

## Financial Consulting Event Hospitality and Tourism Professional Selling Event Professional Selling Event



FINANCE



HOSPITALITY  
+ TOURISM



MARKETING

The **Professional Selling and Consulting Events** provide an opportunity for participants to demonstrate skills needed for a career in sales and/or consulting. Participants will organize and deliver a sales presentation or consultation for one or more products/services/customers.

The guidelines for each of the Professional Selling and Consulting Events have been consolidated to facilitate coordination of participant activities in each of the occupational categories. This means the evaluation form will be the same for each occupational area. However, each occupational area will deliver a sales presentation or consultation for a different product or customer described below in the “Products/Services and Target Customer Descriptions” section.

### 2015 PRODUCTS/SERVICES AND TARGET CUSTOMER DESCRIPTIONS

New products, services, and target market customers (prospects) will be identified annually. The participant will research an actual company he/she represents and real product(s)/services(s) to be presented. The participant will also research the business/organization that the product/service will be presented to. Then the participant will present the product(s)/service(s) to meet the needs of the customer (prospect).

#### ■ FINANCIAL CONSULTING EVENT

For 2014–2015 you will assume the role of financial consultant. A client has scheduled a meeting with you because he/she is looking for advice on how to improve his/her credit score. The client recently checked his/her credit score and discovered that it is 680. The client wants to purchase a home within the next 12-18 months and thinks a higher credit score may lead to lower interest rates on the mortgage. The client has a fair payment history, only making a few late payments in the past 24 months. The client has three credit cards and is carrying a collective balance of \$6,200. You have a meeting scheduled with your client to present your advice.

#### ■ HOSPITALITY AND TOURISM PROFESSIONAL SELLING EVENT

For 2014–2015 you will assume the role of a relationship manager for an international educational tourism company. A school system in your territory has sent you a request for proposal (RFP) because it wants to send 50 teachers and students to Costa Rica this summer to learn about the ecosystem in Central America. You have a meeting scheduled with the school system’s assistant superintendent to present your company’s packages and price points.

#### ■ PROFESSIONAL SELLING EVENT

For 2014–2015 you will assume the role of a sales representative of a major electronics company. A large hospital employing over 2,000 people is searching for wearable technology(ies) to help its workforce be and stay healthy. You have a meeting scheduled with the hospital’s human resources manager to pitch your company’s products and price points.



### EVENT OVERVIEW



1 PARTICIPANT



CLUSTER



PRESENTATION TIME

- Professional Selling and Consulting Events consist of two major parts: the **cluster exam** and the **oral presentation**. The maximum score for the presentation evaluation is 100 points. The presentation will be weighted at twice (2 times) the value of the exam score. The exam score carries forward into the final round of competition.
- Professional Selling and Consulting Events are for **individual participants** only.
- The participant will be given a 100-question, multiple-choice, cluster exam testing knowledge of the Business Administration Core performance indicators and the Cluster Core performance indicators.
  - Participants in the Financial Consulting Event will take the **Finance Cluster Exam**.
  - Participants in the Hospitality and Tourism Professional Selling Event will take the **Hospitality and Tourism Cluster Exam**.

(Continued on next page)

- Participants in the Professional Selling Event will take the **Marketing Cluster** Exam.
- Complete lists of performance indicators are available at [www.deca.org](http://www.deca.org).
- The participant will organize appropriate information and present a sales presentation or provide consultation to a potential buyer or client.
- The participant may bring all visual aids to the event briefing. Only approved visual aids may be used during the presentation.
- The oral presentation may be a maximum of **20 minutes** in length. The first 15 minutes will include a sales presentation or consultation and will be followed by 5 minutes for the judge's questions.
- The judge will evaluate the presentation, focusing on the effectiveness of public speaking and presentation skills and how well the participant responds to questions that the judge may ask during the 5 minutes following the presentation.



## KNOWLEDGE AND SKILLS DEVELOPED

Participants will demonstrate knowledge and skills needed to address the components of the project as described in the evaluation form.

Participants will also develop many 21<sup>st</sup> century skills, in the following categories, desired by today's employers:

- |   |                                    |
|---|------------------------------------|
| ■ Communication and Collaboration       | ■ Creativity and Innovation        |
| ■ Critical Thinking and Problem Solving | ■ Flexibility and Adaptability     |
| ■ Information Literacy                  | ■ Initiative and Self-direction    |
| ■ Leadership and Responsibility         | ■ Media Literacy                   |
| ■ Productivity and Accountability       | ■ Social and Cross-cultural Skills |

A crosswalk is available at [www.deca.org](http://www.deca.org) that shows which 21<sup>st</sup> century skills are developed by participating in each competitive event.

Many Common Core Standards for Mathematics and English Language Arts & Literacy are supported by participation in DECA's competitive events. Crosswalks are available at [www.deca.org](http://www.deca.org) that show which common core standards are supported by participating in each competitive event.



