
From: T. J. McKee, Sales Manager
Re: Your New Sales Training Program—“Developing a Product Selling Strategy”

I am extremely happy that you accepted our offer to join the Sales and Marketing Department. Enclosed is a copy of your new position description (see p. 8). Your first assignment as a trainee will be to learn about our product and what we have recently done to provide total quality customer service. To apply what you are learning, I would like you to follow up on a customer service request I recently received. (See memo p. 26) You will use the following product information to complete the assignment:

AN AWARD-WINNING UPDATE (See pp. 10–25)

We have recently completed a $2.8-million investment in our convention centre. This customer service investment included renovating all guest rooms and suites, lobby and front desk area, meeting rooms, restaurant, and lounge, and enclosure of the swimming pool. Enclosed is a copy of the “Regional Architect’s Award” that our facility won. We are the only facility in the Metro area to have been presented with this award.

MEETING AND BANQUET ROOMS (See p. 19)

The Park Inn offers convention planners just over 750 square metres of award-winning meeting space in attractive, newly renovated meeting and banquet rooms. Our Maple Park East and West rooms are conveniently located on the lobby level of the hotel. Each of these rooms can accommodate 180 people in a theatre-style setting or 80 in a classroom-style setting. They also have a divider wall that can be retracted and, with the combined rooms, can accommodate up to 370 people.

The Top of the Park provides a spectacular view of the city through windows that surround that ballroom. This unique room, located on the top floor, can accommodate 225 classroom-style, 350 banquet-style, or 450 people theatre-style. Also located in the Top of the Park is a revolving platform area that slowly moves, giving guests a 360-degree panoramic view of the city. The Parkview Room, which is also located on the top floor of the hotel, can accommodate 150 people theatre-style and 80 people classroom-style.

In addition, for groups booking 40 rooms or more, we provide one luxurious suite free. This suite features a meeting room, bedroom, wet bar with refrigerator, and Jacuzzi.

Be sure your clients understand that our meeting rooms need to be reserved. The first organization to sign a sales proposal for a specific date has the designated rooms guaranteed.

GUEST ROOM DECOR AND RATES (See pp. 16 and 20)

Our recent renovation included complete redecoration of all 250 of our large and spacious guest rooms. This includes all-new furniture, wallcoverings, drapes, bedspreads, and carpets. Our interior designer succeeded in creating a comfortable, attractive, restful atmosphere. Seventy of our rooms are designated non-smoking.

(continued)
ROOM RATES (continued)

<table>
<thead>
<tr>
<th>REGULAR RATES</th>
<th>GROUP RATES</th>
<th>SAVINGS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Single</td>
<td>$88</td>
<td>$78</td>
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<tr>
<td>Double</td>
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<td>$88</td>
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<td>$96</td>
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<tr>
<td>Quad</td>
<td>$114</td>
<td>$104</td>
</tr>
</tbody>
</table>

A comparison of competitive room, parking, and transportation rates is presented on p. 20.

BANQUET MEALS (See pp. 13–15)

Our executive chef, Ricardo Guido, recently won the Canadian Federation of Chefs and Cooks’ “Outstanding Chef of the Year” Award. His winning entry consisted of the three chicken entrees featured on the enclosed menus. Ricardo has many years of experience as an executive chef. He personally oversees all our food and beverage operations. Ricardo, in my opinion, is one of the outstanding chefs in the country. His expertise and commitment to total quality customer service will help develop long-term relationships with our customers.

The enclosed dinner selections are only suggestions. We will design a special menu for your clients if they wish. A 15% gratuity or service charge is added to all group meal functions.

HOTEL/MOTEL AND SALES TAXES

All room rates are subject to applicable sales taxes. (Sales taxes do not apply to gratuities.)

LOCATION, TRANSPORTATION, AND PARKING (See map on p. 12)

We are located in a dynamic, growing metropolitan area of over 400,000 people. With convenient access, just off of Highway 237 at the downtown exits, we are within a block of the nationally recognized climate-controlled skywalk system. This 8-km system is connected to theatres, excellent shopping, the civic centre, the metropolitan convention centre, and a large selection of ethnic and fast-food restaurants. Our location offers guests the privacy they deserve during their meetings, yet is close enough to downtown to enjoy all the excitement.

Free courtesy van transportation (also known as limousine service) is provided for our overnight guests to and from the airport, as well as anywhere in the downtown area. This service saves our guests who arrive by plane from $8.00 to $10.00 each way.

Guests who will be driving to the hotel will find over 300 parking spaces available to them at no charge. Unlike other downtown properties, our free parking saves guests up to $6.00 per day in parking fees. For security purposes, we have closed-circuit camera systems in the parking lot and underground parking areas.
VALUE-ADDED GUEST SERVICES AND AMENITIES

Our convention centre owners have invested heavily in the facility to provide our clients with total quality service, unmatched by our competition. Additional value-added services and amenities include:

- A large indoor pool, sundeck, sauna, whirlpool, and complimentary Nautilus exercise room in an attractive tropical atmosphere
- “Café in the Park” featuring 24-hour continental cuisine seven days a week
- “Pub in the Park” where friendly people meet, featuring free hors d’oeuvres Monday through Friday, 5 to 7 p.m.
- Cable television with HBO
- A.V. rental of most equipment in-house, at a nominal fee (see pp. 21–22)
- Free coffee and donuts or rolls in the lobby each morning from 6 to 8 a.m.
- A team of well-trained, dedicated, and friendly associates providing total quality front desk, food, and guest services
- Express check-in
- Electronic key-entry system
- Hair dryer, iron, and ironing board in each room
- Data port capabilities for laptop computers in each room
- Desk in each room
- Video message retrieval
- Voice mail
- On-command video (choice of 50 new-release movies)

SALES LITERATURE (See pp. 10–28)

Included in your product training materials are photos, references, letters, room schedules, sales proposals, and other information that you will use in your written proposals and verbal sales presentations. When you move into outside sales, you should use these tools to create effective sales portfolios.

TOTAL QUALITY COMMITMENT

Our convention centre is committed to total quality customer service. Our Partnership Style of Customer Service and Selling is an extension of our total quality process. The Total Quality Customer Glossary provides definitions of terms that describe our total quality process (see p. 9).

The hotel and convention centre industry is mature and well established. Our sales and customer service plan is to establish strong relationships, focus on solving customer problems, provide total quality customer service, and become a long-term hotel and convention centre partner with our clients. By utilizing this type of selling and customer service, your compensation and our sales revenue will both increase substantially.

TJM:ESS
Enclosures
COMPANY DESCRIPTION
The Park Inn Convention Centre is a total quality, full-service, equal-opportunity-employment convention centre that has recently made large investments in the physical facility, the food and beverage department, and the sales department. Company culture includes an effective and enthusiastic team approach to creating total quality value-added solutions for customers in a very competitive industry. The primary sales promotion tool is Partnership Selling, with extensive marketing support in the form of photos, reference letters, team selling, etc. The company goal is to increase revenues 20 percent in the coming year by providing outstanding customer service.

A SUCCESSFUL ACCOUNT EXECUTIVE WILL
1. Acquire necessary convention centre company, product, industry, and competitive information through the company training program
2. Be committed to a total quality customer service process
3. Develop a list of potential prospects in the assigned target market
4. Develop long-term total quality selling relationships that focus on solving the meeting planner’s convention centre needs
5. Achieve a sales volume of $700,000 to $800,000 annually

WORKING RELATIONSHIPS
Reports to: Sales Manager
Works with: Internal Support Team including Food Service, Housekeeping and Operations, Customer Service, and Front Desk; External Relationships including customers, professional associations, and industry personnel

SPECIFIC REQUIREMENTS
1. Must project a positive and professional sales image
2. Must be able to establish and maintain long-term relationships
3. Must be goal oriented with a plan for self-improvement
4. Must be flexible to deal effectively with a wide range of customers
5. Must be good at asking questions and listening effectively
6. Must be accurate and creative in developing customer solutions
7. Must be clear and persuasive in communicating and negotiating solutions
8. Must be good at closing the sale
9. Must follow through on promises and assurances
10. Must have math skills necessary for figuring sales proposals

SPECIFIC REWARDS
1. Attractive compensation package that includes base salary, a commission of 10 percent of sales, bonuses, and an attractive fringe-benefit package
2. Pride in working for an organization that practises total quality management in employee relations and customer service
3. Extensive sales and educational support
4. Opportunity for growth and advancement
TOTAL QUALITY CUSTOMER SERVICE GLOSSARY

DIRFT — DO IT RIGHT THE FIRST TIME means being prepared, asking the right questions, selecting the right solutions, and making effective presentations. This creates repeats and referrals.

