



**KELLEY SCHOOL OF BUSINESS**  
CENTER FOR GLOBAL SALES LEADERSHIP  
National Team Selling Competition

October 6, 2020

Congratulations on being selected to participate in the 14<sup>th</sup> annual National Team Selling Competition hosted by Indiana University's Kelley School of Business. We're looking forward to virtually meeting you on October 21<sup>st</sup>.

The National Team Selling Competition provides an invaluable learning experience for you and your team members, and we are excited about the energy your school will bring to this virtual selling environment. We hope that you are not only challenged by the case, but also have fun working with your team and virtually interacting with Altria and 3M.

As corporate sponsors of the competition, we work closely with Indiana University's Center for Global Sales Leadership to develop a case that will highlight your abilities. Our goal is to give you the opportunity to take your classroom knowledge and experience and apply those skills in a selling situation that is realistic and relevant in today's world.

Altria and 3M employees participating in the case competition have a wide range of sales and other career experiences. "Corporate Connections" networking will follow your first competition appointment. During this virtual segment, we hope you'll get to know us better and learn about our career intern and full-time opportunities.

On behalf of Altria and 3M, we wish you good luck and great selling!



**Altria**





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National Team Selling Competition

## **NTSC 2020 COMPETITION DIRECTIONS & GUIDELINES**

### **NTSC SUMMARY**

NTSC 2020 is a three-student team selling competition. Each team will have two 20-minute virtual appointments (first appointment on Thursday, second appointment on Friday) with two representatives from a fictitious company. The competition will kick off on Wednesday with a virtual welcome and instructions and will conclude Friday with a case debrief and the announcement of competition MVP's and winners.

In the spirit of real-world selling, the case and judging rubric are available two weeks prior to the competition. 30+ schools will be competing in four different competition rooms.

### **SCHEDULE OF EVENTS**

- Wednesday, October 21, 6:00p-7:00p EST – welcome and instructions\* (all participants)
- Thursday, October 22, 8:45a-5:15p EST – first appointment (60 minute time commitment)\*
- Friday, October 23, 8:45a-3:55p EST – second appointment (60 minute time commitment)\*
- Friday, October 23, 4:45p-5:30p EST – conclusion and winners announced (all participants)
- \*Teams will receive a detailed agenda and will find out their specific first and second appointment times closer to the competition. West coast and mountain schools will have later appointments.

### **WINNERS & PRIZES**

- \$9,000.00 in cash prizes.
- 1<sup>st</sup> & 2<sup>nd</sup> place winners in each of the 4 competition rooms. 1<sup>st</sup> place = \$1,500.00. 2<sup>nd</sup> place = 750.00.
- Winners announced Friday following case debrief.

### **COMPETITION LOGISTICS**

- Zoom is the video platform that will be used for the competition. We recommend using Zoom as your team's practice platform. If your school does not utilize Zoom, you can create a free account at Zoom.us. There is also a Zoom mobile app that can be utilized in the event of internet difficulties during the competition (we only recommend mobile connection as a last resort). Being comfortable with Zoom will be instrumental in this virtual competition setting.
- Coaches and alternate team members are welcome to observe the competition with their cameras off and audio muted. Coaches may advise in between appointments.
- Competition attire: business professional.



# KELLEY SCHOOL OF BUSINESS

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National Team Selling Competition

## COMPETITION – Appointment 1 (Thursday)

- **Purpose:** Your objectives for this meeting are to gather information and discuss possible solutions to help you prepare for your second appointment. **There is important information that you will need to uncover during this meeting to be successful.**
- **Format:** 20-minute sales interaction with two role players via Zoom. Teams will be admitted to their competition room where a “tech check” and final instructions will occur. Appointment starts at the conclusion of the final instructions and ends when team finishes appointment or 20 minutes has elapsed – whichever is first. A panel of judges will be observing with their cameras off.
- **Time warning:** Teams are responsible for keeping track of their 20 minutes. A “2 minutes remaining” message will appear in the Zoom chat.
- **Technology:** Appointment is an interactive team discussion via Zoom with two role players. You will have the ability to share your screen if you choose.
- **Appointment recorded:** Appointment will be recorded.
- **Feedback:** No judge feedback following Appointment 1.
- **Corporate Connection:** At the completion of Appointment 1, you will move to a Zoom breakout for 5 minutes to debrief as a team. You will then rejoin the main room for a 20-minute discussion with representatives from Altria and 3M.
- **Meeting conclusion:** Stay connected. Do not “leave” the Zoom meeting until instructed to do so.

