This course outlines the culminating assessment of your sales management curriculum and covers all previous assessment topics. Your competence will be assessed as you complete a performance assessment consisting of 3 performance tasks. This course may take anywhere from 8-12 weeks to complete.

**Introduction**

**Overview**
As a professional sales manager, your ability to analyze sales data, identify problems, and provide solutions for a sales organization will be vital to having a material hand in the success of your firm. As you work through this assessment, you will be utilizing the knowledge and skills you have gained in your sales and business coursework to demonstrate your competence in sales management.

This capstone is designed as a case study in which you will assume the role of a newly hired consultant for the Blue Ridge Coffee Company.

In this role, you will be asked to evaluate company performance and make recommendations on how to improve the company's sales and sales management. You will base your evaluation and recommendation on the material presented in the Blue Ridge Coffee Company case study.

A number of topics are covered in this capstone assessment, including

- sales force training,
- training presentation,
- sales force organization,
- technology integration,
- managing sales performance,
- evaluating sales performance, and
- handling conflict and ethical situations.

You will produce three documents; these documents will address a host of issues and you will provide your recommendations with appropriate justification. They are

- a multimedia slide presentation,
- a two- to three-page memo, and
- a report for senior management.

The case study you will be working on presents some very real problems that you are likely to encounter as a sales manager. If you already work in sales, many of the scenarios in the case study may look familiar.

Applying your skills to this case study provides a practical demonstration of the sales and management techniques acquired during your educational program. It is a crowning assessment that, along with your sales certifications, should provide your career with that extra
boost to achieve your professional goals.

Watch the following video for an introduction to this course:

Note: To download this video, right-click the following link and choose "Save as...": download video.

Competencies
This course provides guidance to help you demonstrate the following 1 competency:

- **Competency 981.1.1: Capstone**
  The graduate integrates and synthesizes competencies from across the degree program and thereby demonstrates the ability to participate in and contribute value to the chosen professional field.

Course Instructor Assistance

As you prepare to successfully demonstrate competency in this subject, remember that course instructors stand ready to help you reach your educational goals. As subject matter experts, mentors enjoy and take pride in helping students become reflective learners, problem solvers, and critical thinkers. Course instructors are excited to hear from you and eager to work with you.

Successful students report that working with a course instructor is the key to their success. Course instructors are able to share tips on approaches, tools, and skills that can help you apply the content you're studying. They also provide guidance in assessment preparation strategies and troubleshoot areas of deficiency. Even if things don't work out on your first try, course instructors act as a support system to help you prepare for another attempt. You should expect to work with course instructors for the duration of your coursework, and you are encouraged to contact them as soon as you begin. Course instructors are fully committed to your success!

Preparing for Success

The information in this section is provided to detail the resources available for you to use as you complete this course.

Learning Resources
The learning resources listed in this section are required to complete the activities in this course. For many resources, WGU has provided automatic access through the course. However, you may need to manually enroll in or independently acquire other resources. Read the full instructions provided to ensure that you have access to all of your resources in a timely manner.

Manually Enrolled Resources

Take a moment to enroll in the learning resources listed in this section. To enroll, navigate to the “Learning Resources” tab, click the “Sections” button, and then click the “Enroll Now” button for each resource. Once your mentor approves your enrollment in the resource, you will receive
an e-mail with further access instructions. Contact your mentor if you have questions.

*Note: For instructions on how to enroll in or subscribe to learning resources through the “Learning Resources” tab, please see the “Acquiring Your Learning Resources” page.*

*Note: If you have completed the Personal Selling (AYV1) and Sales Management (AZV1) assessments, you will already have the relevant materials needed for this assessment. If you have not completed the Personal Selling (AYV1) and Sales Management (AZV1) assessments or do not have access to any of these learning resources, follow the instructions below.*

**Action Selling**

You should enroll in the Action Selling online course through the Learning Resources tab. Your username and password will be e-mailed to you, and a full complement of course materials, including hard-copy workbooks and DVDs, will be mailed to your address.

- **Action Selling Sales Training Program**

You can elect to use either the online program to complete the work (e.g., take your skills drills, read the material online) or the printed material and DVDs to do the work offline. Either way, you will still need to take all of the "skills drills" and tests online.

