

British Columbia Institute of Technology

(Fall Semester 2001)

School of Business

Program: Marketing Management

Option: Professional Sales & Marketing and Entrepreneurship

Course Outline

MKTG 3343

Hours/Week: 4 hrs.

Total Hours: 64

Term Level: 3A

Lecture: 2 hrs.

Total Weeks: 16

Credits: 3

Lab: 2 hrs.

Prerequisite:

Course #: MKTG 2243

Course Name: Professional Sales Skills

MKTG 3343 is a Prerequisite for:

Course # MKTG 4402

Course Name: Relationship Selling

Course Goals:

1. To have the student able to articulate the differences between management & leadership.
2. Introduce the student to the general principles and concepts of sales management.
3. Have the student learn how to apply sales management concepts to solving marketing problems.

Course Description:

The course covers general principles and concepts of sales management and leadership. However, emphasis is given to the:

1. Review of the personal selling function,
2. Defining the strategic role of the sales function,
3. Developing the salesforce,
4. Directing the salesforce, and
5. Determining the salesforce effectiveness and performance.

Evaluation – General	Value	Due Dates
1. Interview Sales Manager	25%	Submit the firms that you're considering - Sept 17 th to Oct 1 st Approval of the Firm - Oct. 8th Email from sponsor - Oct. 22nd Written Report - Nov. 28 th - In Lab
2. Resume	10%	Oct 15 th
3. Case Presentations	30%	Ongoing throughout the course
4. Mid-term	15%	Oct. 17 th - Lecture Lab
5. Final	<u>20%</u>	Week of Dec 10 th - 8th
Total	100%	

Evaluation - Details and Specifics

Interview a Sales Manager & a Sales Representative who reports to that Sales Manger (25%)

- Conduct an interview with the sales manager and a sales representative that reports to that manager.
- This is a group project - Three students per group.
- All members of the group must attend the interview(s) with the sales manager and the sales representative.

Purpose

To expose the students to the realities of a sales management.

Learning Objectives - There are three distinct parts to this report.

I. Sales Manager (Value 25%)

1. Describe the company from the prospective of:
 - a. Company Objectives
 - b. Products
 - c. Markets
 - d. Key competitors
 - e. Business philosophy
 - f. Vision
2. Sales Manager's - career path and responsibilities,
3. Organizational Chart
4. Sales Forecasts
 - a. What approach was used in developing the sales forecast for 2000/01?
 - b. What were the key components of the forecasting decisions?
 - c. What are some of the frustrations encountered in developing the sales forecast?

5. Personal Practices.
 - a. Criteria for recruitment and selection of their sales force
 - b. Where are most candidates recruited? Why?
 - c. Training programs (initial and ongoing)
 - d. Motivation and compensation packages (Incentive programs?)
 - e. How is the sales force compensated
 - f. Evaluation of sales personnel

II. Interview a Sales Representative who reports to that Sales Manger whom you interviewed (Value 20%)

1. Career path and responsibilities,
2. What attributes did they possess that made them a “good hire”?
3. What attributes helps them to be successful at their career,
4. What areas are they working on to improve in their profession? &
5. Ask the Sales Representative to provide an example of an ethical problem that they have encountered and ask them to explain how they dealt with that ethical dilemma.
6. What "Customer Relationship Management" tools are being used in the organization. What are the advantages and/or disadvantages these CRM tools. If there are no CRM tools being used comment.

III. Major “Learnings” (Value 50%)

1. What were the major “learnings” of your team - Relate your experiences to your lectures, labs, and readings.
 2. Recommendations.
- These should be the most substantial and thoughtful sections of your report.

Assignment Deliverables

1. Approval of the firm (Sept 17th to Oct 4th or sooner) - A brief email advising me of the firm(s) that you are considering. (Value 2%)
2. Email from sponsor (Oct. 22nd or sooner). Have the Sales Manager being interviewed for this report email dchapin@bcit.ca the following -
 - a. A list of the team members.
 - b. The name of the sales manager and their title,
 - c. The firm’s name, address, and telephone number,
 - d. The tentative date of the interviews(Value 3%)
3. Written Report
 - a. Style - Short report format
 - b. Appendices are to include -
 - i. Your “appointment letter” &
 - ii. Your “thank you letters” (Sales manager and Sales representative).

