

Lakeview Resort & Convention Centre¹



Source: *Penticton Lakeside Resort and Conference Centre*. Online images c/o:

<https://www.google.com/maps/contrib/115445063469151160458/photos/@49.5031301,-119.5946991,17z/data=!3m1!4b1!4m3!8m2!3m1!1e1> Accessed 19dec20.

¹ Lakeview Resort & Convention Centre is a fictional hotel and simulation created for the selling skills project in MARK 1200 at Langara College. Names, characters, businesses, places, events, locales, and incidents included in this simulation are either fictitious, or based on reality but used in a fictitious manner.



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A Special Note to Students: Use of the Role-Play/Simulation

This role-play/simulation provides an opportunity to apply the principles that serve as a foundation for the four broad strategic areas of personal selling: relationship, product, customer, and presentation strategies. The activities are designed to take you from “learning about” selling to “learning to do” selling.

You will start as a convention centre sales and marketing department trainee. Your sales manager will supply you with memos that will assist you in learning about your product, competition, customers, and presentations. You will be supplied with many sales tools, including photos, awards, schedules, menus, floor plans, references, company policies, electronic sales proposal/product configurators (see pp. 9–37) and sales planning worksheets.

The first memo on p. 5 provides background information about your product, company, industry, and competition. As a trainee, your first sales and marketing assignment (see memo on p. 39) will be to create an electronic sales proposal and cover sales letter. This activity will give you an opportunity to apply information presented in Chapter 6.

After successfully communicating with your first customer and being promoted to account executive, you are instructed by your sales manager in memos on pp. 43–44 to plan and conduct your first face-to-face contact with another potential customer. The primary objective of this first contact is to establish a relationship with your customer.

The next memo from your sales manager on pp. 46–47 requests that you use your questioning skills to conduct a needs analysis involving the customer you previously contacted. Your customer, who was favorably impressed as a result of your first meeting, has called and requested a meeting to talk about an important convention being planned.

The last memo on pp. 49–50 assists you in creating and presenting a proposal that meets your customer’s needs. You will create a portfolio presentation using the awards, photos, price lists, menus, references, floor plans, and schedules provided.

Introduction

Salespeople today are working hard to become more effective in such important areas as person-to-person communications, needs analysis, interpersonal relations, and decision making. This role-play/simulation will help you develop these critical selling skills. You will assume the role of a new sales trainee employed by the Lakeview Resort and Convention Centre.

PART I “Developing a Sales-Oriented Product Strategy” will challenge you to acquire the necessary product information needed to be an effective sales representative for the Lakeview (see Chapters 6 and 7). Your sales manager, Al Scott, will describe your new trainee position in an employment memorandum. Your instructions will include the study of materials featured on the following pages and role-playing the request made in an Al Scott customer service/sales memorandum.

PART II “Developing a Relationship Strategy for Selling” is another major challenge in personal selling. An employment memorandum will inform you of a promotion to an account executive position. A sales memorandum will inform you of your assignment to accounts in a specific market segment. Part II also involves a role-play on the development of a relationship with a new customer in your market segment (see Chapters 3–5 and 10). Your call objective will be to acquire background information on your new customer, who may have a need for your services.

PART III “Understanding Your Customer’s Buying Strategy” involves a needs analysis role-play (see Chapters 8 and 11). You will again meet with the customer who has indicated an interest in scheduling a business conference at your convention centre. During this meeting, you will acquire information to complete Part IV, which involves preparation for the sales presentation.



PART IV “Developing a Sales Presentation Strategy” will involve preparation of a sales proposal and a *portfolio* presentation (see Chapters 11–15). This section also involves a third role-play with the customer. During the role-play, you will reestablish your relationship with the customer, present your proposal, negotiate the customer’s concerns, and attempt to close and service the sale.

Throughout completion of the role-play/simulation, you will be guided by the employment and sales memoranda (from the sales manager) and instructions and additional forms provided by your instructor.

As you complete this simulation activity, note that the principles and practices you are learning to use have application in nearly all personal selling situations.

General Instructions for Role-Playing

Overview

The primary goal of a simulation in personal selling should be to strike a balance between just enough detail to focus on the process of selling and not so much as to drown in an ocean of facts. Either too much detail or too little detail can develop anxiety in role-play participants. *Partnership Selling* is designed to minimize anxiety by including only the facts needed to focus on learning the processes involved in high-performance selling.

Some anxiety will occur, however, because you are asked to perform under pressure (in terms of building relationships, securing strategic information, changing people’s thinking, and getting them to take action). Learning to perform in an environment full of genuine but non-threatening pressure affords you the opportunity to practice your selling skills so you will be prepared for real-world selling anxiety.

The following suggestions for role-playing will help you develop the ability to perform under stress.

Instructions for Salesperson Role-Plays

1. Be well prepared with product knowledge.
2. Read information for each role-play ahead of time.
3. Follow specific instructions carefully.
4. Attempt to sense both the context and the facts of the situation presented.
5. Conduct a mental rehearsal. See yourself successfully conducting and completing the role-play.
6. Be prepared to take notes during the role-play.
7. After the role-play, take note of your feelings and mentally put them into the context of what just occurred.
8. Be prepared to discuss your reaction to what occurred during the role-play.

Instructions for Customer Role-Plays

1. Read the instructions carefully. Be sure to note both the role-play instructions and the information you are about to share.
2. Attempt to sense both the context of the buying situation and the individual facts presented in the instructions.
3. Let the salesperson initiate greetings, conversations, and concluding actions. React appropriately.
4. Supply only the customer information presented in the background description.
5. Supply customer information in a positive manner.
6. Do not attempt to throw the salesperson off track.

Part one

Developing a Sales-oriented Product Strategy

EMPLOYMENT MEMORANDUM 1

To: New Convention Sales Centre Trainees
From: Al Scott, Sales Manager
Re: Your New Sales Training Program: “Developing a Product Selling Strategy”

I am extremely happy that you accepted our offer to join the Sales and Marketing Department. Enclosed is a copy of your new position description (see p. 7). Your first assignment as a trainee will be to learn about our product and what we have recently done to provide *total quality* customer service. *To apply what you are learning, I would like you to follow up on a customer service request I recently received. (See memo p. 39.)* You will use the following product information to complete the assignment.

AN AWARD-WINNING UPDATE (See pp. 9-12)

We have recently completed a *\$4.8 million investment in our convention centre*. This customer service investment included renovating all guest rooms and suites, lobby and front desk area, meeting rooms, restaurant and lounge, and enclosure of the swimming pool. Enclosed is a copy of the “Regional Architects Award” that our facility won. We are the only facility in the Okanagan to have been presented with this award.

MEETING AND BANQUET ROOMS (See pp. 25–29)

The Lakeview offers convention planners just over *8,000 square feet of award-winning meeting space* in attractive, newly renovated meeting and banquet rooms. Our Naramata East and West rooms are conveniently located on the lobby level of the hotel. Each of these rooms can accommodate 180 people in a theatre-style setting or 80 in a classroom-style setting. They also have a divider wall that can be retracted and, with the combined rooms, can accommodate up to 370 people.

The Top of the Lake room provides a spectacular view of Okanagan Lake through windows that surround that ballroom. This unique room, located on the top floor, can accommodate 225 people classroom style, 350 people banquet style, or 450 people theatre style. Also located in the Top of the Lake is a revolving platform area that slowly moves, giving guests a 360-degree panoramic view of the lake, city, and world-famous Naramata Bench. The Lakeview Room, which is also located on the top floor of the hotel, can accommodate 150 people theatre style and 80 people classroom style.

In addition, for *groups booking 40 rooms or more, we provide one luxurious suite free*. This suite features a meeting room, bedroom, wet bar with refrigerator, and jacuzzi.

Be sure your clients understand that our meeting rooms *need to be reserved*. The first organization to sign a sales proposal for a specific date has the designated rooms guaranteed.

GUEST ROOM DECOR AND RATES (See p. 21)

Our recent renovation included complete redecoration of all 250 of our large and spacious guest rooms. This includes all new furniture, wall coverings, drapes, bedspreads, and carpets. Our interior designer succeeded in creating a comfortable, attractive, and restful atmosphere. *All of our rooms are designated nonsmoking.*

	REGULAR RATES	GROUP RATES	SAVINGS
Single	\$169	\$159	\$10
Double	\$199	\$189	\$10

A comparison of competitive room, parking, and transportation rates is presented on p. 21.

(continued)

(continued) **BANQUET MEALS (See pp. 15–19)**

Our executive chef, Ronaldo Shay, recently won the *National Restaurant Association's "Outstanding Chef of the Year" Award* in addition to many other awards. His winning entry consisted of the three chicken entrees featured on the enclosed menus. Ronaldo served as Executive Chef at the five-star rated Sutton Place Hotel in Vancouver, B.C. before we convinced him to join us six months ago. He personally oversees all our food and beverage operations. Ronaldo, in my opinion, is one of the outstanding chefs in the country. His expertise and commitment to total quality customer service will help develop long-term relationships with our customers.

The enclosed dinner selections are only suggestions. We will design a special menu for your clients if they wish. A 16 percent gratuity or service charge is added to all group meal functions.

