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Joseph D. Chapman

Ball State University, jchapman@bsu.edu

Russell G. Wahlers

Ball State University, rwahlers@bsu.edu

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Preparing Performance Reports for Upper Management: A Skills Building Project for Sales Management Students

Joseph D. Chapman

Ball State University

Russell G. Wahlers

Ball State University

ABSTRACT

This paper presents an in-depth assignment used in sales management courses to help students develop the skills needed to prepare a formal performance report for upper management. Students are divided into district management teams and are required to prepare a company performance report for four years of their company's performance. The author provides the detailed guidelines which are given to the students to aid them in the development of the performance report. Example tables for the report, the grading process, and other information for the project are also included.

INTRODUCTION

Education Journals such as the Marketing Education Review (MER) and the Journal of Marketing Education (JME) are filled with articles on experiential learning exercises that have been incorporated by educators all over the world. Experiential exercises are seen by educators as a much better way to educate students compared to using just the traditional classroom education method (Inks et. al. 2011). Educators have been publishing examples of experiential learning projects for decades (e.g. Bowers and Summey 1983, Chapman and Avila 1991, Drea et. al. 1997, Tomkovick 2004, Crancium and Corrigan 2010, and Chapman 2016). This paper presents an assignment used in conjunction with the MARS Sales Management Simulation that is designed to teach sales management students how to write professional reports to provide district performance information to upper management.

HOW THE PROJECT EVOLVED

The sales program at our University has an advisory board of industry sales and sales management professionals that work with the sales program. At an advisory board meeting, one board member mentioned that he thought graduates from our sales program lacked problem-solving skills. The other board members were in agreement. Shortly after that meeting, the professor in our sales program that teaches sales management (the author) heard a presentation about the MARS Sales Management Simulation at a sales conference he attended. Bob Cook, one of the developers of the simulation, was a presenter at the educator's conference and introduced the simulation to the audience. The author adopted the simulation for his sales

management course and has continued to use the simulation to educate sales management students on a variety of skills needed for effective sales management. The author has used the MARS Sales Management Simulation to help teach his students problem-solving skills, how to make effective sales management decisions, and how to manage a sales force.

Over the last several years, our sales faculty have noticed a decline in the quality of written communication on assignments in the sales courses. It was felt that texting and a lack of writing practice was most likely the cause of the decline of students' written communication skills. The sales professors decided to try to help improve students' writing skills by incorporating more written assignments in the sales classes. With this goal in mind, the sales management professor in our sales program (the author) designed an exercise that could be used in conjunction with the MARS simulation to improve students' written communications skills. The next section presents a brief overview of the MARS Sales Management Simulation, which will be followed by a discussion of the written assignment developed by the sales management professor that is used in conjunction with the MARS simulation.

THE MARS SALES MANAGEMENT SIMULATION

Students are divided into district management teams and compete against each other in an on-line sales management simulation. In the simulation, each team is assigned the exact same 5 sales reps (Bob, Emily, Kevin, Jen, and Katie), and each management team must make decisions to try to improve the performance of their sales reps. Quarterly decisions are made over a 4-year period of the game, which results in the district management teams making a total of 16 decisions throughout the course of the semester. With 2 decisions per week, the simulation covers 8 weeks of the semester. It takes an additional 2 weeks to prepare the students for the simulation; therefore, the entire simulation process covers 10 weeks of the semester. Quarterly decisions for each of the management team's sales reps are entered directly on-line and cover areas such as: salary amount, commission rate, bonus amount (if any), setting quotas, determining how much supervision time to allot to each sales rep, determining how much time each rep will spend on his/her A, B, and C accounts, determining how often to train each sales rep and on what training topic, determining which sales reps to recognize for their performance, and determining when and how to run contests. Industry reports can be purchased by the management teams to aid in their decision-making. Numerous Universities with sales programs have adopted the MARS Sales Management simulation for their sales management classes; however, the author is not aware of any programs that have developed assignments to compliment the simulation. Our sales management professor created the idea for an upper management report that can be used in conjunction with the MARS Simulation. He developed this assignment to help students improve writing skills, to refresh their word-processing skills, to refresh their EXCEL skills, and most importantly, to learn how to write a professional performance report for upper management. Finally, the report helps the sales management students generate detailed information that can be used to help them perform better in the MARS Sales Management Simulation game.