*Note: For additional information on Action Selling, log in to the WGU Action Selling website and click on the support tab.*

**SMEI CSE® Certified Sales Executive Program**

*Note: If you have completed the Personal Selling (AYV1/C303) course, you will already have a username and password to access the material in the SMEI "CSE Certifies Sales Executive Program." Please do not re-enroll.*

Enroll in the SMEI "CSE Certified Sales Executive Program" online course through the Learning Resources tab. Your username and password will then be e-mailed to you.

- **CSE Certified Sales Executive Program**

The CSE program includes a preparation guide (in PDF format), which includes chapters from the following text:


**Automatically Enrolled Resources**

You can access the learning resources listed in this section by clicking on the links provided throughout the course. You may be prompted to log in to the WGU student portal to access the resources.

**SkillSoft and Books 24x7**
You will access SkillSoft items at the activity level within this course. For more information on accessing SkillSoft items, please see the “Accessing SkillSoft Learning Resources” page.

**MindEdge**
The following MindEdge module is utilized in the assessment instructions within this course.

- **MindEdge: Blue Ridge Coffee Case Study**

The performance tasks for this course are centered on this case study. The case study can be accessed online and can also be downloaded as a single PDF file.

**Other Resources**

**Access the Performance Assessment**
Before you begin working through your course, it is recommended that you first access the instructions for each of the tasks that make up the performance assessment. Do this now so that you are aware of the information needs you will have for each task and so that you can make the most effective use of your study time.

Follow these directions to access your performance assessment.

**Pacing Guide**
The pacing guide suggests a weekly structure to pace your completion of learning activities. It is provided as a suggestion and does not represent a mandatory schedule. Follow the pacing guide carefully to complete the course in the suggested timeframe.

- **Pacing Guide: Sales and Sales Management Capstone Written Project**

*Note: This pacing guide does not replace the course. Please continue to refer to the course for a comprehensive list of the resources and activities*

**Evaluating Sales Performance**

As a sales manager, you will be regularly monitoring and evaluating the effectiveness of your sales team and sales programs.

While gathering and analyzing valid and useful data regularly can be a tedious task, the perspectives and understanding gained from such performance evaluations can make all the difference between a firm's survival and notable thriving.

A wise sales manager will use both quantitative and qualitative information to help steer the sales organization toward constant improvement.

Competencies covered by this subject:

- **Competency 981.1.1: Capstone**
  The graduate integrates and synthesizes competencies from across the degree program and thereby demonstrates the ability to participate in and contribute value to the chosen
Analyzing Sales Data
Before you consider evaluating a sales team and individual salespeople, it is important to first understand what some of the numbers may indicate.

You should begin your study by learning about the examination of sales volume and follow it with a review on marketing costs and profitability.

CSE Sales: Analysis of Sales Volume

In the CSE preparatory program, read the following from *Sales Management*:

- pages 314–318 of chapter 14 ("Assessing the Performance of the Sales Force and the People Who Comprise It")

As you read and review this material, focus on the following concepts:

- why it is important to evaluate the overall performance of the firm’s sales force
- the advantages and disadvantages of sales, cost, and profit analysis

CSE Sales: Marketing Cost and Profitability Analysis

In the CSE preparatory program, read the following from *Sales Management*:

- pages 321–323 of chapter 14 ("Assessing the Performance of the Sales Force and the People Who Comprise It")

As you read and review this material, focus on the following concepts:

- advantages and disadvantages of sales, cost, and profit analysis
- input and output objective sales performance measures
- the differences between performance and effectiveness

Evaluating Salesperson Performance
In this section, you will learn how to examine relevant data for determining the strengths and areas of improvement for individual sales reps and teams.

Naturally, a sales manager will want to look at the goals and expectations set by quotas as well as performance information to get a complete understanding of an individual's sales performance.

