

Shadow a Sales Representative: Written Report

By the end of this course you are expected to be able to describe the sales process, recognize communication techniques used during the sales process and define the steps of a sales call. The best way to understand the sales process is to see it in action! In this report I want you to explain to me the connections between what we learned in class and the actions of your salesperson. What was the same? What was different? Why did they make the decisions they did?

I'm including below a detailed list of what I expect you to include in the paper. The SWAS report should be in a **typed, double-spaced format**. Note that this is an essay and should not be completed in e-mail format.

1. **Title Page** {5 points}
 - A. Should include report title, your name, instructor's name, class name and number, salesperson's name and company, and the date.
2. **Background Information (minimum of 2 paragraphs)** {5 points}

Share background information about:

 - A. Your sales representative (name, company, products etc.)
 - B. The customers visited
 - C. Date and location of SWAS
3. **Customer Relations Analysis (minimum of 2 pages, max of 4)** {40 points}

Although you should observe and take notes on all of your calls, **choose only one call on which to report**. Of course, you should choose the call that you found the most interesting and rich in detail.

This should be a **detailed summary** of what happened coupled with matching **analysis** of why it happened. Try to organize this action chronologically.

Specifically you must include:

- A. *Examples of verbal and non-verbal communication*, which must include observations about:
 1. Communication style {4 pts}
 2. Vocal inflections {4 pts}
 3. Body language {4 pts}
 4. Any other relevant aspects of the setting, the sales rep's behavior or the buyer's behavior {4 pts}
- B. *Analysis of the Selling Process*, which must include:
 1. How did your salesperson prepare for this call? This section might include a summary of long-term and short-term sales and call objectives and strategies. {4 pts}
 2. What opening techniques were used? {4 pts}
 3. What type of presentation was made? {4 pts}
 4. How were objections handled? {4 pts}
 5. Did your salesperson close? What techniques were used? {4 pts}
 6. What follow-up arrangements were made? {4 pts}

4. **Project Evaluation (1/2 - 2 page)** {10 points}

This section must include:

- A. Your personal reaction to the salesperson {2 pts}
- B. The salesperson's effectiveness, in your opinion {2 pts}
- C. What you learned from the project {2 pts}
- D. Your feelings about the project {2 pts}
- E. Any benefits you might have gained directly from the project. (i.e. job offer, interview, etc.) {2 pts}

5. **Writing** {25 pts}

As we have learned in this class, how you say something is just as important as what you say. As such you will additionally be graded for

- A. Spelling/grammatical errors {15 pts}
- B. Writing style and competency {10 pts}

IMPORTANT: As your paper is graded for content, this checklist will be used to assure that each of these topics have been included. Of course, not every sales call progresses formally through all these steps. Deal with the steps that were used in the call, **being sure that you indicate what steps were not covered and why.** The most important goal of the project is to note how your salesperson employs the selling process, and how he or she adapts it to the needs of the situation. This assignment is worth 85 points.

Please let me know if you have any questions, and I look forward to reading these!