THE PERFORMANCE REPORT PROJECT

Each district sales management team is required to prepare a report on their district's performance and submit the report to their regional manager (the professor) at the end of the semester. At the end of year 1 of the simulation game, the professor covers the guidelines for completing the district performance report; therefore, students can start working on the report as soon as year 1 of the simulation game is completed, i.e., they can start working on the report approximately 5 weeks into the semester. The outline for the report is presented in Appendix A and the content that should go into each outlined section of the report is presented in Appendix B. The professor needs to emphasize that students should not put-off working on the report because the reports are typically between 45-55 pages in length, with numerous tables that have to be created by the students from quarterly simulation game results. Examples of the tables that must be included in the reports are presented in Appendix C. The report is due to the regional manager close to the end of the semester before finals begin. In our program's sales management course, the report is worth 20% of each student's final grade. It should be noted that 4 group evaluations are completed over the time period of students working on the report to help ensure that students are actively participating in the project. Detailed guidelines for the report are listed in Appendix D, the report grading process is available in Appendix E, and an example of the group evaluation forms used for the project is presented in Appendix F.

EFFECTIVENESS OF THE PERFORMANCE REPORT PROJECT

As a professor, I would agree with our advisory board members that students' writing skills have decline over the past decade or so. However, when working on the upper management report, the professor (author) allows the students to submit a rough draft of their year 1 summary for feedback on writing and content. Once corrections are made based on the professor's feedback, students have a guide on how to prepare the other 4 years annual summaries. Many groups take advantage of this help, but unfortunately, some groups don't. The groups that take advantage of the report feedback, typically do better on the report. They also tend to get more out of the assignment and actually improve their writing skills. The year before the professor started offering feedback on rough drafts, the average grade on the reports was 78.5%. Once the professor started offering feedback on rough drafts, the average grade on reports jumped to an 84.5% over a 2 year period. Therefore, the quality of the writing and content of the reports improved. When asked if they thought the report was a useful learning tool as part of the sales management course, 91% agreed.

CONCLUSION

Overall, the upper management report project has been well received by the students. The author is also pleased with the project and will continue to use it in his sales management course. In fact, when talking to a fellow professor about the MARS simulation, the author mentioned the report project to him, and the other professor has since adopted the performance report project for his sales management course to go with the MARS simulation. While the MARS simulation and performance report have worked well for the sales management course, the report is not without limitations. If the professor offers to give feedback on rough drafts, it can be very time-

consuming. This past semester there were 18 management teams divided into three regions, so the professor had to review 18 rough drafts. However, while it does take some time, the feedback does improve the quality of the overall reports. Another drawback is the same problem encountered by professors in any group project. Some students tend to do more work than others. While group evaluations don't seem to completely eliminate this issue, they do help alleviate the problem. Finally, the performance report project is only useful to programs using the MARS Sales Management simulation. However, there are already several schools with sales management courses that use the MARS simulation.

The author has used the MARS simulation and the performance report to replace the case studies he once did in his course. He feels the MARS simulation game actively engages the students in a competitive environment, and they are, therefore, more engaged in the course. Overall, we feel the performance report project is an excellent addition to the MARS simulation, and we feel many more programs would adopt the performance report project, once they are aware of its benefits to the students.

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APPENDIX A - REPORT OUTLINE

Front Cover

Table of Contents

Year 1 Summary

Introduction

Company Performance Analysis

Sales Rep Performance Comparison within Company

Sales Rep Performance Comparison within Industry

Year 2 Summary (same format as year 1 above)

Year 3 Summary (same format as year 1 above)

Year 4 Summary (same format as year 1 above)

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APPENDIX B - CONTENT FOR EACH SECTION OF THE REPORT

Introduction – This should be an introduction to what you are going to present in each section of the report. In other words, what are the subsections and what type of information will be presented and/or discussed in each sub-section. It should be a brief, one paragraph introduction to each main section.