HOTEL/MOTEL SALES TAXES

All room rates are subject to the *provincial hotel/motel sales tax (PST) which is an additional 8 percent. In addition, all billings must have a 3 percent municipal regional district tax (MRDT) added. (These taxes do not apply to gratuities.)*

LOCATION, TRANSPORTATION, AND PARKING (See map on p. 13)

We are located in Penticton, British Columbia on the southern shores of Okanagan Lake. We are conveniently located just five miles (8 km) from the Penticton Regional Airport and within easy travel distance from major attractions, including the Kettle Valley Rail Trail, Skaha Lake Park, SS Sicamous Museum & Heritage Park, Apex Ski Resort, and the Naramata Bench with its numerous VQA wineries. Our lake front location not only offers breathtaking views of Okanagan Lake and the Naramata Bench, but also an excellent list of water sports and walking, hiking and running trails.

Discounted courtesy van transportation is provided to the airport as well as other attractions in the area. This service saves \$7 to \$14 each way for our guests who arrive by plane. Additionally, for those guests arriving by automobile our secured free 300 car parking area saves them up to \$26 per day compared to some other Okanagan resorts. For security purposes, we have closed-circuit camera systems to monitor the parking lot.

VALUE-ADDED GUEST SERVICES AND AMENITIES

Our convention centre owners have invested heavily in the facility to provide our clients with *total quality service*, unmatched by our competition. Additional value-added services and amenities include:

- A private beach area (seasonal), complimentary fitness centre, indoor pool and hot tub in an attractive tropical decor (see p.23)
- "Cafe on the Lake" featuring 24-hour continental cuisine seven days a week
- "Pub on the Lake" where friendly people meet, featuring *free hors d'oeuvres* Monday through Friday, 5 to 7 p.m.
- Cable television with HBO
- A.V. rental of most equipment in-house, at a nominal fee (see p. 31)
- *Free coffee and donuts or rolls* in the lobby each morning from 6 to 8 a.m.
- A team of *well-trained, dedicated, and friendly associates* providing total quality front desk, food, and guest services
- Express check-in
- Electronic key entry system
- Hair dryer, iron, and ironing board in each room
- Data port capabilities for laptop computers in each room
- Desk in each room
- Video message retrieval
- On-command video (choice of 50 new release movies)

SALES LITERATURE (See pp. 9-37)

Included in your product training materials are photos, references, letters, room schedules, sales proposals, and other information that you will use in your written proposals and verbal sales presentations. When you move into outside sales, you should use these tools to create effective sales portfolios.

TOTAL QUALITY COMMITMENT

Our convention center is committed to *total quality customer service*. Our *Partnership Style of Customer Service and Selling* is an extension of our total quality process. The Total Quality Customer Service Glossary provides definitions of terms that describe our total quality process (see p. 8).

The hotel and convention center industry is mature and well established. Our sales and customer service plan is to *establish strong relationships, focus on solving customer problems, provide total quality customer service, and become a long-term hotel and convention centre partner with our clients*. By utilizing this type of selling and customer service, your compensation and our sales revenue will both increase substantially.

POSITION DESCRIPTION—CONVENTION CENTRE ACCOUNT EXECUTIVE

COMPANY DESCRIPTION

The Lakeview Resort and Convention Centre is a total quality, full-service equal opportunity employment convention centre that has recently made large investments in the physical facility, the food and beverage department, and sales department. Company culture includes an effective and enthusiastic team approach to creating *total quality*, value-added solutions for customers in a very competitive industry. The primary sales promotion tool is *Partnership Selling* with extensive marketing support in the form of photos, reference letters, team selling, and so forth. The company goal is to increase revenues 20 percent in the coming year by providing outstanding customer service.

A SUCCESSFUL ACCOUNT EXECUTIVE will:

1. Acquire necessary convention centre company, product, industry, and competitive information through company training program
2. Be committed to a total quality customer service process
3. Develop a list of potential prospects in the assigned target market
4. Develop long-term, total quality selling relationships that focus on solving the meeting planner's convention centre needs
5. Achieve a sales volume of \$800,000 to \$1 million annually

WORKING RELATIONSHIPS

Reports to: Sales Manager

Works with: Internal Support Team including Food Service, Housekeeping and Operations, Customer Service and Front Desk; External Relationships including customers, professional associations, and industry personnel

SPECIFIC REQUIREMENTS

1. Must project a positive and professional sales image
2. Must be able to establish and maintain long-term partnering relationships
3. Must be goal oriented with a plan for self-improvement
4. Must be flexible to deal effectively with a wide range of customers
5. Must be good at asking questions and listening effectively
6. Must be accurate and creative in developing customer's solutions
7. Must be clear and persuasive in communicating and negotiating solutions
8. Must be good at closing the sale
9. Must follow through on promises and assurances
10. Must have math skills necessary for figuring sales proposals

SPECIFIC REWARDS

1. Attractive compensation package that includes base salary, a commission of 10 percent of sales, bonuses, and an attractive fringe benefits package
2. Pride in working for an organization that practices total quality management in employee relations and customer service
3. Extensive sales and educational support
4. Opportunity for growth and advancement

EOE/AA/TQM

TOTAL QUALITY CUSTOMER SERVICE GLOSSARY

DIRFT—DO IT RIGHT THE FIRST TIME means being prepared, asking the right questions, selecting the right solutions, and making effective presentations. This creates repeats and referrals.

QIP—QUALITY IMPROVEMENT PROCESS means always striving to better serve our customers resulting in high-quality, long-term relationships.

TQM—TOTAL QUALITY MANAGEMENT means the commitment to support and empower people to deliver legendary customer service.

QIT—QUALITY IMPROVEMENT TEAM means a team approach to deliver outstanding customer service.

COQ—COST OF QUALITY means the ultimate lowering of cost by providing outstanding service the first time, so as to build a list of repeat and referred customers.

PONC—PRICE OF NONCONFORMANCE means the high cost of not meeting high standards. This results in correcting problems and losing customers. PONC also causes longer sales cycles and higher sales costs.

POC—PRICE OF CONFORMANCE means the lower costs of providing outstanding customer service and achieving a list of repeat or referred customers.

WIIFM—WHAT'S IN IT FOR ME means the psychic and monetary rewards in the form of personal enjoyment, higher salaries, commissions, or bonuses caused by delivering outstanding customer service.

QES—QUALITY EDUCATION SYSTEMS means internal and external educational activities designed to improve the quality of customer service.

YOU—THE MOST IMPORTANT PART OF QUALITY means the ongoing program of self-improvement that results in outstanding customer service and personal and financial growth.

Award Winning Lakefront Resort



Lakeview Resort and Convention Centre

*The all-new Lakeview Resort & Convention Centre
featuring an award winning \$4.8 million dollar renovation*

Source: Penticton Lakeside Resort and Convention Centre. Image c/o:
<https://www.google.com/maps/contrib/115445063469151160458/photos/@49.5031301,-119.5946991,17z/data=!3m1!4b1!4m3!8m2!3m1!1e1> Accessed 19dec20.

➔ Use the sales information on the reverse side of this page to position your convention centre and the \$4.8 million renovation in the mind of your customer.

**Awards
Architects
Award**

**REGIONAL ARCHITECTS
ASSOCIATION**

Vancouver, B.C. Canada

EXCELLENCE IN RENOVATION DESIGN

Lakeview Resort & Convention Centre

With Special Recognition for Innovative Design creating
an Outstanding Resort and Convention Complex

