

## Western Technical College

10104164 Principles of Inside Sales

# Course Design

### Course Information

|  |  |  |
| --- | --- | --- |
|  | Description | This course will focus on the tools, strategies and techniques of inside sales including: pre-call planning, prospecting and qualifying leads, developing value statements, the role of social media in the sales process and follow up. This course will place special emphasis on the hands on application of a Customer Relationship Management (CRM) system and other technologies. |
|  | Career Cluster | Marketing |
|  | Instructional Level | Associate Degree Courses |
|  | Total Credits | 3.00 |
|  | Total Hours | 54.00 |

Types of Instruction

|  |  |
| --- | --- |
| Instruction Type | Credits/Hours |
| Lecture | 3 CR / 54 HR |

Pre/Corequisites

|  |  |
| --- | --- |
| Prerequisite | 10104119 Selling Principles |

Textbooks

|  |
| --- |
| *Business 2000 Selling Learner Guide*.  Copyright 2003. Greene, Cynthia L. Publisher: Cengage Learning. **ISBN-13**: 978-0-538-43145-3. Required. |

### Core Abilities

|  |  |
| --- | --- |
| 1. | Apply mathematical concepts. |
| 2. | Demonstrate ability to think critically. |
| 3. | Demonstrate ability to value self and work ethically with others in a diverse population. |
| 4. | Make decisions that incorporate the importance of sustainability. |
| 5. | Transfer social and natural science theories into practical applications. |
| 6. | Use effective communication skills. |
| 7. | Use technology effectively. |

### Program Outcomes

|  |  |
| --- | --- |
| 1. | Model professionalism in the workplace |
| 2. | Demonstrate effective workplace communications |
| 3. | Incorporate Customer Service Principles into Client or Customer Interaction |
| 4. | Prepare selling strategies |
| 5. | Integrate appropriate sales tools into the selling process |