QIP — QUALITY IMPROVEMENT PROCESS means always striving to better serve our customers, resulting in high quality, long-term relationships.

TQM — TOTAL QUALITY MANAGEMENT means the commitment to support and empower people to deliver legendary customer service.

QIT — QUALITY IMPROVEMENT TEAM means a team approach to deliver outstanding customer service.

COQ — COST OF QUALITY means the ultimate lowering of cost by providing outstanding service the first time, so as to build a list of repeat and referred customers.

PONC — PRICE OF NONCONFORMANCE means the high cost of not meeting high standards. This results in correcting problems and losing customers. PONC also causes longer sales cycles and higher sales costs.

POC — PRICE OF CONFORMANCE means the lower costs of providing outstanding customer service and achieving a list of repeat or referral customers.

WIIFM — WHAT IS IN IT FOR ME means the psychic and monetary rewards in the form of personal enjoyment, higher salaries, commissions, or bonuses caused by delivering outstanding customer service.

QES — QUALITY EDUCATION SYSTEMS means internal and external educational activities designed to improve the quality of customer service.

YOU — THE MOST IMPORTANT PART OF QUALITY means the ongoing program of self-improvement that results in outstanding customer service, and personal and financial growth.
THE ALL-NEW PARK INN
(with an award-winning $2.8-million renovation)
REGIONAL ARCHITECTS ASSOCIATION

"EXCELLENCE IN RENOVATION DESIGN"

PRESENTED TO:

Park Inn International

WITH SPECIAL RECOGNITION FOR CREATING AN OUTSTANDING
CONVENTION ENVIRONMENT.

PRESENTED ON THE ELEVENTH DAY OF MARCH, 200__.

Patricia Barrett
President, Regional Architects Association

Allen Rogge
Chairperson, Design Selection Committee
CONVENIENT, EASY-TO-FIND LOCATION
WITH FREE PARKING
Conveniently located at Highway 6 and Laurentian Ave. Just 13 km from Maple Hill International Airport.
OUTSTANDING FOOD SERVICE
Personally Supervised by Award-Winning “Executive Chef of the Year” Ricardo Guido
CANADIAN FEDERATION OF CHEFS AND COOKS

EXECUTIVE CHEF OF THE YEAR

AWARDED TO:

Ricardo Guido

PRESENTED ON THE ELEVENTH DAY OF APRIL, 200__.

Patricia Reed
President, Canadian Federation of Chefs and Cooks

Ella Reed
Conference Chairperson
# Banquet-Style Menu Selections

All selections include tossed greens with choice of dressing, choice of potato (baked, oven browned, au gratin, or mashed), rice or buttered noodles, rolls with butter, coffee, decaffeinated coffee, tea, or iced tea.

## Entrees

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Chicken Wellington</strong></td>
<td>Boneless breast of chicken topped with a mushroom mixture, wrapped in puff pastry shell and baked to a golden brown</td>
<td>$17.95</td>
</tr>
<tr>
<td><strong>Chicken Breast Teriyaki</strong></td>
<td>Marinated boneless breast of chicken grilled and topped with our special teriyaki sauce</td>
<td>$17.95</td>
</tr>
<tr>
<td><strong>Chicken Breast New Orleans</strong></td>
<td>Baked boneless breast of chicken, garnished with peppers, mushrooms, onions, and Monterey Jack cheese</td>
<td>$17.95</td>
</tr>
<tr>
<td><strong>Broiled New York Strip Steak</strong></td>
<td>Centre cut New York strip steak broiled to perfection, topped with our own seasoned herb butter</td>
<td>$16.50</td>
</tr>
<tr>
<td><strong>Broiled Filet Mignon</strong></td>
<td>A steak from the centre cut tenderloin, broiled and served with a rich red wine sauce</td>
<td>$24.50</td>
</tr>
<tr>
<td><strong>Sliced Pork Loin with Mustard Sauce</strong></td>
<td>Boneless loin of pork oven roasted and sliced, served with a mustard sauce</td>
<td>$17.95</td>
</tr>
<tr>
<td><strong>Grilled Pork Chop</strong></td>
<td>A thick cut of pork grilled to juicy perfection</td>
<td>$18.95</td>
</tr>
<tr>
<td><strong>Broiled Orange Roughy</strong></td>
<td>A filet of orange roughy broiled and covered with basil-lemon sauce</td>
<td>$18.95</td>
</tr>
<tr>
<td><strong>Broiled Halibut Steak</strong></td>
<td>Tender flaky halibut cut into steaks and broiled in lemon butter served with fresh lemon slices</td>
<td>$19.95</td>
</tr>
</tbody>
</table>

Sales taxes and gratuity not included.
ATTRACTIVE, COMFORTABLE GUEST ROOMS
(All-new furnishings, HBO in every room, free *Globe and Mail* weekday and Saturday delivery, no telephone and access charges for 800 and credit card calls, and data port capabilities for laptop computers)
A TROPICAL PARADISE

For relaxation after a day’s work—
attractive pool, sauna, whirlpool,
sundeck, and Nautilus fitness centre
BRIGHT, COMFORTABLE, AND STRATEGICALLY ARRANGED MEETING ROOMS

Everything you need for outstanding meetings
Meeting Room | Size | Theatre | Classroom | Banquet | Reception | Ceiling | Sq. m
--- | --- | --- | --- | --- | --- | --- | ---
Maple Park East | 9.5 × 14 | 180 | 80 | 80 | 300 | 3.0 | 133
Maple Park West | 10.3 × 14 | 180 | 80 | 80 | 300 | 3.0 | 144
Combined | 20.2 × 14 | 370 | 180 | 180 | 300 | 3.0 | 283
Park Lane | 3.1 × 6.7 | 25 | 16 | 16 | | 2.4 | 21
Top of the Park | 16.8 × 23.8 | 450 | 225 | 350 | 500 | 3.2 | 400
Revolver | 15.2 × 15.2 | 300 | 150 | 180 | 200 | 2.6 | 231
Dance Floor | 14.3 × 7.9 | 150 | 75 | 90 | 120 | 3.2 | 113
Parkview | 9.5 × 13.7 | 150 | 80 | 80 | 120 | 2.4 | 130
1007 & 1009 | 4.9 × 5.8 | 30 | 16 | 16 | | | 107 & 109 | 4.9 × 5.8 | Conference for 12 each room
<table>
<thead>
<tr>
<th>HOTEL/MOTEL</th>
<th>SINGLE</th>
<th>DOUBLE</th>
<th>DAILY PARKING</th>
<th>AIRPORT TRANS.</th>
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<td>Park Inn</td>
<td>78</td>
<td>88</td>
<td>Free</td>
<td>Free</td>
</tr>
<tr>
<td>Marriott</td>
<td>80</td>
<td>90</td>
<td>6</td>
<td>10 each way</td>
</tr>
<tr>
<td>Sheraton</td>
<td>85</td>
<td>105</td>
<td>6</td>
<td>12 each way</td>
</tr>
<tr>
<td>Hilton</td>
<td>80</td>
<td>100</td>
<td>7</td>
<td>9 each way</td>
</tr>
<tr>
<td>Embassy</td>
<td>82</td>
<td>103</td>
<td>6</td>
<td>8 each way</td>
</tr>
<tr>
<td>Guest Quarters</td>
<td>84</td>
<td>104</td>
<td>Free</td>
<td>8 each way</td>
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<tr>
<td>Carlton</td>
<td>75</td>
<td>95</td>
<td>8</td>
<td>3 each way</td>
</tr>
<tr>
<td>Saboe</td>
<td>75</td>
<td>85</td>
<td>Free</td>
<td>12 each way</td>
</tr>
<tr>
<td>Chesterfield</td>
<td>70</td>
<td>80</td>
<td>Free</td>
<td>13 each way</td>
</tr>
<tr>
<td>Best Western</td>
<td>65</td>
<td>70</td>
<td>Free</td>
<td>15 each way</td>
</tr>
<tr>
<td>Days Inn</td>
<td>60</td>
<td>65</td>
<td>Free</td>
<td>12 each way</td>
</tr>
<tr>
<td>Sunset Inn</td>
<td>55</td>
<td>n/a</td>
<td>Free</td>
<td>12 each way</td>
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</table>

