

C3 – Case Study and Interview Preparation Guide

Description:

You may demonstrate this competency by doing a Case Study proposed by our content specialist. For the Case Study, you will be required to analyze the prescribed case and to present your sales pitch and product/solution presentation, create a distribution strategy and your plan to develop an effective sales team.

Competency elements:

Through your portfolio and interview, you must demonstrate that you can:

- 1. Develop the sales pitch and product/solution presentation.**
 - a) Identify and establish contact with potential customer for a possible sales meeting for product/solution presentation.
 - b) Present sales pitch of product/solution answering potential customer's needs and expectations.
 - c) Present your product/solution effectively to close the sale.
 - d) Introduce the following post-closing steps.

- 2. Create a distribution strategy.**
 - a) Present optimal distribution plan that fits with business strategies and product/solution offer.
 - b) Identify potential partners in distribution strategy, as well as possible challenges in the deployment of the distribution strategy.

- 3. Develop an effective sales team.**
 - a) Presenting the form of sales organization chosen and advantages / disadvantages relating.
 - b) Explaining the training strategy in line with the sales organization and reasons why this strategy was developed.
 - c) Develop a sales compensation in line with sales objectives and market strategy.
 - d) Motivate the case study sales team for successful sales results.
 - e) Analyze sales reports and identify post-steps by management.
 - f) Chose appropriate information technology to support the case study sales organization to success.

Assessment process:

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For your assessment, you must:

- 1- Submit your case study
- 2- Participate in an interview with a content specialist

1. Submission of the case study:

- a) You can either propose a case study and get it approved by the content specialist or request that the content specialist assign you a case study.
- b) You then prepare your case study and submit it to the content specialist. The content specialist will review your portfolio and either:
 - Provide feedback on the improvements required before you can be interviewed. (If improvements are required, you must improve your case study and re-submit it to the content specialist for approval).
 - Recommend that you book an appointment for an interview.

2. Participation in an interview

Once your case study has been approved by the content specialist, you will be required to participate in an interview, which can either be done in person or long-distance.

During your interview, the content specialist will ask you questions on the following topics:

- Your potential customer (who are they? where are they? how do you reach them? how do you convince them to meet with you?)
- Explain your sales strategy (steps through the sales cycle, preparation, sales person attitude, objectives in meeting with the customer, identifying the decider)
- Identifying your potential customer's needs and expectations
- Presenting your product/solution
- Listening skills and other requires skills for successful selling
- Possible objections and possible challenges
- Strategy for negotiations
- Competitive advantages
- Closing techniques
- Developing a distribution strategy and deploying
- Validating success in distribution strategy and adjustments required
- Identifying key partners in distribution strategy
- Building a sales organization for the company in the case study and hiring the right sales people

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- Compensation
- Motivation

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Competency element 1: Develop a sales “pitch” and product/solution presentation.