## COMPETITION – Appointment 2 (Friday)

- **Purpose:** Your objective for this meeting is to gain commitment to a sale of Helping Hand.
- **Format:** 20-minute sales interaction with two role players via Zoom. Teams will be admitted to their competition room where a “tech check” and final instructions will occur. Appointment starts at the conclusion of the final instructions and ends when team finishes appointment or 20 minutes has elapsed – whichever is first. A panel of judges will be observing with their cameras off.
- **Time warning:** Teams are responsible for keeping track of their 20 minutes. A “2 minutes remaining” message will appear in the Zoom chat.
- **Technology:** Appointment is an interactive team discussion via Zoom with two role players. You will have the ability to share your screen if you choose.
- **Appointment recorded:** Appointment will be recorded.
- **Feedback:** At the completion of Appointment 2, you will have 10 minutes to debrief as a team while buyers and judges consult in a Zoom breakout. Buyers and judges will then rejoin the main room for 10 minutes of verbal feedback.
- **Meeting conclusion:** Stay connected. Do not “leave” the Zoom meeting until instructed to do so.

## POST COMPETITION

- Checks and trophies mailed to winning teams.
- Overall room rank and video links emailed to teams.
- NTSC survey emailed to teams and coaches.

## 2020 NTSC Case Overview and Objectives

### **Note: This case is a fictional situation.**

The following case situation was developed for the Indiana University National Team Selling Competition (NTSC) presented by Altria and 3M. Although it reflects real-life conditions, both the company you are representing and the account you are selling to are fictitious. All similarities to actual companies are coincidental and unintended. Any actual trademarks used or mentioned are the property of their respective owners. In this case, you will find the use of actual and fictional market data to develop the case scenario. The market and volume data are not intended to reflect real life market data for companies mentioned. The market volume and pricing data for the account has been fabricated. Market information about the company you are representing was also fabricated. No information from previous NTSC cases has any relevance in this case.

### **Case Introduction**

Your sales team works for Tech Spot and is representing a new robot called Helping Hand. You just secured two appointments to meet with a new prospective retail client, Hats Off To You. The goal is to sell Helping Hand. Considering their upcoming busy holiday season, Hats Off To You has asked for virtual meetings.

Your three-person student team represents the Helping Hand sales team. Hats Off To You is a chain of grocery stores located in the Midwest region of the United States.



You have two appointments scheduled with Hats Off To You.

### **Appointment 1 - 20 Minutes**

Your first appointment is with Taylor, the President and CEO, and Devin, the Director of Operations, of Hats Off To You. Your objectives for this meeting are to gather information and discuss possible solutions to help you prepare for your second appointment. There is important information that you will need to uncover during this meeting to be successful.

### **Appointment 2 - 20 Minutes**

During the second appointment, your team will have an engaging selling conversation with Taylor and Devin. Your objective for this meeting is to gain commitment to a sale of Helping Hand.





Grace could not believe her dreams were coming true. She attributed much of her success to her grandparents who raised her from birth. Her grandpa inspired her love for building things and making them come to life. He was a mechanic by trade, but during most of his free time tinkered with machines and built contraptions that would make every day tasks just a bit easier to manage. His first invention was a self-feeding dog bowl for his best friend Muffin. As the oldest grandchild, Grace would spend hours in the garage with her grandpa helping him build his next helpful gadget. Grace also had a big heart and loved volunteering in the community with her grandma. On the weekends, she would spend much of her free time during the day volunteering and then after dinner when her grandpa would get home from work, she would head straight to the garage. After school Grace spent time at the local community youth organization until her grandma could pick her up. The organization offered many optional learning sessions for the kids, and Grace was so excited when they offered a session on robotics. It was there that Grace discovered another love – robots.