**RENTAL RATES**

**MEETING ROOM RATES**

<table>
<thead>
<tr>
<th>SQUARE METRES</th>
<th>MEETING ROOM</th>
<th>4 HOURS</th>
<th>8 HOURS</th>
<th>24 HOURS</th>
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<tbody>
<tr>
<td>400</td>
<td>Top of the Park</td>
<td>$400</td>
<td>$600</td>
<td>$900</td>
</tr>
<tr>
<td>133</td>
<td>Maple Park East</td>
<td>$150</td>
<td>$200</td>
<td>$300</td>
</tr>
<tr>
<td>144</td>
<td>Maple Park West</td>
<td>$160</td>
<td>$200</td>
<td>$300</td>
</tr>
<tr>
<td>283</td>
<td>Combined Maple Park</td>
<td>$300</td>
<td>$400</td>
<td>$500</td>
</tr>
<tr>
<td>21</td>
<td>Park Lane</td>
<td>$25</td>
<td>$40</td>
<td>$60</td>
</tr>
<tr>
<td>231</td>
<td>Revolver</td>
<td>$300</td>
<td>$500</td>
<td>$700</td>
</tr>
<tr>
<td>113</td>
<td>Dance Floor</td>
<td>$100</td>
<td>$175</td>
<td>$275</td>
</tr>
<tr>
<td>130</td>
<td>Parkview</td>
<td>$110</td>
<td>$185</td>
<td>$300</td>
</tr>
<tr>
<td>28</td>
<td>1007 and 1009</td>
<td>$40</td>
<td>$60</td>
<td>$80</td>
</tr>
<tr>
<td>28</td>
<td>107 and 109</td>
<td>$40</td>
<td>$60</td>
<td>$80</td>
</tr>
</tbody>
</table>

- Meeting room rental charges based on set changes at 12:00 noon, 5:00 p.m., or 10:00 p.m.
- For groups of 20 or more who are reserving 20 or more guest rooms or scheduling 20 or more banquet meals, rental rates will be waived for rooms up to 150 square metres for up to 8 hours of use per day.
- For groups of 50 or more who are reserving 50 or more guest rooms or scheduling 50 or more banquet meals, rental rates will be waived for all rooms for up to 24 hours of use.
# AUDIO VISUAL PRESENTATIONS GUIDE

These are the most popular audio/visual equipment items. If you require special equipment and services not listed, please let us know. We’ll do the rest!

## AUDIO VISUAL EQUIPMENT PACKAGES

### 35mm Slides

Kodak Ektagraphic III 35mm Slide projector package features a projection stand or cart, 4" to 8" zoom lens, wireless remote control, spare 80-slide tray, all extension AC cords safely taped. Select Screens Below.

- 35mm Slide Projector Package..........................$45.00

**Recommended by Professional Meeting Planners:**

- Complete speaker freedom with Laser Pointer..........................$27.50
- Wireless Microphone.............................$80.00

Groups over 75 people:

- Special Zoom Lens..........................$11.00

### Overhead Projectors

Popular overhead projector package with super-wide overhead projector featuring automatic spare lamp changer. All AC extension cords safely taped. Select Screens Below.

- Overhead Projector Package..........................$40.00

**Recommended by Professional Meeting Planners:**

- Complete speaker freedom with Laser Pointer..........................$27.50
- Wireless Microphone.............................$80.00

### LCD Video Projection

LCD Proxima Video Projector..........................$500.00

Colour Video Projector Projects Full Colour Video or Computer Images up to SVGA. Recommended for larger groups. Select Screen Below.

- Colour Computer Data Panel..........................$325.00

### Video VCR/Monitor

VHS 1/2” or U-MATIC 3/4” Player/Recorder package features a roll-around 54” projection cart, a 27” full-function colour video monitor/receiver. All cable connections. AC extension cords safely taped.

- “VHS 1/2”..................................................$150.00
- 3/4” U-MATIC.................................$185.00

**Recommended by Professional Meeting Planners:**

- More visibility for large groups with additional 27” video, monitor and cart, includes cables and connectors.
  - Each..................................................$90.00
  - Full House Sound.............................$27.50

### Continued
### Motion Picture Projection
- 16mm Autoload projector w/2" prime lens with stand $40.00

### Hi-Intensity Overhead Projector
- 4000 Lumen projector for LCD computer Data panel or larger groups $65.00

### Meeting Accessories
- Laser Pointer $27.50
- Flip-Chart Easel (No Pen) $14.00
- Flip-Chart Rental w/Markers $22.00
- Projection carts and stands $16.50
- Meeting accessories such as acetate rolls and sheets are available on request.

### Video Equipment
- Camcorder with tripod $120.00
- VCR $60.00

### Audio Equipment
- Cassette Player/Recorder $40.00
- CD Player $40.00
- Portable CD/Cassette Player $40.00

### AV Technician Services
AV Tech is on-site for installation and dismantle.
Requirements for exclusive event management will be charged these hourly rates:
- Monday through Friday, 7am–5pm $30.00
- Evenings, Weekdays, and Holidays $40.00

### Microphones
- Microphone, wired $22.00
- Lavaliere, wired $22.00
- Wireless microphone (Hand held or Lavaliere) $80.00
- Sound patch to house system $27.50
- 4-Channel mixer $27.50

### Screens
- 6’ x 6’ Tripod $22.00
- 8’ x 8’ Tripod $27.50
- 10’ x 10’ Cradle $55.00
- 7 1/2” x 10’ Fast Fold $80.00
- 9’ x 12’ Fast fold $110.00
- Front or rear projection Fast-fold drape kits included.
December 15, 200_  

Carroll Parez, General Manager  
The Park Inn  
580 King Street  
Maple Hill, Ontario  
K2R 4P7  

Dear Carroll:  

On behalf of our employees I thank you and your associates for the wonderful time we had at the Park Inn during our convention last month. Enclosed is a cheque for $22,991.23 to pay the invoice for the meeting costs.  

The hospitality that we received during our time there was unparalleled. The friendliness and dedication of the staff simply made our time so enjoyable we hated to leave.  

The Chicken New Orleans was superb. Our heartfelt thanks to Chef Ricardo Guido for creating the best meals we have ever had at a convention.  

Without reservation I will direct anyone looking for convention space to your award-winning property. The group who gave you the award certainly knew what was important to convention planners. You may count on us to return in the future.  

Sincerely,  

Reggie Regan  
Reggie Regan, Vice-President  
Field Sales Division  

Enclosures:  
Schedule for our next eight convention dates  
Cheque  
Service Evaluation  

ss
# REFERENCES

<table>
<thead>
<tr>
<th>COMPANY/ADDRESS</th>
<th>TELEPHONE NO.</th>
<th>DATE OF BOOKING</th>
</tr>
</thead>
<tbody>
<tr>
<td>Association of Business and Industry</td>
<td>265–8181</td>
<td>July 1–2</td>
</tr>
<tr>
<td>2425 Hubbell</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mr. James Warner (Director)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Acme Supply Company</td>
<td>265–9831</td>
<td>July 14</td>
</tr>
<tr>
<td>2531 Dean</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Linn Compiano (Training Manager)</td>
<td></td>
<td></td>
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<tr>
<td>Rotary International</td>
<td>792–4616</td>
<td>July 28–29</td>
</tr>
<tr>
<td>1230 Executive Towers</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mr. Roger Shannon (Executive Director)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Archway Cookie Company</td>
<td>432–4084</td>
<td>August 9</td>
</tr>
<tr>
<td>Boone Industrial Park</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mr. Bill Sorenson (Sales Manager)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>West College</td>
<td>283–4142</td>
<td>September 9–11</td>
</tr>
<tr>
<td>4821 College Parkway</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Toni Bush (Athletic Director)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Travellers Insurance Company</td>
<td>223–7500</td>
<td>November 14</td>
</tr>
<tr>
<td>1452 29th</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mr. Richard Wiese (Training Manager)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Meredith Corporation</td>
<td>284–2654</td>
<td>November 23–24</td>
</tr>
<tr>
<td>1716 Locust</td>
<td></td>
<td></td>
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<tr>
<td>Mrs. Carol Rains (Public Relations)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pioneer Hi-Bred Incorporated</td>
<td>272–3660</td>
<td>December 12–13</td>
</tr>
<tr>
<td>5700 Merle Highway</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mrs. Sheri Sitterly (Administrative Services)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
CONVENTION CENTRE POLICIES AND GENERAL INFORMATION

FOOD AND BEVERAGE

• A 15% gratuity or service charge and applicable sales tax will be added to all food and beverage purchases. Any group requesting a tax exemption must submit their Certificate of Exemption prior to the event.