Patricia Bennett

Patricia Bennett, President
Regional Architects Association

Allen Rogge

Chairperson
Design Award Committee

Presented July, 2020

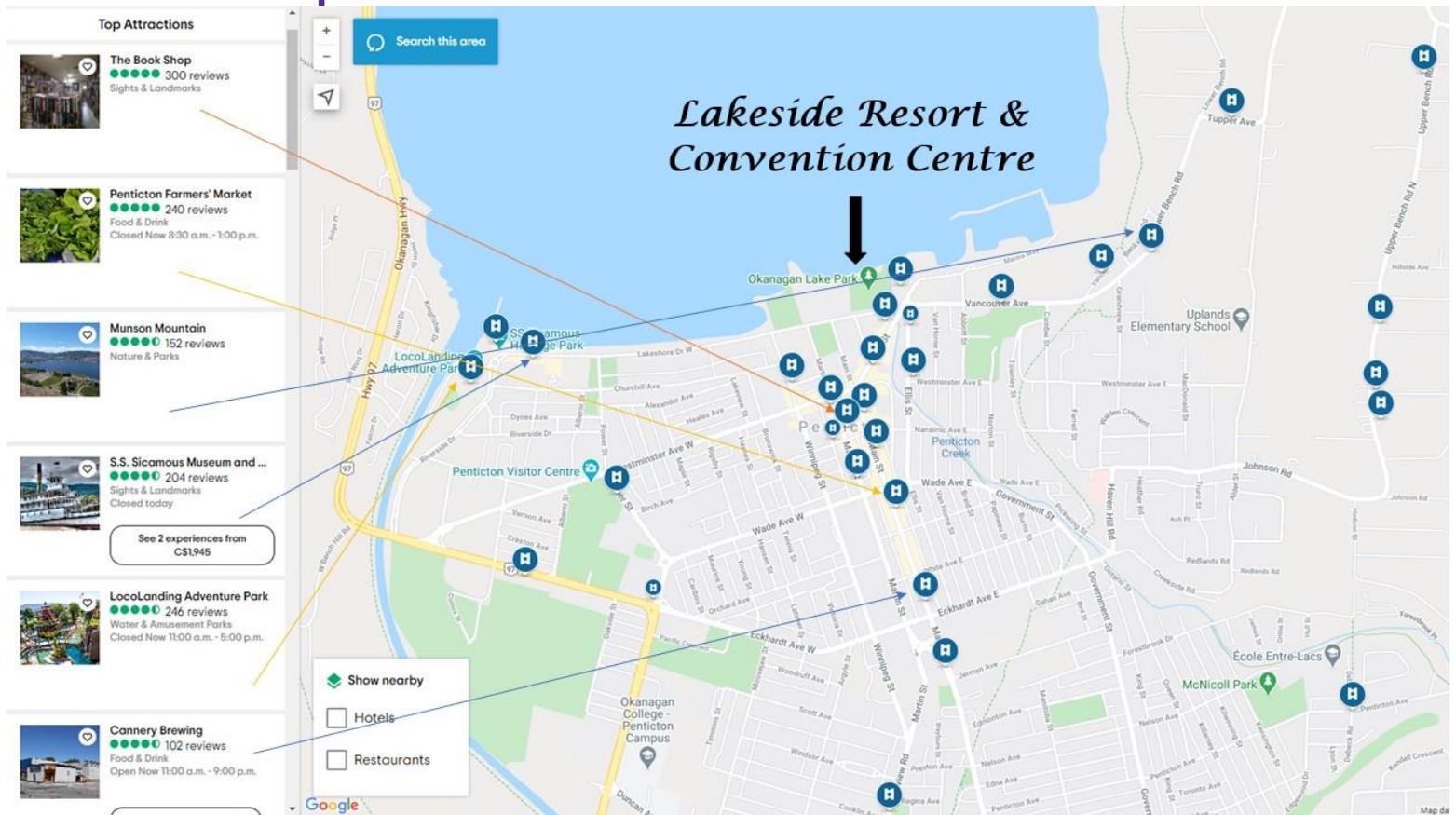
**DESIGN
AWARD
2020**

LAKEVIEW RESORT & CONVENTION CENTRE

*Regional Architects Association
Excellence in Renovation Design*

➡ Use the sales information on the reverse side of this page to demonstrate and describe the award for “Creating an Outstanding Convention environment” and explain that it was given with regard to the quality of the meeting rooms, guest rooms, ambiance of lobby and restaurant, and the pool area.

Location



Lakeview Resort and Convention Centre

*Convenient easy-to-find lakefront location
with free on-site parking.*

*Close to all major southern Okanagan attractions.
Just 5 miles from Penticton Regional Airport*

Source: [https://www.tripadvisor.ca/Attractions-g154937-Activities-Penticton Okanagan Valley British Columbia.html#MAPVIEW](https://www.tripadvisor.ca/Attractions-g154937-Activities-Penticton_Okanagan_Valley_British_Columbia.html#MAPVIEW) Downloaded & edited 19dec20

➡ Use the sales information on the reverse side of this page to illustrate the ease and convenience of your customers locating and traveling to the Convention Centre in addition to highlighting all the nearby attractions.

Award-Winning Executive Chef



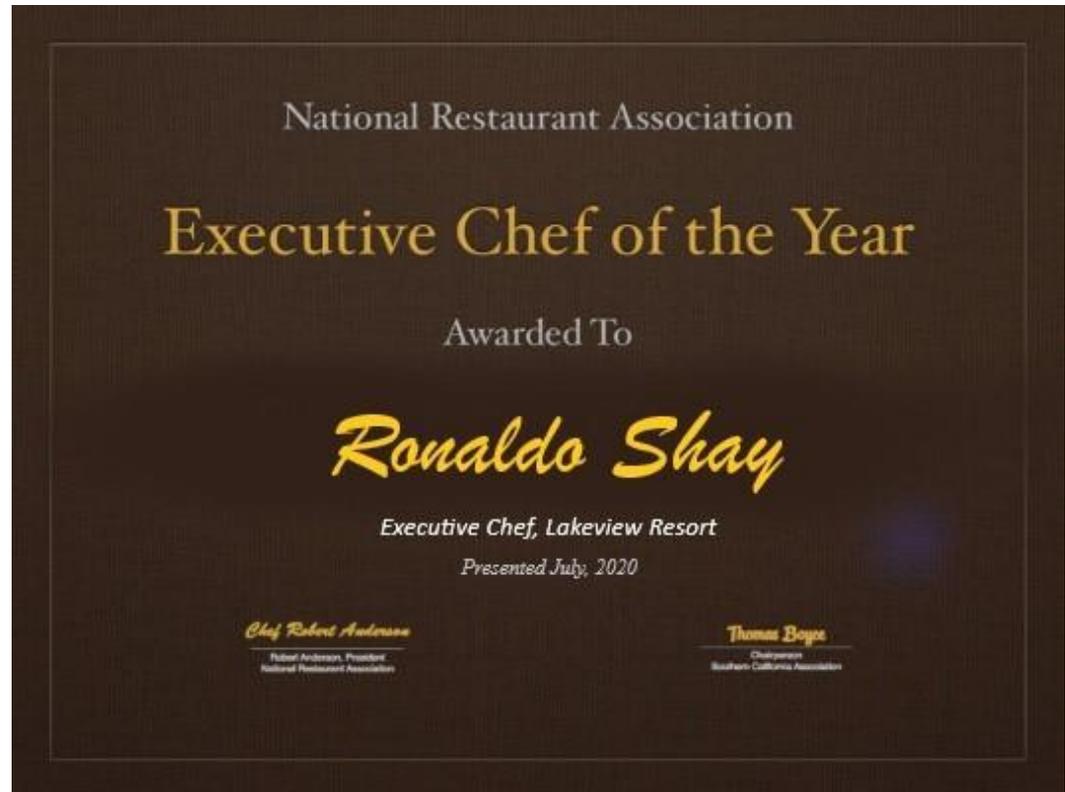
Lakeview Resort and Convention Centre

*Outstanding food service
personally supervised by award winning
Chef Ronaldo Shay
National Restaurant Association
“Executive Chef of the Year”
Robert James Foundation
“Best Chef - West Coast Region”*

Source: Photo c/o Marco Island Beach Resort

→ Use the sales information on the reverse side of this page to introduce and explain the “outstanding food service” that will be personally supervised by Executive Chef of the Year Ronaldo Shay.

Awards
Food & Beverage





➡ Use the sales information on the reverse side of this page to explain the benefits of having an award-winning executive chef and describe his background.

the Banchetto

BANQUET STYLE MENU

All banquet selections include the Banchetto dinner salad with tossed greens with fresh local tomato and choice of dressing, choice of baked, oven browned, au gratin or garlic mashed potato, fresh vegetables, homemade rolls with butter.

All selections are accompanied with a choice of coffee, tea, iced tea or sodas.

Desserts are extra.

CHICKEN ENTREES

Chicken Wellington | \$48

Boneless Breast of Chicken topped with a Mushroom Mixture in a Puffy Pastry Shell and Baked to a Golden Brown.

Chicken Breast Teriyaki | \$48

Marinated Boneless Breast of Chicken Grilled and topped with Banchetto's Special Teriyaki Sauce.

Chicken Breast New Orleans | \$48

Baked Boneless Breast of Chicken Garnished with Peppers, Mushrooms, Onions and Monterey Jack Cheese.

Prices Do Not include a 16% Service Charge or Sales Tax.

BEEF ENTREES

New York Strip | \$54

Centre Cut New York Strip Steak Broiled to Perfection topped with Banchetto's Seasoned Herb Butter.

Filet Mignon | \$54

Centre Cut Beef Tenderloin Broiled and served in a Rich Wine Sauce.

PORK ENTREES

Sliced Pork Loin w/Mustard Sauce | \$58

Boneless Loin of Pork Oven Roasted and Sliced served with Mustard Sauce.

FISH ENTREES

Encrusted Rainbow Trout | \$48

Served over Red and Black Lentils with Yellow Pepper Oil, Grilled Potatoes and Brown Sugar Baby Carrots.

Broiled Sockeye Salmon | \$48

A Filet of Sockeye Salmon broiled and covered with a Basil Lemon Sauce.

➔ Use the sales information on the reverse side of this page to explain and configure the menus available for banquet-style meals.

Group Rates Rooms

LAKEVIEW RESORT - COMPETITIVE RATES GUEST ROOM RATES FOR GROUPS



HOTEL/RESORT	SINGLE	DOUBLE	PARKING/DAY	AIRPORT TRANS
LAKEVIEW RESORT	\$159	\$189	FREE	\$15 Each Way
Lake Okanagan Resort	\$173	\$199	\$12	\$22 Each Way
Casa Loma Lakeshore	\$185	\$195	\$16	\$29 Each Way
Marriott Grand Okanagan	\$195	\$205	\$20	\$19 Each Way
Coast Capri Hotel	\$185	\$190	\$22	\$24 Each Way
Watermark Beach Resort	\$175	\$195	\$26	\$24 Each Way
Bellstar Royal Kelowna	\$183	\$185	\$22	\$24 Each Way
Cove Lakeside Resort	\$171	\$190	\$20	\$26 Each Way
Summerland Waterfront	\$174	\$190	\$19	\$24 Each Way