CSE Sales: Sales Force Quotas and Expenses

In the CSE preparatory program, read the following from *Sales Management*:

- chapter 11 ("Setting Goals and Managing the Sales Force’s Performance")

As you read and review this material, focus on the following concepts:
- how sales managers use goals to guide and control the efforts of their sales force
- elements of effective goals
- when different outcomes and behavioral sales goals should be used
- resources available to capture information used for making effective decisions on goals
- how goal-setting theory can improve managerial and motivational practices

CSE Sales: Evaluating a Salesperson’s Performance

In the CSE preparatory program, read the following from Sales Management:

- pages 323–335 of chapter 14 ("Assessing the Performance of the Sales Force and the People Who Comprise It")

As you read and review this material, focus on the following concepts:

- the importance of profitability and the application of ROI and ROAM
- formal and informal evaluations
- how the sales manager can implement an effective performance review
- ratio measures for performance appraisals

Customer Relationship Management

Customer relationship management (CRM) technology enables a company to record every touch point with its customers, enabling the proverbial right hand to know what the left hand is doing.

When a salesperson can easily access every communication with a client or prospect, she or he can make better decisions on how to handle a client and move through the sales process more efficiently.

Organizations can use the same technology to spot trends and issues with their customer base and make strategic business decisions based on the information.

Competencies covered by this subject:

- **Competency 981.1.1: Capstone**
  The graduate integrates and synthesizes competencies from across the degree program and thereby demonstrates the ability to participate in and contribute value to the chosen professional field.

CRM Technology

Your study of CRM technology will be primarily through online resources and chapter 6 in the Sales Management text. You will review the web sites and text that explain this technology and its benefits.

You may also view demonstrations of different CRM systems to gain a more complete understanding of the technologies available today.

Customer Relationship Management Technology
Read about customer relationship management technology on the following website.

- "What Is CRM (Customer Relationship Management)?"

As you read, be thinking about how the addition of CRM technology to a sales force (like the one in the assessment case study) can benefit an organization.

As you read and review this material, focus on the following concepts:

- what sales force automation technology is and what it is used for
- what a customer relationship management system is and the challenges related to implementing one
- how sales managers can encourage employees to adopt and effectively utilize technology

**CRM Demonstrations**

Watch the following demonstrations of customer relationship management technology:

- Salesforce CRM Demo for Small Business
- Any of the screencasts on the "CRM software demonstration screencasts" webpage
- Financial Consolidation

From these demonstrations, you should try to gain a more complete understanding of how CRM systems can benefit sales organizations.

**Leading a Sales Force**

Leading a team of sales reps takes skill beyond being a hotshot sales rep. To lead a sales force, a manager needs to know how to foster personal and professional development of sales people through structured training and sales programs.

Training entire teams to work the same process can enable the organization to achieve its greatest potential.

In addition, a sales manager must be able to understand the most effective ways to provide constructive feedback as well as enforce and set an example of ethical behavior expected by the sales team.

Competencies covered by this subject:

- **Competency 981.1.1: Capstone**
  The graduate integrates and synthesizes competencies from across the degree program and thereby demonstrates the ability to participate in and contribute value to the chosen professional field.

**Sales Force Training Programs**

Your study of sales force development begins with exploring the implementation of training
programs.

Then you will review a standardized sales program, action selling, which you should have mastered in an earlier assessment.

**CSE Sales: Developing, Delivering, and Reinforcing a Sales Training Program**

In the CSE preparatory program, read the following from *Sales Management*:

- chapter 9 ("Training and Developing the Sales Force")

As you read and review this material, focus on the following concepts:

- factors that help determine what types of training are needed by sales personnel
- the inputs needed to design and deliver an effective sales training program
- why it is important to assess the effectiveness of a firm’s sales training and what’s involved in the assessment
- elements that contribute to effective and ineffective training programs

In the CSE preparatory program, read the following from *Sales Management*:

- chapter 10 ("Supervising, Managing, and Leading Salespeople")

As you read and review this material, focus on the following concepts:

- the difference between sales supervision, management, and leadership
- the skills and abilities a person needs to become a good sales manager
- elements of teamwork
- how to successfully develop and work with teams, including those that are virtual
- ethical challenges facing leaders and teams in the sales environment

**Action Selling Review**

Review the following in the *Action Selling: How to Sell Like a Professional, Even If You Think You Are One* text (which you received as part of the Action Selling learning resource):


Reflect on each of the individual steps of the process and on the process as a whole. Then, apply these concepts to the case.