• There is a $25 setup fee for each meal function of 25 persons or less.

GUARANTEES

• The Convention Centre will require your menus and meeting room requirements no later than two weeks before your meeting or food function.

• Convention Centre facilities are guaranteed on a “first confirmed, first served” basis.

• A meal guarantee is required 48 hours prior to your function. This guarantee is the minimum your group will be charged for the function. If no guarantee is received by the Catering Office, we will then consider your last number of attendees as the guarantee. We will be prepared to serve 5% over your guaranteed number.

BANQUET AND MEETING ROOMS

• As other groups may be utilizing the same room prior to or following your function, please adhere to the times agreed on. Should your time schedule change, please contact the Catering Office, and every effort will be made to accommodate you.

• Function rooms are assigned by the number of people anticipated. If attendance drops or increases, please contact the Catering Office to ensure proper assignment of rooms.

AUDIOVISUAL SERVICES

• A wide selection of audiovisual equipment and services is available on a rental basis. (See audiovisual presentation guide for details.)
To: Convention Sales Trainee  
From: T. J. McKee, Sales Manager  
Re: Assistance with a Customer Request

A new prospect called and requested that we immediately submit a proposal for a potential meeting at our hotel. Please review the profile in our automated database (printed as follows).

**CONTACT REPORT**

<table>
<thead>
<tr>
<th>Name: Graphic Forms</th>
<th>Address: 1234 Parsons Pond Road</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contact: B. H. Rivera</td>
<td></td>
</tr>
<tr>
<td>Phone: 555–619–4879</td>
<td></td>
</tr>
<tr>
<td>Title: President</td>
<td>City: Fredericton</td>
</tr>
<tr>
<td>Sec:</td>
<td>Province: New Brunswick</td>
</tr>
<tr>
<td>Dear: B. H. Rivera</td>
<td>Postal Code: E6B 7W3</td>
</tr>
</tbody>
</table>

(McKee) Visited with B. H. Rivera on the phone. Seemed very interested. Nice emotive person. Has a son, Matt, attending West College. Also knew Toni Bush of West, who is an excellent account of ours. B. H. wants a proposal ASAP to cover the following buying conditions:

1. Ten single guest rooms for two nights—Friday and Saturday
2. A meeting room for 20 people, classroom style, Friday and Saturday from 2 to 6 P.M.
3. Dinner for 20, banquet style, at 6 P.M. each night
   - Friday: Grilled Pork Chops
   - Saturday: Broiled Orange Roughy
4. A swimming pool

Complete the following customer service/sales assignment using the material in your product sales training program (pp. 10–25) and the forms on the next two pages. (See Chapters 6 and 7 for information on developing a product strategy.)

1. **Complete the sales proposal worksheet** (p. 27).
   
   Our sales proposal needs to contain accurate and complete facts because, when signed, it becomes a legally enforceable sales contract. All the product and pricing guidelines have been supplied in your sales training materials. You should sign your name with your new job title “Account Executive” in the lower left-hand corner of the form.

2. **Write a sales letter** (p. 28).
   
   Prepare a letter that custom fits and positions the benefits that will appeal to B. H. Rivera. Be sure to list any sales literature you will be sending under the Enclosure section of your letter. (Use business letter format on p. 23.)

Make file copies of everything you prepare so our food and beverage, housekeeping, and accounting departments will have them available.

We should send or fax the proposal, cover letter, and sales literature by tomorrow afternoon.

Thank you.

Enclosures
SALES PROPOSAL

Customer Name: ___________________________________________ Title: ___________________________________________
Organization Name: _______________________________________ Telephone: _______________________________________
Address: __________________________________________________
Date(s) of Meetings: _________________________________________
Kind of Meetings: ___________________________________________
Buying Conditions (what the customer needs—be specific): _________________________________________________________

A. Meal Functions Needed

<table>
<thead>
<tr>
<th>Time</th>
<th>Description</th>
<th>Quantity</th>
<th>Price</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Meal 1</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Meal 2</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td>(Beverages, setup fees, etc.)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Total _________________
Sales Taxes _________________
Service Charge _________________
Total Meal Cost _________________

B. Meeting and Banquet Rooms and Equipment Needed (describe time, date, and cost)

Total _________________
Sales Taxes _________________

Total Meeting/Banquet Rooms and Equipment Charges _________________

C. Guest Rooms Needed

<table>
<thead>
<tr>
<th>Number of Rooms Needed</th>
<th>Description (dates, location, special conditions)</th>
<th>Group Rate per Room</th>
<th>Total Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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<td></td>
<td></td>
</tr>
</tbody>
</table>

Total _________________
Sales Taxes _________________

D. Total Customer Costs (from above)
A. $__________ plus B. $__________ plus C. $__________ equals **Total Charges** $__________

Authorized Signature ___________________ Date ____________
Customer Signature ___________________ Date ____________

Title ___________________
EMPLOYMENT MEMORANDUM 2

To: New Convention Centre Account Executives
From: T. J. McKee, Sales Manager
Re: Your New Sales Assignment

Congratulations on successfully completing your training program and receiving your new appointment. You will find three challenges as you partner with your accounts.

Your first challenge will be establishing relationships with your customers. This will require that you do strategic planning before you can call on your client for the first time. Make sure your initial meetings focus on subjects of interest to your customer.

Your second major challenge will be to gain a complete and accurate understanding of your customer’s needs. You should prepare to ask good questions, take detailed and accurate notes, and confirm your customer’s and your own understanding of their need. This process is a part of our total quality management program, which strives to provide total quality customer service.

Your third challenge as an account executive will be to make good presentations. Our industry, as most others these days, is competitive and is characterized by many look-alike products and some price cutting. Always organize and deliver good presentations that focus on (1) providing solutions to immediate and long-term customer needs, (2) negotiating double-win solutions to customer concerns, and (3) closing sales that keep our facility full. This approach will give you a competitive edge and help you maintain high-quality, long-term profitable relationships.

Effectively meeting these challenges will also require that you have a program of self-improvement. This will enhance your career as an account executive.

Attached you will find a memorandum on an account I would like you to develop. Please follow the instructions included and provide me with appropriate feedback on your progress. I look forward to working with you on this account.

P. S. I want to compliment you on your excellent work on the B. H. Rivera account. B. H. called while you were attending a training meeting and said that your proposal and letter looked very good. Their organization was impressed with our facility, the apparent quality of our food, and your letter. Their organization will be scheduling a total of 11 more meetings at our convention centre during the next 12 months if everything works the way you describe it. Each of these sales will be reflected in your commission cheques. Great work.
SALES MEMORANDUM 1A

To: Association Account Sales
From: T. J. McKee, Sales Manager
Re: Developing the Erin Adkins, YWCA Account
(Call 1, Establishing a Relationship Strategy)

My sales assistant has called Erin Adkins, chairperson of the YWCA Physical Fitness Week program (see following contract report), and set up an appointment for you on Monday at 1:00 p.m. in Erin’s office. During your first sales call with Erin, your call objectives will be to

1. Establish a strong relationship
2. Share an appealing benefit of our property to create customer interest
3. Find out if you customer is planning any conventions in the future

As we discussed during your training class, using Erin Adkins’s prospect information presented later and the sales tools in your product strategy materials, your presentation plan should be to (see Chapters 3 and 10)

1. Use compliments, comments on observations, or a search for mutual acquaintances to determine which topics Erin wants to talk about (Erin will only want to talk about three of these topics). This should set the stage for a good relationship.
2. Take notes on the topics of interest to Erin so we can add them to our customer information data bank for future calls. (Erin will share three new items of information on each topic of interest, if you acknowledge interest.)
3. Show and describe an appealing and unique benefit of our facility so we will be considered for Erin’s future convention needs. (Consider using the Architect’s Award.)
4. Discuss any conventions Erin may be planning.
5. Schedule a callback appointment.

