

COURSE SYLLABUS

IT 406: Industrial Sales

Spring 2014

Monday / Wednesday-10:10am – 12 Noon, Room 03-113

Instructor: Jim Valdez
e-mail: jvaldez@calpoly.edu
Office: 03-441
Phone: 756-7176
Office Hours: Tu/Tr-10-11 AM

Course Materials:

- (Required) *Hope is Not a Strategy*, book by Rick Page. Available at El Corral Bookstore and other book sellers such as Amazon.com.
- All other materials will either be distributed in class or via the course Web site in PolyLearn, accessible at <https://my.calpoly.edu>. You will be expected to visit the course Web site, regularly, as new materials and information will be posted frequently and without advance notice.

Learning Objectives

LO1: The student will be able to analyze and evaluate a of a case study for a company from the stand point of industrial sales and marketing.

LO2: The student will participate in a project team . The student will demonstrate writing skills through the development of a project team report. The student will apply effective team presentation skills through a presentation of the report on an industrial sales case study.

LO3.2. Demonstrate effective speaking skills

Related Learning Objectives

LG#1 (General IT knowledge)

LG#3(Effective communicators and team players

LG#4 (Analyze and evaluate alternate solutions to problems using appropriate data to support decisions)

LG#5 (Demonstrate effective team participation, report writing and presentations skills)

Course Learning Outcomes

After completion of the course, the student will be able to:

1. Understand the analysis and evaluation of a case study for a company from the stand point of industrial sales and marketing(LG#1)
2. Be able to work in a team to plan and complete a project utilizing project management skills (LG#4/LG#5)
3. Complete an individual sales presentation (role-play) (LG#3).

Course Overview:

What is Industrial Sales?

The term **industrial sales** refers to all of the activities that support the sale of products (including goods and services) whose intended application is in manufacturing. An example is the sale of an injection-molding machine for use in a manufacturing facility.

The Emphasis of This Class Is On The Customer!

As you might expect, industrial sales is a unique profession that requires a distinctive blend of knowledge and skills. This course is the first step in preparing you for a career in industrial sales. It combines topics relating to engineering, production and operations, facilities management, purchasing, marketing, and, of course, selling. We will place primary importance on the customer in this course, so that you can become a sales professional who adds value to every selling situation by solving customer problems. Thus, a majority of our time in this course will be devoted to understanding how industrial products are used within a customer's manufacturing processes, how customers make purchasing decisions, and how industrial salespeople can add value by designing solutions to manufacturing challenges.

Sales Process Engineering

We will be discussing the philosophies and tool sets surrounding the discipline of process engineering as it can be applied in sales, marketing and customer service.

Customer Relations & Rapport

Customer relations are at the heart of all organizations' successes or failures. When asked what groups are the most important for any business, business leaders consistently answer "customers, customers, and then customers."

But consumers often wonder if businesses really mean this. Sometimes they feel as if they are intruding when they visit a store or another sales location. Sometimes they feel inferior based on the follow-up responses by salespeople to their questions. Sometimes they feel they have been cheated and have nowhere to turn.

This buyer-seller association is one of the oldest types of connections in the world. Customer relations have been an issue as long as there have been products or services and something to exchange in return.

Although this relationship can be positive and enjoyable for both sides, many organizational leaders in today's fast-paced world seem to have forgotten basic rapport-building rules when dealing with customers. Good relationships are built when basic rules are followed. Disintegrating relationships occur when organizations do not make use of positive customer relations.

Activities and Grading:

Points

Quizzes (3 @ 25 points each)	75
Individual technical product presentation and written proposal	50
Team case study presentation and written report	75
Listening exercises (2 @ 25 points each)	50
Quantity, quality and professionalism of class participation	<u>50</u>
TOTAL Points in Course	<u>300</u>

Course Activities:

QUIZZES: Quizzes will be administered throughout the quarter. You will be quizzed on information from the assigned readings, lectures, and guest speakers. You will be notified of a planned quiz the lecture before it is administered. Bring a SCANTRON answer sheet to **every** class. You might also be assigned learning exercises that would count as a quiz score.

INDIVIDUAL TECHNICAL PRODUCT PRESENTATION AND WRITTEN PROPOSAL: Role-plays are a great opportunity to practice and develop your selling and presentation skills.

1. First, you will be given an industrial product to sell. A wide variety of products will be used, each with their own distinctive qualities. Your challenge is to develop an effective sales approach for your product, regardless of how new, old, simple, or technical it may be.
2. Second, you will identify and research a realistic buyer for the product and the context for the sale (e.g., Intel is trying to reduce its demand for electricity in its manufacturing operations.)
3. Third, you will prepare a sales presentation that effectively communicates technical (i.e., related to the application of the product in the manufacturing process), financial, and strategic reasons for the customer to purchase your solution (your presentation must account for all three types of reasons), and you will give the presentation to your instructor (role-playing-buyer) in class.
4. Finally, you will accompany the verbal presentation with a written proposal (3 pages) that could be left behind with the customer and distributed to key decision makers who did not view your presentation.

TEAM CASE STUDY: In this project, you will have an opportunity to interact with an actual firm and its manufacturing customers, learn how industrial sales have occurred, and prescribe sales strategies for future efforts.