### Course Competencies

|  |  |  |  |
| --- | --- | --- | --- |
| 1. | Explore career pathways for inside sales representatives. | | |
|  | Assessment Strategies | | |
|  | 1.1. | Reflection | |
|  | 1.2. | Presentation | |
|  | Criteria | | |
|  | Performance will meet expectations when: | | |
|  | 1.1. | Learner outlines a potential inside sales positions. | |
|  | 1.2. | Learner differentiates between inside and outside sales roles. | |
|  | 1.3. | Learner outlines skills requirements. | |
|  | 1.4. | Learner describes working conditions. | |
|  | 1.5. | Learner outline sample compensation model. | |
|  | 1.6. | Learner reflects on current and past work experience. | |
|  | 1.7. | Learner reflects on personal desired work conditions and hours. | |
|  | 1.8. | Learner outlines they ways in which and inside sales position could fit in to short or long term career goals. | |
|  | Learning Objectives | | |
|  | 1.a. | Differentiate between Inside and Outside Sales. | |
|  | 1.b. | Describe the continuum of inside sales from account management to hunt and kill. | |
|  | 1.c. | Describe the hybrid nature of most inside sales roles. | |
|  | 1.d. | Discuss the salary rate ranges based on industry and company. | |
|  | 1.e. | Discuss the variety of compensation models for Inside Sales Representatives. | |
|  | 1.f. | Explain the variety of ways companies define Inside Sales. | |
| 2. | Use various social selling tools. | | |
|  | Assessment Strategies | | |
|  | 2.1. | Skill Demonstration | |
|  | Criteria | | |
|  | Performance will meet expectations when: | | |
|  | 2.1. | Learner sets up a social media account. | |
|  | 2.2. | Learner researches a potential target using a social media account. | |
|  | 2.3. | Learner follows five prospects via a social media account. | |
|  | 2.4. | Learner joins a selling group or organization on a social media account. | |
|  | Learning Objectives | | |
|  | 2.a. | Explain emerging social selling trends. | |
|  | 2.b. | Compare the applications of social selling in today's marketplace. | |
|  | 2.c. | Describe how Twitter is used for social selling. | |
|  | 2.d. | Describe how LinkedIn is used for social selling. | |
|  | 2.e. | Describe how Google is used for social selling. | |
| 3. | Use customer relationship management tools. | | |
|  | Assessment Strategies | | |
|  | 3.1. | Skill Demonstration | |
|  | Criteria | | |
|  | Performance will meet expectations when: | | |
|  | 3.1. | Learner describes how to create and edit contacts. | |
|  | 3.2. | Learner describes how to add and delete accounts. | |
|  | 3.3. | Learner outlines an appropriate workflow from lead to close. | |
|  | 3.4. | Learner recognizes the limitations of any CRM tool. | |
|  | Learning Objectives | | |
|  | 3.a. | Describe basic lead management. | |
|  | 3.b. | Describe the process of working with opportunities. | |
|  | 3.c. | Describe how to schedule events and tasks. | |
|  | 3.d. | Describe the management function of a CRM. | |
|  | 3.e. | Describe the function of a CRM in the context of the larger organizational divisions. | |
|  | 3.f. | Explain the connection between social selling and salesforce.com. | |
|  | 3.g. | Explain the role accurate data inputs impact the effectiveness of the CRM as a business tool. | |
| 4. | Explore the role of relationships in account management. | | |
|  | Assessment Strategies | | |
|  | 4.1. | Written Product | |
|  | Criteria | | |
|  | Performance will meet expectations when: | | |
|  | 4.1. | Learner articulates the ways in which companies can measure the success of inside sales activities. | |
|  | 4.2. | Learner describes the role of sales goals. | |
|  | 4.3. | Learner differentiates between the time spent managing accounts, growing existing accounts and bringing in net new accounts. | |
|  | 4.4. | Learner describes relationship development and maintenance techniques. | |
|  | Learning Objectives | | |
|  | 4.a. | Assess viability of customer accounts. | |
|  | 4.b. | Describe the role of up-selling in inside sales. | |
|  | 4.c. | Discuss the importance of customer relationship management. | |
|  | 4.d. | Explore effective communication skills needed in the development and maintenance of relationships. | |
|  | 4.e. | Discuss conflict diffusion techniques. | |
| 5. | Apply customer retention strategies. | | |
|  | Assessment Strategies | | |
|  | 5.1. | Simulation | |
|  | Criteria | | |
|  | Performance will meet expectations when: | | |
|  | 5.1. | Learner leads and guides conversation with customer. | |
|  | 5.2. | Learner uses questions and active listening techniques to identify why the customer is upset. | |
|  | 5.3. | Learner uses de-escalation techniques throughout conversation. | |
|  | 5.4. | Learner's voice inflection, volume, and rate are appropriate for the content. | |
|  | 5.5. | Learner's nonverbal communication is consistent with your verbal message. | |
|  | 5.6. | Learner provides the customer with a value added solution. | |
|  | Learning Objectives | | |
|  | 5.a. | Discuss the role of SWOT analysis in customer retention. | |
|  | 5.b. | Describe ways to diffuse conflict using de-escalation techniques. | |
|  | 5.c. | Describe the role of active listening in information gathering. | |
|  | 5.d. | Describe techniques for understanding customer pain points. | |
|  | 5.e. | Outline methods for building loyalty. | |
|  | 5.f. | Discuss the role of upselling in customer retention. | |
| 6. | Outline best practices for outbound communication efforts. | | |
|  | Assessment Strategies | | |
|  | 6.1. | Demonstration | |
|  | 6.2. | Written Product | |
|  | Criteria | | |
|  | Performance will meet expectations when: | | |
|  | 6.1. | Learner describes the best way to deal with voice mail and e-mail follow up. | |
|  | 6.2. | Learner discusses strategies for effective e-mail subject lines. | |
|  | 6.3. | Learner describes effective e-mail openings. | |
|  | 6.4. | Learner differentiates between casual and professional but personal communication styles. | |
|  | 6.5. | Learner addresses the contact with appropriate title, name and company. | |
|  | 6.6. | Learner introduces themselves in a professional manner. | |
|  | 6.7. | Learner describes a product or service in clear, descriptive language. | |
|  | 6.8. | Learner states a call to action. | |
|  | Learning Objectives | | |
|  | 6.a. | Discuss the purpose and essential steps of the sales call. | |
|  | 6.b. | Describe how to handle the difficulties that may arise during the sales call. | |
|  | 6.c. | Describe how to gain the prospects participation in the sales call. | |
|  | 6.d. | Discuss follow up strategies. | |
|  | 6.e. | Discuss mass e-mail etiquette. | |
|  | 6.f. | Differentiate between personal and mass mail techniques. | |
| 7. | Outline methods for growing a book of business. | | |
|  | Assessment Strategies | | |
|  | 7.1. | Written Product | |
|  | Criteria | | |
|  | Performance will meet expectations when: | | |
|  | 7.1. | Learner identifies 3 opportunities for business growth. | |
|  | 7.2. | Learner outlines a short term plan for implementing opportunities. | |
|  | 7.3. | Learner outlines a long term plan for implementing opportunities. | |
|  | 7.4. | Learner outlines upselling techniques to support organic growth. | |
|  | Learning Objectives | | |
|  | 7.a. | Describe interpersonal methods for developing trust. | |
|  | 7.b. | Discuss the role of trust and accountability in relationship building. | |
|  | 7.c. | Describe ways in which a CRM can be used as a tool to recognize opportunity. | |
|  | 7.d. | Describe the importance of building on success to target like-minded customers. | |
|  | 7.e. | Examine best practices for devising short term and long term plans for implementing opportunities for growth. | |
| 8. | Examine the process of preparing to sell. | | |
|  | Assessment Strategies | | |
|  | 8.1. | Written Product | |
|  | Criteria | | |
|  | Performance will meet expectations when: | | |
|  | 8.1. | Learner describes the importance of researching potential customers in the preparation process. | |
|  | 8.2. | Learner outlines methods for researching potential target companies. | |
|  | 8.3. | Learner describes the importance of seeking institutional knowledge in the research process. | |
|  | 8.4. | Learner identifies potential points of connection with the potential buyer. | |
|  | 8.5. | Learner outlines methods for leveraging relationships to grow business. | |
|  | 8.6. | Learner outlines reasons why a potential customer might buy a particular product or service. | |
|  | 8.7. | Learner outlines possible objections. | |
|  | 8.8. | Learner describes possible ways to overcome particular objections. | |
|  | 8.9. | Learner outlines strengths and weaknesses of a competing product. | |
|  | Learning Objectives | | |
|  | 8.a. | Explain the role of needs satisfaction in the sales process. | |
|  | 8.b. | Explain how knowledge of the product is important to a salesperson. | |
|  | 8.c. | Discuss the importance of understanding the competition. | |
|  | 8.d. | Describes methods for understanding company goals and objectives. | |
|  | 8.e. | Describe methods for understanding buyer needs and motives. | |
|  | 8.f. | Explain the importance of matching product to goals and objectives. | |
| 9. | Use virtual meeting tools to communicate. | | |
|  | Assessment Strategies | | |
|  | 9.1. | Simulation | |
|  | Criteria | | |
|  | Performance will meet expectations when: | | |
|  | 9.1. | Learner adjusts camera, microphone, and volume to effectively conduct the virtual meeting. | |
|  | 9.2. | Learner's voice inflection, volume, and rate are appropriate for the content. | |
|  | 9.3. | Learner's nonverbal communication is consistent with your verbal message. | |
|  | Learning Objectives | | |
|  | 9.a. | Research various virtual meeting tools. | |
|  | 9.b. | Practice using various virtual meeting tools. | |
|  | 9.c. | Identify similarities and differences between meetings conducted face to face vs. virtual meeting tool. | |
|  | 9.d. | Demonstrate how to adjust camera, microphone, and volume to effectively conduct the virtual meeting. | |
| Meta Data Tags: | | |
| Inside sales strategies; inside sales techniques; pre-call planning; qualifying leads, value statements; social media; selling process; customer relationship management tools (CRM); virtual meeting tools; de-escalation techniques | | |

### Course Learning Plans and Performance Assessment Tasks

Learning Plan 1 - Inside Sales Careers

Overview/Purpose

Students are presented with a holistic overview of career pathways for inside sales representatives.  Students will also take the time to self-assess, and visualize potential opportunities for the future.

Target Competencies

|  |  |  |
| --- | --- | --- |
| 1. | Explore career pathways for inside sales representatives. | |
|  | Assessment Strategies | |
|  | 1.1. | Reflection |
|  | 1.2. | Presentation |

### Learning Activities

|  |  |
| --- | --- |
| 1. | **Review** competency and learning objectives. |
| 2. | **Read** instructor prepared materials. |
| 3. | **Listen** to instructor's lecture on career pathways for inside sales representatives. |
| 4. | **Research** the internet and identify various career websites. |
| 5. | **Participate** in instructor designed small group presentations relating to career pathways for inside sales representatives. |

### Assessment Activities

|  |  |
| --- | --- |
| 1. | COMPLETE PAT - Inside Sales Positions |

Inside Sales Positions

Directions

**Reflection:**

Learner will research career websites and choose one inside sales position.  Learner will create a two-page written assignment to hand in to instructor.  Page one of the reflection is the researched position, copied and pasted (citation needed).  Page two of the reflection is a summary of the following questions:

1)  What is the difference between an outside sales position and an inside sales position?  How do you know this is an inside sales position?