Name: YWCA
Address: 16 Durham Avenue
Contact: Erin Adkins
Phone: 555-515-3740
Title: Chairperson, Physical Fitness Programs
City: Maple Hill
Sec: Province: Ontario
Dear: Erin
Postal Code: K2N 4C9

(McKee) Toni Bush, the Athletic Director of West College, supplied the following information about Erin Adkins:

1. Toni and Erin have a close relationship.
2. Erin just designed and built a new home.
3. Erin appears in local TV advertising about the YWCA.
4. An autographed picture of the Chicago Bulls basketball team
5. A Schwinn Air-dyne Fitness Cycle

(continued)
<table>
<thead>
<tr>
<th>Comments, Compliments, and Questions</th>
<th>Notes on New Items of Interest to Customer</th>
</tr>
</thead>
<tbody>
<tr>
<td>(Toni Bush suggested you mention his name.)</td>
<td>1. (Example) Toni Bush is my cousin</td>
</tr>
<tr>
<td></td>
<td>2.</td>
</tr>
<tr>
<td></td>
<td>3.</td>
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<tr>
<td></td>
<td>1.</td>
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<td></td>
<td>2.</td>
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<td></td>
<td>3.</td>
</tr>
</tbody>
</table>
SALES MEMORANDUM 1B

To: Corporate Account Sales
From: T. J. McKee, Sales Manager
Re: Developing the Leigh Combs, Epic Design Systems Account
( Call 1, Establishing a Relationship Strategy )

My sales assistant has called Epic Design Systems (see following contact report) and set up an appointment for you on Monday at 1:00 p.m. in Leigh’s office. During your first sales call with Leigh, your call objectives will be to

1. Establish a strong relationship
2. Share an appealing benefit of our property to create customer interest
3. Find out if your customer is planning any conventions in the future

As we discussed during your training class, using Leigh Combs’s prospect information presented later and the sales tools in your product strategy materials, your presentation plan should be to (see Chapters 3 and 10)

1. Use compliments, comments on observations, or a search for mutual acquaintances to determine which topics Leigh wants to talk about (Leigh will only want to talk about three of these topics). This should set the stage for a good relationship.
2. Take notes on the topics of interest to Leigh so we can add them to our customer information data bank for future calls. (Leigh will share three new items of information on each topic of interest, if you acknowledge interest.)
3. Show and describe an appealing and unique benefit of our facility so we will be considered for Leigh’s future convention needs. (Consider using the Executive Chef’s Award.)
4. Discuss any conventions Leigh may be planning.
5. Schedule a callback appointment.

(continued)
<table>
<thead>
<tr>
<th>Comments, Compliments, and Questions</th>
<th>Notes on New Items of Interest to Customer</th>
</tr>
</thead>
<tbody>
<tr>
<td>(Linn Compiano mentioned that Leigh Combs just returned from a very enjoyable vacation.)</td>
<td>1. (Example) Spent one week in California</td>
</tr>
<tr>
<td></td>
<td>2.</td>
</tr>
<tr>
<td></td>
<td>3.</td>
</tr>
<tr>
<td>1.</td>
<td></td>
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<tr>
<td>2.</td>
<td></td>
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<tr>
<td>3.</td>
<td></td>
</tr>
</tbody>
</table>
PRESALE PLAN WORKSHEET

SALES CALL 1 — ESTABLISHING A RELATIONSHIP

Name:____________________________

Your appointment for your first call is scheduled for (1) ____________________ at (2) ____________________ p.m. Your appointment was set up by (3) _____________________. On entering your prospect’s office, you will need to (4) ______________________ yourself, (5) ______________________ hands, and explain your (6) ______________________ objectives. Your next step will be to make a (7) ______________________, (8) ______________________, or do a search for mutual acquaintances or interests. When your customer opens up and shares new information, you are instructed to (9) ______________________ and take (10) ______________________. If you are successful in getting your customer to talk about things in which (s)he is interested, you should receive (11) ______________________ new pieces of relationship information. At the appropriate time during your call you will convert attention from the (12) ______________________ to showing a (13) ______________________ device and presenting a (14) ______________________, to interest your customer in your convention centre. In completing your call (15) ______________________ you are asked to (16) ______________________ if your customer has any planned future (17) ______________________. If you have not received a total of (18) ______________________ new pieces of relationship information, you should go back and talk about things of interest to your customer. The (19) ______________________ screen on the contact report provides factual information about your prospect while the (20) ______________________ contains information that reflects your customer’s interests. Erin Adkins is active in the (21) ______________________. Erin also knows (22) ______________________ of West College. Leigh Combs is a (23) ______________________ manager and has just returned (24) ______________________. There are at least two important items to (25) ______________________ in both Erin’s and Leigh’s office.
# ASSESSMENT FORM 1

## RELATIONSHIP STRATEGY

<table>
<thead>
<tr>
<th>Assessment Item</th>
<th>Excellent</th>
<th>Average</th>
<th>Poor</th>
<th>Did Not Do</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Conducted good verbal introductions (shared full name, title, and company name)</td>
<td>10</td>
<td>9</td>
<td>8</td>
<td>7</td>
</tr>
<tr>
<td>2. Made good nonverbal introduction (good entrance, carriage, handshake, and seating posture)</td>
<td>10</td>
<td>9</td>
<td>8</td>
<td>7</td>
</tr>
<tr>
<td>3. Communicated call objectives (shared why salesperson was calling)</td>
<td>10</td>
<td>9</td>
<td>8</td>
<td>7</td>
</tr>
<tr>
<td>4. Verbalized effective comments and compliments (sincerely made comments and compliments on five relationship topics)</td>
<td>10</td>
<td>9</td>
<td>8</td>
<td>7</td>
</tr>
<tr>
<td>5. Kept conversation focused on customer topics (acknowledged new information provided by customer)</td>
<td>10</td>
<td>9</td>
<td>8</td>
<td>7</td>
</tr>
<tr>
<td>6. Took effective, non-distractive notes (was organized and prepared to take notes)</td>
<td>10</td>
<td>9</td>
<td>8</td>
<td>7</td>
</tr>
<tr>
<td>7. Attractively showed material on convention centre (was well prepared with a proof device)</td>
<td>10</td>
<td>9</td>
<td>8</td>
<td>7</td>
</tr>
<tr>
<td>8. Made effective benefit statement (made a benefit statement that appealed to customer)</td>
<td>10</td>
<td>9</td>
<td>8</td>
<td>7</td>
</tr>
<tr>
<td>9. Effectively inquired about convention needs (asked good questions about future needs)</td>
<td>10</td>
<td>9</td>
<td>8</td>
<td>7</td>
</tr>
<tr>
<td>10. Effectively thanked customer (communicated appreciation, said thank you, indicated interest in prospect’s future business)</td>
<td>10</td>
<td>9</td>
<td>8</td>
<td>7</td>
</tr>
</tbody>
</table>

Relationship Presentation: ____________________________________________

Total Points: ____________________________________________

Your Name: ____________________________________________

*Return this form to salesperson and discuss your reaction to this presentation!*
SALES MEMORANDUM 2A

To: Association Account Salesperson
From: T. J. McKee, Sales Manager
Re: Erin Adkins Account—phone call from customer
(Call 2, Discovering a Customer’s Buying Strategy)

Erin Adkins from the YWCA, whom you called on recently, left a message for you to stop in about a program they are planning. Congratulations on making that first call so effectively. Apparently you established a good relationship.

As we discussed in your training program, your call objectives should be to

1. Re-establish your relationship
2. Discover Erin’s buying conditions (the what, why, who, when, and what price needs), so we can custom-fit a program for them
3. Set up an appointment to present your solution

Also, as we discussed, your presentation plan for this call should include (see Chapters 8 and 11)

1. In advance of your meeting, prepare general information-gathering questions designed to get your customer talking and to achieve your call objectives. (Use our form below.)
2. Later in your meeting, use probing and confirmation questions to clarify and confirm Erin’s and your own perceptions of each buying condition.
3. During your sales meeting, write down each of Erin’s buying conditions. (Use our form below.)
4. To end your first meeting, use your notes to construct a summary confirmation question to clarify and confirm all six of Erin’s buying conditions.
5. Schedule a callback appointment to make your presentation and present your proposal.

Good luck!