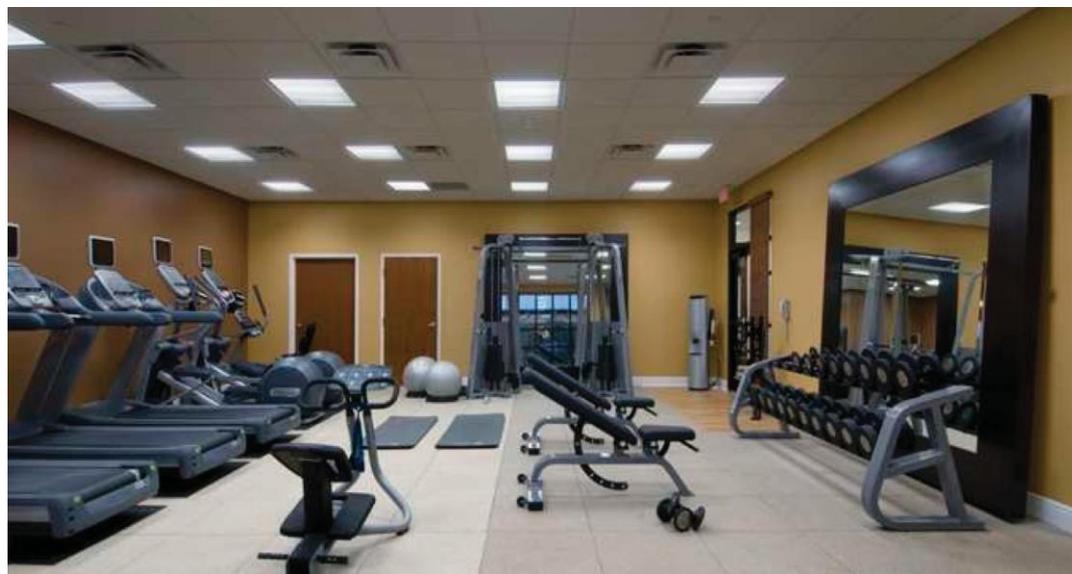
Recent renovation included complete redecoration of all 250 of our large and spacious guest rooms. This includes all new furniture, wall coverings, drapes, bedspreads, and carpets. Our interior designer succeeded in creating a comfortable, attractive, and restful atmosphere. The Lakeview is a smoke free facility. Pets under 25 pounds (12 kilograms) are allowed with a \$50 non-refundable cleaning fee. There is also a safe in every room and at the front desk.

Discounted *courtesy van transportation* (also known as limousine service) priced at \$15/each way is provided for our overnight guests to and from the airport, as well as anywhere in the downtown area. This service saves our guests who arrive by plane from \$7.00 to \$14.00 each way.

Guests who will be driving to the hotel will find over 300 *parking spaces* available to them at *no charge*. Unlike other beach properties, our free parking saves guests up to \$26.00 per day in parking fees. For security purposes, we have closed-circuit camera systems in the parking lot and in the parking garage areas.

→ Use the sales information on the reverse side of this page to explain and illustrate the attractive and comfortable guest rooms. Remind customers that the rooms were a major factor in receiving the Architects Award. Also, point out competitive room rates survey in addition to the savings on transportation and parking, and that the competitive room, transportation and parking rate surveys are conducted and updated weekly.

Pool & Fitness Centre



LAKEVIEW RESORT & CONVENTION CENTRE

For relaxation after a day's work, take advantage of our beautiful indoor pool and spa hot tub accented with bright tropical décor. Or relax outside on a comfortable chaise lounge at our private beach (open April 15– September 30).

Take advantage of the state-of-the-art exercise equipment in our complementary fitness centre.

Source: *Penticton Lakeside Resort and Conference Centre.* Online images c/o: <https://www.google.com/maps/contrib/115445063469151160458/photos/@49.5031301,-119.5946991,17z/data=!3m1!4b1!4m3!8m2!3m1!1e1> Accessed 19dec20.

→ Use the sales information on the reverse side of this page to explain and illustrate the benefits of the private beach, indoor pool, hot tub, and fitness centre.

Set Ups

Award Winning Meeting Room

LAKEVIEW RESORT & CONVENTION CENTRE MEETING ROOM SET UP OPTIONS



CONFERENCE STYLE



CLASSROOM STYLE



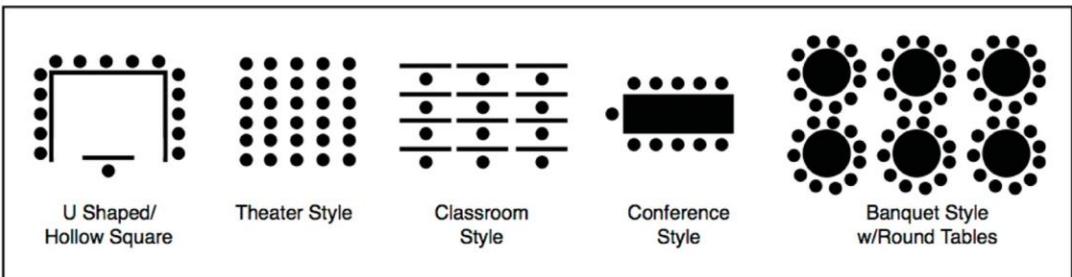
BANQUET STYLE



U SHAPED/HOLLOW CENTER STYLE



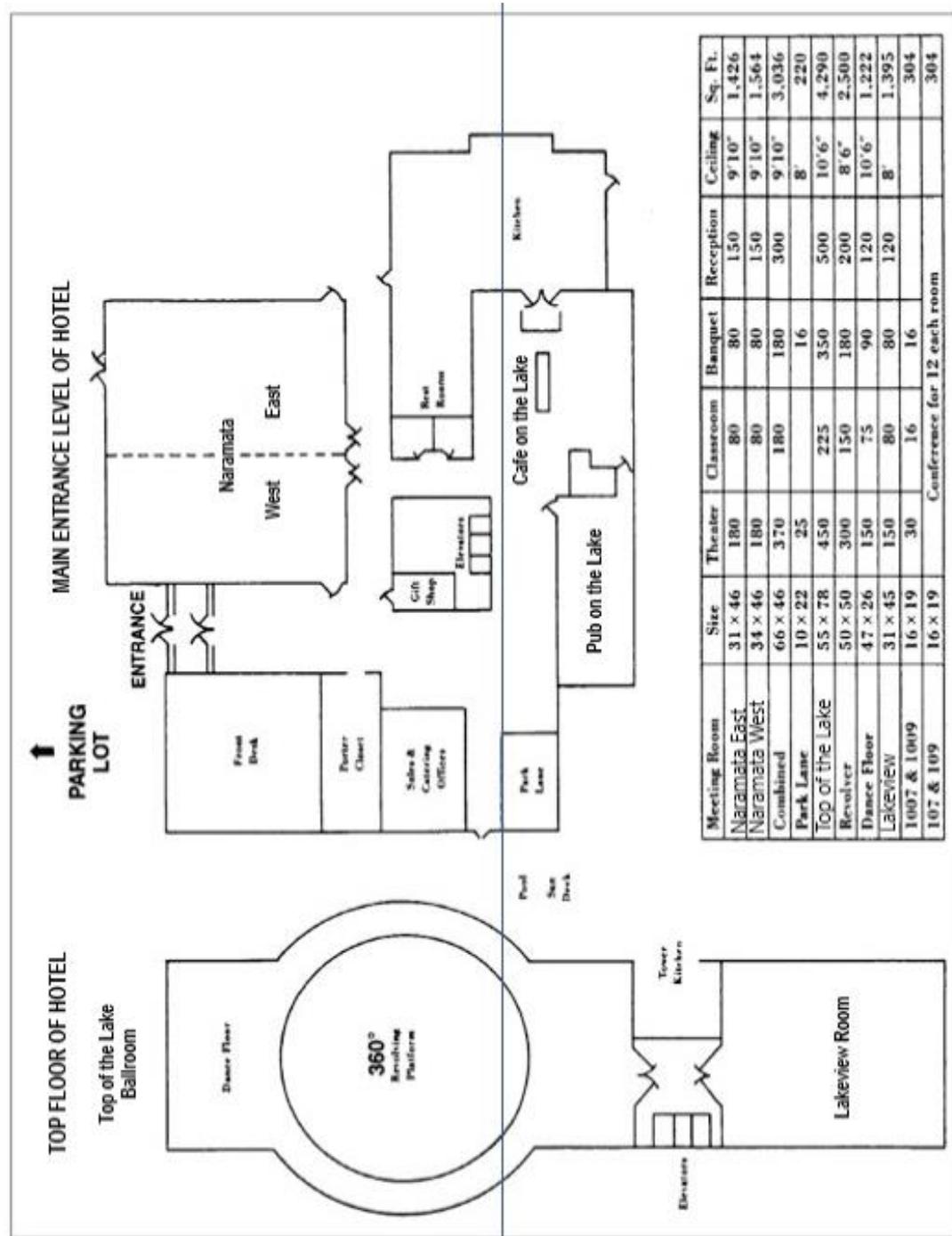
THEATER STYLE



Source: Courtesy of Marco Island Beach Resort

➡ Use the sales information on the reverse side of this page to illustrate the attractiveness of the newly remodeled meeting rooms, which were another important factor in receiving the Architects Award. Also, use this form to explain and illustrate the various seating arrangements for meeting rooms.

Floor Plan Award Winning Meeting Rooms



LAKEVIEW RESORT & CONVENTION CENTRE

*Meeting Rooms need to be reserved.
The first organization to sign a Sales Proposal for a specific date
has the designated room guaranteed.*

Source: Courtesy of Marco Island Beach Resort (Edited)

→ Use the sales information on the reverse side of this page to illustrate the location and layout of the meeting rooms in the convention centre. Also, use this information to configure and explain the various sizes and capacities for each style of seating in the meeting rooms for your customers.

