

MKTG 3600 – Final Sales Call Scenario

ME: I am the **Vice President of Sales for Grace Insurance Services (GIS)**. We sell both business insurance (property & casualty, business interruption, etc.) and personal line insurance (home, auto, life). We have offices in Kalamazoo (home office), St. Josephs, Holland, Grand Rapids, Battle Creek and Coldwater. The business insurance staff is 12 people and the personal line staff is 15. There is also a group of account service representatives that handle the claims and service elements of the existing relationships. GIS represents over 30 different insurance companies as a broker and thus focuses its success on matching up the best company/policy with each customer. Your intern, Eric Howse, set up an appointment with me. His dad, Greg Howse and I played basketball together in a men's league for almost 10 years, so the appointment was easy to get. However, I did mention that we (as a company) rarely left the Kalamazoo area for meetings as we provided the insurance for the Radisson Hotel in Kalamazoo and thus did most of our meeting business there. But I did mention that we were considering a big meeting this spring involving a few of our key insurance company partners.

YOU: You are an **Account Executive for Crystal Mountain Resort & Spa (CMR)** in Thompsonville, Michigan. You have been there for 2 years after graduating from WMU with a degree in Sales & Business Marketing. You started as an inside sales representative and recently you were promoted to your current position. Your job is to identify and secure business from business clients from the western side of Michigan. Mainly you book firms for business meetings that involve the use of CMR's conference facilities, their food & catering services, their hotel & condo accommodations, and all of the activities (golf, skiing, spa, etc.) available at the resort.

THE SCENARIO: You have a 25 minute meeting scheduled with Jim Eckert from Grace Insurance Services to discuss the possibility of CMR hosting a business event for GIS. You hope to use this 25 minute meeting to understand Mr. Eckert's needs and sell him on the idea of hosting the event at CMR. In situations like these, a typically successful call involves gaining a verbal commitment from the buyer to host the event (with the formal contract being signed later), although sometimes all you can get is a commitment to accept a written proposal from you, without any actual commitment to do business together. If the potential deal is big enough you have the authority to invite the client (1-2 people maximum) to CMR for a few days to do an on-site presentation. These trips cost quite a bit of money so you generally only offer this if the group is big enough (minimum 20 people) and will be staying for at least 3 days.