Criteria	Excellent	Meets minimal standard	Does not meet minimal standard
Contact with potential customers effectively established. 10 points	<ul style="list-style-type: none"> - Excellent understanding of the sales approach, and the elements / steps of the sales cycle. - Candidate presents a great sales attitude and is professional in his approach. - Candidate is very well prepared for the evaluation with the content expert. 9-10 points	<ul style="list-style-type: none"> - Acceptable understanding of the sales approach, and the elements / steps of the sales cycle. - Candidate presents a good attitude, and is generally professional in his approach. - Candidate is prepared for the evaluation with the content expert. 6-8 points	<ul style="list-style-type: none"> - unacceptable understanding of the sales approach, and the elements / steps of the sales cycle. - Candidate presents a bad or wrong attitude, and/or is not professional in his approach. - Candidate is not prepared for the evaluation with the content expert. 0-5 points
Present an effective sales pitch taking into account the customer’s needs and expectations.. 20 points	<ul style="list-style-type: none"> - Excellent understanding of how to present the product/solution. - Excellent knowledge and method of identifying key benefits in line with customer expectations - Excellent presenter skills and candidate is an excellent communicator - Excellent listening skills - Excellent skills and methods in identifying and answering to customer resistance, and proposing solutions to overcome it. 16-20 points	<ul style="list-style-type: none"> - Acceptable understanding of how to present the product/solution. - acceptable knowledge and method of identifying key benefits in line with customer expectations - Acceptable presenter skills and candidate is an acceptable communicator - Acceptable listening skills - Acceptable skills and methods in identifying and answering to customer resistance, and proposing solutions to overcome it. 13-15 points	<ul style="list-style-type: none"> - Unacceptable understanding of how to present the product/solution. - Unacceptable knowledge and method of identifying key benefits in line with customer expectations - Unacceptable presenter skills and candidate is a bad communicator - Unacceptable listening skills - Unacceptable presentation of skills and methods in identifying and answering to customer resistance, and proposing solutions to overcome it. 0-12 points
Effective use of negotiation techniques to arrive at an agreement with a customer and close the sale. 10 points	<ul style="list-style-type: none"> - Excellent negotiation skills and excellent understanding of negotiation levers. - Concluded in closing the sale. 9-10 points	<ul style="list-style-type: none"> - Acceptable negotiation skills and basic understanding of negotiation levers. - Concluded in closing the sale. 6-8 points	<ul style="list-style-type: none"> - Unacceptable negotiation skills and lack of understanding in negotiation levers. - Did not conclude in closing the sale. 0-5 points
Accurate Identification of key post-closing steps and correct explanation of how to transform sales into positive, long-term business relationships. 10 points	<ul style="list-style-type: none"> - Excellent understanding (how and why) and is excellent in explaining the post-closing steps. - Excellent business understanding of long-term relationships with customers leading to additional revenue by repeat selling or by referencing new customers. 9-10 points	<ul style="list-style-type: none"> - Acceptable understanding (how and why) and candidate present acceptable skills in explaining the post-closing steps. - Acceptable business understanding of long-term relationships with customers leading to additional revenue by repeat selling or by referencing new customers. 6-8 points	<ul style="list-style-type: none"> - Lack of understanding (how and why) and unacceptable in skills in explaining the post-closing steps. - Lack of understanding business know-how and reasons for long-term relationships with customers leading to additional revenue by repeat selling or by referencing new customers.

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Competency element 2: Create a distribution strategy

Criteria	Excellent	Meets minimal standard	Does not meet minimal standard
<p>Effective preparation of an optimal distribution strategy that fits business strategies and product mix. (2.1, 2.2)</p> <p>10 points</p>	<ul style="list-style-type: none"> - Excellent explanation of distribution strategy and implementation through company business strategy - Excellent presentation of distribution plan in line with business objectives <p>9-10 points</p>	<ul style="list-style-type: none"> - Acceptable explanation of distribution strategy and implementation through company business strategy - acceptable presentation of distribution plan in line with business objectives <p>6-8 points</p>	<ul style="list-style-type: none"> - Unacceptable skills in understanding and explaining distribution strategy and implementation through company business strategy - unacceptable presentation and lack of understanding in a distribution plan in line with business objectives <p>0-5 points</p>
<p>Identify potential tensions and challenges in distribution network and develop solutions to overcome these tensions and challenges. (2.3,2.4)</p> <p>10 points</p>	<ul style="list-style-type: none"> - Excellent understanding and explaining key potential challenges and tensions from the customer and internally within the sales organization. - Excellent solution providing skills and understanding of development of these solutions with customer and within the sales organization. <p>9-10 points</p>	<ul style="list-style-type: none"> - Basic and acceptable understanding and explaining skills of key potential challenges and tensions from the customer and internally within the sales organization. - Basic and acceptable solution providing skills and acceptable understanding of development of these solutions with customer and within the sales organization. <p>6-8 points</p>	<ul style="list-style-type: none"> - Lack of understanding and unacceptable explaining skills of key potential challenges and tensions from the customer and internally within the sales organization. - Unacceptable solution providing skills and unacceptable understanding of development of these solutions with customer and within the sales organization. <p>0-5 points</p>