2. Sales Resume (10%) - Oct 15th

Purposes

To develop a "hard hitting" resume.

Learning Objectives

1. To understand what a sales manager is looking for in a resume
2. To revise (or develop) a sales resume that will impress
3. To be able to evaluate the sales resume of a sales applicant.

Assignment Deliverable

1. A "hard hitting" sales resume. Because of the importance of this document you should receive 80% or higher or a fail.

3. Case Presentation (30%) - Ongoing

Please see "Case Presentation Notes" – Attached

4. Mid-term (15%) - Oct 17th

The mid-term will evaluate the students understanding of all the material covered in the course (lectures, labs, readings, exercises, videos, etc.) prior to the mid-term exam.

5. Final Exam (20%) - Week of Dec 10th - 14th

The final exam will be cumulative; however, there will be an emphasis on the material covered after the midterm.

Course Record

Development Date: August 2001.

Effective Date: September 2001.

Start Date: September 4, 2001.

Instructor: Dr. David T. Chapin

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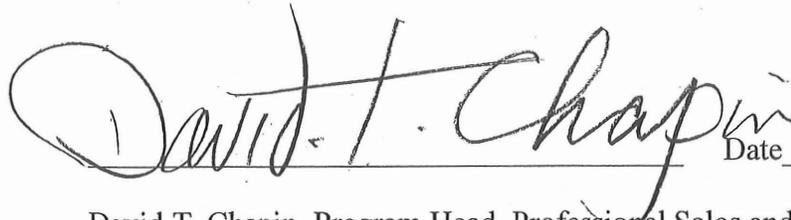
Office Hours: Mon - 3:30 to 4:30

Tue - 10:30 to 12:20

Wed - 9:30 to 10:30

Or by appointment at your convince.

Developed by:

 Date Sept 1/01

David T. Chapin, Program Head, Professional Sales and Marketing,
Prov. Instructors Dipl., Dipl. Adult Ed., B.A., B.Ed.(Adult), A.G.D.D.E.,
M.D.E., (Candidate), M.B.A., D.B.A.

Approved by:

 Date Sept 1/01

Morie Shacker, Associate Dean

Text: Ingram, T., LaForge, R., Avila, R., Schwepker, C., & William, M. (2001) Sales Management: Analysis and Decision Making. (4th Ed.). Toronto: Harcourt College Publishers.
SBN0-03-026699-8

Reference Texts and Recommended Equipment:

There are numerous sales management texts and journals available in the library that students may refer to for different approaches to the subject. Students are advised to make use of supplemental readings when preparing assignments.

Course notes (Policies and Procedures):

1. The mid-term and the final exam must be written on scheduled dates at scheduled times. Students are required to ensure that they are available to write exams at appointed "timetabled" times.
2. The student must achieve a pass (50%) on the combined marks of the mid-term and the final exams in order to receive credit for the assignments. If a 50% average on the mid-term and final is not achieved zero will be assigned for all other submitted assignments.
3. The student must complete every assignment in order to successfully complete the course. If any assignment is not completed then all other assignment, quizzes, and exams will receive a grade of zero.
4. Please, no late assignments. Late submissions must be delivered *in person* to the instructor.
5. Students must be prepared to provide the instructor with a second copy of any submission. (Please keep a back-up copy of your assignments.)
6. Case examples, guest speakers, lab exercises, videos and discussions are intended to supplement, and not duplicate, course readings. The student is responsible to know and understand all course material for their assignments, midterms and final exams.
7. The attendance policy as outlined in the BCIT Full-Time Programs Calendar 2001-2002 page 15 will be enforced. Excessive absence will consist of missing the equivalent of two lab hours for reasons within the student's control. Upon notification of excessive absence and failure to provide adequate explanation, the student will be disqualified from writing the final exam.