2)  What are the skill requirements for this position?

3)  What are the working conditions for this position?

4)  What is the compensation?

 )  Reflect on your current and past work experience, as well as your desired work conditions and hours.  Based on this information, would this position potentially be a good fit for you? Why or why not?

**Presentation:**

Learner will prepare and deliver a 5 minute presentation to the class regarding the above listed information.

Target Course Competencies

|  |  |
| --- | --- |
| 1. | Explore career pathways for inside sales representatives. |

### Scoring

Rating Scale

|  |  |
| --- | --- |
| Value | Description |
| 5 | Consistently Exceeds Expectations.  Displays at all times, without exception, a consistently high level of skill.  All assignments/task are completed beyond the level of expectation.  Initiative and self-direction are characteristic. |
| 4 | Often Exceeds Expectations.  Displays a high level of skill, exceeding requirements in some areas, but not consistently or not without exception. |
| 3 | Meets Expectations.  Displays and maintains an effective and consistent level of skill.  Work output regularly achieves desired or required outcomes or expectations.  Problems or errors are reported and corrected quickly. |
| 2 | Some Improvement Needed.  Displays inconsistency in performance and frequently falls below acceptable levels.  Tasks may be significantly late at times or incomplete, with serious or potentially serious consequences. |
| 1 | Major Improvement Needed.  Output is consistently low, regularly fails to meet criterion, and error rate is high requiring repetition. |
| 0 | No evidence of meeting requirement. |
| Met | Fully or adequately met expectations |
| Not Met | Partially met or failed to meet expectations |

Scoring Standard

A minimum of 3 must be earned on all criteria and must meet all met/not met criteria to demonstrate competency.

### Scoring Guide

|  |  |  |
| --- | --- | --- |
|  | Criteria | Ratings |
| **1.** | **Reflection** |  |
| 2. | Learner differentiates between an outside sales position and an inside sales position. | 5 4 3 2 1 0 |
| 3. | Learner identifies why the chosen position is an inside sales position. | 5 4 3 2 1 0 |
| 4. | Learner outlines skill requirements for this position. | 5 4 3 2 1 0 |
| 5. | Learner describes working conditions for this position. | 5 4 3 2 1 0 |
| 6. | Learner outlines compensation for this position. | 5 4 3 2 1 0 |
| 7. | Learner reflects on current and past work experience. | 5 4 3 2 1 0 |
| 8. | Learner reflects on personal desired work conditions and hours. | 5 4 3 2 1 0 |
| 9. | Learner assesses fit of position for self | 5 4 3 2 1 0 |
| 10. | Learner chooses one inside sales position from a career website | Met Not Met |
| 11. | Page one is the position from the internet (copied and pasted) | Met Not Met |
| 12. | Page one position is cited | Met Not Met |
| 13. | Reflection shows evidence of logical critical thinking | Met Not Met |
| 14. | Reflection follows an effective organizational plan | Met Not Met |
| 15. | Reflection exhibits correct and appropriate grammar, punctuation, spelling, syntax, and word usage | Met Not Met |
| 16. | Reflection follows written assignment guidelines | Met Not Met |
| **17.** | **Presentation** |  |
| 18. | Learner differentiates between an outside sales position and an inside sales position. | 5 4 3 2 1 0 |
| 19. | Learner identifies why the chosen position is an inside sales position. | 5 4 3 2 1 0 |
| 20. | Learner outlines skill requirements for this position. | 5 4 3 2 1 0 |
| 21. | Learner describes working conditions for this position. | 5 4 3 2 1 0 |
| 22. | Learner outlines compensation for this position. | 5 4 3 2 1 0 |
| 23. | Learner reflects on current and past work experience. | 5 4 3 2 1 0 |
| 24. | Learner reflects on personal desired work conditions and hours. | 5 4 3 2 1 0 |
| 25. | Learner assesses fit of position for self | 5 4 3 2 1 0 |
| 26. | Learner introduces self | Met Not Met |
| 27. | Learner completes presentation with a conclusion | Met Not Met |
| 28. | Presentation is completed in 5 minutes or less | Met Not Met |
| 29. | Delivery holds audience attention; you are energetic and enthusiastic | Met Not Met |
| 30. | Learner’s voice inflection, volume, and rate are appropriate for the content | Met Not Met |
| 31. | Learner’s nonverbal communication is consistent with your verbal message | Met Not Met |
| 32. | Learner presents information in a style and tone consistent with the audience’s level of interest and level of understanding | Met Not Met |
| 33. | Main points are clear and concise | Met Not Met |
| 34. | Main points are well organized | Met Not Met |

Learning Plan 2 - Social Media

Overview/Purpose

Businesses have a common goal: to get their product/service to their target audience.  One way to do this is through social media.  Because of the ever-expanding, tech-savvy world, students will explore this huge potential for social media marketing to increase sales.

Target Competencies

|  |  |  |
| --- | --- | --- |
| 1. | Use various social selling tools. | |
|  | Assessment Strategies | |
|  | 1.1. | Skill Demonstration |

### Learning Activities

|  |  |  |  |
| --- | --- | --- | --- |
| 1. | **Review** competency and learning objectives. | | |
| 2. | **Read** instructor prepared materials. | | |
| 3. | **Listen** to instructor's lecture on the role of social media in sales. | | |
| 4. | **Set-up** a Linkedin account. | | |
|  | Learning Materials | | |
|  | Linkedin | [Linked In](https://www.linkedin.com/) |
| 5. | **Create** alerts in Linkedin. | | |
| 6. | **Recognize** sales events. | | |

### Assessment Activities

|  |  |  |  |
| --- | --- | --- | --- |
| 1. | SUBMIT journal entry regarding comfort level with LinkedIn.  What aspects of LinkedIn are you comfortable with?  What are some opportunities for improvement?  Choose 2 opportunities for improvement, and outline a plan for gaining confidence in these areas.  See attached journal rubric to earn most points. | | |
|  | Learning Materials | | |
|  | Journal Rubric | [Journal Rubric.docx](https://westerntc.wids.org//PublicDocuments.axd?DocumentID=45c1f37e-9f42-4e0f-828a-bb9dd8331a6b) |
|  | Linkedin | [Linked In](https://www.linkedin.com/) |
| 2. | PRESENT to classmates a product/service for sale remotely via Skype.  See attached rubric. | | |
|  | Learning Materials | | |
|  | Sales Presentation via Skype rubric | [Sales Presentation via Skype Rubric.docx](https://westerntc.wids.org//PublicDocuments.axd?DocumentID=6e9db1df-5cd8-413e-93ed-590971674877) |
| 3. | SUBMIT journal entry on the pros/cons of presenting face-to-face versus remotely (ex: using Skype).  Identify 3 Pros and 3 Cons.  Overall, which method of presenting do you prefer and why?  See attached journal rubric to earn most points. | | |
|  | Learning Materials | | |
|  | Journal Rubric | [Journal Rubric.docx](https://westerntc.wids.org//PublicDocuments.axd?DocumentID=45c1f37e-9f42-4e0f-828a-bb9dd8331a6b) |

Learning Plan 3 - Customer Relationship Management

Overview/Purpose

Customer Relationship Management (CRM) tools provide a place to store invaluable customer details.  Proper utilization of CRM tools result in positive relationships with businesses and organizations. This lesson will offer an opportunity to explore various CRMs.