In the beginning of 6<sup>th</sup> grade, Mrs. Jackson, Grace’s science teacher, approached her about an idea to start a robotics club. The clubs were becoming quite popular in many schools to bring awareness to the Science, Technology, Engineering and Mathematics (STEM) fields. Mrs. Jackson knew Grace had a passion for robots and building things, and thought she would be a great advocate for the club. She loved the idea and convinced her closest friends to join, and quickly, with the help of her science teacher, they had over 25 members. They would meet once a week, and after a few months, started competing in local area robotics competitions. As the club president, Grace set a goal for them to win a competition before the end of her 7<sup>th</sup> grade year, and they did just that! The robotics club had successfully built many different gadgets as a team, but the winning robot was inspired by Grace’s invention of a mini robot that was able to mop her grandma’s floors. Grace always set her sights on building robots that would help with everyday tasks. It was her way of connecting her love of building things and helping people.

Grace’s passion for robotics continued throughout high school, as well. Due to her leadership, the robotics club routinely was recognized across the state and placed in most of the competitions they entered. One component that made their high school robotics team unique was their mission to give back and help foster a learning environment for the elementary students to better understand robotics and its endless possibilities. Grace coordinated with her middle school science teacher to mentor the younger students two times a month during their routine meetings. The entire robotics team agreed that sharing their love and knowledge of robots was one of their favorite things to do.

Early in her college search, Grace had determined she would like to pursue a career in engineering and hoped to stay in the Midwest. Lucky for her, there were multiple highly-ranked engineering schools to consider within her geography preferences. Her grandparents were getting older and were not as mobile as they once were, so being close to them was important to her. She was thrilled when she was direct admitted into a top-ranked engineering program and also received a significant scholarship. As the first grandchild to attend college, she knew she was making her grandparents very proud.



As expected, Grace continued to tinker with building robots throughout college and was a member of the collegiate robotic club and attended multiple competitions. She had chosen electrical engineering as her major because it seemed to be the best foundation to pursue a career in robotics, which was her passion. While attending the competitions she had the opportunity to network with several companies in the robotics industry. Representatives from the tech companies often served as judges for the competitions and many quickly noticed Grace's talent and passion for building robots.

A west coast technology company, Tech Spot, identified Grace as a student they would like to recruit for their internship program. During a recruiting visit on campus, the managers at Tech Spot invited her to dinner to discuss more about their career opportunities. Grace was thrilled and gladly accepted the invitation. She had heard great things about this company, knew they had many innovative products in their portfolio, and had recently created a new robotics division. She couldn't wait to learn more! During dinner, she met two Tech Spot managers and one recent graduate from her university who had also interned at the company after his junior year in college. His name was Jack and she immediately felt at ease speaking to him about his experiences as an intern and now a full-time employee starting an exciting career. Jack shared with Grace that he had won the internship competition by pitching his photo technology product idea. Ultimately that is how Jack received his current Project Lead position, making him responsible for the development and launch of his product creation, OptimEYEz.

After two successful interviews and a site visit, Grace made the decision to join Tech Spot the summer after her junior year. All interns received a mentor for the summer, and she was so excited to learn that her mentor was Jack. She loved the idea of continuing to learn about the industry and best practices from someone she could relate to. As in previous summers, all Tech Spot interns would have the opportunity to create and pitch a tech product that would address a need in the retail industry. The winning product pitch could potentially be launched and marketed by the company. Jack challenged Grace to be creative and stay true to her passions while developing her product. She knew she wanted to create a robot that would fulfill a need in the retail industry. The question was, "what will this robot do?"

She had learned much more about Jack's product, OptimEYEz, during her mentoring sessions. She was intrigued to learn that the product allowed for cameras to monitor store shelf inventory conditions and alert category/department managers of inventory opportunities. The camera technology was so sophisticated that it could view how many of each monitored item remained on the shelf. OptimEYEz launched and was receiving rave reviews from all customers.