Company Performance Analysis - This section should be a discussion of HOW your company performed compared to the other companies in your region. Your discussion should focus on the data from three industry data tables showing sales volume, market share, and profitability for all companies in the region. How or why you made decisions should NOT be part of this discussion. Stick to the facts and avoid supposition. Where did your company rank in sales volume, market share, and profitability compared to the other companies in the region and how far behind or ahead was your company compared to the company right ahead of you, the company right behind you, and the #1 company? If your company is #1, compare yourself to #2 and #3. Discuss sales volume and market share together, followed by a discussion of profitability. Data from the industry data tables should be included in your discussion of each of the 3 areas. Reference the data in your discussion, e.g. (Table 1.1). Do not break the discussion into a quarter-by-quarter discussion. Base the discussion on the yearly performance of your company. Examples of the 3 tables for this section are included later in these guidelines.

Sales Rep Performance Comparison within Company - This should be a discussion explaining how your sales reps performed during each year in comparison to each other. Base the discussion on the information in Tables 1.4 & 1.5. The discussion should focus on sales volume, percent of company sales, contribution to profit, and percent of the contribution to profit for your sales reps. The data referred to in your discussion should be referenced, e.g. (Table 1.4). Do not break your discussion into a quarter-by-quarter discussion. It should be based on the yearly performance of your sales reps. How did your sales reps rank in each of the 3 areas? How far behind was each sales rep from the next higher ranked sales rep. Examples of the tables to be included in these sections are included later in these guidelines.

Sales Rep Performance Comparison within Industry – This should be a discussion explaining how each of your sales reps performed during each year compared to his/her “mirror” sales reps from the other companies in your region. The discussion should focus on information from the 5 tables (Tables 1.6, 1.7, 1.8, 1.9, 1.10 for year 1) that must be included in this section of your report that show sales volume and percent of sales. Reference the data in your discussion, e.g. (Table 1.6). Do not break your discussion into a quarter-by-quarter discussion. It should be based on the yearly performance of your sales reps. What was your sales rep rank in sales volume and percent of sales compared to his/her mirror sales reps in the region? Compared to the mirror sales rep ranked directly ahead of your sales rep, how far behind was your sales rep? Compared to the mirror sales rep ranked directly behind your sales rep, how far ahead was your sales rep? Finally, compared to the number 1 ranked mirror sales rep, how far behind was your sales rep? If your sales rep is #1, compare your sales rep to the #2 and #3 mirror sales reps. Discuss sales volume and percent of sales together. Examples of the tables for this section are included later in these guidelines.

Overall Company Summary – Prepare the write-ups for the 3 sub-sections of the Overall Company Summary just as you did for the corresponding yearly sections discussed earlier in these guidelines; however, instead of discussing yearly results, base the discussion on the results for all 4 years of company and sales rep performance. Do not break the discussion into a year-by-year discussion. Base your discussion on the overall performance of your company for the entire 4-year period. Reference the data referred to in your discussion, e.g. (Table 5.1) Examples of the required tables for this section are presented later in these guidelines (Table 5.1 through Table 5.10)

Decision-Making Processes - This section is a discussion of your final decision-making process used for each of the decision areas of the game. Discuss each decision item (those listed in the outline) should in detail. You should give examples using specific data/information from the simulation game to help explain the decision-making process you finally settled on for each of the decision items. In other words, explain the process, and then give a specific example of the process using data/information from the simulation game.

Management Summary - This should be your overall assessment of the sales management simulation as a learning tool. What were the advantages and the disadvantages of using the simulation as a learning tool? Would you recommend it for further classes, why or why not? Each manager should write his/her own summary for this section of the report. No manager names please, just label as Manager 1, Manager 2, etc.