8. All assignments, presentations, and exams will be judged using industry standards.

Course Syllabus

Please note: This is a tentative schedule. Some topics may be given additional consideration, some may be given less, should other learning opportunities be presented during the term we will take full advantage of them. Therefore, this schedule is subject to change at the discretion of the instructor.

<i>Week Dates</i>	<i>Material Covered</i>	<i>Due Dates</i>
Week 1 Sept 4 to 7	Welcome Back! Registration and Orientation	
Week 2 Mon Sept 10 Tue Sept 13	Lectures - Dimensions of the Leadership Process McClelland's Theory of Motivation Labs - Introductions Course & Syllabus Overview	
Week 3 Mon Sept 17 Wed Sept 19	Lectures - Situational Leadership Labs - What Kind of Sales Manager Are You? Shinerama - Wednesday Sept 19 th	Submit the firms that you're considering for your SM Report- Sept 17 th to Oct 1 st
Week 4 Sept 24 to 28	Lectures - Module 2 - Review of Personal Selling Module 3 - Personal Selling: Approaches and Process Labs - Traits of Successful Sales Professionals	Submit the firms that you're considering for your SM Report- Sept 17 th to Oct 1 st
Week 5 Oct 1 to 5	Lectures - The Resume, Job Interview, & Current Issues Dawn Longshaw, B.Sc. A.P.M.R., C.P.C (Chair, Industry Advisory Committee, Professional Sales and Marketing) Senior Consultant, Holloway, Schults, & Partners Labs - Please bring your resumes to Labs for review	Submit the firms that you're considering for your SM Report- Sept 17 th to Oct 1 st

Week 6 Oct 8 to 12	<p>Thanksgiving - Monday Oct 8th</p> <p>Module 4 - Organizational Strategies and the Sales Functions</p> <p>Lab - Sales Force Development</p>	My Approval of the Firm - Oct. 8 th
Week 7 Oct 15 to 19	<p>Oct 15th and 16th</p> <p>Review and Prep for Mid-term exam</p> <p>Oct 17th - Mid-term exam</p>	Resume Due Oct 15 th
Week 8 Oct 22 to 26	<p>Lecture -</p> <p>Module 5 - Sales Organization Structure & Salesforce Development</p> <p>Labs - Case and Discussion</p> <p><u>Case #1</u> / Morgantown Inc. - Pg. 336</p> <p>Reference: Modules 3, 4, & 6)</p>	Email from sponsor re Sales Managers Report - Oct. 22 nd
Week 9 Oct 29 to Nov 2	<p>Lecture -</p> <p>Module 6 - Staffing the Salesforce: Recruitment & Selection</p> <p>Labs - Case and Discussion</p> <p><u>Case #2</u> / BSI: Manufactures' Representative Agency - The Dilemma of Expansion - Pg. 346 (Reference: Module 4, 5, & 6)</p>	<p>- Email from sponsor for your SM Report.</p> <p>- Mid Term Oct 11th</p>
Week 10 Nov 5 to 9	<p>Module 7 - Continual Development of the Salesforce: Sales training</p> <p><u>Case #3</u> / Romano Pitesti - Pg. 360 (Reference: Module 4 & 8)</p>	
Week 11 Nov 12 to 16	<p>Monday November 12th - Remembrance Day</p> <p>No Labs</p> <p>Lecture -</p> <p>Module 9 - Motivation and Reward System Management</p>	
Week 12 Nov 19 to 23	<p>Lecture -</p> <p>Module 10 - Evaluating the Effectiveness of the Organisation</p> <p><u>Case #4</u> / Hong-Kong Bank of Canada - Pg. 369 (Reference: Module #7, 8 & 9)</p>	

Week 13 Nov 26 to 29	Lecture - Module 11- Evaluating the Performance of Salespeople <i>Case #5 / The Windsor Management Corporation: Are Salespeople Worth it? - Pg. 363 (Reference: Modules 6, 9, & 11)</i>	Written Sales Managers Report is Due - Nov. 28th
Week 14 Dec 3 to 7	Review and Prep for final	
Week 15 Dec 10 to 14	Final Exam Week at BCIT	