## PRESENTATION GUIDELINES

- The objective for the sales presentation or consultation is for the participant to assume the role of salesperson or consultant making a presentation to a potential buyer or client (judge). Prior to ICDC, the participant will prepare a sales presentation or consultation presentation for the product/service and target market customers described above.
- The participant will make a 20-minute sales presentation or consultation presentation to the judge worth 100 points. (See Presentation Judging.)
- The presentation begins immediately after the introduction of the participant to the judge by the adult assistant.
- The participant will spend not more than 15 minutes setting up visual aids and delivering the sales presentation or consultation. The participant may bring presentation notes to use during the sales presentation or consultation.
- The judge will spend the remaining 5 minutes questioning the participant. (See the Presentation Evaluation Form.)
- The participants may use the following items during the oral presentation:
  - visual aids appropriate for an actual sales presentation or consultation.
  - not more than three (3) standard-sized posters not to exceed 22<sup>1</sup>/<sub>2</sub> inches by 30<sup>1</sup>/<sub>2</sub> inches each. Participants may use both sides of the posters, but all attachments must fit within the poster dimensions.
  - one (1) standard-sized presentation display board not to exceed 36<sup>1</sup>/<sub>2</sub> inches by 48<sup>1</sup>/<sub>2</sub> inches.
  - one (1) desktop flip chart presentation easel 12 inches by 10 inches (dimensions of the page).
  - one (1) personal laptop computer.
  - cell phones/smartphones, iPods/MP3 players, iPads/tablets or any type of a hand-held, information sharing device will be allowed in written events *if* applicable to the presentation.
  - sound, as long as the volume is kept at a conversational level.
- Only visual aids that can be easily carried to the presentation by the actual participants will be permitted, and the participants themselves must set up the visuals. No set-up time will be allowed. Participants must furnish their own materials and equipment. No electrical power or Internet connection will be supplied.

- Materials appropriate to the situation may be handed to or left with judges in all competitive events. Items of monetary value may be handed to but may not be left with judges. Items such as flyers, brochures, pamphlets and business cards may be handed to or left with the judge. No food or drinks allowed.
- If any of these rules are violated, the adult assistant must be notified by the judge.

## **PRESENTATION JUDGING**

The participant, assuming the role of salesperson or consultant, will have prepared a sales presentation or consultation presentation for the product(s)/service(s)/client(s) described above. The role of the judge is that of potential buyer for the product(s) and/or service(s) or a client seeking consultation.

During the first 15 minutes of the presentation (after introductions), the participant will set up any visual aids and make the presentation. Setup time and presentation time are included in the 15 minutes. Allow the participant to complete this portion without interruption, unless you are asked to respond.

During the final 5 minutes, you may question the participant on his/her presentation. Familiarize yourself with all of the guidelines before starting to evaluate the entry. Your job is to complete the Presentation Evaluation Form.

After the questioning period, please thank the participant. Then complete the Presentation Evaluation Form, making sure to record a score for all categories. The maximum score for the evaluation is 100 points. It may help to go through several entries before actually starting to score the entries. Take notes on a separate sheet of paper if you wish to ask the participant about specific areas of the proposal during the presentation.

**FINANCIAL CONSULTING EVENT, 2015**  
**HOSPITALITY AND TOURISM**  
**PROFESSIONAL SELLING EVENT, 2015**  
**PROFESSIONAL SELLING EVENT, 2015**

Participant: \_\_\_\_\_

I.D. Number: \_\_\_\_\_

**PRESENTATION EVALUATION FORM**

		Little/No Value	Below Expectations	Meets Expectations	Exceeds Expectations	Judged Score
1.	The opening was effective and engaging	0-1	2-3	4-5	6-7	
2.	Established relationship with customer/client	0-1	2-3-4	5-6	7-8	
3.	Communicated understanding of customer/client needs	0-1	2-3-4	5-6	7-8	
4.	Facilitated customer/client buying decisions	0-1	2-3-4	5-6	7-8	
5.	Recommended specific product(s)/service(s)/action(s)	0-1	2-3-4	5-6	7-8	
6.	Demonstrated or explained product(s)/service(s)/action(s)	0-1	2-3-4	5-6	7-8	
7.	Properly stated features and benefits of products/services/actions	0-1	2-3	4-5	6-7	
8.	Prescribed solution to customer/client needs	0-1	2-3-4	5-6	7-8	
9.	Effectively answered customer/client questions and concerns	0-1	2-3-4	5-6	7-8	
10.	Effectively closed the sale or ended the consultation	0-1-2	3-4-5	6-7-8	9-10	
11.	The presentation was well-organized and clearly presented; used professional grammar and vocabulary; voice conveyed proper volume, enthusiasm, enunciation and pronunciation	0-1-2	3-4-5	6-7-8	9-10	
12.	Professional appearance, poise and confidence	0-1	2-3	4	5	
13.	Overall general impression	0-1	2-3	4	5	
<b>Total Possible Points: 100</b>					<b>Judge's Total Score:</b>	

Judge: A B C D E F G H I J (circle one)