As you review the information, consider the following:

- What are the key success factors in selling according to this methodology?
- What are key factors in the selling process?
- What factors influence buying decisions?
- How can sales organizations benefit from this kind of sales training program?
Sales Force Leadership
You will begin your study of sales force leadership by examining the variety of managerial skills needed to guide your team to success and effectively resolve challenging problems.

Then you will take a more pointed look at the ethical and legal responsibilities that a sales manager has and the behavior she or he should emulate in the sales management position.

CSE Sales: The Field of Sales Force Management

In the CSE preparatory program, read the following from *Sales Management*:

- pages 1–11 of chapter 1 ("Introduction to Sales Management")

As you read and review this material, focus on the following concepts:

- strategy hierarchy and how a firm’s sales and marketing strategies affect its overall strategy
- different types of selling strategies, and how the selling process varies across these types
- responsibilities and activities of sales managers throughout the sales management process

CSE Sales: Leadership of a Sales Force

In the CSE preparatory program, read the following from *Sales Management*:

- chapter 3 ("Leadership and the Sales Executive")

As you read and review this material, focus on the following concepts:

- historical development and different approaches to examining leadership
- contributions made by contemporary leadership approaches
- issues that sales leaders face

CSE Sales: Ethical and Legal Responsibilities of Sales Managers

In the CSE preparatory program, read the following from *Sales Management*:

- chapter 4 ("Ethics, the Law, and Sales Leadership")

As you read and review this material, focus on the following concepts:

- common ethical dilemmas that face salespeople, sales managers, and sales executives
- organizational policies and practices that support ethical behavior and those that enable unethical behavior
- how principled leadership can foster a firm’s ethical principles and corporate culture
- appropriate courses of action for addressing an ethical dilemma

Sales and Selling
Before one can become successful at managing a sales force, one must first understand the role of the sales function in an organization. It is also important to understand the sales process from the buyer's perspective and, in this case, organizational buyers.

Personal selling, which is one of the most critical sales methods in today's business, is the linchpin for any organization's promotional mix. While some people are naturally gifted with personal selling skills, management skills are distinctly different and can be learned.

In the coming decades, the management and advanced sales skills will make all the difference in an organization's ability to survive and thrive.

Competencies covered by this subject:

- **Competency 981.1.1: Capstone**
  The graduate integrates and synthesizes competencies from across the degree program and thereby demonstrates the ability to participate in and contribute value to the chosen professional field.

**Sales to Organizational Buyers**

Your study of the sales function begins by understanding the nature of organizational selling in today's marketplace.

By studying the organizational purchase decision process, you will see how the sales techniques needed to create a win-win situation for the buyer and the seller are different than they were decades ago.

Technology innovation and savvy customers have necessitated the creation of new selling techniques and order/delivery models.

**CSE Marketing: Business, Government, and Institutional Buying**

In the CSE preparatory program, read the following from *Sales Management*:

- chapter 5 ("Business-to-Business -B2B- Sales and Customer Relationship Management")

As you read and review this material, focus on the following concepts:

- how individual forces influence the B2B buying process
- how buyer-seller relationships are established and maintained
- success factors that apply to buyer-seller relationships
- seller performance factors that lead to successful customer relationships

**Personal Selling and Value-Added Selling**

Your study of personal selling continues with a more in-depth journey into the concept of value-added selling.

The learning resources you will explore will show you how to effectively convey the value of
your good or service so you can earn the best possible price and maintain profitability for your organization.

**CSE Sales: The Personal Selling Process**

In the CSE preparatory program, read the following from *Sales Management*:

- pages 12–23 of chapter 1 (“Introduction to Sales Management”)

As you read and review this material, focus on the following concepts:

- strategy hierarchy and how a firm’s sales and marketing strategies affect its overall strategy
- different types of selling strategies, and how the selling process varies across these types
- responsibilities and activities of sales managers throughout the sales management process

**SkillSoft Exercises: Personal Selling and Value-Added Selling**

Complete the following modules in SkillSoft:

- [Competitive Selling - Defining Value](#)
- [Competitive Selling - Beating the Competition](#)

**SkillSoft: Books24x7 QuickTalks Video**

View the following SkillSoft video:

- [QuickTalks: TrainOne: What are the Best Ways to Add Value?](#)

**Value-Added Selling**

Read the following website to learn some additional ideas for value-added selling.