Case Presentation Notes” - - Sections I through V

Section I

Matrix (Case Presentation Notes)

Groups	A	B	C	D	E
Case 1 Morgantown Inc. - Pg. 336 (Reference: Modules 3, 4, & 6) Date Week 8 Oct 22 to 26	Oral Presentation 10%	Written Report 10%	Discussion & Reaction Group	Critique 5%	Marking 5%
Case 2 BSI - Pg. 346 (Reference: Module 4, 5, & 6) Date Week 9 Oct 29 to Nov 2	Discussion & Reaction Group	Oral Presentation 10%	Written Report 10%	Marking 5%	Critique 5%
Case 3 Romano Pitesti - Pg. 360 (Reference: Module 4 & 8) Date Week 10 Nov 5 to 9	Critique 5%	Marking 5%	Oral Presentation 10%	Written Report 10%	Discussion & Reaction Group
Case 4 Hong-Kong Bank of Canada - Pg. 369 (Reference: Module #7, 8 & 9) Date Week 12 Nov 19 to 23	Marking 5%	Discussion & Reaction Group	Critique 5%	Oral Presentation 10%	Written Report 10%

Case 5 The Windsor Management Corporation- Pg. 363 (Reference: Modules 6, 9, & 11) Date Week 13 Nov 26 to 29	Written Report 10%	Critique 5%	Marking 5%	Discussion & Reaction Group	Oral Presentation1 10%
Totals for Case Presentations	30%	30%	30%	30%	30%

Section II
Oral Presentation - (Case Presentation Notes)

Presentation Outline	Guide
1. Case Synopsis: - Present a summary of events and facts in the case	Familiarize yourself with the case by answering: - What is this case generally about? - What are the main facts, characters, events, etc.
2. Identification of Key Problems: - Define the major problems or issues in the case - Define the main problem(s) or issue(s) that you are going to address	Diagnose the case by asking: - What are the problems or issues presented in the case? - Develop problem statements - Develop <i>question statements</i> from your problem statements - Determine which problems you are going to discuss
4. Identify and Evaluate of Alternatives - State alternatives you are considering	- The cases generate more than one alternative on problems and issues presented and you are expected to describe more than a single alternative. - Develop reasonable alternatives and evaluate them in terms of feasibility, projected costs, advantages, disadvantages, and potential short and long term consequences. Avoid the tendency to propose utopian solutions that would be financially impossible to justify. - Assumptions will be made in your case analysis; you must defend your rational for making all assumptions.

<p>5. Solution</p> <ul style="list-style-type: none"> - Choose one of your alternatives as your solution - Defend your position 	<p>Make a decision by answering:</p> <ul style="list-style-type: none"> - How do the alternative solutions compare in terms of their advantages and disadvantages? - Which alternative solution seem best
<p>6. Select a Course of Action</p> <ul style="list-style-type: none"> - Present a workable plan of action that will have reasonable probability of success in the implementation phase. This is a step-by-step process. 	<ul style="list-style-type: none"> - Charting a course of action is a difficult job for the Sales Manager, but implementation is the true challenge.
<p>7. Concepts Used From the Course</p> <ul style="list-style-type: none"> - Discuss the major concepts used from the course and your additional research. 	
<p>8. Appearance Appropriate Attire... Other Considerations Equal participation by all team members... Maximum time allowed for presentations is 45 mins...</p>	

Section III

Written Report - (Case Presentation Notes)

- Style – Short report
- Audience – V.P. Sales and Marketing
- Appearance – Typed, double-spaced

Each section has equal value (20% each)

1. Analyzing the Current Situation

The proper context must be established for the case analysis. Present a brief summary of events, facts, problems and/or issues in the case. Summarize the key environmental factors *such as* industry trends, level of competitiveness, customer perceptions, legal consideration, and evolving technology at the onset of your analysis. Summarize the external environment in term of opportunities and threats to the firm being studied. There should an assessment of the internal environment of the firm in terms of strengths and weaknesses. Assumptions will be made in your case analysis; you must defend your rational for making all assumptions.