Target Competencies

|  |  |  |
| --- | --- | --- |
| 1. | Use customer relationship management tools. | |
|  | Assessment Strategies | |
|  | 1.1. | Skill Demonstration |

### Learning Activities

|  |  |
| --- | --- |
| 1. | **Review** competency and learning objectives. |
| 2. | **Read** instructor prepared materials. |
| 3. | **Listen** to instructor's lecture on Customer Relationship Management (CRM) tools. |
| 4. | **Set-up** instructor chosen CRM trial account. |
| 5. | **Use** trial account to determine features. |
| 6. | **Discuss** various CRMs.  Identify pros/cons of each CRM.  In your opinion, which CRM is best?  Why? |
| 7. | **Reflect** upon the PAT - Collaboration: Social Media and CRM tools.  After completing the PAT, reflect on the possibility of collaboration between social media and CRM tools for inside sales careers.  Identify positives and negatives of this collaboration.  In your opinion, could this potential collaboration be effective for an inside sales career?  Why or Why not? |

### Assessment Activities

|  |  |  |  |
| --- | --- | --- | --- |
| 1. | SUBMIT journal entry regarding how to use a customer relationship management tool (CRM) in your sales career. What is your overall opinion of the instructor-chosen CRM tool - why?  See attached journal rubric to earn most points. | | |
|  | Learning Materials | | |
|  | Journal Rubric | [Journal Rubric.docx](https://westerntc.wids.org//PublicDocuments.axd?DocumentID=4db108c1-e236-4c42-a5f3-acf702ad8c83) |
| 2. | COMPLETE PAT - Collaboration: Social Media and Customer Relationship Management (CRM) Tools | | |

Collaboration: Social Media and Customer Relationship Management (CRM) Tools

Directions

**Skill Demonstration:**

This skill demonstration will be peer reviewed.  Learner will choose a student from class as a partner.   Each learner will complete the following skill demonstration, while the partner watches, and assesses by using the instructor-designed rubric.

There are three steps to this skill demonstration: 1) Creating a Social Media Account, 2) Creating a Customer Relationship Management (CRM) Account, and 3) Researching information via a Social Media Account to input information into a Customer Relationship Management (CRM) Account.

**::: Step 1 :::  Creating a Social Media Account**

* Learner will set up an instructor-chosen social media account by creating a username and password.
* Learner will join a selling group or organization via the social media account.
* Learner will identify five prospects via the social media account.
* Learner will follow five prospects via the social media account.
* Learner will research one potential target via the social media account.

**::: Step 2 :::  Creating a Customer Relationship Management (CRM) Account**

* Learner will set up an instructor-chosen CRM account by creating a username and password.
* Learner describes to partner how to create and edit contacts in the CRM.
* Learner describes to partner how to add and delete accounts in the CRM.

**::: Step 3 :::  Learner researches one potential target from a Social Media Account to input information into a Customer Relationship Management (CRM) Account.**

* Learner creates a contact in the CRM using the information researched for one potential target from the social media account.
* Learner creates an account in the CRM using the information researched for one potential target from the social media account.
* Learner outlines to their partner an appropriate workflow from lead to close
* Learner explains to their partner the limitations of a CRM.

## Target Course Competencies

|  |  |
| --- | --- |
| 1. | Use various social selling tools. |
| 2. | Use customer relationship management tools. |

### Scoring

Rating Scale

|  |  |
| --- | --- |
| Value | Description |
| Met | Fully or adequately met expectations |
| Not Met | Partially met or failed to meet expectations |

Scoring Standard

You must score a "met" on all met/not met criteria to demonstrate competency.

### Scoring Guide

|  |  |  |
| --- | --- | --- |
|  | Criteria | Ratings |
| **1.** | **Skill Demonstration:** |  |
| **2.** | **::: Step 1 ::: Creating a Social Media Account** |  |
| 3. | Learner sets up an instructor-chosen social media account by creating a username and password. | Met Not Met |
| 4. | Learner joins a selling group or organization via the social media account. | Met Not Met |
| 5. | Learner identifies five prospects via the social media account. | Met Not Met |
| 6. | Learner follows five prospects via the social media account. | Met Not Met |
| 7. | Learner researches one potential target via the social media account. | Met Not Met |
| **8.** | **::: Step 2 ::: Creating a Customer Relationship Management (CRM) Account** |  |
| 9. | Learner sets up an instructor-chosen CRM account by creating a username and password. | Met Not Met |
| 10. | Learner describes to partner how to create and edit contacts in the CRM. | Met Not Met |
| 11. | Learner describes to partner how to add and delete accounts in the CRM. | Met Not Met |
| **12.** | **::: Step 3 ::: Learner researches one potential target from a Social Media Account to input information into a Customer Relationship Management (CRM) Account.** |  |
| 13. | Learner creates a contact in the CRM using the information researched for one potential target from the social media account. | Met Not Met |
| 14. | Learner creates an account in the CRM using the information researched for one potential target from the social media account. | Met Not Met |
| 15. | Learner outlines to their partner an appropriate workflow from lead to close. | Met Not Met |
| 16. | Learner explains to their partner the limitations of a CRM. | Met Not Met |

Learning Plan 4 - Relationship Strategies

Overview/Purpose

To be successful in sales, the establishment and maintenance of relationships is key to customer retention.  This lesson will feature best practices in communication, diffusing conflict situations, and utilizing customer relationship management (CRM) tools to enhance relationships.