<table>
<thead>
<tr>
<th>INFORMATION-GATHERING QUESTIONS</th>
<th>NOTES ON BUYING CONDITIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>(Example: Can you share with me what you had in mind?)</td>
<td>(Example: Needs a small meeting room)</td>
</tr>
<tr>
<td></td>
<td>1.</td>
</tr>
<tr>
<td></td>
<td>2.</td>
</tr>
<tr>
<td></td>
<td>3.</td>
</tr>
<tr>
<td></td>
<td>4.</td>
</tr>
<tr>
<td></td>
<td>5.</td>
</tr>
<tr>
<td></td>
<td>6.</td>
</tr>
</tbody>
</table>
SALES MEMORANDUM 2B

To: Corporate Account Salesperson  
From: T. J. McKee, Sales Manager  
Re: Leigh Combs Account—phone call from customer  
     (Call 2, Discovering a Customer's Buying Strategy)

Leigh Combs from Epic Design Systems, whom you called on recently, left a message for you to stop in about a program they are planning. Congratulations on making that first call so effectively. Apparently you established a good relationship.

As we discussed in your training program, your call objectives should be to

1. Reestablish your relationship
2. Discover Leigh’s buying conditions (the what, why, who, when, and what price needs), so we can custom-fit a program for them
3. Set up an appointment to present your solution

Also, as we discussed, your presentation plan for this call should include (see Chapters 8 and 11)

1. In advance of your meeting, prepare general information-gathering questions designed to get your customer talking and to achieve your call objectives. (Use our form below.)
2. Later in your meeting, use probing and confirmation questions to clarify and confirm Leigh’s and your own perceptions of each buying condition.
3. During your sales meeting, write down each of Leigh’s buying conditions. (Use our form below.)
4. To end your first meeting, use your notes to construct a summary confirmation question to clarify and confirm all six of Leigh’s buying conditions.
5. Schedule a callback appointment to make your presentation and present your proposal.

Good luck!

<table>
<thead>
<tr>
<th>INFORMATION-GATHERING QUESTIONS</th>
<th>NOTES ON BUYING CONDITIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>(Example: Can you share with me what you had in mind?)</td>
<td>(Example: Needs a small meeting room)</td>
</tr>
</tbody>
</table>
PRESALE PLAN WORKSHEET

SALES CALL 2 — DISCOVERING A CUSTOMER STRATEGY

Name: ______________________________

In call 2 your first objective is to (1) _________________________________. To do this you should plan to visit about (2) ________________________________ information you acquired in call (3) _________________________________. Because your (4) ________________________________ requested this meeting, you probably do not have to state your (5) _________________________________ at the beginning of the call. The reason this meeting was requested is because you apparently did a good job of (6) ________________________________ the _________________ in call 1. In discovering your customer’s needs (buying conditions) “what” refers to services your customer needs and (7) ________________________________ refers to the budget that your customer has. (8) ________________________________ refers to the people coming, and (9) ________________________________ refers to the reason for the meeting. To secure general information you should use (10) __________________________-____________________ questions, and to get the details you should use (11) __________________________-____________________ questions. (12) __________________________-____________________ questions check your customer’s and (13) ________________________________ perceptions. (14) __________________________-____________________ questions are used to summarize and check a list of things the customer needs. Active listening requires that you (15) __________________________-____________________ so you have a record to work from in custom-fitting a solution. You will also use your (16) __________________________-____________________ to construct your (17) __________________________-____________________ question. When you have received (18) __________________________-____________________ buying conditions from your customer, you will be prepared to set up an (19) __________________________-____________________ to come back and make a (20) __________________________-_____________________. Your second call objective is to (21) __________________________-____________________, and your third call objective is to schedule an (22) __________________________-____________________. Erin Adkins is in the (23) __________________________-____________________ accounts market, and Leigh Combs is in the (24) __________________________-____________________ accounts market.
**ASSESSMENT FORM 2**

## CUSTOMER STRATEGY

<table>
<thead>
<tr>
<th>Assessment Item</th>
<th>Excellent</th>
<th>Average</th>
<th>Poor</th>
<th>Did Not Do</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Effectively re-established relationship (made enthusiastic comments about information from first meeting)</td>
<td>10</td>
<td>9</td>
<td>8</td>
<td>7</td>
</tr>
<tr>
<td>2. Communicated positive body language (entrance, carriage, handshake, and seating)</td>
<td>10</td>
<td>9</td>
<td>8</td>
<td>7</td>
</tr>
<tr>
<td>3. Communicated positive verbal language (used positive words, showed enthusiasm with well-modulated voice)</td>
<td>10</td>
<td>9</td>
<td>8</td>
<td>7</td>
</tr>
<tr>
<td>4. Used customer’s name effectively (used name at least three times)</td>
<td>10</td>
<td>9</td>
<td>8</td>
<td>7</td>
</tr>
<tr>
<td>5. Asked quality information-gathering questions (seemed prepared, questions were general and open ended)</td>
<td>10</td>
<td>9</td>
<td>8</td>
<td>7</td>
</tr>
<tr>
<td>6. Asked quality probing questions (followed up to secure all details)</td>
<td>10</td>
<td>9</td>
<td>8</td>
<td>7</td>
</tr>
<tr>
<td>7. Verified customer needs with good confirmation questions (wanted to be correct in interpreting customer needs)</td>
<td>10</td>
<td>9</td>
<td>8</td>
<td>7</td>
</tr>
<tr>
<td>8. Appeared to take effective notes (was organized and non-distracting, used notes in confirming needs)</td>
<td>10</td>
<td>9</td>
<td>8</td>
<td>7</td>
</tr>
<tr>
<td>9. Effectively set up next appointment (requested another meeting; suggested and wrote down date, time, and place)</td>
<td>10</td>
<td>9</td>
<td>8</td>
<td>7</td>
</tr>
<tr>
<td>10. Effectively thanked customer (communicated appreciation, said thank you, indicated enthusiasm for next meeting)</td>
<td>10</td>
<td>9</td>
<td>8</td>
<td>7</td>
</tr>
</tbody>
</table>

**Discovering Customer Needs Presentation:**

**Total Points**

*Return this form to salesperson and discuss your reaction to this presentation!*
# SALES MEMORANDUM 3A

**To:** Association Account Sales  
**From:** T. J. McKee, Sales Manager  
**Re:** Your recent meeting on the Erin Adkins Account  
(Call 3, Developing a Presentation Strategy)

Congratulations on doing such a thorough job of discovering Erin's buying conditions. I found that your list of buying conditions includes the kind of customer information important to increasing our sales and partnering with our clients. I would like to see a copy of Erin's proposal when you complete it.

Reviewing what we discussed during your training, your next *call objectives* are:

1. Make a persuasive sales presentation that custom-fits your proposal to Erin's needs  
2. Negotiate any concerns Erin may have  
3. Close and confirm the sale  
4. Build repeat and referral business

Also, as we discussed, your *presentation plan* for this call should be to

1. Prepare and price a product solution that meets Erin's needs. *Complete the Sales Proposal Worksheet* (p. 45).  
2. Before your sales call, prepare a *portfolio* presentation (see model on p. 44) that follows these guidelines.  
   a. Review the relationship information and prepare for those topics you will discuss.  
   b. Prepare a summary confirmation question that verifies the buying conditions secured in your second call (see Chapter 11).  
   c. Select sales tools (proof devices) and create feature/benefit selling statements that appeal to Erin's buying conditions (see Chapter 12).  
   d. Plan confirmation questions that verify Erin's acceptance of your solution to each buying condition. *Complete Strategic Planning Form A* (p. 48) for items b, c, and d.  
   e. Prepare to negotiate the time, price, source, and product objections. *Complete Strategic Planning Form B* (p. 49) (see Chapter 13).  
   f. Prepare at least four closing methods in addition to the summary of benefits. *Complete Strategic Planning Form C* (p. 50) (see Chapter 14).  
   g. Plan methods to service the sale. Follow up by scheduling an appointment between now and the convention date (telephone call or personal visit) to follow through on guarantees concerning rooms and meals, suggestions about audiovisual needs, and any possible changes in the convention schedule. *Complete Strategic Planning Form D* (p. 51) (see Chapter 15).