APPENDIX C - REQUIRED TABLES

Tables Required for your Yearly Company Performance Analysis Sections

Table 1.1
Sales Volume – Year 1

| Company Name | Quarter 1 | Quarter 2 | Quarter 3 | Quarter 4 | Total |
|--------------|-----------|-----------|-----------|-----------|--------------|
| Company 1 | \$000,000 | \$000,000 | \$000,000 | \$000,000 | \$0,000,000 |
| Company 2 | \$000,000 | \$000,000 | \$000,000 | \$000,000 | \$0,000,000 |
| Company 3 | \$000,000 | \$000,000 | \$000,000 | \$000,000 | \$0,000,000 |
| Etc. | \$000,000 | \$000,000 | \$000,000 | \$000,000 | \$0,000,000 |
| Total | | | | | \$00,000,000 |

Table 1.2
Market Share – Year 1

| Company Name | Quarter 1 | Quarter 2 | Quarter 3 | Quarter 4 | Annual |
|--------------|-----------|-----------|-----------|-----------|--------|
| Company 1 | 00.0% | 00.0% | 00.0% | 00.0% | 00.00% |
| Company 2 | 00.0% | 00.0% | 00.0% | 00.0% | 00.00% |
| Company 3 | 00.0% | 00.0% | 00.0% | 00.0% | 00.00% |
| Etc. | 00.0% | 00.0% | 00.0% | 00.0% | 00.00% |

*Label the last column of the market share table as “Annual” (as shown above)

Table 1.3
Profitability – Year 1

| Company Name | Quarter 1 | Quarter 2 | Quarter 3 | Quarter 4 | Total |
|--------------|-----------|-----------|-----------|-----------|-------------|
| Company 1 | \$00,000 | \$00,000 | \$00,000 | \$00,000 | \$000,000 |
| Company 2 | \$00,000 | \$00,000 | \$00,000 | \$00,000 | \$000,000 |
| Company 3 | \$00,000 | \$00,000 | \$00,000 | \$00,000 | \$000,000 |
| Etc. | \$00,000 | \$00,000 | \$00,000 | \$00,000 | \$000,000 |
| Total | | | | | \$0,000,000 |

Tables Required for the “Sales Rep Performance Comparison within Company” sections

Table 1.4
Our Sales Reps’ Sales Volume & Percent of Company Sales – Year 1

| Rep’s Name | Quarter 1 | Quarter 2 | Quarter 3 | Quarter 4 | Total | PCS |
|------------|-----------|-----------|-----------|-----------|-------------|--------|
| Bob | \$0,000 | \$0,000 | \$0,000 | \$0,000 | \$00,000 | 00.00% |
| Emily | \$0,000 | \$0,000 | \$0,000 | \$0,000 | \$00,000 | 00.00% |
| Kevin | \$0,000 | \$0,000 | \$0,000 | \$0,000 | \$00,000 | 00.00% |
| Jen | \$0,000 | \$0,000 | \$0,000 | \$0,000 | \$00,000 | 00.00% |
| Katie | \$0,000 | \$0,000 | \$0,000 | \$0,000 | \$00,000 | 00.00% |
| Total | | | | | \$0,000,000 | |

* “PCS” = Percent of Company Sales

**Table 1.5
Contribution to Profit & Percent of CP– Year 1**

| Rep’s Name | Quarter 1 | Quarter 2 | Quarter 3 | Quarter 4 | Total | PCP |
|------------|-----------|-----------|-----------|-----------|-------------|--------|
| Bob | \$0,000 | \$0,000 | \$0,000 | \$0,000 | \$00,000 | 00.00% |
| Emily | \$0,000 | \$0,000 | \$0,000 | \$0,000 | \$00,000 | 00.00% |
| Kevin | \$0,000 | \$0,000 | \$0,000 | \$0,000 | \$00,000 | 00.00% |
| Jen | \$0,000 | \$0,000 | \$0,000 | \$0,000 | \$00,000 | 00.00% |
| Katie | \$0,000 | \$0,000 | \$0,000 | \$0,000 | \$00,000 | 00.00% |
| Total | | | | | \$0,000,000 | |

* “PCP” = Percent of Contribution to Profit.