Rates

Meeting Room

LAKEVIEW RESORT & CONVENTION CENTRE MEETING ROOM RATES

MEETING ROOM	SQ FEET	4 HOURS	8 HOURS	24 HOURS
Top of the Lake	4,290	\$600	\$800	\$1,200
Naramata - East	1,426	\$200	\$250	\$350
Naramata - West	1,564	\$190	\$240	\$340
Naramata - Combined	3,036	\$350	\$450	\$600
Park Lane	220	\$45	\$50	\$70
Revolver	2500	\$500	\$700	\$900
Dance Floor	1222	\$200	\$275	\$375
Lakeview	1395	\$150	\$215	\$380
Room # 107	304	\$80	\$100	\$120
Room # 109	304	\$80	\$100	\$120
Room # 1007	304	\$80	\$100	\$120
Room # 1009	304	\$80	\$100	\$120

- Meeting room rental charges based on set changes at 12:00 noon, 5:00 p.m., or 10:00 p.m.
- For groups of 20 or more who are reserving 20 or more guest rooms or scheduling 20 or more banquet meals, rental rates will be waived for rooms up to 1,600 square feet for up to 8 hours of use per day.
- FOR GROUPS OF 50 OR MORE WHO ARE RESERVING 50 OR MORE GUEST ROOMS OR SCHEDULING 50 OR MORE BANQUET MEALS, RENTAL RATES WILL BE WAIVED FOR ALL ROOMS FOR UP TO 24 HOURS OF USE.

Source: Courtesy of Marco Island Beach Resort (edited)

➔ Also, use the sales information at the bottom of the page to configure and explain the pricing and policies with regard to charges for use of the meeting rooms. Explain that the convention centre's policies with regard to pricing and the use of meeting rooms are very competitive with the charges of other conference facilities in the Okanagan region of British Columbia.

Rates Technology/ Media



LAKEVIEW RESORT & CONVENTION CENTRE

INTERNET CONNECTIVITY

Single Access Hardwire | \$100 each connection/per day

Wireless | \$50 each connection/per day

For specific Bandwidth contact your Sales Associate.

TELEPHONE ACCESS

Voice, Modem or FAX Line | \$200/Event

BUSINESS EQUIPMENT

Laptop Computers | \$150/Event

Printers | \$100/Event

MEETING EQUIPMENT

Microphone (Wireless) | \$50/Event

LCD Projector | \$100/Event

Rear Screen Projection | \$100/Event

Video Camera | \$50/Event

TECHNOLOGY ASSISTANCE

For specific Technology Assistance contact your Sales Associate.

Source: Courtesy of Marco Island Beach Resort

➡ Use the sales information on the reverse side of this page to sell, configure, and explain the availability of audiovisual equipment to customers scheduling meetings in the convention centre. This equipment must be reserved in advance of the scheduled date to guarantee availability.

Letter of Reference

THE PRINCIPAL COMPANY

October 1, 202_

Don Hill, General Manager
Lakeview Resort & Convention Centre
10 Lakeshore Drive
Penticton, B.C. V2A 7M7

Dear Don,

On behalf of our employees, I thank you and your associates for the wonderful time we had at the Lakeview Resort and Convention Centre during our convention last month. Enclosed is a cheque for \$28,992.50 to pay the invoice for the meeting costs.

The hospitality that we received during our time there was unparalleled. The friendliness and dedication of the staff simply made our time so enjoyable that we hated to leave.

The Chicken New Orleans was superb. Our heartfelt thanks to Chef Ronaldo Shay for creating the best meals we have ever had at a convention.

Without reservation I will direct anyone looking for convention space to your award-winning property. The group that gave you the award certainly knew what was important to convention planners. You may count on us to return in the future.

Sincerely,

Reggie Regan

Reggie Regan, Vice President
Field Sales Division

Enclosures:
Schedule for our next eight convention dates
Cheque
Service Evaluation

➔ Use this reference letter with customers to support the outstanding service we strive to provide to ALL of our convention centre customers. Note the friendliness and dedication of the centre staff, the quality of the food service, the reference to the award, and the enclosures regarding repeat business involving eight more meeting dates and the cheque in the amount of \$28,992.50.

Client References

REFERENCES

Company/Location	Reference/Title	Phone/Email
BC Forest Preservation Council Prince George	Helen Logan Executive Vice President	250-933-2529 helenlogan@bcfpc.ca
Clean Energy Coalition Calgary, AB	Elon Tesler VP Public Relations	403-781-0498 etesler@cleanenergy.ca
FlexiCold Logistics New Westminster, B.C.	Tiffany Nguyen VP Human Resources	604-591-7887 tiffany@flexicold.com
HR Professionals of BC Vancouver, B.C.	Rosevinder Gill Director, Special Events	604-255-8121 rosegill@hrpbc.ca
Innovation West Kelowna, B.C.	Carlos Antonio VP Design & Production	250-944-8944 Carlos@innovawest.com
Langara College Vancouver, B.C.	Jill McWilliam Director of Athletics	604-323-4142 jmcwilliam@langara.ca
Manufacturers Safety Alliance Abbotsford, B.C.	Rajiv Malhotra Chief Operating Officer	778-894-7733 rajiv@msa.ca
PGA West (Professional Golfers Association) Vernon, B.C.	Tiger Weir Chief Executive Golfer	250-545-2311 tigerweir@pgawest.ca
Reliable Communications Edmonton, AB	Grace Wong Director of Sales	780-555-3880 grace@reliable.ca
VQA BC (Vintners Quality Alliance) Penticton, B.C.	Sarah McWatters Executive Director	250-490-1900 smcwatters@vqa.ca

→ Use the sales information on the reverse side of this page to supply a list of successful businesspeople who can be contacted regarding the quality of food and service they received at previous meetings they have scheduled at the convention centre.

The Policies

FOOD AND BEVERAGE

| A 16 percent gratuity or service charge and applicable sales tax will be added to all food and beverage purchases.

| There is a \$25 setup fee for each meal function of 25 persons or less.

GUARANTEES

| The Convention Centre will require your menu and meeting room requirements no later than two weeks before your meeting or food function.

| Convention Centre facilities are guaranteed on a “first confirmed, first served” basis.

| A meal guarantee is required 48 hours prior to your function. This guarantee is the minimum your group will be charged for the function. If no guarantee is received by the Catering Office, we will then consider your last number of attendees as the guarantee. We will be prepared to serve 5 percent over your guaranteed number

BANQUET AND MEETING ROOMS

| As other groups may be utilizing the same room prior to or following your function, please adhere to the times agreed on. Should your time schedule change, please contact the Catering Office, and every effort will be made to accommodate you.

| Function rooms are assigned by the room-number of people anticipated. If attendance drops or increases, please contact the Catering Office to ensure proper assignment of rooms.

TECHNOLOGY | MEDIA SERVICES

| A wide variety of technology services is available on a rental basis. See Technology/Media Rental Rates for details or contact your Sales Associate.

➔ Use the sales information on the reverse side of this page to carefully explain the policies and general information on the operation of the convention centre. Please note the 16 percent gratuity and the \$25 setup fee for certain meals. Also, note the policies and guarantees that are required for menus, meeting rooms, and meals.

CUSTOMER SERVICE/SALES MEMORANDUM 1

To: Convention Sales Trainee
From: Al Scott, Sales Manager
Re: Assistance with a Customer Request

A new prospect called and requested that we immediately submit a proposal for a planned meeting in Penticton. Please review the profile and initial contact notes in our CRM database (printed as follows):

Name: Canadian Western Graphics	Address: #101 – 6800 King George Blvd.
Contact: Jaydeep (Jay) Sanghera	:
Phone: 604-591-4879	City: Surrey
Title: President	Province/State: BC
Email: Jay.Sanghera@CWGraphics.ca	Postal Code/ZIP: V3W 5H8

(Scott) Visited with Jay Sanghera on the phone. He seemed very interested. Nice emotive person. Has a son, Darien, is attending Langara College and plays for the Falcons. Also knew Jill McWilliam of Langara, who is an excellent account of ours. Jay wants a proposal ASAP to cover the following buying conditions:

1. Ten single guest rooms for two nights—Friday and Saturday
2. A meeting room for 20 people, classroom style, Friday and Saturday from 2 to 6 p.m.
3. Dinner for 20, banquet style, at 6 p.m. each night
4. Friday: Sliced Pork Loin
5. Saturday: Broiled Sockeye Salmon
6. A swimming pool

Complete the following customer service/sales assignment using the material in your product sales training program and the forms on the next two pages. (See Chapters 6 and 7 on Developing a Product Strategy.)

1. Complete the sales proposal worksheet (p. 40).

Our sales proposal needs to contain accurate and complete facts because, when signed, it becomes a legally enforceable sales contract. All the product and pricing guidelines have been supplied in your sales training materials. You should sign your name with your new job title “Account Executive” in the lower left-hand corner of the form.

2. Write a sales letter (p. 41).

Prepare a letter that custom fits and positions the benefits that will appeal to Jay Sanghera. Be sure to list any sales literature you will be sending under the Enclosure section of your letter. (Use business letter format similar to the reference on p. 33.) Keep copies of everything you prepare so our food and beverage, housekeeping, and accounting departments will have them available.

We should email the proposal, cover letter, and sales literature by tomorrow afternoon.

Thank you.

Lakeview Resort & Convention Centre

10 Lakeshore Drive Penticton B.C. V2A 7M7
E: Sales@Lakeview.ca F: 250-491-1500

PARTS II TO IV

EMPLOYMENT MEMORANDUM 2

To: New Convention Centre Account executives
From: Al Scott, Sales Manager
Re: Your New Sales Assignment

Congratulations on successfully completing your training program and receiving your new appointment. You will find three challenges as you work with your customer's buying process.

Your *first challenge will be establishing relationships* with your customers. This will require that you do strategic planning before you can call on your client for the first time. Make sure your initial meetings focus on subjects of interest to your customer. Remember, "Customers don't care how much you know until they know how much you care."