3. During the sales call re-establish the relationship, and using your portfolio presentation  
   a. Confirm all of Erin's previous buying conditions  
   b. Match a proof device and feature/benefit selling statement with each buying condition  
   c. Confirm Erin's acceptance of each of your proposed benefit statements  
   d. Negotiate any sales resistance  
   e. Close the sale  
   f. Service the sale to get repeats and referrals

Good luck!
SALES MEMORANDUM 3B

To: Corporate Account Sales
From: T. J. McKee, Sales Manager
Re: Your recent meeting on the Leigh Combs Account
   (Call 3, Developing a Presentation Strategy)

Congratulations on doing such a thorough job of discovering Leigh's buying conditions. I found that your list of buying conditions includes the kind of customer information important to increasing our sales and partnering with our clients. I would like to see a copy of Leigh's proposal when you complete it.

Reviewing what we discussed during your training, your next call objectives are:

1. Make a persuasive sales presentation that custom-fits your proposal to Leigh's needs
2. Negotiate any concerns Leigh may have
3. Close and confirm the sale
4. Build repeat and referral business

Also, as we discussed, your presentation plan for this call should be to

1. Prepare and price a product solution that meets Leigh's needs. Complete the Sales Proposal Worksheet (p. 45).
2. Before your sales call, prepare a portfolio presentation (see model on p. 44) that follows these guidelines:
   a. Review the relationship information and prepare for those topics you will discuss.
   b. Prepare a summary confirmation question that verifies the buying conditions secured in your second call (see Chapter 11).
   c. Select sales tools (proof devices) and create feature/benefit selling statements that appeal to Leigh's buying conditions (see Chapter 12).
   d. Plan confirmation questions that verify Leigh's acceptance of your solution to each buying condition. Complete Strategic Planning Form A (p. 48) for items b, c, and d.
   e. Prepare to negotiate the time, price, source, and product objections. Complete Strategic Planning Form B (p. 49) (see Chapter 13).
   f. Prepare at least four closing methods in addition to the summary-of-benefits close. Complete Strategic Planning Form C (p. 50) (see Chapter 14).
   g. Plan methods to service the sale. Follow up by scheduling an appointment between now and the convention date (telephone call or personal visit) to follow through on guarantees concerning rooms and meals, suggestions about audiovisual needs, and any possible changes in the convention schedule. Complete Strategic Planning Form D (p. 51) (see Chapter 15).
3. During the sales call re-establish the relationship, and using your portfolio presentation
   a. Confirm all of Leigh's previous buying conditions
   b. Match a proof device and feature/benefit selling statement with each buying condition
   c. Confirm Leigh's acceptance of each of your proposed benefit statements
   d. Negotiate any sales resistance
   e. Close the sale
   f. Service the sale to get repeats and referrals

Good luck!
SALES CALL 3 — DEVELOPING A PRESENTATION

Name:____________________________

In opening your third sales call, your first activity should be to (1) _____________________ the relationship. To do this you will comment on topics discussed in call number (2) _________________. After this step, you will make a (3) _____________________-type presentation. The first page in your presentation will be a (4) _____________________ of items discovered in call (5) ____________________. To present this you will use a (6) _____________________ _____________________ question. If your customer (7) _____________________ you will return to the (8) _____________________ (9) _____________________ condition, repeat it, and show a (10) _____________________ _____________________ from your (11) _____________________ strategy materials. In describing what you have shown, you will make one or more (12) _____________________ statements, and then you will use a (13) _____________________ _____________________ to see if your customer agrees and likes your solution. If your customer disagrees with any of your (14) _____________________ statements or raises a concern, you have an (15) _____________________ to overcome (16) _____________________. If your customer agrees, you will proceed through all (17) _____________________ buying conditions. After you have successfully gone through all the buying instructions, you are instructed to summarize the (18) _____________________ and (19) _____________________ the sale. Prior to the customer signing your sales proposal, you will need to overcome the (20) _____________________ concerns. After addressing each concern, you should try to (21) _____________________ the sale. Overcoming these concerns is best accomplished by you (22) _____________________ them and preparing ahead of time. After closing you will (23) _________________ by scheduling an (24) _____________________ to follow up on meeting details, such as (25) _____________________ concerning rooms and meals.
# ASSESSMENT FORM 3

## PRESENTATION STRATEGY

<table>
<thead>
<tr>
<th>Assessment Item</th>
<th>Excellent</th>
<th>Average</th>
<th>Poor</th>
<th>Did Not Do</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Re-established a good relationship (talked sincerely and enthusiastically about topics of interest to customer)</td>
<td>10</td>
<td>9</td>
<td>8</td>
<td>7</td>
</tr>
<tr>
<td>Comments:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Confirmed needs from previous meeting</td>
<td>10</td>
<td>9</td>
<td>8</td>
<td>7</td>
</tr>
<tr>
<td>Comments:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. Made solution sound appealing (used non-technical, customer-oriented benefit statements)</td>
<td>10</td>
<td>9</td>
<td>8</td>
<td>7</td>
</tr>
<tr>
<td>Comments:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. Used proof devices to prove sales appeals (made product sound appealing)</td>
<td>10</td>
<td>9</td>
<td>8</td>
<td>7</td>
</tr>
<tr>
<td>Comments:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5. Verified customer’s understanding of solutions</td>
<td>10</td>
<td>9</td>
<td>8</td>
<td>7</td>
</tr>
<tr>
<td>Comments:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6. Negotiated price objection (established high value-to-price impression)</td>
<td>10</td>
<td>9</td>
<td>8</td>
<td>7</td>
</tr>
<tr>
<td>Comments:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7. Negotiated time objection (created need to sign now using empathy)</td>
<td>10</td>
<td>9</td>
<td>8</td>
<td>7</td>
</tr>
<tr>
<td>Comments:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8. Negotiated source objection (knew the competition well)</td>
<td>10</td>
<td>9</td>
<td>8</td>
<td>7</td>
</tr>
<tr>
<td>Comments:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>9. Asked for the order, closed sale (attempted to close after each objection)</td>
<td>10</td>
<td>9</td>
<td>8</td>
<td>7</td>
</tr>
<tr>
<td>Comments:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10. Serviced the sale (established relationship that would result in referrals or repeat sales opportunities)</td>
<td>10</td>
<td>9</td>
<td>8</td>
<td>7</td>
</tr>
<tr>
<td>Comments:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Overall quality of sales portfolio and proof devices: 25 20 15 10 5 0

**Presentation Points**

<table>
<thead>
<tr>
<th></th>
<th>Excellent</th>
<th>Average</th>
<th>Poor</th>
<th>Did Not Do</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Points</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Return this form to salesperson and discuss your reaction to this presentation!*
PORTFOLIO PRESENTATION MODEL

Three-ring binder with pockets recommended

**PAGE 1**
Summary of Customer's Buying Conditions
1. 
2. 
3. 
4. 
5. 
6. (confirmation question)

**PAGE 2**
Buying Condition 1

**PAGE 3**
Proof Devices (could be more than one)

**PAGE 4**
Buying Condition 2

**PAGE 5**
Proof Devices

**PAGE 6**
Buying Condition 3

**PAGE 7**
Proof Devices

**PAGE 8**
Buying Condition 4

**PAGE 9**
Proof Devices

**PAGE 10**
Buying Condition 5

**PAGE 11**
Proof Devices

**PAGE 12**
Buying Condition 6

**PAGE 13**
Proof Devices

**PAGE 14**
Summary of Benefits
1. 
2. 
3. 
4. 
5. 
6. (trial close)

**FRONT POCKET MATERIALS**
Additional value-added pages as needed to overcome sales resistance, close, and service the sale

**BACK POCKET MATERIALS**
Additional value-added pages as needed to overcome sales resistance, close, and service the sale
### SALES PROPOSAL

Customer Name: ___________________________ Title: ___________________________
Organization Name: ___________________________ Telephone: ___________________________
Address: ________________________________________________________________
Date(s) of Meetings: __________________________________________________________
Kind of Meetings: ____________________________________________________________
Buyings Conditions (what the customer needs—be specific): __________________________

#### A. Meal Functions Needed

<table>
<thead>
<tr>
<th>Time</th>
<th>Description</th>
<th>Quantity</th>
<th>Price</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Meal 1</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Meal 2</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(Beverages, setup fees, etc.)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Total: ___________________________
Sales Taxes: ___________________________
Service Charge: ___________________________
Total Meal Cost: ___________________________

#### B. Meeting and Banquet Rooms and Equipment Needed (describe time, date, and cost)

Total: ___________________________
Sales Taxes: ___________________________
Total Meeting/Banquet Rooms and Equipment Charges: ___________________________