Tables Required for the Yearly “Sales Rep Performance Comparison within Industry” sections

**Table 1.6
Sales Volume & Percent of Sales (Bob) – Year 1**

| Company Name | Quarter 1 | Quarter 2 | Quarter 3 | Quarter 4 | Total | POS |
|--------------|-----------|-----------|-----------|-----------|-----------|--------|
| Company 1 | \$0,000 | \$0,000 | \$0,000 | \$0,000 | \$00,000 | 00.00% |
| Company 2 | \$0,000 | \$0,000 | \$0,000 | \$0,000 | \$00,000 | 00.00% |
| Company 3 | \$0,000 | \$0,000 | \$0,000 | \$0,000 | \$00,000 | 00.00% |
| Etc. | \$0,000 | \$0,000 | \$0,000 | \$0,000 | \$00,000 | 00.00% |
| Total | | | | | \$000,000 | |

* “POS” = Percent of Sales

PLEASE NOTE: You should have tables like the one above for each named sales rep, i.e, Table 1.7 Emily, Table 1.8 Kevin, Table 1.9 Jen, Table 1.10 Katie.

TABLES REQUIRED FOR YOUR OVERALL COMPANY SUMMARY SECTION

Company Performance Analysis

**Table 5.1
Final Total Sales Volume**

| Company Name | Year 1 | Year 2 | Year 3 | Year 4 | Total |
|--------------|-------------|-------------|-------------|-------------|--------------|
| Company 1 | \$000,000 | \$000,000 | \$000,000 | \$000,000 | \$0,000,000 |
| Company 2 | \$000,000 | \$000,000 | \$000,000 | \$000,000 | \$0,000,000 |
| Company 3 | \$000,000 | \$000,000 | \$000,000 | \$000,000 | \$0,000,000 |
| Etc. | \$000,000 | \$000,000 | \$000,000 | \$000,000 | \$0,000,000 |
| Total | \$0,000,000 | \$0,000,000 | \$0,000,000 | \$0,000,000 | \$00,000,000 |

Table 5.2
Final Overall Market Share

| Company Name | Year 1 | Year 2 | Year 3 | Year 4 | Overall |
|--------------|--------|--------|--------|--------|---------|
| Company 1 | 00.00% | 00.00% | 00.00% | 00.00% | 00.00% |
| Company 2 | 00.00% | 00.00% | 00.00% | 00.00% | 00.00% |
| Company 3 | 00.00% | 00.00% | 00.00% | 00.00% | 00.00% |
| Etc. | 00.00% | 00.00% | 00.00% | 00.00% | 00.00% |

Table 5.3
Final Total Profitability

| Company Name | Year 1 | Year 2 | Year 3 | Year 4 | Total |
|--------------|-----------|-----------|-----------|-----------|-------------|
| Company 1 | \$00,000 | \$00,000 | \$00,000 | \$00,000 | \$000,000 |
| Company 2 | \$00,000 | \$00,000 | \$00,000 | \$00,000 | \$000,000 |
| Company 3 | \$00,000 | \$00,000 | \$00,000 | \$00,000 | \$000,000 |
| Etc. | \$00,000 | \$00,000 | \$00,000 | \$00,000 | \$000,000 |
| Total | \$000,000 | \$000,000 | \$000,000 | \$000,000 | \$0,000,000 |

*Label the last column of the market share table as “Overall.”

Sales Rep Performance Comparison within Company

Table 5.4
Our Sales Reps’ Sales Volume & Percent of Company Sales – All 4 Years

| Rep’s Name | Year 1 | Year 2 | Year 3 | Year 4 | Total | PCS |
|------------|---------|---------|---------|---------|-------------|--------|
| Bob | \$0,000 | \$0,000 | \$0,000 | \$0,000 | \$00,000 | 00.00% |
| Emily | \$0,000 | \$0,000 | \$0,000 | \$0,000 | \$00,000 | 00.00% |
| Kevin | \$0,000 | \$0,000 | \$0,000 | \$0,000 | \$00,000 | 00.00% |
| Jen | \$0,000 | \$0,000 | \$0,000 | \$0,000 | \$00,000 | 00.00% |
| Katie | \$0,000 | \$0,000 | \$0,000 | \$0,000 | \$00,000 | 00.00% |
| Total | | | | | \$0,000,000 | |

