

### In-class client call/script exercise

#### **Class #2**

***AU & Partners LLC— the company that sells everything!***

#### **Mission**

- Today, your CEO handed you an important, almost-in-the-bag sales prospect who could become a multi-million dollar client for your firm.
- The previous executive of this prospect is no longer with your firm.
- A call with them is coming in 20 minutes. You will talk to them
- Your team must quickly assemble talking points, which shall act as a:
  - A loose client sales script
  - A guide for you to build the relationship quickly
- Please take the next 15 minutes to whip up a plan accordingly.
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#### **Your sales prospect info for today**

Your firm, AU & Partners LLC, will have a pre-sales call with this individual today, played by your professor.

Contact/Role:	Tara Jones, Exec. Director	
Firm:	Future Homeowners USA (FH-USA)	
Product Interest:	Among its many efforts, FH-USA builds quick-construction, low-cost, pre-fab bungalow houses in underserved neighborhoods across America. It must buy \$5m of roofing material for new homes in hurricane-impacted regions.	
Other intel:	<p>Ms. Jones founded FH USA after a career with the American Red Cross. The budget is largely funded by several foundations (Pritzker, MacArthur, Bill &amp; Melinda Gates, etc.), but she aims to save every penny she can for future projects to help those in need.</p> <p>She's very friendly, is a big talker, and tries to use her friendly nature to disarm everyone she does business with.</p>	

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**Write an introduction for yourself and your (two to three) associates who will be on this conference call.**

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**Make sure to:**

- 1. Introduce yourselves & get to know the prospect/client**
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Contact/Role:	Tyrone Emerson, CFO	
Firm:	Casino Design Etc.	
Product Interest:	Casino Design Etc. builds vintage-style casino tables and accessories distributed worldwide. They need \$15M of high-grade green felt for Blackjack tables they've been contracted to deliver soon.	
Other intel:	Emerson is CFO and makes all sales and financial transactions for his firm. He does not know much about materials and asks a lot of questions, but is a hard bargainer. Their newest Hong Kong-based client owns casinos throughout SE Asia.  He is a Mormon, does not gamble or drink alcohol, and is from Las Vegas, where Casino Design Etc. is based.	

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Contact/Role:	Hoaky Hickle, co-owner	
Firm:	Hickle's Pickles	
Product Interest:	<p>Hickle's Pickles needs 8 million jars for their organic, craft pickles. AU &amp; Partners LLC already has design/specs in-house for the jars ready to be made.</p> <p>You know they have a \$1M budget, but they usually bargain for deep discounts on large orders. You are authorized to concede a 15% discount, but your CEO wants you to maximize revenue.</p>	
Other intel:	The Hickle brothers were pickle farmers from Louisiana who bought and revived a failing pickle producer. Hoaky is a hard bargainer. The brothers are also part of a well-known rockabilly band. Both love LSU Tigers football and hate SEC rivals Auburn and Alabama.	

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Contact/Role:	Winthrop Penobscot VI, CEO	
Firm:	Albright Aviation LLC	
Product Interest:	The firm needs \$10M of rivets for custom airplanes it sells to wealthy buyers.	
Other intel:	<p>Albright is a closely-held private family firm, so your contact today is the CEO and not a purchasing agent. Albright is owned by the Penobscot Family of Vermont, dating back to the dawn of commercial aviation in 1938.</p> <p>Winthrop is an avid golfer and sailor. He tries to be an everyday person and sees himself as unlike an elite New England Brahmin. His daughter is a 2x All-American softball pitcher at Yale.</p>	

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Contact/Role:	Cheryl Williams, owner	
Firm:	Halo Lighting Partners	
Product Interest:	Halo just signed a \$1B deal to set up lighting in 17 Midwestern Target stores. Their need is time-sensitive, and Williams is the only full-time employee of this sales outfit.	
Other intel:	Cincinnati-based Halo is owned by Williams, who struck out on her own after a successful career at General Electric. She's very type-A, no-nonsense, and does not discuss her personal life.  She's a lifelong Cincinnati Reds & Bengals fan / premium ticket holder, and is on the Exec. Board of the Cincinnati Zoo.	

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Contact/Role:	Mike Smith, purchasing agent	
Firm:	Samsung America	
Product Interest:	Smith needs to procure between \$5 and \$15M of packaging (cardboard, plastic, wood base pallets) for the appliances Samsung America assembles in Kentucky and ships to Best Buy and Abt. You are authorized to negotiate a 20% discount for “larger sales,” but your CEO didn’t elaborate on specifics,	
Other intel:	Smith is detail-oriented but usually needs to approve all significant transactions with higher-ups. As such, he may pull the trigger today if the price is right.  He is a Samsung lifer and wants to build his reputation through smart moves for his company. He is friendly, but bad at small talk.	

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