#### C. Guest Rooms Needed

<table>
<thead>
<tr>
<th>Number of Rooms Needed</th>
<th>Description (dates, location, special conditions)</th>
<th>Group Rate per Room</th>
<th>Total Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Total: ___________________________
Sales Taxes: ___________________________
Total Guest Room Charges: ___________________________

#### D. Total Customer Costs (from above)

A. $_________ plus B. $_________ plus C. $_________ equals Total Charges $_________

Authorized Signature: ___________________________ Date: ___________________________
Customer Signature: ___________________________ Date: ___________________________
Title: ___________________________
## MEETING AND BANQUET ROOM SCHEDULE OF EVENTS

### 1ST THURSDAY OF NEXT MONTH

<table>
<thead>
<tr>
<th>Venue</th>
<th>Event Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Maple Park East</td>
<td>Open — Expect confirmation tomorrow</td>
</tr>
<tr>
<td>Maple Park West</td>
<td>Open — Expect confirmation tomorrow</td>
</tr>
<tr>
<td>Park Lane</td>
<td>10:00 a.m. C of C Membership Committee</td>
</tr>
<tr>
<td></td>
<td>2:00 p.m. County Central Planning Committee</td>
</tr>
<tr>
<td>Top of the Park</td>
<td>Open — Expect confirmation tomorrow</td>
</tr>
<tr>
<td>Revolver</td>
<td>Open</td>
</tr>
<tr>
<td>Dance Floor</td>
<td>7:00 p.m. IBM Dinner and Dance</td>
</tr>
<tr>
<td>Parkview</td>
<td>Open — Expect confirmation tomorrow</td>
</tr>
<tr>
<td>1007 and 1009</td>
<td>11:00 a.m. Advertising Profs’ Luncheon</td>
</tr>
<tr>
<td></td>
<td>7:00 p.m. IBM Communication Seminar</td>
</tr>
<tr>
<td>107 and 109</td>
<td>10:00 a.m. — Expect confirmation tomorrow</td>
</tr>
</tbody>
</table>

**ATTENTION:** Phone 225–0925, ext. 8512 immediately to confirm reservations.
### Strategic Planning Form A

#### Matching Buying Conditions with Proof Devices and Feature/Benefits

<table>
<thead>
<tr>
<th>Buying Condition</th>
<th>Proof Device</th>
<th>Feature</th>
<th>Benefit</th>
<th>Confirmation Question</th>
</tr>
</thead>
<tbody>
<tr>
<td>You indicated you wanted . . .</td>
<td>Here is . . .</td>
<td>which has (have) . . .</td>
<td>which means to you . . .</td>
<td>What do you think?</td>
</tr>
<tr>
<td>1. ___(number) guest rooms</td>
<td>A picture of one of our guest rooms (see p. 16)</td>
<td>Just been remodelled</td>
<td>Your people will enjoy clean, comfortable, spacious, and attractive surroundings</td>
<td>Is that what you had in mind?</td>
</tr>
<tr>
<td>2.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Optional Role Play 3-A Instructions (see Chapters 11 and 12)**

1. Prepare your presentation plan by completing the above form.
2. Organize your presentation plan by placing the above information on 8½” × 11” sheets of paper according to the portfolio presentation plan on p. 44. Select proof devices from the product strategy materials presented on pp. 10–25 and the completed proposal on p. 45.
3. Using the portfolio materials you have prepared, pair off with another student who will play the role of your customer. Review your customer's buying conditions, present your solutions with benefit statements, prove your sales appeals with demonstrations, secure your customer's reactions, and summarize the benefits presented. Discuss your customer's reactions to your presentation. This exercise will help you prepare for call 3.
### STRATEGIC PLANNING FORM B

**ANTICIPATING AND NEGOTIATING SALES RESISTANCE WORKSHEET**

<table>
<thead>
<tr>
<th>PART I</th>
<th>ANTICIPATING SALES RESISTANCE</th>
<th>PART II</th>
<th>NEGOTIATING SALES RESISTANCE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type</td>
<td>What Customer Might Say</td>
<td>Methods*</td>
<td>What You Will Say (include proof devices you will use)</td>
</tr>
<tr>
<td>Time</td>
<td>“I would like to take a day to think over your proposal.”</td>
<td>Indirect denial</td>
<td>“I understand, but . . .” (Show p. 47, Schedule of Events.)</td>
</tr>
<tr>
<td>Price</td>
<td>“That price is way over my budget.”</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Source</td>
<td>“I’m going to check with the Marriott.”</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Product</td>
<td>“I’m concerned about the size of your meeting rooms.”</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Optional Role Play 3-B Instructions**

Using the preceding material you have prepared, pair off with another student who will play the role of your customer. Provide your customer with the material in Part I and instruct him or her to raise sales resistance in any order he or she chooses. Playing the role of the salesperson, you will respond with the material you prepared in Part II. Continue the dialogue until all the types of sales resistance have been successfully negotiated. Discuss with your customer his or her reaction to your methods of successfully negotiating the different types of sales resistance. This exercise will help you prepare for Sales Call 3.

*Methods of Negotiating Sales Resistance* (see Chapter 13)

- Direct Denial
- Indirect Denial
- Question
- Third Party
- Superior Benefit
- Demonstration
- Trial Offer
- Feel, Felt, Found
### STRATEGIC PLANNING FORM C

**CLOSING AND CONFIRMING THE SALE WORKSHEET**

<table>
<thead>
<tr>
<th>PART I</th>
<th>PART II</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Verbal and Nonverbal Closing Clues</strong></td>
<td><strong>Method of Closing</strong>*</td>
</tr>
<tr>
<td><strong>Agreement with each benefit</strong></td>
<td><strong>Summary of the benefits and direct appeal</strong></td>
</tr>
<tr>
<td><strong>Agreement after an objection to price, time, or source</strong></td>
<td><strong>Assumption</strong></td>
</tr>
<tr>
<td><strong>Appears enthusiastic and impatient</strong></td>
<td><strong>Trial close and assumption</strong></td>
</tr>
<tr>
<td><strong>Agreement with all benefits but will not under any circumstances go over budget</strong></td>
<td><strong>Special concession</strong></td>
</tr>
</tbody>
</table>

---

**Optional Role Play 3-C Instructions**

Using the preceding material you have prepared, pair off with another student who will play the role of your customer. Provide your customer with the appropriate closing clues from Part I and instruct him or her to provide verbal or nonverbal closing clues in any order he or she chooses. Playing the role of the salesperson, you will respond with the material you prepared in Part II. Continue the dialogue until you have responded to all the anticipated closing clues. Discuss with your customer his or her reaction to your methods of successfully closing and confirming the sale. This exercise will help you prepare for Sales Call 3.

---

*Methods of Closing the Sale* (see Chapter 14)

- Trial Close
- Summary of the Benefits
- Assumption
- Special Concession
- Multiple Option
- Direct Appeal
### STRATEGIC PLANNING FORM D

**SERVICING THE SALE WORKSHEET**

<table>
<thead>
<tr>
<th>PART I</th>
<th>PART II</th>
</tr>
</thead>
<tbody>
<tr>
<td>What You Will Do to Add Value to the Sale</td>
<td>What You Will Say or Write to Add Value to the Sale</td>
</tr>
<tr>
<td>1. Schedule appointments to confirm rooms and final counts on meals.</td>
<td>“I would like to call to confirm . . .”</td>
</tr>
<tr>
<td>Date</td>
<td>Time</td>
</tr>
<tr>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>2. Make suggestions during next meeting about audiovisual equipment, beverages for breaks, etc.</td>
<td>(Show p. 25, Convention Centre Policies, and write date and time on your calendar.)</td>
</tr>
<tr>
<td>3. Provide personal assurances concerning your continuing efforts to make the meeting an outstanding success.</td>
<td></td>
</tr>
<tr>
<td>4. Prepare thank-you letter concerning call 3.</td>
<td></td>
</tr>
</tbody>
</table>

---

**Optional Role Play 3-D Instructions**

Using the preceding material you have prepared, pair off with another student who will play the role of your customer. Using the topics identified in Part I, verbally present what you have prepared in Part II on this form. Discuss with your customer his or her reaction to your methods of servicing the sale. This exercise will help you prepare for Sales Call 3.

**Methods of Servicing the Sale** (see Chapter 15)

- Suggestion Selling
- Follow through on Promises and Obligations
- Follow up to Ensure Customer Satisfaction