* “PCS” = Percent of Company Sales

Table 5.5
Contribution to Profit & Percent of CP – All 4 Years

| Rep’s Name | Year 1 | Year 2 | Year 3 | Year 4 | Total | PCP |
|------------|---------|---------|---------|---------|-------------|--------|
| Bob | \$0,000 | \$0,000 | \$0,000 | \$0,000 | \$00,000 | 00.00% |
| Emily | \$0,000 | \$0,000 | \$0,000 | \$0,000 | \$00,000 | 00.00% |
| Kevin | \$0,000 | \$0,000 | \$0,000 | \$0,000 | \$00,000 | 00.00% |
| Jen | \$0,000 | \$0,000 | \$0,000 | \$0,000 | \$00,000 | 00.00% |
| Katie | \$0,000 | \$0,000 | \$0,000 | \$0,000 | \$00,000 | 00.00% |
| Total | | | | | \$0,000,000 | |

* “PCP” = Percent of Contribution to Profit

Sales Rep Performance Comparison within Industry

**Table 5.6
Sales Volume & Percent of Sales (Bob) – All 4 Years**

| Company Name | Year 1 | Year 2 | Year 3 | Year 4 | Total | POS |
|--------------|---------|---------|---------|---------|-----------|--------|
| Company 1 | \$0,000 | \$0,000 | \$0,000 | \$0,000 | \$00,000 | 00.00% |
| Company 2 | \$0,000 | \$0,000 | \$0,000 | \$0,000 | \$00,000 | 00.00% |
| Company 3 | \$0,000 | \$0,000 | \$0,000 | \$0,000 | \$00,000 | 00.00% |
| Etc. | \$0,000 | \$0,000 | \$0,000 | \$0,000 | \$00,000 | 00.00% |
| Total | | | | | \$000,000 | |

* “POS” = Percent of Sales

PEASE NOTE: You should have tables like the one above for each named sales rep, i.e, Table 5.7 Emily, Table 5.8 Kevin, Table 5.9 Jen, Table 5.10 Katie.

APPENDIX D - REPORT GUIDELINES

Final Report Guidelines for the Simulation Project

The final report is a group project. The final report grade is based on the quality of the report (spelling and grammar) and the quality and accuracy of the information in the report. The report should look professional and flow together as if written by one person. Spelling and/or grammar errors will have a significant impact on your final report grade; therefore, make sure you prepare and edit your report carefully. The report should be double-spaced (except tables), left justified (however, indent the first line of each paragraph), ½ (0.5) inch margins (top, bottom, left, and right), and typed in Times New Roman 12-point font (except for the cover page). The report should have a table of contents, and the pages should be numbered beginning with the first page following the table of contents (page 1). The front page of the report should include your company name, each group member's name, a signature line next to each member's name, and the submission date for the report. **Please note:** Your signature indicates you have read the entire report and approve the contents of the entire report. If you have not proofed the entire report, do not sign the report. Signing your name, without proofing the entire report, will be an ethics violation under BSU policy and will result in a grade of 0% on the report. There is no page limit for the final report; however, your report should thoroughly cover the information requested for the outline below. Print the report one-sided with the pages placed back-to-back in plastic protective insert sheets. Your report is to be submitted in a ½ (0.5) inch, 3-ring binder. Use plastic insert sheets for placing the report pages in the binder. Prepare the report as if you are the district management team reporting to your regional manager. Do not use the terms “simulation,” “game,” or “MARS” when preparing your report, except in the manager summary section of the report. Failure to follow these guidelines will result in a reduction of your grade for the report. Your report should include the following sections in this order:

Other Important Guidelines for Tables Included in the Report

*For your tables, **round** all data in the “Annual,” “Overall,” “PCS,” “POS,” and “PCP” columns to **two decimal places**. You may copy the **quarterly** market share numbers directly from the game tables, the quarterly market share numbers (in the game) are rounded to the tenth column (one decimal place).

*When listing your company's sales reps in the tables, list them in order based on seniority, with the most senior sales rep listed first (as shown in the examples).