Your *second major challenge will be to gain a complete and accurate understanding of your customer's needs*. You should prepare to ask good questions, take detailed and accurate notes, and confirm your customer's and your own understanding of their needs. This process is a part of our total quality management program, which strives to provide total quality customer service. "To be an effective consultative salesperson you need to seek first to understand."

Your *third challenge as an account executive will be to make good presentations*. Our industry, as most others these days, is competitive and is characterized by many look-alike products and some price cutting. Always *organize and deliver good presentations* that focus on (1) providing solutions to immediate and long-term customer's needs, (2) negotiating win-win solutions to customer's concerns, and (3) closing sales that keep our facility full. This approach will give you a competitive edge and help you maintain high-quality, long-term profitable relationships.

Attached you will find a memorandum on an account I would like you to develop. Please follow the instructions included and provide me with appropriate feedback on your progress. I look forward to working with you on this account.

P.S. I want to compliment you on your excellent work on the Jay Sanghera account. Jay called while you were attending a training meeting and said that your proposal and letter looked very good. Their organization was impressed with our facility, the apparent quality of our food, and your letter. Their organization will be scheduling a total of *11 more meetings* at our convention centre during the next 12 months if everything works the way you describe it. Each of these sales will be reflected in your *commission cheques*. Great work.

Part Two

Developing a Relationship Strategy for Selling

SALES MEMORANDUM 1A

To: Association Account Sales
From: Al Scott, Sales Manager
Re: Developing the Ashley Hall YWCA Account (Call 1, establishing a Relationship Strategy)

My sales assistant has called Ashley Hall, chairperson of the YWCA Physical Fitness Week program (see following contact report), and set up an appointment for you on Monday at 1:00 p.m. in Ashley's office. During your first sales call with Ashley, your call objectives will be to (1) establish a strong relationship, (2) share an appealing benefit of our property to create customer interest, and (3) find out if your customer is planning any conventions in the future.

As we discussed during your training class, using Ashley Hall's prospect information presented below and the sales tools in your product strategy materials, your presentation plan should be to (see Chapters 3–5 and 10):

1. Use compliments, comments on observations, or search for mutual acquaintances to determine which topics Ashley wants to talk about (Ashley will only want to talk about three of these topics). This should set the stage for a good relationship.
2. Take notes on the topics of interest to Ashley so we can add them to our customer information data bank for future calls. (Ashley will share three new items of information on each topic of interest, if you acknowledge interest.)
3. Show and describe an appealing and unique benefit of our facility so we will be considered for Ashley's future convention needs. (Consider using the Architects Award, p. 11.)
4. Discuss any conventions Ashley may be planning.
5. Schedule a call back appointment.

Name:	YWCA Okanagan	Address:	375 Hartman Rd
Contact:	Ashley Hall		:
Phone:	250-491-3740	City:	Kelowna
Title:	Director, Physical Fitness Programs	Prov/St:	B.C.
Email:	Ashley.Hall@YWCA.ca	PC/ZIP:	V1X 2M9

(Scott) Jill McWilliam, the Athletic Director of Langara College, supplied the following information about Ashley Hall:

1. Jill and Ashley have a close relationship.
2. Ashley just designed and built a new home.
3. Ashley appears in local TV and social media advertising about the YWCA.

Jill reports that in Ashley's office you will observe the following:

4. An autographed picture of Olympic Gold Medalist Cindy Klassen
5. A Schwinn Airdyne Fitness Cycle

Comments, Compliments, and Questions

(Jill McWilliam suggested you mention her name.)

Notes on New items of Interest to Customer

- | |
|--|
| 1. (e.g., Jill McWilliam and I were in the same swim club) |
| 2. |
| 3. |
| 1. |
| 2. |
| 3. |
| 1. |
| 2. |
| 3. |

SALES MEMORANDUM 1B

To: Corporate Account Sales
From: Al Scott, Sales Manager
Re: Developing the David Navarro Highpoint Design Group Account (Call 1, establishing a Relationship Strategy)

My sales assistant has called Highpoint Design Group (see following contact report) and set up an appointment for you on Tuesday at 1:00 p.m. in David's office. During your first sales call with David, your call objectives will be to (1) establish a strong relationship, (2) share an appealing benefit of our property to create customer's interest, and (3) find out if your customer is planning any conventions in the future.

As we discussed during your training class, using David Navarro's prospect information presented below and the sales tools in your product strategy materials, your presentation plan should be to (see Chapters 3-5 and 10):

1. Use compliments, comments on observations, or search for mutual acquaintances to determine which topics David wants to talk about (David will only want to talk about three of these topics). This should set the stage for a good relationship.
2. Take notes on the topics of interest to David so we can add them to our customer information data bank for future calls. (David will share three new items of information on each topic of interest, if you verbally or nonverbally acknowledge interest.)
3. Show and describe an appealing and unique benefit of our facility so we will be considered for David's future convention needs. (Consider using the Executive Chef Awards & Menu, p. 15-19.)
4. Discuss any conventions David may be planning.
5. Schedule a call back appointment.

Name: Highpoint Design Group	Address: 1700 Dolphin Ave
Contact: David Navarro	:Suite 600
Phone: 250-763-0925	City: Kelowna
Title: Operations Manager	Prov/St: B.C.
Email: dnavarro@highpoint.ca	PC/ZIP: V1Y 8S3

(Scott) Carlos Antonio the VP of Design and Production at Innovation West, provided the following information about David Navarro:

1. David has been on vacation.
2. David is Carlos Antonio's cousin.

Carlos reports that in David's office you will observe the following:

1. A print of a famous painting by Pablo Picasso
2. A degree from University of BC
3. An extra-large bookcase containing many business books

Comments, Compliments, and questions	Notes on New items of interest to Customer
(Carlos Antonio mentioned that David Navarro just returned from a very enjoyable vacation.)	1. (Example: Spent one week in New York City.) 2. 3.
	1. 2. 3.
	1. 2. 3.

ASSESSMENT FORM 1

RELATIONSHIP STRATEGY

Salesperson's Name: _____

Assessment item	Excellent		Average	Poor	Did Not Do	
1. Conducted good verbal introductions (shared full name, title, and company name)	10	9	8	7	6	0
2. Made good nonverbal introduction (good entrance, carriage, handshake, and seating posture)	10	9	8	7	6	0
3. Communicated call objectives (shared why salesperson was calling)	10	9	8	7	6	0
4. Verbalized effective comments and compliments (sincerely made comments and compliments on five relationship topics)	10	9	8	7	6	0
5. Kept conversation focused on customer topics (acknowledged new information provided by customer)	10	9	8	7	6	0
6. Took effective non-distractive notes (was organized and prepared to take notes)	10	9	8	7	6	0
7. Attractively showed material on convention centre (was well prepared with a proof device)	10	9	8	7	6	0
8. Made specific benefit statement (made a benefit statement that appealed to customer)	10	9	8	7	6	0
9. Effectively inquired about convention needs (asked good questions about future needs)	10	9	8	7	6	0
10. Effectively thanked customer (communicated appreciation, said thank you, indicated interest in prospect future business)	10	9	8	7	6	0

Relationship Presentation: _____

Total Points

Your Name: _____

Return this form to salesperson and discuss your reaction to this presentation!

Part Three

Understanding Your Customer's Buying Strategy

SALES MEMORANDUM 2A

To: Association Account Salesperson
From: Al Scott, Sales Manager
Re: Ashley Hall Account—Phone Call From Customer
 (Call 2, Discovering a Customer's Buying Strategy)

Ashley Hall from the YWCA, whom you called on recently, left a message for you to stop in about a program they are planning. Congratulations on making that first call so effectively. Apparently, you established a good relationship.

As we discussed in your training program, your *call objectives* for this sales call should be to:

1. Reestablish your relationship
2. Discover specific information about Ashley's buying conditions (the what, why, who, when, and what price needs), so we can custom fit a program for them
3. Set up an appointment to present your solution

Also, as we discussed, your *presentation plan* for this call should include (see Chapters 8 and 11):

1. In advance of your meeting, prepare *general survey questions* to gather facts about your customer's buying situation and to achieve your call objectives.
2. During your meeting, use *confirmation questions* to clarify and confirm Ashley's and your own perception of each buying condition. Later, use *specific survey questions* to discover any special buying problems.
3. During your sales meeting, write down each of Ashley's buying conditions.
4. To end your first meeting, use your notes to construct a *summary-confirmation question* to clarify and confirm all six of Ashley's buying conditions.
5. Schedule a callback appointment to make your presentation and present your proposal.

Good luck!

GENERAL SURVEY QUESTIONS

(Example: Can you share with me what you had in mind?)

NOTES ON BUYING CONDITIONS

(Example: Needs a small meeting room)

	1.
	2.
	3.
	4.
	5.
	6.

SALES MEMORANDUM 2B

To: Association Account Salesperson
From: Al Scott, Sales Manager
Re: David Navarro Account—phone call from customer (Call 2, Discovering a Customer’s Buying Strategy)

David Navarro from Highpoint Design Group, whom you called on recently, left a message for you to stop in about a program they are planning. Congratulations on making that first call so effectively. Apparently, you established a good relationship.

As we discussed in your training program, your *call objectives* should be to:

1. Reestablish your relationship
2. Discover the facts about David’s buying conditions (the what, why, who, when, and what price needs), so we can custom fit a program for them
3. Set up an appointment to present your solution

Also, as we discussed, your *presentation plan* for this call should include (see Chapters 8 and 11):

1. In advance of your meeting, prepare *general survey questions* to gather facts about your customer’s buying situation and to achieve your call objectives.
2. During your meeting, use *confirmation questions* to clarify and confirm David’s and your own perceptions of each buying condition. Later, use *specific survey questions* to discover any special buying problems.
3. During your sales meeting, write down each of David’s buying conditions.
4. To end your first meeting, use your notes to construct a *summary-confirmation question* to clarify and confirm all six of David’s buying conditions.
5. Schedule a callback appointment to make your presentation and present your proposal.

