



## Marketing

### SAMPLE ROLE PLAY 3

#### PARTICIPANT INSTRUCTIONS

- You have 20 minutes to review the information and prepare your presentation. You can take notes for the presentation.
- During preparation, give an ID label to your adult assistant.
- Your presentation is 7 minutes long. You'll get a 1-minute warning when the timekeeper holds up a colored card. When time is up, the timekeeper will hold up a colored card, and you must stop immediately.
- After the presentation, you have up to 3 minutes to answer the judge's questions.
- Every team member must participate in both the presentation and answering questions.
- Turn in all notes and materials when you're done.

#### PERFORMANCE INDICATORS

- Explain the role of customer loyalty programs in building repeat business.
- Identify ways to create a unique store atmosphere and customer experience.
- Describe how to use community partnerships to increase brand awareness.
- Explain the importance of product mix and inventory management in retail.
- Explain strategies for effectively positioning a brand in a competitive market.

SAMPLE

## CASE STUDY SITUATION

You are to assume the roles of marketing consultants for LAKESIDE BOOKSTORE, an independent bookstore that has served the community for 18 years. The owner (judge) has hired your firm to develop a marketing plan to increase foot traffic, build customer loyalty, and compete more effectively against online retailers and large bookstore chains.

LAKESIDE BOOKSTORE is a locally-owned independent bookstore located in a historic downtown district. The store specializes in curated book selections, hosts author events, offers a cozy reading café, and provides personalized recommendations from knowledgeable staff. The store has maintained a loyal core customer base of avid readers aged 35-60 who appreciate the personal touch and community atmosphere that the store provides.

Over the past three years, sales have declined by 30%, and daily customer traffic has decreased significantly. Many customers now browse the store but purchase books online for lower prices and convenience. A major bookstore chain opened a superstore 10 miles away, offering discounts and a larger selection. Additionally, e-readers and audiobook subscriptions have changed how people consume books. While some independent bookstores have thrived by creating destination experiences and building strong community connections, LAKESIDE BOOKSTORE has struggled to adapt its business model. The store's marketing efforts have been limited to a basic website, email newsletter, and occasional newspaper ads.

The owner recognizes that the store must evolve beyond simply selling books to survive. Recent surveys show that customers value the store's atmosphere, staff expertise, and community events, but many don't visit frequently enough. The owner has asked your team to develop a comprehensive marketing plan to increase visits, build stronger customer relationships, and position the store as a community gathering place rather than just a retail location.

You must address the following in your presentation:

- What unique advantages the bookstore has and how to leverage them
- Strategies to increase customer visits and build stronger loyalty
- Ways to create experiences that compete with online shopping convenience

Your team will present the plan to the owner (judge) in a meeting at the bookstore. The owner (judge) will begin the presentation by greeting your team and asking to hear the plan. After the plan has been presented and you have answered the owner's (judge's) questions, the owner (judge) will conclude the meeting by thanking you for your work.

## JUDGE'S INSTRUCTIONS

You are to assume the role of owner of LAKESIDE BOOKSTORE. You have hired a team of marketing consultants (participant team) to develop a marketing plan to increase foot traffic, build customer loyalty, and compete more effectively against online retailers and large bookstore chains.

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You recognize that the store must evolve beyond simply selling books to survive. Recent surveys show that customers value the store's atmosphere, staff expertise, and community events, but many don't visit frequently enough. You have asked the team of marketing consultants (participant team) to develop a comprehensive marketing plan to increase visits, build stronger customer relationships, and position the store as a community gathering place rather than just a retail location.

The marketing consultants (participant team) should address the following in their presentation:

- What unique advantages the bookstore has and how to leverage them
- Strategies to increase customer visits and build stronger loyalty
- Ways to create experiences that compete with online shopping convenience

The consultants (participants) will present the plan to you in a meeting to be held at the bookstore. You are to begin the presentation by greeting the consultants (participants) and asking to hear the plan.

### Presentation Procedure

- Participants receive 20 minutes of preparation time prior to presenting. Presentations will be scheduled at 10–15 minute intervals.
- Please place the participant team's name and ID number in the upper right-hand corner of the Evaluation Form.
- During the first 7 minutes, the team presents their analysis, recommendations, and rationale. Allow them to complete this portion without interruption unless a question is required. Timekeeper will provide 1-minute warning and indicate when time is up.
- During the next 3 minutes, ask questions to determine understanding. Each team member should respond to at least one question. Ask the same standard questions to all teams, then any team-specific questions.
- After questioning, conclude by thanking the participants and complete the Evaluation Form, recording scores for all categories. Maximum score is 100 points.