Target Competencies

|  |  |  |
| --- | --- | --- |
| 1. | Explore the role of relationships in account management. | |
|  | Assessment Strategies | |
|  | 1.1. | Written Product |
| 2. | Apply customer retention strategies. | |
|  | Assessment Strategies | |
|  | 2.1. | Simulation |

### Learning Activities

|  |  |
| --- | --- |
| 1. | **Review** competencies and learning objectives. |
| 2. | **Read** instructor prepared materials. |
| 3. | **Listen** to instructor's lecture on the role of relationships in account management. |
| 4. | **Use** an instructor created document to practice entering customer details into a Customer Relationship Management (CRM) system. |
| 5. | **Participate** in a role play regarding conflict diffusion by using de-escalation techniques. |
| 6. | **Discuss** instructor created case study regarding customer retention, conflict diffusion, de-escalation techniques, and value added solutions. |

### Assessment Activities

|  |  |  |  |
| --- | --- | --- | --- |
| 1. | SUBMIT Written Assignment.  What is the difference between upselling and cross-selling?  Why is this important?  Research the internet for an article.  Write a 1 page, double spaced summary, summarizing your feelings on the article.  Cite the article. See attached rubric for guidelines when writing a paper. | | |
|  | Learning Materials | | |
|  | Writing Guidelines | [Written Paper Guidelines.docx](https://westerntc.wids.org//PublicDocuments.axd?DocumentID=7487a598-a492-45ad-a2a8-f7a2b379f89f) |
| 2. | SUBMIT Strengths, Weaknesses, Opportunities, and Threats (SWOT) analysis.  Research the internet and identify 1 company to analyze as a potential customer.  Identify 2 strengths, 2 weaknesses, 2 opportunities, and 2 threats for this customer and enter the data on the SWOT analysis chart. See attached SWOT Analysis Chart and Directions. | | |
|  | Learning Materials | | |
|  | SWOT Analysis Chart and Directions | [SWOT Analysis Chart and Directions.docx](https://westerntc.wids.org//PublicDocuments.axd?DocumentID=35a84766-9eb8-46a4-9ffd-d0eb6602ecfd) |
| 3. | COMPLETE PAT - Role of Relationships in Account Management | | |

Role of Relationships in Account Management

Directions

**Written Product:**

Write a 200-400 word reflection.  Identify ways in which companies can measure success of inside sales activities.  Include information on the importance of sales goals.  Explain the importance of account management in regards to success.  Reflect on the difference between time spent managing accounts, growing existing accounts, and bringing in net new accounts. Outline techniques that can be used to develop and maintain relationships in account management and why these techniques are important for success.

Target Course Competencies

|  |  |
| --- | --- |
| 1. | Explore the role of relationships in account management. |

### Scoring

Rating Scale

|  |  |
| --- | --- |
| Value | Description |
| 5 | Consistently Exceeds Expectations.  Displays at all times, without exception, a consistently high level of skill.  All assignments/task are completed beyond the level of expectation.  Initiative and self-direction are characteristic. |
| 4 | Often Exceeds Expectations.  Displays a high level of skill, exceeding requirements in some areas, but not consistently or not without exception. |
| 3 | Meets Expectations.  Displays and maintains an effective and consistent level of skill.  Work output regularly achieves desired or required outcomes or expectations.  Problems or errors are reported and corrected quickly. |
| 2 | Some Improvement Needed.  Displays inconsistency in performance and frequently falls below acceptable levels.  Tasks may be significantly late at times or incomplete, with serious or potentially serious consequences. |
| 1 | Major Improvement Needed.  Output is consistently low, regularly fails to meet criterion, and error rate is high requiring repetition. |
| 0 | No evidence of meeting requirement. |
| Met | Fully or adequately met expectations. |
| Not Met | Partially met or failed to meet expectations. |

Scoring Standard

A minimum of 3 must be earned on all criteria and must meet all met/not met criteria to demonstrate competency.

### Scoring Guide

|  |  |  |
| --- | --- | --- |
|  | Criteria | Ratings |
| 1. | Learner identifies ways in which companies can measure success of inside sales activities. | 5 4 3 2 1 0 |
| 2. | Learner explains the importance of sales goals. | 5 4 3 2 1 0 |
| 3. | Learner examines the importance of account management in regards to success. | 5 4 3 2 1 0 |
| 4. | Learner reflects on the difference between time spent managing accounts, growing existing accounts, and bringing in net new accounts. | 5 4 3 2 1 0 |
| 5. | Learner outlines techniques that can be used to develop and maintain relationship in account management. | 5 4 3 2 1 0 |
| 6. | Learner explains why relationship techniques are important for success. | 5 4 3 2 1 0 |
| 7. | Written product is 200-400 words. | Met Not Met |
| 8. | Written product shows evidence of logical critical thinking. | Met Not Met |
| 9. | Written product follows an effective organizational plan. | Met Not Met |
| 10. | Written product exhibits correct and appropriate grammar, punctuation, spelling, syntax, and word usage. | Met Not Met |
| 11. | Written product follows written assignment guidelines. | Met Not Met |

Learning Plan 5 - Communication Strategies for Inside Sales

Overview/Purpose

Clear and concise communications (verbal and written) shows professionalism and positively affects the customer relationship.  This lesson will explore best practices in outbound communication, including but not limited to voicemails and emails.  Special emphasis will be directed on forming value proposition statements.

Target Competencies

|  |  |  |
| --- | --- | --- |
| 1. | Outline best practices for outbound communication efforts. | |
|  | Assessment Strategies | |
|  | 1.1. | Demonstration |
|  | 1.2. | Written Product |

### Learning Activities

|  |  |
| --- | --- |
| 1. | **Review** competency and learning objectives. |
| 2. | **Read** instructor prepared materials. |
| 3. | **Listen** to instructor's lecture on best practices for outbound communication efforts. |
| 4. | **Discuss** instructor prepared sales call voicemail message.  Identify strengths and opportunities for improvement of the voicemail message. |
| 5. | **Discuss** instructor prepared sales email.  Identify strengths and opportunities for improvement of the email message. |
| 6. | **Discuss**the importance of a value proposition statement. |

### Assessment Activities

|  |  |  |  |
| --- | --- | --- | --- |
| 1. | SUBMIT Written Assignment.  Use an online search engine to search for an article about outbound calling skills.  Choose 5 outbound calling skills from the article, and explain why each skill is important.  Write a 1 page, double spaced summary.  See attached rubric for guidelines when writing a paper. | | |
|  | Learning Materials | | |
|  | Writing Guidelines | [Written Paper Guidelines.docx](https://westerntc.wids.org//PublicDocuments.axd?DocumentID=679e08ec-1436-439f-93bf-bafc8b8ee622) |
| 2. | SUBMIT Written Assignment - Value Proposition Statement.  Choose one company to represent as the inside sales representative.  Create a value proposition statement.  See attached rubric for guidelines. | | |
|  | Learning Materials | | |
|  | Value Proposition Statement Rubric | [Value Proposition Statement Rubric.docx](https://westerntc.wids.org//PublicDocuments.axd?DocumentID=df5c8fcb-cfd4-495c-8ce2-93b6703452d1) |
| 3. | COMPLETE PAT - Communications: Mass Email and Voicemail Messages | | |

Communications: Mass Email and Voicemail Messages

Directions

**Written Product: Mass Email Message**

Learner will write a two paragraph or less mass email regarding their product/service to target new customers.  The mass email will be in a professional tone and have a descriptive subject line, effective email opening, address the contact with appropriate title, name, and company; introduce themselves; introduce their company; introduce 2-3 benefits of the product/service; and include a call to action.