Good luck!

GENERAL SURVEY QUESTIONS	NOTES ON BUYING CONDITIONS
(Example: Can you share with me what you had in mind?)	(Example: Needs a small meeting room)
	1.
	2.
	3.
	4.
	5.
	6.

ASSESSMENT FORM 2

CUSTOMER STRATEGY

Salesperson's Name: _____

Assessment item	Excellent		Average		Poor	Did Not Do
1. Effectively reestablished relationship (made enthusiastic comments about information from first meeting)	10	9	8	7	6	0
2. Communicated positive body language (entrance, carriage, handshake, and seating)	10	9	8	7	6	0
3. Communicated positive verbal language (used positive words, showed enthusiasm with well-modulated voice)	10	9	8	7	6	0
4. Used customer's name effectively (used name at least three times)	10	9	8	7	6	0
5. Asked general survey questions to secure facts (seemed prepared, questions were general and open ended)	10	9	8	7	6	0
6. Verified customer needs with good confirmation questions (wanted to be correct in interpreting customer needs)	10	9	8	7	6	0
7. Asked specific survey questions to discover special problems (followed up to secure all details)	10	9	8	7	6	0
8. Appeared to take effective notes (was organized and nondistracting, used notes in confirming needs)	10	9	8	7	6	0
9. Effectively set up next appointment (requested another meeting; suggested and wrote down date, time, and place)	10	9	8	7	6	0
10. Effectively thanked customer (communicated appreciation, said thank you, indicated enthusiasm for next meeting)	10	9	8	7	6	0

Discovering Customer Needs Presentation: _____
Total Points

Your Name: _____

Return this form to salesperson and discuss your reaction to this presentation!

Part Four

Developing a Sales Presentation Strategy

SALES MEMORANDUM 3A

To: Association Account Sales
From: Al Scott, Sales Manager
Re: Your recent meeting on the Ashley Hall Account
(Call 3, Developing a Presentation Strategy)

Congratulations on doing such a thorough job of discovering Ashley's buying conditions. I found that your list of buying conditions includes the kind of customer information important to increasing our sales and partnering with our clients. I would like to see a copy of Ashley's proposal when you complete it.

Reviewing what we discussed during your training, your next call objectives are:

1. Make a persuasive sales presentation that custom fits your proposal to Ashley's needs
2. Negotiate any concerns Ashley may have
3. Close and confirm the sale
4. Build repeat and referral business

Also, as we discussed, your *presentation plan* for this call should be to:

1. Prepare and price a product solution that meets Ashley's needs. *Complete the Sales Proposal Form* (p. 53).
2. Before your sales call, prepare a *portfolio or power point* presentation (see model on p. 52) that follows these guidelines. Also, view the PowerPoint presentation at www.pearsonhighered.com/manning.
 - a. Review the relationship information and prepare for those topics you will discuss.
 - b. Prepare a summary *confirmation* question that verifies the buying conditions secured in your second call. Prepare *probing* questions to discover any pain your customer may be experiencing.
 - c. Select sales tools (proof devices), and create feature/benefit selling statements and *need-satisfaction questions* that appeal to Ashley's buying conditions (see Chapter 12).
 - d. Plan summary confirmation questions that verify Ashley's acceptance of your solution to each buying condition. *Complete Strategic Sales Planning Form A* (p. 57) for items b, c, and d.
 - e. Prepare to negotiate the time, price, source, and product objections. *Complete Strategic Sales Planning Form B* (p. 58) (see Chapter 13).
 - f. Prepare at least four closing methods in addition to the summary of benefits. *Complete Strategic Planning Form C* (p. 59) (see Chapter 14).
 - g. Plan methods to service the sale. Follow up by scheduling an appointment between now and the convention date (telephone call or personal visit) to follow through on guarantees concerning rooms and meals, suggestions about audiovisual needs, and any possible changes in the convention schedule. *Complete Strategic Sales Planning Form D* (p. 60) (see Chapter 15).
3. During the sales call reestablish the relationship and, using your portfolio presentation,
 - a. Confirm all of Ashley's previous buying conditions, and explore any pain being experienced
 - b. Match a proof device and feature/benefit selling statement with each buying condition
 - c. Confirm Ashley's acceptance to each of your proposed benefit statements and need-satisfaction questions
 - d. Negotiate any sales resistance
 - e. Close the sale
 - f. Service the sale to get repeats and referrals

Good luck!

SALES MEMORANDUM 3B

To: Corporate Account Sales
From: Al Scott, Sales Manager
Re: Your recent meeting on the David Navarro Account
(Call 3, Developing a Presentation Strategy)

Congratulations on doing such a thorough job of discovering David's buying conditions. I found that your list of buying conditions includes the kind of customer information important to increasing our sales and partnering with our clients. I would like to see a copy of David's proposal when you complete it.

Reviewing what we discussed during your training, your next *call objectives* are:

1. Make a persuasive sales presentation that custom fits your proposal to David's needs
2. Negotiate any concerns David may have
3. Close and confirm the sale
4. Build repeat and referral business

Also, as we discussed, your *presentation plan* for this call should be to:

1. Prepare and price a product solution that meets David's needs. *Complete the Sales Proposal Form* (p. 53).
2. Before your sales call, prepare a *portfolio or power point* presentation (see model on p. 52) that follows these guidelines. Also, view the PowerPoint presentation at www.pearsonhighered.com/manning.
 - a. Review the relationship information and prepare for those topics you will discuss.
 - b. Prepare a summary *confirmation* question that verifies the buying conditions secured in your second call. Prepare *probing* questions to discover any pain your customer may be experiencing.
 - c. Select sales tools (proof devices) and create feature/benefit selling statements and *need-satisfaction questions* that appeal to David's buying conditions (see Chapter 12).
 - d. Plan confirmation questions that verify David's acceptance of your solution to each buying condition. *Complete Strategic Sales Planning Form A* (p. 57) for items b, c, and d.
 - e. Prepare to negotiate the time, price, source, and product objections. *Complete Strategic Sales Planning Form B* (p. 58) (see Chapter 13).
 - f. Prepare at least four closing methods in addition to the summary-of-benefits close. *Complete Strategic Planning Form C* (p. 59) (see Chapter 14).
 - g. Plan methods to service the sale. Follow up by scheduling an appointment between now and the convention date (telephone call or personal visit) to follow through on guarantees concerning rooms and meals, suggestions about audiovisual needs, and any possible changes in the convention schedule. *Complete Strategic Sales Planning Form D* (p. 60) (see Chapter 15).
3. During the sales call reestablish the relationship and, using your portfolio presentation,
 - a. Confirm all of David's previous buying conditions, and explore any pain being experienced
 - b. Match a proof device and feature/benefit selling statement with each buying condition
 - c. Confirm David's acceptance to each of your proposed benefit statements and *need-satisfaction* questions
 - d. Negotiate any sales resistance
 - e. Close the sale
 - f. Service the sale to get repeats and referrals

Good luck!

ASSESSMENT FORM 3

PRESENTATION STRATEGY

Salesperson's Name: _____

Assessment item	Excellent		Average		Poor	Did Not Do
1. Reestablished a good relationship (talked sincerely and enthusiastically about topics of interest to customer) Comments:	10	9	8	7	6	0
2. Confirmed needs from previous meeting Comments:	10	9	8	7	6	0
3. Made solution sound appealing (used nontechnical, customer-oriented benefit statements) Comments:	10	9	8	7	6	0
4. Used proof devices to prove sales appeals (made product sound appealing) Comments:	10	9	8	7	6	0
5. Verified customer's understanding of solution Comments:	10	9	8	7	6	0
6. Negotiated price objection (established high value to price impression) Comments:	10	9	8	7	6	0
7. Negotiated time objection (created need to sign now using empathy) Comments:	10	9	8	7	6	0
8. Negotiated source objection (knew the competition well) Comments:	10	9	8	7	6	0
9. Asked for the order, closed sale (attempted to close after each objection) Comments:	10	9	8	7	6	0
10. Serviced the sale (established relationship that would result in referrals or repeat sales opportunities) Comments:	10	9	8	7	6	0

Overall quality of sales portfolio and proof devices Presentation Points

25 20 15 10 5 0

Comments: _____

Total Points

Return this form to salesperson and discuss your reaction to this presentation!