Late one night while brainstorming product ideas, drinking Starbucks, and listening to her favorite pump-up song, Grace had a breakthrough. What if she was able to incorporate the camera technology Jack had created into a robot that would help with a need in the retail industry? She heard about some retailers using robots to clean and some using robots to communicate where products are in stores; but she needed to think deeper. She knew from her research that online product ordering for store pick-up and delivery was on the rise; however, it was difficult for retailers to hire, train, and retain employees to complete the work. Another challenge was the friction inside the store that was created as these online orders were being picked and processed. Employees were often in the way of in-store shoppers trying to complete their shopping. What if Grace created a robot that was able to process online store orders for pick-up and delivery after the stores were closed?

Grace went to work on the tasks that the robot would be able to complete. The robot would contain Jack's photo technology to identify products from customer online orders and would have the functionality to pick the items from the shelf or backroom. Using UPCs and unique customer barcodes, Helping Hand would allow for the orders to be processed by a robot and stored in the backroom for pickup and delivery. This robot would have the potential to be a Helping Hand to retailers across the country.

The next morning, she immediately texted Jack and asked if he would be available to join her for lunch so she could share her idea and get his approval to incorporate his photo technology. Jack was very impressed with her idea, and quickly agreed she could use his technology in the robot. Grace was excited to get started on her product outline and pitch, and Jack was eager to help her practice and provide feedback.

As Jack predicted, Grace did an outstanding job presenting her robot idea. The executives unanimously agreed that Grace was the clear winner of the internship product pitch competition. She was offered a full-time job after graduation as the Product Lead for Helping Hand. She was now responsible for the development and launch of this innovative robot.

Fast forward, Grace couldn't believe that she was already approaching her one-year anniversary as a full-time employee at Tech Spot. The last year had certainly been challenging; however, Grace could not be more excited about how far she and the team had come in developing her robot, Helping Hand. She never imagined all the possibilities that existed with a robot like this one. During the development stage her team was able to brainstorm multiple features that could be incorporated into Helping Hand. The robot could do so much more to help retailers than Grace had ever imagined. They had come so far, and the end-result was amazing! The team could not wait to launch the product this month, and through a personal connection, the Tech Spot sales team had already secured two appointments with one of the largest grocery chains in the Midwest, Hats Off to You.





## Helping Hand Product Overview

Helping Hand Robot Type	Product Features	Product Purchase Option	Product Rental Option	Monthly Maintenance Fee- Only Applies to Rental Option
HH1	HH1 includes the technology to read, process and pick on-line orders for customer pick-up.	\$20,000 per one robot \$1,000 off for each additional	\$2,000 per month/per robot	\$200 per store/per robot
HH2	Includes HH1 features, plus provides a daily report of each order completed along with inventory reports of out of stock items identified during order processing.	\$22,500 per robot \$1,000 off for each additional	\$2,250 per month/per robot	\$225 per store/per robot
HH3	Includes HH1 and HH2 features plus technology that allows for the robot to stock shelves.	\$25,000 per robot \$1,000 off for each additional	\$2,500 per month/per robot	\$250 per store/per robot

### Additional Product Information:

- On average, one Helping Hand robot can process three on-line orders an hour.
- Helping Hand’s battery life is eight hours and requires two hours to fully re-charge.
- For all robots purchased, there is a 90-day satisfaction guarantee. At the end of the 90-day period, owner will assume any repair costs.
- All rental agreements are for one full year.
- For all rented robots, the maintenance fee includes monthly robot check-ups conducted by a Tech Spot technician and is required for all robots under rental. Covers the cost of all needed robot repairs.

*Case Assumption: the robot has the capability to pick/stock any item in a retail store.*



2019 U.S. National Robotics Award Winner

2019 & 2020 Global Innovation Trials Award Winner

2020 World Innovation Technology Challenge Gold Medallion



## To solve your ordering needs, you need a Helping Hand

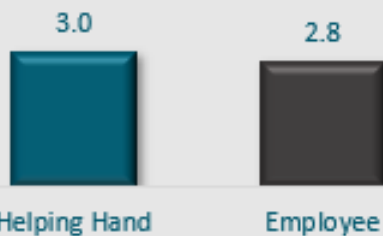
### We Understand Online Order Challenges