**Demonstration:  Voicemail Message**

Learner will create a voicemail message regarding their product/service to target new customers using an instructor chosen tool to create videos.  This 30 second or less voicemail message will be in a professional tone and address the contact with appropriate title, name and company; introduce themselves; introduce their company; introduce 2-3 benefits of the product/service; and include a call to action.

Target Course Competencies

|  |  |
| --- | --- |
| 1. | Outline best practices for outbound communication efforts. |

### Scoring

Rating Scale

|  |  |
| --- | --- |
| Value | Description |
| 5 | Consistently Exceeds Expectations.  Displays at all times, without exception, a consistently high level of skill.  All assignments/task are completed beyond the level of expectation.  Initiative and self-direction are characteristic. |
| 4 | Often Exceeds Expectations.  Displays a high level of skill, exceeding requirements in some areas, but not consistently or not without exception |
| 3 | Meets Expectations.  Displays and maintains an effective and consistent level of skill.  Work output regularly achieves desired or required outcomes or expectations.  Problems or errors are reported and corrected quickly. |
| 2 | Some Improvement Needed.  Displays inconsistency in performance and frequently falls below acceptable levels.  Tasks may be significantly late at times or incomplete, with serious or potentially serious consequences. |
| 1 | Major Improvement Needed.  Output is consistently low, regularly fails to meet criterion, and error rate is high requiring repetition. |
| 0 | No evidence of meeting requirement. |
| Met | Fully or adequately met expectations |
| Not Met | Partially met or failed to meet expectations |

Scoring Standard

A minimum of 3 must be earned on all criteria and you must meet all met/not met criteria to demonstrate competence.

### Scoring Guide

|  |  |  |
| --- | --- | --- |
|  | Criteria | Ratings |
| **1.** | **Written Product: Mass Email Message** |  |
| 2. | Learner writes a descriptive subject line. | 5 4 3 2 1 0 |
| 3. | Learner writes an effective email opening. | 5 4 3 2 1 0 |
| 4. | Learner addresses the contact with appropriate title, name, and company. | 5 4 3 2 1 0 |
| 5. | Learner introduces themselves. | 5 4 3 2 1 0 |
| 6. | Learner introduces their company. | 5 4 3 2 1 0 |
| 7. | Learner introduces 2-3 benefits of the product/service. | 5 4 3 2 1 0 |
| 8. | Learner expresses a call to action. | 5 4 3 2 1 0 |
| 9. | Mass email is 2 paragraphs or less. | Met Not Met |
| 10. | Mass email displays professionalism. | Met Not Met |
| 11. | Mass email has a salutation/greeting. | Met Not Met |
| 12. | Mass email has a closing and signature. | Met Not Met |
| 13. | Mass email shows evidence of logical critical thinking. | Met Not Met |
| 14. | Mass email follows an effective organizational plan. | Met Not Met |
| 15. | Mass email exhibits correct and appropriate grammar, punctuation, spelling, syntax, and word usage. | Met Not Met |
| **16.** | **Demonstration: Voicemail Message** |  |
| 17. | Learner addresses the contact with appropriate title, name, and company. | 5 4 3 2 1 0 |
| 18. | Learner introduces themselves. | 5 4 3 2 1 0 |
| 19. | Learner introduces their company. | 5 4 3 2 1 0 |
| 20. | Learner introduces 2-3 benefits of the product/service. | 5 4 3 2 1 0 |
| 21. | Learner expresses a call to action. | 5 4 3 2 1 0 |
| 22. | Voicemail is 30 seconds or less. | Met Not Met |
| 23. | Voicemail displays professionalism. | Met Not Met |
| 24. | Learner's voice inflection, volume, and rate are appropriate for the content. | Met Not Met |
| 25. | Delivery holds audience attention; you are energetic and enthusiastic. | Met Not Met |
| 26. | Main points are clear and concise. | Met Not Met |
| 27. | Main points are well organized. | Met Not Met |

Learning Plan 6 - Growing a Book of Business

Overview/Purpose

Trust and accountability are foundational factors to growing a book of business. This lesson will explore short term and long term plans for implementing opportunities for business growth, as well as recognizing the role of developing trust and accountability to enhance selling relationships.

Target Competencies

|  |  |  |
| --- | --- | --- |
| 1. | Outline methods for growing a book of business. | |
|  | Assessment Strategies | |
|  | 1.1. | Written Product |

### Learning Activities

|  |  |
| --- | --- |
| 1. | **Review** competency and learning objectives. |
| 2. | **Read** instructor prepared materials. |
| 3. | **Listen** to instructor's lecture on growing a book of business. |
| 4. | **Participate** in a role play regarding developing trust and accountability. |
| 5. | **Discuss** PAT: Communications - Email and Voicemail |
| 6. | **Examine** best practices for devising short term and long term plans for implementing opportunities for growth. |

### Assessment Activities

|  |  |  |  |
| --- | --- | --- | --- |
| 1. | SUBMIT journal entry.  Reflect on the in class role play on developing trust and accountability.  Identify 3 ways to develop trust and accountability.  Why are these important?  Refer to journal rubric. | | |
|  | Learning Materials | | |
|  | Journal Rubric | [Journal Rubric.docx](https://westerntc.wids.org//PublicDocuments.axd?DocumentID=5f76044a-cc66-487f-8772-529fa21c419c) |
| 2. | COMPLETE PAT - Growing a Book of Business | | |

Growing a Book of Business

Directions

**Written Product:**

Learner will choose one company to work for as an inside sales representative.  Write a 200-400 reflection on the following:

* Using an instructor-chosen Customer Relationship Management tool, identify and explain 3 opportunities for business growth.
* Outline a short term plan for implementing these 3 opportunities.
* Outline a long term plan for implementing these 3 opportunities.
* Discuss upselling techniques to support organic growth.
* Examine the role of accountability and trust in opportunities for business growth.

