
Hours/Week:	4	Total Hours:	40	Term/Level:	4B
Lecture:	2	Total Weeks:	10	Credits:	
Lab:	2	Start Date:	Mar 20/2000		
Other:		End Date:	May 26/2000		

Prerequisites:

Successful completion of MKTG 1102 and program specific prerequisites.

Course Goals:

The goal of this course is for the Financial Planning student to gain basic selling skills with a major focus on Relationship Selling Skills for the Financial Planning Industry.

Course Description:

This is a course designed to cover three main areas: the mechanics of selling, relationship selling concepts, and skills necessary for personal selling success. The student explores the subject through exercises, role-plays, in-class discussions, videos, readings and lectures. There is a combination of small group teamwork and individual learning activities.

Evaluation:

Assignment 1: (Personality Profile)	10%
Assignment 2: (Sales Presentation)	30%
Mid-term Exam	15%
Final Exam	30%
Participation	15%
TOTAL	<hr/> 100%

Key Course Outcomes and Sub-Outcomes:

Upon successful completion of this course, the student will be able to:

1. Explain the steps in the sales process.
 2. Develop, deliver and critique a sales presentation.
 3. Recommend strategies for relationship selling and providing customer service.
 4. Conduct a personality profile.
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Course Record:

Designed by: Randy Singer

Date: March 1999

Revised by: Randy Singer

Date: March 2000

Effective Date:

March 20, 2000

Instructor	Office	Hours	BCIT	e-mail
Randy Singer	SE6-312	As posted	451-6767	rssinger@bcit.ca

Texts and Equipment:

Required:

- No single text has been adopted for this course. Instead, during the course the instructor will provide several readings from selected texts and publications as handouts. The content of these readings is considered examinable material.

Recommended:

- Numerous sales textbooks and other resources are available in the library. Students are advised to make use of them to supplement required readings and when preparing assignments.
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Course Notes (Policies and Procedures):

1. The attendance policy as outlined in the BCIT calendar will be followed. Students are expected to be in attendance for all scheduled Lecture and Lab time. For this course, excessive absence will consist of missing more than the equivalent of four class hours (10% of total class time) for reasons within the student's control. Upon notification of excessive absence and failure to provide adequate explanation, the student shall be disqualified from writing the final exam.
 2. The student is required to achieve a pass (50%) on the combined marks of the Mid-term Exam and Final Exam in order to receive credit for Assignments 1 and 2.
 3. The Mid-term exam and Final exam must be written on scheduled dates at scheduled times. The student is required to ensure that he or she is available to write exams at the appointed times.
 4. The student is required to complete and submit every assignment to successfully complete this course.
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5. Assignments submitted after the time and date due shall be considered late. Late penalties shall apply to items submitted after deadline. Late submissions must be delivered in person to the instructor.
6. Since a high level of written communication skills is important for success in a Financial Planning career, spelling, grammar and sentence construction will be considered in assigning marks to written submissions.
7. The student is required to keep a back-up copy of all written submissions, and to be prepared to provide the instructor with a second copy of any submissions, upon request.
8. Case examples, role-play exercises, videos, discussion and presentations during Lectures and Labs are intended to supplement, not duplicate, course readings. The combination of readings, Lecture and Lab content will assist the student in completing assignments, and will be included in both exams.
9. The participation grade shall be based upon both
 - A) The degree to which the student each week:
 - Arrives for Lectures and Labs on time,
 - Asks questions which are relevant and pre-thought,
 - Volunteers and contributes valuable ideas during class discussion,
 - Demonstrates professionalism and willingness to participate in role-plays and exercises,
 - Demonstrates ability to focus attention on the task at hand during Lectures and Labs, and
 - Enhances the learning environment for fellow students, and
 - B) Feedback received from other team members regarding the student's level of participation.

Course Map:

Week/ Date	Outcome/ Material Covered	Assignment/ Due Date
1 Mar 20- 24	LEC: Course overview, Approach, FAB's & Trial Closes LAB: Instructor/student intros, expectations Analysis of a professional sales person	
2 Mar 27- 31	LEC: Buying motives, Three Realms, Needs Analysis LAB: Role play Approach Role play FAB's & Trial Closes	
3 Apr 3-7	LEC: Closing, Objections LAB: Role play Needs Analysis	
4 Apr 10- 14	LEC: Decision-making process, Communication skills LAB: Role play Closing Role play Objections	
5 Apr 17- 21	LEC: Mid-term Exam, Social styles LAB: Team presentations	
6 Apr 24- 25	EASTER HOLIDAY - no classes Apr 24 th LEC: Principles of Relationship Selling, Versatility LAB: Assignment preparation	
7 May 1-5	LEC: Matching your presentation to the prospect's personality profile, Building Trust LAB: Student Sales Presentations	2.1 In-class (per schedule)
8 May 8- 12	LEC: Prospecting and Qualifying LAB: Student Sales Presentations	2.1 In-class (per schedule)
9 May 15- 19	LEC: Follow-up and Customer service LAB: Student Sales Presentations	2.1 In-class (per schedule) 1.1 1630 May 18, 2000
10 May 22- 26	Final Exam (date, time, TBA)	

NOTE: The Course Map above is tentative and subject to change according to the needs and interests of learners.