Your Name: _____

POWER POINT OR PORTFOLIO PRESENTATION MODEL

POWER POINT SLIDES OR THREE-RING BINDER SUGGESTIONS

<p style="text-align: center;">PAGE 1</p> <p style="text-align: center;">Summary of Customer's Buying Conditions</p> <ol style="list-style-type: none"> 1. 2. 3. 4. 5. 6. <p style="text-align: center;">(confirmation question)</p>	<p style="text-align: center;">PAGE 2</p> <p style="text-align: center;">Buying Condition 1</p>	<p style="text-align: center;">PAGE 3</p> <p style="text-align: center;">Proof Devices (could be more than one)</p> <p style="text-align: center;">(state benefits, ask confirmation question)</p>	<p style="text-align: center;">PAGE 4</p> <p style="text-align: center;">Buying Condition 2</p>
<p style="text-align: center;">PAGE 5</p> <p style="text-align: center;">Proof Devices</p> <p style="text-align: center;">(state benefits, ask confirmation question)</p>	<p style="text-align: center;">PAGE 6</p> <p style="text-align: center;">Buying Condition 3</p>	<p style="text-align: center;">PAGE 7</p> <p style="text-align: center;">Proof Devices</p> <p style="text-align: center;">(state benefits, ask confirmation question)</p>	<p style="text-align: center;">PAGE 8</p> <p style="text-align: center;">Buying Condition 4</p>
<p style="text-align: center;">PAGE 9</p> <p style="text-align: center;">Proof Devices</p> <p style="text-align: center;">(state benefits, ask confirmation question)</p>	<p style="text-align: center;">PAGE 10</p> <p style="text-align: center;">Buying Condition 5</p>	<p style="text-align: center;">PAGE 11</p> <p style="text-align: center;">Proof Devices</p> <p style="text-align: center;">(state benefits, ask confirmation question)</p>	<p style="text-align: center;">PAGE 12</p> <p style="text-align: center;">Buying Condition 6</p>
<p style="text-align: center;">PAGE 13</p> <p style="text-align: center;">Proof Devices</p> <p style="text-align: center;">(state benefits, ask confirmation question)</p>	<p style="text-align: center;">PAGE 14</p> <p style="text-align: center;">Summary of Benefits</p> <ol style="list-style-type: none"> 1. 2. 3. 4. 5. 6. 7. <p style="text-align: center;">(trial close)</p>	<p style="text-align: center;">FRONT POCKET</p> <p style="text-align: center;">MATERIALS</p> <p style="text-align: center;">Additional value-added pages as needed to overcome sales resistance and close the sale</p>	<p style="text-align: center;">BACK POCKET</p> <p style="text-align: center;">MATERIALS</p> <p style="text-align: center;">Additional value-added pages as needed to service the sale</p>

Lakeview Resort & Convention Centre

10 Lakeshore Drive Penticton B.C. V2A 7M7
E: Sales@Lakeview.ca F: 250-491-1500

MEETING AND BANQUET ROOM SCHEDULE OF EVENTS

1ST THURSDAY OF NEXT MONTH

Naramata east

Open—Expect confirmation tomorrow

Naramata west

Open—Expect confirmation tomorrow

Park Lane

10:00 a.m. Chamber of Commerce Meeting

2:00 p.m. Penticton Central Planning Committee

Top of the Lake

Open—Expect confirmation tomorrow

Revolver

Open

Dance Floor

7:00 p.m. VQA BC Dinner and Dance

Lakeview

Open—Expect confirmation tomorrow

1007 and 1009

11:00 a.m. PGA West Luncheon

6:00 p.m. VQA BC Executive Meeting

107 and 109

10:00 A.M.—Expect confirmation tomorrow

ATTENTION: Phone 250-491-1500 ext. 1 or email reservations@lakeview.ca to confirm reservations as soon as possible.

➡ Use the scheduling information on the reverse of this page to illustrate to your customers that reservations for rooms must be scheduled as soon as possible. All guest and meeting room reservations are guaranteed on a “first come, first signed” basis with the customer’s signature on a sales proposal. Once a room has been reserved on a signed sales form, it is no longer available. Upon receiving a signature, sales and marketing personnel should immediately phone, fax, or e-mail this information to the reservations department. Noting that a possible meeting may be confirmed does not constitute a signed reservation.

STRATEGIC SALES PLANNING FORM A

MATCHING BUYING CONDITIONS WITH PROOF DEVICES AND FEATURES/BENEFITS

BUYING CONDITION	PROOF DEVICE	FEATURE	SPECIFIC BENEFIT	CONFIRMATION QUESTION
<i>You indicated you wanted . . .</i>	<i>Here is . . .</i>	<i>which has (have) . . .</i>	<i>which means to you . . .</i>	<i>What do you think?</i>
1. _____(number) guest rooms	A picture of one of our guest rooms (see p. 21)	Just been remodeled	Your people will enjoy clean, comfortable, spacious, and attractive surroundings	Is that what you had in mind?
2.				
3.				
4.				
5.				
6.				

Optional Role-Play 3-A instructions (see Chapters 11 and 12)

- Step 1 Prepare your presentation plan by completing the above form.
- Step 2 Organize your presentation plan by placing the above information on 8 1/2" x 11" sheets of paper according to the portfolio or power point presentation plan on page 52. Select proof devices from the product strategy materials presented on pages 5–38 and the completed proposal on page 53.
- Step 3 Using the power point or portfolio materials you have prepared, pair off with another student who will play the role of your customer. Review your customer's buying conditions, present your solutions with benefit statements, prove your sales appeals with demonstrations, secure your customer's reactions, and summarize the benefits presented. Discuss your customer's reactions to your presentation. This exercise will help you prepare for Sales Call 3.

STRATEGIC SALES PLANNING FORM B

ANTICIPATING AND NEGOTIATING SALES RESISTANCE WORKSHEET

PART I ANTICIPATING SALES RESISTANCE		PART II NEGOTIATING SALES RESISTANCE	
Type	What Customer Might Say	Methods*	What You Will Say (include proof devices you will use)
Time	“I would like to take a day to think over your proposal.”	Indirect denial	“I understand, however” (Show p. 55, Schedule of Events.)
Price	“That price is way over my budget.”		
Source	“I’m going to check with the Marriott.”		
Product	“I’m concerned about the size of your meeting rooms.”		

Optional Role-Play 3-B instructions

Using the preceding material you have prepared, pair off with another student who will play the role of your customer. Provide your customer with the material in Part I and instruct her to raise sales resistance in any order he/she chooses. Playing the role of the salesperson, you will respond with the material you prepared in Part II. Continue the dialogue until all the types of sales resistance have been successfully negotiated. Discuss with your customer his/her reaction to your methods of successfully negotiating the different types of sales resistance. This exercise will help you prepare for Sales Call 3.

***Method of Negotiating Sales Resistance (see Chapter 13)**

- Direct denial
- Superior benefit
- Postponement
- Indirect denial
- Demonstration
- Question
- Trial offer
- Third party
- Feel, felt, found

STRATEGIC SALES PLANNING FORM C

CLOSING AND CONFIRMING THE SALE WORKSHEET

PART I	PART II										
Verbal and Nonverbal Closing Clues	Method of Closing*	What You Will Say (include proof devices you will use)									
Agrees with each benefit	Summary of the benefits and direct appeal	“Let me review what we have talked about.May I get your signature?” (Use p. 53, Sales Proposal.)									
Agrees after an objection to price, time, or source	Assumption										
Appears enthusiastic and impatient	Trial close and assumption										
Agrees with all benefits but will not under any circumstances go over budget	Special concession										
<p>Optional Role-Play 3-C instructions</p> <p>Using the preceding material you have prepared, pair off with another student who will play the role of your customer. Provide your customer with the appropriate closing clues from Part I and instruct him/her to provide verbal or nonverbal closing clues in any order he/she chooses. Playing the role of the salesperson, you will respond with the material you prepared in Part II. Continue the dialogue until you have responded to all the anticipated closing clues. Discuss with your customer his/her reaction to your methods of successfully closing and confirming the sale. This exercise will help you prepare for Sales Call 3.</p> <p>*Method of Closing the Sale (see Chapter 14)</p> <table style="width: 100%; border: none;"> <tr> <td style="width: 33%;">d Trial close</td> <td style="width: 33%;">d Special concession</td> <td style="width: 33%;">d Balance sheet</td> </tr> <tr> <td>d Summary of the benefits</td> <td>d Multiple option</td> <td>d Management</td> </tr> <tr> <td>d Assumption</td> <td>d Direct appeal</td> <td>d Impending event</td> </tr> </table>			d Trial close	d Special concession	d Balance sheet	d Summary of the benefits	d Multiple option	d Management	d Assumption	d Direct appeal	d Impending event
d Trial close	d Special concession	d Balance sheet									
d Summary of the benefits	d Multiple option	d Management									
d Assumption	d Direct appeal	d Impending event									

STRATEGIC SALES PLANNING FORM D

SERVICING THE SALE WORKSHEET

PART I	PART II						
What You Will Do to Add Value to the Sale	What You Will Say or Write to Add Value to the Sale						
<p>1. Schedule appointments to confirm rooms and final counts on meals.</p> <table style="width: 100%; border: none;"> <tr> <td style="width: 50%;">Dates</td> <td style="width: 50%;">Time</td> </tr> <tr> <td>1 _____</td> <td>1 _____</td> </tr> <tr> <td>2 _____</td> <td>2 _____</td> </tr> </table> <p>2. Make suggestions during next meeting about audiovisual equipment, beverages for breaks, etc.</p> <p>3. Provide personal assurances concerning your continuing efforts to make the meeting an outstanding success.</p> <p>4. Prepare thank-you letter concerning Sales Call 3.</p>	Dates	Time	1 _____	1 _____	2 _____	2 _____	<p>“I would like to call to confirm.....” (Show p. 37, Convention Centre Policies)</p>
Dates	Time						
1 _____	1 _____						
2 _____	2 _____						
<p>Optional Role-Play 3-D instructions</p> <p>Using the preceding material you have prepared, pair off with another student who will play the role of your customer. Using the topics identified in Part I, verbally present what you have prepared in Part II on this form. Discuss with your customer his/her reaction to your methods of servicing the sale. This exercise will help you prepare for Sales Call 3.</p> <p>Method of Servicing the Sale (see Chapter 15)</p> <ul style="list-style-type: none"> ▫ Follow through on promises and obligations ▫ Follow up to ensure customer satisfaction ▫ Expansion selling 							