Target Course Competencies

|  |  |
| --- | --- |
| 1. | Outline methods for growing a book of business. |

### Scoring

Rating Scale

|  |  |
| --- | --- |
| Value | Description |
| 5 | Consistently Exceeds Expectations.  Displays at all times, without exception, a consistently high level of skill.  All assignments/task are completed beyond the level of expectation.  Initiative and self-direction are characteristic. |
| 4 | Often Exceeds Expectations.  Displays a high level of skill, exceeding requirements in some areas, but not consistently or not without exception. |
| 3 | Meets Expectations.  Displays and maintains an effective and consistent level of skill.  Work output regularly achieves desired or required outcomes or expectations.  Problems or errors are reported and corrected quickly. |
| 2 | Some Improvement Needed.  Displays inconsistency in performance and frequently falls below acceptable levels.  Tasks may be significantly late at times or incomplete, with serious or potentially serious consequences. |
| 1 | Major Improvement Needed.  Output is consistently low, regularly fails to meet criterion, and error rate is high requiring repetition. |
| 0 | No evidence of meeting requirement. |
| Met | Fully or adequately met expectations. |
| Not Met | Partially met or failed to meet expectations. |

Scoring Standard

A minimum of 3 must be earned on all criteria and must meet all met/not met criteria to demonstrate competency.

### Scoring Guide

|  |  |  |
| --- | --- | --- |
|  | Criteria | Ratings |
| 1. | Learner identifies which company they work for as an inside sales representative. | 5 4 3 2 1 0 |
| 2. | Learner uses an instructor-chosen Customer Relationship Management (CRM) tool to identify and explain 3 opportunities for business growth. | 5 4 3 2 1 0 |
| 3. | Learner outlines a short term plan for implementing these 3 opportunities. | 5 4 3 2 1 0 |
| 4. | Learner outlines a long term plan for implementing these 3 opportunities. | 5 4 3 2 1 0 |
| 5. | Learner discusses upselling techniques to support organic growth. | 5 4 3 2 1 0 |
| 6. | Learner examines the role of accountability and trust in opportunities for business growth. | 5 4 3 2 1 0 |
| 7. | Written Product is 200-400 words. | Met Not Met |
| 8. | Written product shows evidence of logical critical thinking. | Met Not Met |
| 9. | Written product follows an effective organizational plan. | Met Not Met |
| 10. | Written product exhibits correct and appropriate grammar, punctuation, spelling, syntax, and word usage. | Met Not Met |
| 11. | Written product follows written assignment guidelines. | Met Not Met |

Learning Plan 7 - Selling Process

Overview/Purpose

Knowledge of a customer - such as likes/dislikes, need, motive, goal, and objectives - will enhance relationships and remove barriers to the steps to sell.  This lesson will outline and highlight best practices for each step to sell.  Students will have the opportunity to demonstrate their competence level in a steps to sell presentation.

Target Competencies

|  |  |  |
| --- | --- | --- |
| 1. | Examine the process of preparing to sell. | |
|  | Assessment Strategies | |
|  | 1.1. | Written Product |

### Learning Activities

|  |  |
| --- | --- |
| 1. | **Review** competency and learning objectives. |
| 2. | **Read** instructor prepared materials. |
| 3. | **Listen** to the instructor's lecture on the selling process. |
| 4. | **Discuss** the steps of the selling process. |
| 5. | **Participate** in instructor designed small group presentations on the selling process. |

### Assessment Activities

|  |  |  |  |
| --- | --- | --- | --- |
| 1. | PRESENT Preparing to Sell Presentation.  See attached rubric for directions and guidelines. | | |
|  | Learning Materials | | |
|  | Preparing to Sell Rubric | [Preparing to Sell Presentation Rubric.docx](https://westerntc.wids.org//PublicDocuments.axd?DocumentID=564f01a0-c201-4833-8ebb-7ae3b22f5273) |
| 2. | COMPLETE PAT - Preparing to Sell | | |

Preparing to Sell

Directions

**Written Product:**

Learner will choose one company to work for as an inside sales representative.  Choose one product/service, sold by your company, to sell to potential customers.  Using a social media account, identify one potential customer.

Write a 400-600 word reflection:  With your company and product/service in mind, as well as your potential customer, analyze the steps in the process of preparing to sell by reflecting on the following:

1.  Research:

* Describe the importance of researching potential customers in the sales preparation process.
* Why is it important to seek institutional knowledge (your company's knowledge) during the research process?
* What are the methods you used to research and identify your potential customer?  Why?

2.  Relationship:

* What are some possible points of connection between you and the potential customer you identified via social media?
* Identify methods you could use for relationship building to grow business.

3. Motive:

* What are some potential reasons the customer you identified via social media may be interested in buying your product/service?
* What are their potential objections to buying your product/service?
* Identify possible ways to overcome these potential objections.

4.  Competition:

* Identify one competing product/service.
* What are the strengths and weaknesses of this competing product/service?
* Why is it important to consider competition when preparing to sell?

Target Course Competencies

|  |  |
| --- | --- |
| 1. | Examine the process of preparing to sell. |

### Scoring

Rating Scale

|  |  |
| --- | --- |
| Value | Description |
| 5 | Consistently Exceeds Expectations.  Displays at all times, without exception, a consistently high level of skill.  All assignments/task are completed beyond the level of expectation.  Initiative and self-direction are characteristic. |
| 4 | Often Exceeds Expectations.  Displays a high level of skill, exceeding requirements in some areas, but not consistently or not without exception |
| 3 | Meets Expectations.  Displays and maintains an effective and consistent level of skill.  Work output regularly achieves desired or required outcomes or expectations.  Problems or errors are reported and corrected quickly. |
| 2 | Some Improvement Needed.  Displays inconsistency in performance and frequently falls below acceptable levels.  Tasks may be significantly late at times or incomplete, with serious or potentially serious consequences. |
| 1 | Major Improvement Needed.  Output is consistently low, regularly fails to meet criterion, and error rate is high requiring repetition. |
| 0 | No evidence of meeting requirement. |
| Met | Fully or adequately met expectations |
| Not Met | Partially met or failed to meet expectations |

Scoring Standard

A minimum of 3 must be earned on all criteria and you must meet all met/not met criteria to demonstrate competence

