



2019 National Sales Challenge

First Round Role Play Scenario

CDS-Xerox Role Play 1

2019 NSC 1st Round Role Play: Complete Document Solutions

Your Company

Complete Document Solutions, CDS (www.cdsrx.com) works with a wide range of small to medium-sized businesses and organizations, helping them improve their office workflow, productivity, and overall business processes through document management solutions, as well as customized IT solutions.

Complete Document Solutions provides a broad array of technology, printing services, and workflow solutions that are customized for each business. In addition to selling Xerox multifunction devices, CDS offers managed IT services.

The Prospect

The Accounting firm of Garcia & Davis LLP (G&D) is a multi-disciplinary accounting, tax and advisory firm serving the needs of nonprofit organizations and construction businesses. G&D prides itself in offering industry-specific expertise, comprehensive tax and accounting offerings and client-centric results for over 40 years. G&D has clients in multiple states across the U.S. The G&D headquarters are in Wayne, NJ with two smaller satellite locations in Dallas, TX and San Francisco, CA. Each location has a team of accountants and support staff, but the Wayne office is the only location with an IT professional - Alex Miller, their IT Administrator.

Alex Miller, whom you are going to meet, is the sole IT administrator at G&D. He works at their Wayne, NJ headquarters and has been with G&D for 7 years. Miller manages all IT-related issues for everyone in the company. Miller also manages the purchases from the IT vendors and negotiates the contracts. Furthermore, Miller manages the company's IT infrastructure, including printers. G&D operates three different locations in three states - therefore security, ease of use, and ability to solve problems remotely are the most important factors for Miller when choosing IT equipment. Miller is the final decision maker for the IT equipment; however, he/she often seeks input from one of the IT-savvy partners of the company.

Background Information and Your Role

You are a full time sales representative working for CDS at its Fairfield, NJ office. You started this position after completion of a successful internship at CDS about a year ago. During this period, you have worked under the supervision of a senior colleague.

Jane Williams, the IT manager of the law firm of Penny & Case, LLP (P&C) and a client of yours for the past nine months, referred you to Alex Miller, the IT administrator at the accounting firm of G&D a month ago. Based on your preliminary research on the prospect, you have found out that G&D has been growing steadily in recent years. This is consistent with Jane's personal assessment of the IT situation at G&D. Jane told you: "Alex seems to have too much going on and struggles to keep up with the ongoing demands and unforeseen issues". Jane also hinted at Alex's continuous challenge to maintain a network of printers at three multi-state offices.

This is your first independent assignment, and you are anxious to sell to this prospect professionally. You see an opportunity to suggest that G&D upgrades its printers to new state-of-the-art printers available to you from CDS. You are confident you can help Alex streamline the business workflow and alleviate most

of the concerns regarding maintenance. You will present a new generation of printers that you proudly introduce as smart printers!

A week ago, you emailed and then called Alex Miller. Alex sounded interested in your overall proposal, but you also felt some hesitation when you bragged about printers as “smart printers”. You have scheduled an appointment with Alex. While you are excited to pitch some new printers, you are still anxious about how Alex might react to your ideas.

Your Tasks

1. Meet and Build rapport with Alex Miller.
2. Learn the customer’s needs with respect to printing solutions.
3. Get an understanding of the problems that Miller faces regarding IT and printing solutions.
4. Address Miller’s concerns.
5. Present how CDS-Xerox will be able to offer valuable printing solutions to G&D.
6. Motivate Miller that your new printers are a good choice for their company.
7. Make sure Miller is ready to consider a proposal from you.
8. Secure a follow-up appointment with Alex Miller to present your preliminary proposal.

2019 NSC 1st Round Role Play: Evaluation Rubrics

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

APPROACH & RELATIONSHIP BUILDING (Effectively gained attention and built rapport) – 15%

- Greeted the customer professionally and established rapport
- Gained client's attention
- Demonstrated enthusiasm and confidence
- Demonstrated smooth transition into needs identification

NEEDS IDENTIFICATION (Obtained a clear understanding of client's situation) – 20%

- Effectively determined relevant facts about client's concerns
- Asked effective questions, uncovered client's needs and requirements
- Effectively clarified needs of the client (discovered current problems, goals, etc.)

OBJECTION HANDLING (Eliminated concerns to client's satisfaction) 25%

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

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

- Effectively used verbal communication (active listening; restated, rephrased, clarified, probed for understanding)
- Exhibited product-market knowledge
- Reinforced value in relationship with CDS-Xerox
- Highlighted the gain for the client in offering enhanced benefits to their employees and clients
- Used appropriate/professional visual aids
- Effectively involved the client in the conversation
- Persuaded the client to build a relationship

CLOSE (Took initiative to move the meeting to the next step in a smooth fashion with mutual commitment) 15%

- Asked for a next meeting to review the preliminary proposal
- Client agreed to a meeting to review CDS-Xerox's ideas