- Order fulfillment capacity and accuracy are daily obstacles
- Avoiding out-of-stocks is a constant concern
- Employee dissatisfaction of stocking shelves and picking orders

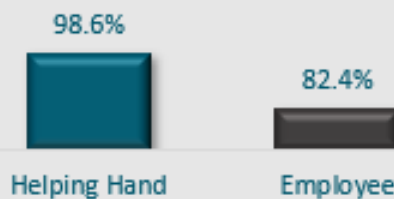
### Benefits of a Helping Hand

- Employee Training Costs Eliminated
- Improved Order Accuracy
- Inventory Management & Tracking
- Product Shelf Stocking Resolved

#### Orders Per Hour



#### Order Accuracy



*Helping Hand performance results based on a grocery test environment and employee performance results based on grocery industry trade association statistics*

### Helping Hand Robot Type

### Features

HH1	HH1 Includes the technology to read process and pick on-line orders for customer pick-up
HH2	Includes HH1 features plus provides a daily report of each order completed along with inventory reports of out-of-stock items identified during order processing
HH3	Includes HH1 & HH2 features plus technology that allows for the robot to stock shelves



*Mission:*

*We are a friendly grocery store that strives to create a positive shopping experience.*



Taylor couldn't believe her grandfather's legacy was now her responsibility. She had always dreamed of "running the show", as her grandfather, Pappy, would say. Fifty years ago, her grandfather opened his first Hats Off To You grocery store in the Midwest and since, the chain has expanded to 410 stores. Taylor always loved to listen to the story her grandfather would share about how he chose the name of his first store. He would tell her that for centuries, most men wore hats because it was thought that colds and flu were caused by winter chills to the head. Pappy grew up wearing hats, and he learned at an early age that it was a sign of respect to remove your hat when appropriate. He also learned that to take your hat off or to tip it, was also a method for greeting someone. Pappy's inspiration for his first store came from his personal experiences as a child, and thought what a great way to greet customers with a warm Midwest welcome. He always took pride in the tradition and to this day, at the age of 85, wears a hat.

Throughout the years, employees at Hats Off To You have made the hat wearing tradition a part of their everyday culture. Wearing your favorite style and colored hat is a must for all workers, and nothing is off-limits. There is even a monthly hat contest where all employees get to vote on their favorite hat, and the winner receives a gift card to their favorite restaurant. As his business grew along with the store count, Pappy loved to take a break from the corporate office to visit stores to see what new hat creations his employees had come up with. As a child, Taylor enjoyed shopping for unique hats for her grandfather's birthday, and they were always his favorite!

While the culture at Hats Off To You was its backbone, the focus on the customer and the evolving grocery industry was key to its success. As the current President and CEO, Taylor prides herself on staying up with the latest trends and consumer preferences. This has resulted in a per store yearly sales average of approximately \$20 million dollars. The biggest trend that Taylor is currently focused on is the increase in online shopping orders for pick-up or delivery. Due to the recent increase of these online orders, Hats Off To You has struggled to maintain the high level of customer service that is expected. Their customer service line is flooded with complaints about long wait times, incorrect online orders, and out of stock items. In addition, in-store shoppers are also calling to complain about their inability to easily shop in store with all the e-commerce clerks in their way picking online orders. Taylor is aware that she needs to address this problem quickly for the long-term success of her grandfather's legacy.