*When listing the companies, list the companies in the same order as listed in the simulation reports when preparing your tables.

*Do something to make your company's name and data stand out from the other companies in your tables.

*All tables in the report should be numbered and labeled for easy reference. Use the table number when referring to specific data in your discussions when preparing the report.

*Each table should fit on the same page it was started, i.e., tables should not be split across two pages. If an entire table will not fit on a page, move the entire table to the following page.

*In general, insert tables into the report either directly before or after where you first refer to the table in your discussion.

* Do not begin a section of your report with a table.

*The cells in your table should look like the example tables as far as height (single spaced cells) for a more professional appearance.

PLEASE NOTE

*All the tables in the guidelines are required for your report. Therefore, you must include all 10 tables in each of the 5 sections of your report that requires tables for a total of 50 required tables for your report.

***All tables MUST be accurate.** There will be a **1-point deduction** from your final report grade for **each** table containing inaccurate information, inaccurately formatted table design, or inaccurately formatted data.

***Your group has until _____ to submit a rough draft of the Year 1 Summary for your company.** The rough draft should include the following:

*The Cover Page (no signatures needed at this time)

*The Table of Contents (for the information included at time of submission)

*The Introduction for the Year 1 Summary

*The write-up for the information in Tables 1.1 and 1.2 of the Company Performance Analysis section

*The write-up for the information in Table 1.4 of the Sales Rep Performance Comparison within Company section

*The write-up for the information in Table 1.6 of the Sales Rep Performance Comparison within Industry section

*Include all 10 required tables even though you do not include all the write-ups.

Follow all final report guidelines when submitting the rough draft. Submit a printed hard copy to your regional manager. Print the rough draft one-sided and staple the rough draft in the upper left corner. I will review rough drafts in the order submitted. The regional manager will not check the numbers in the tables for accuracy when reviewing rough drafts. However, the regional manager will give detailed feedback on table and data formatting as well as on the written discussions of each section.

*The regional manager will not review rough drafts of Year 2, 3, or 4 annual summaries nor of the overall company summary because once your group has the year 1 summary corrected and

finalized, the process is the same for those other sections of the report; therefore, you will have a template to go by to complete those other sections.

*The regional manager will review rough drafts of 3 subsections of the **decision-making processes section** of final reports once the subsections are completed. There is no deadline for submitting these subsections for feedback.

***IF YOU HAVE ANY QUESTIONS REGARDING THESE GUIDELINES OR IF YOU HAVE ANY QUESTIONS REGARDING YOUR FINAL REPORT, PLEASE SEE YOUR REGIONAL MANAGER.**

WARNING: DO NOT DELAY STARTING ON THIS REPORT!

*The final report is due _____.

*Group Evaluations for the final report are due as follows:

Final Report Group Evaluation #1 (p. 72) is due _____.

Final Report Group Evaluation #2 (p. 73) is due _____.

Final Report Group Evaluation #3 (p. 74) is due _____.

Final Report Group Evaluation “Entire Report” group evaluation (p. 75) is due _____.

All evaluations are due at the beginning of class on the due dates. Late, missing or incomplete evaluations will lower your final report grade.

APPENDIX E - FINAL REPORT GRADING PROCESS

Final Report Grade: The final report grade is based on the quality of the information in the report and providing complete information to accurately describe your company's performance according to the reporting instructions received from the regional manager. Specifically, the final report grade is based on: following the formatting guidelines, following content requirements, providing all necessary tables to explain company and sales rep performance (company performance and sales rep performance sections), the accuracy of the data provided in the tables, writing uniformity and clarity, and the professional appearance of the report.