1. As a team, identify a manufacturing industry that interests you, and a buyer-seller exchange within that industry.
2. Conduct a basic industry analysis of both the seller and buyer's industries. Describe the industry, the major competitors, and the most significant trends currently affecting both industries.
3. With the help of both the seller and the buyer, establish the basic buying situation that led to the eventual sale that you are researching. What circumstances, activities, or relationships led to the sale that you are studying?
4. Prepare a decision making profile that explains the who, when, where, how, and why's of the sale. It is often helpful to build a timeline of events that eventually led to a transaction.
5. Using the industrial sales audit worksheet that will be provided, and any additional criteria that you feel are important, critically analyze the entire sale (that is, identify both the strengths and weaknesses) and suggest future sales strategies for the seller as it seeks to build profitable customer relationships for its future.
6. You will, then, present your findings as a team to the class, both in the form of a verbal presentation and written report. In your presentation and/or written report, be sure to explain why you selected your industry, how you located the buyer and sellers, the efforts you made to gather the information for this project, the challenges you faced, and how you overcame them. This content is in addition to the sales strategy assessment that is the core of the project.

SPECIAL NOTE: FOR THE TEAM CASE STUDY: YOU WILL BE PUT INTO A TEAM. IT IS CRITICAL THAT YOUR TEAM SELECTS A LOCAL (OR OTHER-APPROVED) COMPANY TO WHICH YOU WILL HAVE SIGNIFICANT ACCESS AND THAT SUPPORTS INDUSTRIAL SALES, IN ORDER TO SUCCESSFULLY COMPLETE THE ASSIGNMENT.

LISTENING EXERCISES: You will be provided with a copy of a chapter from Stephen Covey's book *The Seven Habits of Highly Effective People* titled "Seek First to Understand, Then Be Understood" that describes an approach to listening called empathic listening. You will need to read this chapter when assigned and apply it to two conversations that you have, and then reflect on how the conversations turned out in comparison to the typical conversations you have with people, particularly when you have conflicting opinions about emotional issues. You'll discover this to be an eye-opening experience, and one that will help you become a more effective listener in all aspects of your life.

CLASS PARTICIPATION: Class participation will be graded based on your professionalism, attendance and punctuality, preparation for each class, active participation in class discussions and role-plays, and the quality of your interaction with your instructor, guest speakers, clients, and your student colleagues.

Course Calendar

Date	Topic / Activity	Required Deliverables
3/31(Monday)	Holiday	None
4/2 (Wed.)	-Instructor & course introductions -What is industrial sales?	Purchase <i>Hope is Not a Strategy</i> and read Section I (chapters 1-5) by 4/18.
4/7 (Monday)	-The typical responsibilities and activities of an industrial salesperson -Effective sales presentation techniques	-Assign products for individual technical product presentations. -Read Industrial Sales Delivery ---- Fundamentals-before class
4/9 (Wed.)	The qualities and competencies of an effective industrial salesperson/ Effective listening strategies (Demonstration Pres.)	Read "Seek First to Understand, Then be Understood" from <i>The 7 Habits of Highly Effective People</i> .
4/14(Monday)	Selling to an operations manager: quantifying value and quality	Begin individual technical product presentations in class, ~ 5 / day
4/16(Wed.)	Guest Speaker	Listening Exercise #1 Due
4/21 (Monday)	Team Selling- team meetings for team case study	Read Section II (chapters 6 - 12) of <i>Hope is Not a Strategy</i> by 5/9.
4/23(Wed.)	Becoming a student of your customer's business	
4/28 (Mon.)	Understanding the customer decision making process	
4/30 (Wed.)	Team Case Study Projects	
5/5 (Monday)	The distinctive challenges of selling technical solutions	
5/7(Wed.)	Strategic Selling– team meetings for team case study	
5/12 (Monday)	Negotiations in sales Part I	Read Section III and IV (chapters 13 - 17) of <i>Hope is Not a Strategy</i> by 5/23.
5/14 (Wed.)	Negotiations in sales Part II	Listening Exercise #2 Due
5/19(Monday)	Managing a sales territory	
5/24 (Wed.)	Managing a sales force/Guest Speaker	
5/26(Monday)	Holiday-Tuesday 5/28 Class (Monday Schedule) Industrial Sales-Bringing It All Together	
5/28(Wed.)	Team Case Presentations	Team Case Study Reports due at the time of Presentation
6/2(Monday)	Team Case Presentations	Team Case Study Reports due at the time of Presentation
6/6 (Wed.)	Prep for Final	
6/9– 6/13	Final Exam	

Notes:

- All assignments are due at 10:10 AM on their due date in class. Late assignments will receive limited credit.
- Students are responsible for checking announcements on the PolyLearn Course Page for modifications to this schedule.
- Students will be given notice of upcoming quizzes in class, verbally, one class session before they are administered, and no prior written notifications will be provided on PolyLearn.

Students with Special Needs:

If you have a disability for which you are or may be requesting an accommodation, you are encouraged to contact both me and the Disability Resource Center (DRC), Building 124, Room 119, (805)756-1395 or email drc@calpoly.edu as early as possible in the quarter.

Code of Conduct:

Improper academic conduct shall be interpreted to mean the obtaining and using of information during an examination by means other than those permitted by the instructor, including supplying such information to other students. All forms of academic dishonesty, including cheating, plagiarism, and falsification of academic records are subject to disciplinary action.

Student Privacy (FERPA):

If you have chosen to protect your Directory Information (which includes name and email), it is important you communicate this to your instructor prior to or on the first day of class. This course uses Blackboard tools that will display students' full names and email addresses