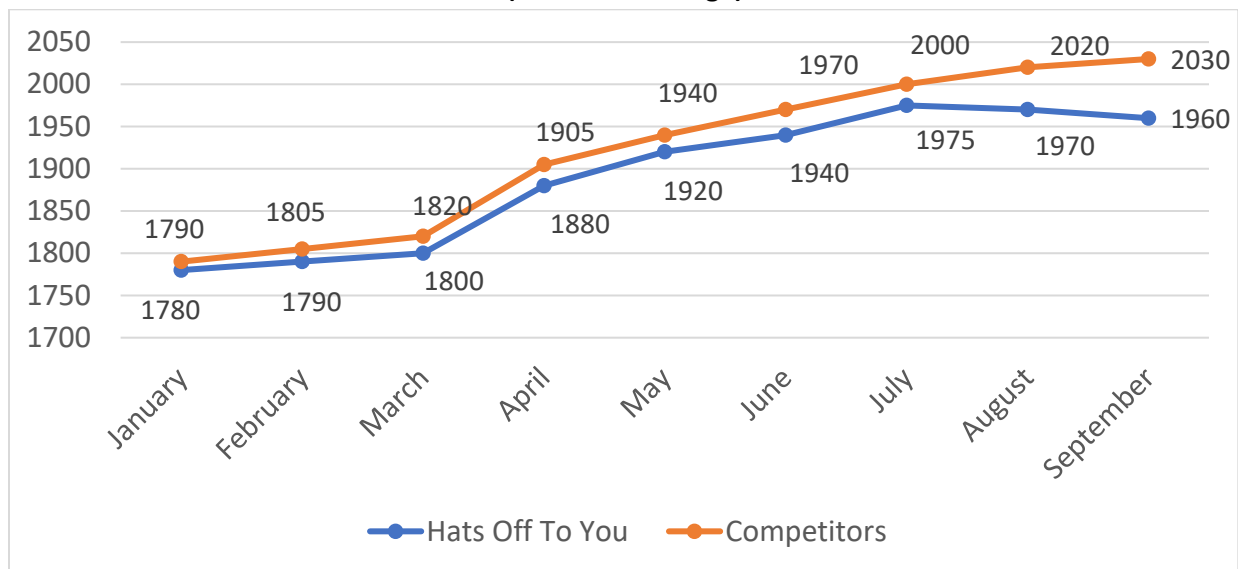
While hundreds of Hats Off To You employees have worked in the stores for years and are extremely loyal, there are also many just looking for the easiest, highest paid hourly work. This has resulted in high-turnover and inexperienced employees. It is especially an issue with the e-commerce clerk, who is responsible for processing, picking and delivering online orders. On average three e-commerce clerks work to process online orders during their normal business hours of 6:00 AM to 11:00 PM. In addition, there are two e-commerce clerks who work to load orders in cars and complete deliveries. Pappy, and now Taylor, pride themselves on offering a fair wage and benefits and, on occasion, have offered bonuses when needed to secure employees.

Taylor is looking for a quick and innovative solution and is even considering using a temp agency for the first time to secure needed employees. The Hats Off To You human resources (HR) manager chatted with Taylor last week and shared that her department was having a difficult time sourcing and hiring the hundreds of employees needed to cover the e-commerce positions in all 410 stores. While the HR manager disliked sharing this bad news with Taylor, it was a reality. Fortunately, the HR manager had some good news to share, too. She shared with Taylor