POINT ALLOCATION

| | |
|--|-----------------|
| Cover Page | 5 pts |
| Table of Contents | 5 pts |
| Introduction write-ups | 5 pts |
| Company Performance write-ups | 20 pts |
| Sales Rep Performance (Company) write-ups | 20 pts |
| Sales Rep Performance (Industry) write-ups | 20 pts |
| Decision Process write-ups | 20 pts |
| Manager Summaries | <u>5 points</u> |
| Total | 100 points |

OTHER FACTORS THAT AFFECT THE GROUP REPORT GRADE:

Table containing incorrect data (-2 points for each), missing tables (-5 points for each), improperly formatted table or improperly formatted data in the table (-2 points for each), not submitting rough draft on time (-5 points)

Formatting errors:

Page numbers (-1 to -3 points), Margins (-1 to -3 points), Font (-1 to -3 points), Spacing of report (-1 to -5 points), Justification (-1 to -3 points), Highlighting data (-1 to -5), Binder (-3 points), Insert Sheets (-3 to -5 points)

OTHER FACTORS THAT AFFECT INDIVIDUAL GRADES FOR THE FINAL REPORT:

| | |
|---|-----------------|
| Submitting the Wrong Evaluation Form | -2 each |
| Submitting a Late Evaluation Form | -2 each |
| Submitting an Incomplete Evaluation Form | -2 each |
| Working on an evaluation form in class | -3 each |
| Submitting a "Late, Late" Evaluation Form | -3 each |
| Not submitting an Evaluation Form | -5 points each |
| Group Evaluation Ratings | (+/- ?? points) |

APPENDIX F - FINAL REPORT GROUP EVALUATION EXAMPLE

Company _____ Evaluator: _____ Date: _____

| PERFECT | | | | AVG | | | | POOR | | | |
|--|----|-----|---|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|
| Scale | 10 | 9.5 | 9 | 8.5 | 8 | 7.5 | 7 | 6.5 | 6 | 5.5 | 5 |
| Manager Names: (including yourself) | | | | | | | | | | | |
| Evaluation Items | | | | Rating |
| Attendance at meetings | | | | | | | | | | | |
| Promptness to meetings | | | | | | | | | | | |
| Preparation for meetings | | | | | | | | | | | |
| Quantity of work on report | | | | | | | | | | | |
| Quality of work on report | | | | | | | | | | | |
| Attitude toward other managers | | | | | | | | | | | |
| Attitude toward the report | | | | | | | | | | | |
| Leadership | | | | | | | | | | | |
| Communication with managers | | | | | | | | | | | |
| Cooperativeness | | | | | | | | | | | |
| Ratings Total | | | | | | | | | | | |

You must include comments to support the ratings for **each manager** on the back of this page!

ABOUT THE AUTHORS

Joseph D. Chapman Dr. Chapman is a professor in the Marketing Department at Ball State University. He earned his doctorate from Virginia Polytechnic and State University (Virginia Tech University), and he has over 30 years of teaching and consulting experience in the sales area. Dr. Chapman was instrumental in the establishment and growth of Ball State's nationally recognized sales program. He has published research in several well-known business journals including the *Journal of Personal Selling and Sales Management*, the *Journal of Marketing Theory and Practice*, the *Review of Business*, the *Marketing and Management Journal*, and the *Marketing Education Review*. He has also published and presented numerous papers at national and regional professional marketing, business, and sales conferences. Dr. Chapman is an experienced business consultant. His consulting has focused on sales training, sales selection, customer satisfaction, customer service, and employee satisfaction. He has been recognized by Big Brothers Big Sisters and the YMCA for his direction and support of those non-profit organizations.

Russell G. Wahlers Dr. Wahlers is the Department Chair of the Marketing Department at Ball State University. He received his DBA degree from Kent State University. Prior to joining the Ball State faculty, he taught at the University of Notre Dame, John Carroll University, and Kent State University. Dr. Wahlers' industry experience includes assignments at The BFGoodrich Engineered Systems Company in Market Research, Business Planning, and Corporate Purchasing. His teaching interests are in the areas of Consumer Behavior and Marketing Simulation. Dr. Wahlers has published research in the *Journal of Marketing Theory and Practice*, *Advances in Consumer Research*, *International Journal of Retailing and Distribution Management*, *Journal of Leisure Research*, *Journal of Travel Research*, *Journal of Professional Services Marketing*, *Review of Business*, and *Marketing Intelligence and Planning*. He has also published and presented numerous papers at national and regional professional marketing and business conferences.