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Competency element 3: Develop an effective sales team

Criteria	Excellent	Meets minimal standard	Does not meet minimal standard
<p>Appropriate choice of a sales organizational structure that matches overall strategic goals and the targeted distribution network.</p> <p>10 points</p>	<ul style="list-style-type: none"> - Excellent understanding and explaining of the different sales organizations and their advantages and disadvantages for the company. - Candidate chose the appropriate structure and was excellent in backing up his choice by a constructive and accurate evaluation of requirements and parameters. <p>9-10 points</p>	<ul style="list-style-type: none"> - Basic and acceptable understanding and explaining of the different sales organizations and their advantages and disadvantages for the company. - Candidate chose an appropriate structure and was able to back up his choice by a constructive and accurate evaluation of requirements and parameters. <p>6-8 points</p>	<ul style="list-style-type: none"> - Unacceptable understanding and lacking skills in explaining and convincing the content expert of the different sales organizations and their advantages and disadvantages for the company. - Candidate chose an inappropriate structure and was not able to back up his choice by a constructive and accurate evaluation of requirements and parameters. <p>0-5 points</p>
<p>Build sales training approaches and tools, and create an optimized sales compensation structure. Motivate a sales team.</p> <p>SHOULD WE SPLIT UP THESE?</p> <p>10 points</p>	<ul style="list-style-type: none"> - Excellent understanding of the basics of providing training and proper tools to a sales team, and candidate is great at providing examples in types of training methods and solutions. - Excellent understanding of the approach and methods to train a sales team. - Excellent understanding and knowledge in benchmarking a sales compensation structure which is in line with company objectives, with sales team professional requirements, and is motivating to the sales team. - Candidate exceeds expectations in examples of motivating a sales team, and understanding very well the reasons of demotivation in a sales team. <p>9-10 points</p>	<ul style="list-style-type: none"> - Acceptable understanding of the basics of providing training and proper tools to a sales team, and candidate has basic knowledge by giving examples in types of training methods and solutions. - Good understanding of the approach and methods to train a sales team. - Acceptable understanding and knowledge in benchmarking a sales compensation structure which is in line with company objectives, with sales team professional requirements, and is motivating to the sales team. - Candidate meets expectations in examples of motivating a sales team, and understanding some of the reasons of demotivation in a sales team. <p>6-8 points</p>	<ul style="list-style-type: none"> - Lack of understanding of the basics of providing training and proper tools to a sales team, and candidate has lack of knowledge by giving examples in types of training methods and solutions. - Lack of understanding of the approach and methods to train a sales team. - Unacceptable understanding and knowledge in benchmarking a sales compensation structure which is in line with company objectives, with sales team professional requirements, and is motivating to the sales team. - Candidate does not meet expectations in examples of motivating a sales team, and understanding some of the reasons of demotivation in a sales team. <p>0-5 points</p>

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<p>Correct analysis of sales reports and accurate recognition of when to adjust strategy. Appropriate information technology tools chosen to support the sales organization.</p> <p>10 points</p>	<ul style="list-style-type: none"> - Excellent knowledge of the importance of sales reports, what their objectives and functions are to a sales organization. - Excellent arguments in convincing sales members to fill out sales reports. - Excellent knowledge of different CRMs (or other software) and technology parameters in choosing a reliable and appropriate sales report method. <p>9-10 points</p>	<ul style="list-style-type: none"> - Basic and acceptable knowledge of the importance of sales reports, what their objectives and functions are to a sales organization. - Good arguments in convincing sales members to fill out sales reports. - Basic and acceptable knowledge of different CRMs (or other software) and technology parameters in choosing a reliable and appropriate sales report method. <p>6-8 points</p>	<ul style="list-style-type: none"> - Unacceptable knowledge of the importance of sales reports, what their objectives and functions are to a sales organization. - Candidate lacks in arguments in convincing sales members to fill out sales reports. - Unacceptable knowledge of different CRMs (or other software) and technology parameters in choosing a reliable and appropriate sales report method. <p>0-5 points</p>
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