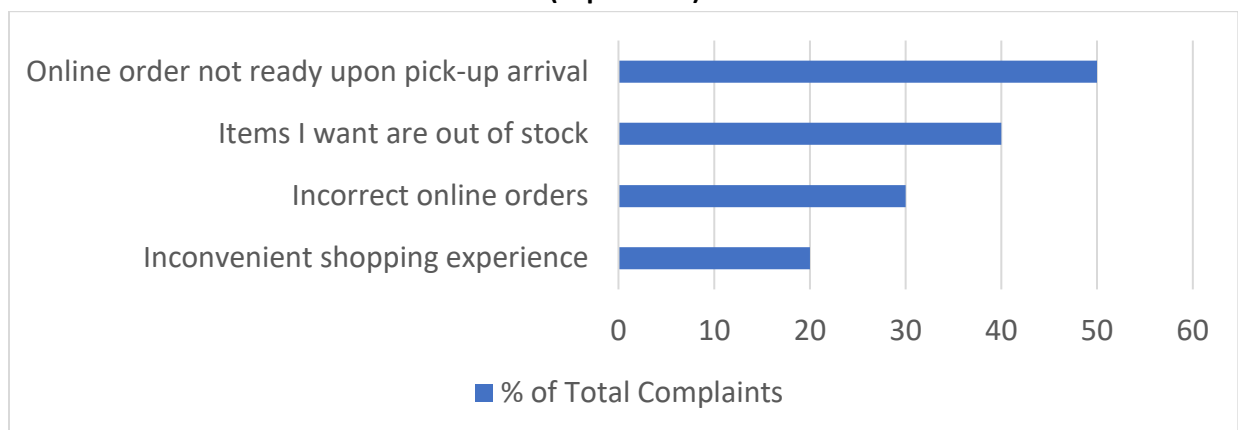


that her son, Jack, worked for a company called Tech Spot, and his photo technology was instrumental in developing a robot that was designed to help retailers fulfill online orders with ease. Taylor was thrilled to hear about new innovative options to solve her problem, and she quickly connected with Jack and Grace at Tech Spot to set up two appointments with their sales team. Taylor would also include her Director of Operations, Devin, in the meetings as she knew he would be skeptical about the Helping Hand robot and would have many questions. Devin is very loyal to Hats Off To You and always keeps the best interest of his employees and customers at the forefront of his mind.

**Year to Date Total Monthly Online Orders  
(Per Store Average)**

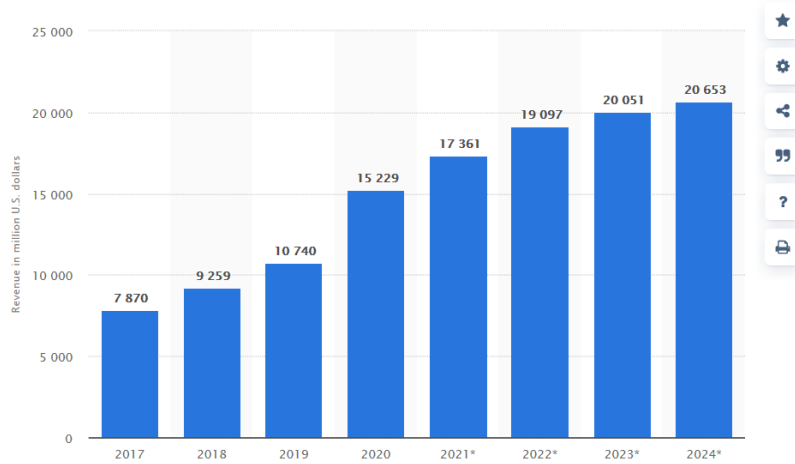


**Hats Off To You Customer Service Line - Top Complaint Reasons  
(September)**





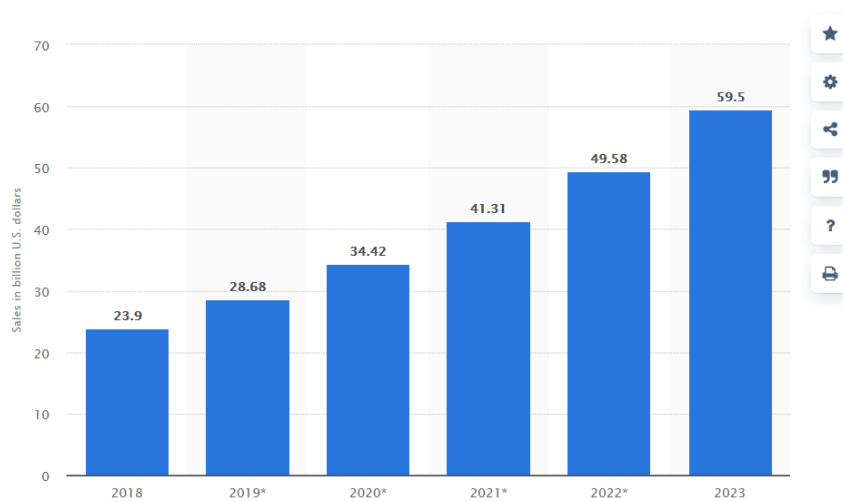
### Food and Beverage Retail E-commerce Revenue in the United States from 2017-2024 (in million U.S. dollars)



Details: United States; Statista Digital Market Outlook; 2017 to 2020; forecast adjusted for expected impact of COVID-19

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### Online Grocery Shopping Sales in the United States from 2018 to 2023 (in billion U.S. dollars)



Details: United States; IGD; Statista; 2018

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