## JUDGING THE PRESENTATION

### Judge Responsibilities

- Listen to the full presentation without interruption.
- Ask the standard questions provided (plus any team-specific questions).
- Score the participants using the **Response Criteria**, **Performance Indicators**, and **Presentation Criteria**.
- Conclude the meeting by thanking participants.

### Response Indicators

Evaluate the participant's ability to analyze the business situation and develop strategic recommendations using the following criteria:

- Demonstrates understanding of the role play and defines the business objectives.
- Identifies logical solution and develops implementation plan.

### Performance Indicators

Ensure that the scores reflect the participant's understanding and application of the performance indicators:

- Explain the role of customer loyalty programs in building repeat business.
- Identify ways to create a unique store atmosphere and customer experience.
- Describe how to use community partnerships to increase brand awareness.
- Explain the importance of product mix and inventory management in retail.
- Explain strategies for effectively positioning a brand in a competitive market.

### Presentation Criteria

Evaluate the quality of the presentation itself using the following presentation criteria:

- Statements are well-organized and clearly stated; demonstrates preparedness.
- Consistently displays confidence, poised body language, engaging eye contact, and effective voice projection.
- Demonstrates the ability to effectively answer the judges' questions.

### Standard Questions

After the initial presentation you are to ask the following questions of each participant team:

1. How can we get customers to buy books here instead of just browsing and then purchasing online?
2. What potential challenges might we face in implementing these strategies, and how could we address them?
3. How would you ensure that your plan appeals to both current loyal customers and new prospects?
4. What should we realistically expect in terms of sales improvement, and over what timeframe?

### Scoring Definitions

- **Exceeds Expectations:** Information is presented effectively and creatively; nothing more could be expected.
- **Meets Expectations:** Information is presented well; minor problems or omissions may exist but are not significant. Creativity may be limited.
- **Below Expectations:** Presentation does not meet minimum standards of acceptability.
- **Little/No Value:** Major flaw or omission significantly reduces effectiveness, or the information presented is of no value.

## JUDGE'S EVALUATION FORM

**Event:** Marketing Role Play

Response Criteria	Exceeds Expectations	Meets Expectations	Below Expectations	Little/No Value	Judged Score
Demonstrates understanding of the role play and defines the business objectives	10-9	8-7-6	5-4-3	2-1-0	_____
Identifies logical solution and develops implementation plan	10-9	8-7-6	5-4-3	2-1-0	_____

**Case Analysis & Response Subtotal:** \_\_\_\_\_ / 20

Performance Indicator <i>Did the Participant:</i>	Exceeds Expectations	Meets Expectations	Below Expectations	Little/No Value	Judged Score
Explain the role of customer loyalty programs in building repeat business?	10-9	8-7-6	5-4-3	2-1-0	_____
Identify ways to create a unique store atmosphere and customer experience?	10-9	8-7-6	5-4-3	2-1-0	_____
Describe how to use community partnerships to increase brand awareness?	10-9	8-7-6	5-4-3	2-1-0	_____
Explain the importance of product mix and inventory management in retail?	10-9	8-7-6	5-4-3	2-1-0	_____
Explain strategies for effectively positioning a brand in a competitive market?	10-9	8-7-6	5-4-3	2-1-0	_____

**Performance Indicators Subtotal:** \_\_\_\_\_ / 50

Presentation Criteria	Exceeds Expectations	Meets Expectations	Below Expectations	Little/No Value	Judged Score
Statements are well-organized and clearly stated; demonstrates preparedness?	10-9	8-7-6	5-4-3	2-1-0	_____
Consistently displays confidence, poised body language, engaging eye contact, and effective voice projection?	10-9	8-7-6	5-4-3	2-1-0	_____
Demonstrates the ability to effectively answer the judges' questions?	10-9	8-7-6	5-4-3	2-1-0	_____

**Presentation Subtotal:** \_\_\_\_\_ / 30

**Total Points:** \_\_\_\_\_ / 100