### Scoring Guide

|  |  |  |
| --- | --- | --- |
|  | Criteria | Ratings |
| 1. | Learner identifies which company they work for. | 5 4 3 2 1 0 |
| 2. | Leaner identifies which product/service they sell. | 5 4 3 2 1 0 |
| 3. | Learner identifies one potential customer via social media. | 5 4 3 2 1 0 |
| 4. | Learner describes the importance of researching potential customers in the sales preparation process. | 5 4 3 2 1 0 |
| 5. | Learner identifies why it is important to seek institutional knowledge (your company's knowledge) during the research process. | 5 4 3 2 1 0 |
| 6. | Learner outlines methods used when researching and identifying potential customer via social media. | 5 4 3 2 1 0 |
| 7. | Learner describes some possible points of connection between themselves and the potential customer identified via social media. | 5 4 3 2 1 0 |
| 8. | Learner outlines methods that could be used for relationship building to grow business. | 5 4 3 2 1 0 |
| 9. | Learner describes potential reasons the customer identified via social media may be interested in buying the product/service. | 5 4 3 2 1 0 |
| 10. | Learner identifies potential objections to buying the product/service. | 5 4 3 2 1 0 |
| 11. | Learner outlines possible ways to overcome these potential objections. | 5 4 3 2 1 0 |
| 12. | Learner identifies one competing product/service. | 5 4 3 2 1 0 |
| 13. | Learner outlines strengths and weaknesses of competing product/service. | 5 4 3 2 1 0 |
| 14. | Learner describes why it is important to consider competition when preparing to sell. | 5 4 3 2 1 0 |
| 15. | Written product is 400-600 words. | Met Not Met |
| 16. | Written product shows evidence of logical critical thinking | Met Not Met |
| 17. | Written product follows an effective organizational plan | Met Not Met |
| 18. | Written product exhibits correct and appropriate grammar, punctuation, spelling, syntax, and word usage | Met Not Met |
| 19. | Written product follows written assignment guidelines | Met Not Met |

Learning Plan 8 - Virtual Meeting Tools

Overview/Purpose

Tech-savvy organizations utilize multiple tools to conduct business.  Knowledge and skill in the usage of virtual meeting tools will be foundational to this new era of communication.  This lesson will explore various virtual meeting tools, and provide students an opportunity to utilize these tools in the sales realm.

Target Competencies

|  |  |  |
| --- | --- | --- |
| 1. | Use virtual meeting tools to communicate. | |
|  | Assessment Strategies | |
|  | 1.1. | Simulation |

### Learning Activities

|  |  |
| --- | --- |
| 1. | **Review** competency and learning objectives. |
| 2. | **Read** instructor prepared materials. |
| 3. | **Listen** to instructor's lecture on virtual meeting tools. |
| 4. | **Participate** in class discussion on pros/cons of virtual meeting tools. |

### Assessment Activities

|  |  |  |  |
| --- | --- | --- | --- |
| 1. | SUBMIT Written Assignment.  Research and choose 1 virtual meeting tool.  Identify 3 pros and 3 cons of this tool.  Write a 1 page, double spaced summary.  See attached rubric for guidelines when writing a paper. | | |
|  | Learning Materials | | |
|  | Writing Guidelines | [Written Paper Guidelines.docx](https://westerntc.wids.org//PublicDocuments.axd?DocumentID=365f5601-eaa7-4420-8cca-9f92c2ca0ab8) |
| 2. | PARTICIPATE in a virtual meeting tool interview.  See attached rubric for directions and guidelines. | | |
|  | Learning Materials | | |
|  | Virtual Meeting Tool Interview Rubric | [Virtual Meeting Tool Interview Rubric.docx](https://westerntc.wids.org//PublicDocuments.axd?DocumentID=08bd039c-566b-4c42-9117-f66e87b7eb0d) |
| 3. | COMPLETE PAT - De-escalation Virtual Meeting | | |

De-escalation Virtual Meeting

Directions

**Simulation:**

**The Scenario:**  The learner is an inside sales representative of a company.  The instructor is the number one customer of the inside sales representative.  This customer is upset.

**The Communication Method:**  The customer is unavailable to meet face-to-face, and has requested a virtual meeting with the inside sales representative.

**The Goal:**  The learner (inside sales representative) will conduct a de-escalation meeting via a virtual meeting tool with the customer (instructor).  From the conversation of the meeting, the learner must identify the reason the customer is upset, and provide a value added solution to retain this customer.

This simulation will end in 4 minutes or less.   The learner will be successful if, by the conclusion of the virtual meeting, the customer has been retained.

Target Course Competencies

|  |  |
| --- | --- |
| 1. | Apply customer retention strategies. |
| 2. | Use virtual meeting tools to communicate. |

### Scoring

Rating Scale

|  |  |
| --- | --- |
| Value | Description |
| 5 | Consistently Exceeds Expectations.  Displays at all times, without exception, a consistently high level of skill.  All assignments/task are completed beyond the level of expectation.  Initiative and self-direction are characteristic. |
| 4 | Often Exceeds Expectations.  Displays a high level of skill, exceeding requirements in some areas, but not consistently or not without exception. |
| 3 | Meets Expectations.  Displays and maintains an effective and consistent level of skill.  Work output regularly achieves desired or required outcomes or expectations.  Problems or errors are reported and corrected quickly. |
| 2 | Some Improvement Needed.  Displays inconsistency in performance and frequently falls below acceptable levels.  Tasks may be significantly late at times or incomplete, with serious or potentially serious consequences. |
| 1 | Major Improvement Needed.  Output is consistently low, regularly fails to meet criterion, and error rate is high requiring repetition. |
| 0 | No evidence of meeting requirement. |
| Met | Fully or adequately met expectations. |
| Not Met | Partially met or failed to meet expectations. |

Scoring Standard

A minimum of 3 must be earned on all criteria and must meet all met/not met criteria to demonstrate competency.

### Scoring Guide

|  |  |  |
| --- | --- | --- |
|  | Criteria | Ratings |
| **1.** | **Simulation:** |  |
| 2. | Learner leads and guides conversation with customer. | 5 4 3 2 1 0 |
| 3. | Learner uses questions and active listening techniques to identify why the customer is upset. | 5 4 3 2 1 0 |
| 4. | Learner provides the customer with a value added solution. | 5 4 3 2 1 0 |
| 5. | Learner uses de-escalation techniques throughout conversation. | 5 4 3 2 1 0 |
| 6. | Learner adjusts camera, microphone, and volume to effectively conduct the virtual meeting. | Met Not Met |
| 7. | The simulation ends in 4 minutes or less. | Met Not Met |
| 8. | Learner’s voice inflection, volume, and rate are appropriate for the content. | Met Not Met |
| 9. | Learner’s nonverbal communication is consistent with your verbal message. | Met Not Met |
| 10. | Main points are clear and concise. | Met Not Met |
| 11. | Main points are well organized. | Met Not Met |

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