



RUSS BERRIE INSTITUTE
FOR PROFESSIONAL SALES
WILLIAM PATERSON UNIVERSITY

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COTSAKOS COLLEGE OF BUSINESS
WAYNE, NEW JERSEY

FIRST ROUND ADP ROLE PLAY

ADP Role Play 1 (2015)

You are an ADP sales representative and have recently taken over the territory from a colleague who just left (Jerry Jones). Your division of ADP, Small Business Services, sells outsourced payroll and HR related services to small businesses. As part of your 'getting to know your territory' exercise you decided to call on a corporate business partner, a mid-sized CPA firm, Jonathan, Deller & Company, LLP (JD). Founded in 1971, JD has 28 partners and 180 professional staff.

You will meet Pat Smith, a partner of JD who works out of their Wayne office in NJ. ADP and JD are in a corporate partnership to network together where they exchange leads for each other's business. Much of your business is obtained through referrals from not only satisfied clients but also 'centers of influence' such as JD. Most often, CPAs are looking to partner with someone they can trust that will take good care of their clients. If ADP didn't handle the referrals delicately and something went wrong, it could damage the relationship the CPA has with their clients and that is usually the most important aspect of this relationship.

You know that Smith was a bit edgy to learn that your predecessor has left ADP and was anxious that ADP would fulfill all the promises made by your colleague. Smith is looking to get the same level of reciprocity from you as he/she got from the previous ADP representative. A 10-year veteran at JD and known as a 'strategist', Smith was recently appointed as JD's representative at their business partner group, the Leading Edge Alliance, a group of exclusive mid-sized CPA firms around the globe to serve clients seamlessly across national borders. He is known to be professional, and gets down to business very quickly at business meetings.

JD places a premium on their business partners being trustworthy and values long-term relationships. So, it is crucial that you build trust with your partner during this call. You also know that many ADP sales reps often help their business partners such as JD to find new customers as part of this process. Even as you prepare for the call, you are conscious of how firms such as JD approach their relationship with ADP: 1) assess your competence and trustworthiness before recommending you to their clients, with no financial expectation in return 2) or look for a mutually beneficial financial arrangement in which revenue is shared back with the CPA from the referral they gave to ADP. As you knock on Pat's door, you wish Jerry had told you where Pat stood on this!

Your Task:

- Introduce yourself, establish trust and credibility
- Follow up on promises and make sure the partner is satisfied
- Illustrate how you can introduce Pat to the 200+ ADP clients you have in the area, who currently work with other accounting firms, for him to sell his services
- Work towards your business objective of finding new prospects

First Round Role-Play Evaluation

(On a scale of 1 to 10 where 1 is *strongly disagree* and 10 is *strongly agree*)

APPROACH & RELATIONSHIP BUILDING (*Effectively gains attention and builds rapport*) – 15%

- Introduced himself/herself professionally and built rapport
- Gained partner's attention
- Demonstrated enthusiasm and confidence
- Demonstrated smooth transition into needs identification

NEEDS IDENTIFICATION (*Obtained a clear understanding of partner's situation*) – 25%

- Effectively determined relevant facts about company and/or partner
- Effectively determined partner's preferred approach to referral relationships
- Asked effective questions, uncovered partner's needs and requirements
- Effectively clarified needs of the partner (discovered current problems, goals, etc.)

OBJECTION HANDLING (*Eliminate concerns to partner's satisfaction*) 20%

- Initially gained better understanding of objection (clarified or allowed partner to clarify the objection)
- Effectively answered the objection
- Confirmed that the objection is no longer a concern of the partner
- Built trust in the relationship by taking ownership of the relationship from predecessor
- Established credibility

COMMUNICATION & PRESENTATION (*Communicates well, demonstrated product knowledge, used visual aids, is clear and concise, used appropriate non-verbal communication*) 25%

- Effectively used verbal communication (active listening; restated, rephrased, clarified, probed for understanding)
- Exhibited program knowledge
- Reinforced value in relationship with ADP
- Highlighted the gain for the partner
- Used appropriate/professional visual aids
- Effectively involved the partner in the conversation
- Persuaded the partner to "build a relationship"

CLOSE WITH REFERRAL (*Takes initiative to move the meeting to the next step in a smooth fashion filled with mutual commitment*) 15%

- Requested referral
- Partner committed to provide referral