2. Identification of Key Problems

Identify the key problems and issues presented in the case. Do not identify symptoms of the problems, while failing to identify the real problems. For example, a weak written report may cite declining sales as a problem, when declining sales is only a symptomatic of a more complex, harder to observe set of problems.

3. Identify and Evaluate Alternatives

Develop reasonable alternatives to resolve the problems and evaluate your alternatives in terms of feasibility, projected costs, advantages, disadvantages, and potential short term and long term consequences. Avoid the tendency to propose utopian solutions that would be financially impossible to justify. The case will generate more than one alternative on issues presented and you are expected to present more than one alternative.

3. Select a Course of Action

A course of action is to be explicitly stated, and appropriate strategies and tactics to accomplish the chosen course should be discussed. This is a step-by-step process.

5. Concepts Used From the Course & Additional Research

Evidence of concepts used from the course and additional research. (Please in **blue** the concepts used from the course – Use correct format for your reference/bibliography section).

Section III

Guidelines for Marking the Oral Case Presentation - (Case Presentation Notes)

Your grade for the oral presentation will be the *average of*:

- the grade assigned by the marking group, &
- the grade assigned by your instructor.

/10 Case Synopsis

- Was the context of the case established?
- Was there a brief summary of events and facts (of the case) presented?
- *A short written justification of your grade...*

/15 Identification of Key Problems

- Problems clearly identified and stated in a question form?
- *A short written justification of your grade...*

/15 Identify and Evaluation of Alternatives

- Reasonable alternatives developed?
- Alternatives evaluated in terms of feasibility, projected costs, advantages, disadvantages, and potential short term and long term consequences?
- Tendency to propose utopian solutions avoided?
- *A short written justification of your grade...*

/25 Solution

- Was the best alternative chosen for a solution?
- Was the presented solution defend appropriately?

- *A short written justification of your grade...*

/25 Select a Plan of Action

- Was a workable plan of action presented?
- Was there a reasonable probability of success for the plan of action?
- Was the plan of action presented as a step-by-step process?
- *A short written justification of your grade...*

/5 Concepts Used From the Course

- Was there evidence that there were concepts used from the course?
- Was there evidence of other research done for this case presentation?
- *A short written justification of your grade...*

/5 Appropriate Attire

- Business attire is always appropriate...
Other...
- Equal participation by all team members?
- Use of time...
- *A short written justification of your grade...*

/100 Marks Awarded (Your marks count for 50% of the marks awarded to the group)

Section IV

Oral Critique - (Case Presentation Notes)

A "Case Critique" is the art of evaluating or analyzing with preparation and knowledge the case being presented. A "Case Critique" is not simply an act of negative criticism, but an evaluation of both the positive and negative aspects of the case being presented.

Please note - In order to properly critique the case being presented the critiquing group must be very familiar with the case. They must have developed their own case synopsis, identified the key problems presented in the case, identified and evaluated alternatives, developed a solution, selected a plan of action, and developed a relationship between the concepts used in the course and the case. (The primary focus of your critique should be on the case).

An *example* of what the critiquing group might focus on:

1. Was the synopsis clear and concise?
2. Did the presenting group identify the key problems of the case? Were the problems presented relevant to the case?
3. Were logical and defensible assumptions made where necessary?
4. Did the presenting group identify and evaluate alternatives presented?
5. Did the presenters present a viable solution to the problem(s) that they presented?
6. Was there a clear, concise, appropriate plan of action presented? Was the plan of action presented as a step-by-step process?
7. Did the group apply any concepts learned in the course to the case?

The critiquing group should also consider:

Criticism may be offered on how well the case was articulated and prepared. The use or non-use of visual aids, voice, posture, the use of time, participation by each member of the group, etc...

Section V

Discussion & Reaction Group - (Case Presentation Notes)

Read the case and be prepared to:

1. Enter into the case discussion at the end of the critiquing session
2. Be willing to discuss the strengths and weakness of the critiquing group
3. You will be responsible to help resolve any unresolved issues at the end of the session