- ["The Concept of Value-Added Selling: 10 Ways That You can Add Value to Your Product or Service"](#)

**Sales Forecasting**

Unless you have a precise crystal ball, chances are that sales forecasts you might work with will be somewhat different from actual sales results. When performing a sales forecast, you might use a "best guesstimate" method (or a complex regression analysis) to come up with viable numbers.

While these are popular methods, there are a number of others you will study. Some methods rely on experience and intuition. Others rely on historical data, mathematical assumption, or complex calculations.

It is wise to know a variety of forecasting methods so you can be prepared to provide a credible
and well-supported forecast when needed.

Competencies covered by this subject:

- **Competency 981.1.1: Capstone**
  The graduate integrates and synthesizes competencies from across the degree program and thereby demonstrates the ability to participate in and contribute value to the chosen professional field.

### Sales Forecast Methods

Your study of sales forecasting methods will explore a variety of qualitative and quantitative methods that most companies use today.

Be sure to familiarize yourself with both types of methods, so you can create viable forecasts with the historical data and resources that are available to you.

### CSE Sales: Sales Forecasting and Developing Budgets

In the CSE preparatory program, read the following from *Sales Management*:

- chapter 13 ("Turning Customer Information Into Sales Knowledge")

As you read and review this material, focus on the following concepts:

- major elements of customer data integration
- how documented, accessible customer information benefits a firm’s various functional groups
- various types of sales forecasting methods prominently implemented in sales settings

### SkillSoft Exercise: Sales Forecasting

Complete the following courses/modules in SkillSoft.

- [Sales Forecasting - Applying Forecasting Methods](#)

### Marketing Factors

While personal selling is the primary element of the promotional strategy that you have studied, there are other marketing strategies relevant to your work in sales and sales management (and on this assessment).

These strategies are, more specifically, the marketing message (which is part of promotional strategy) and pricing strategy.

While executives may make the final decisions on the content of each strategy, it is the sales team that is expected to implement and reinforce it with the customer.

Competencies covered by this subject:
• Competency 981.1.1: Capstone
  The graduate integrates and synthesizes competencies from across the degree program and thereby demonstrates the ability to participate in and contribute value to the chosen professional field.

Marketing Messages
Your study of the marketing messages includes a review of integrated marketing communication.

You will do activities that focus in on the marketing message and the marketing communication plan. Then you will review a simple process for creating marketing messages.

CSE Marketing: Integrated Marketing Communications (IMC)

Watch the following video:

  • Ch. 16 Integrated Marketing Communications

Note: The information in this video relates to the textbook Marketing by Dhruv Grewal and Michael Levy; McGraw-Hill/Irwin; 2 edition.

SkillSoft Exercise: The Marketing and Sales Plan

Complete the following module in SkillSoft:

  • The Marketing and Sales Plan

Website: Marketing Message

Review the following website for a simple method for creating an effective marketing message.

  • "The Five Step Formula for Creating your Marketing Message"

Be thinking about how you create an effective marketing message for the company in the case study for the assessment.

Pricing Strategy
Your study of price will review important factors that influence the selection of a pricing strategy, as well as strategies themselves.

You will also review the concept that you get what you pay for, a long-held belief that most buyers possess.

CSE Marketing: Pricing Strategy

Read the following from the text from SkillSoft’s Books 24x7:

Innovative Pricing Strategies to Increase Profits ID: 51335

  • pay special attention to chapters 2, 3, and 4

Product and Brand Strategy Website
Review the following web page from Entrepreneur:

- "The Basics of Branding"

Pricing Strategies Website

Review the lesson on the following web page:

- "Pricing Strategies"

The Strategic Sales Force

As a company develops its long-term plans, it should include a plan for its sales force in addition to the other traditional components of a strategic business plan.

The actions of the sales team should be consistent with the strategic marketing plan, which is part of the strategic business plan. In fact, the marketing objectives can be best achieved when sales is an integral part of the planning, because the sales team implements the strategies.

A successful sales manager will understand how sales fits into the long-term marketing plans and overall strategic goals of an organization.

Competencies covered by this subject:

- Competency 981.1.1: Capstone
  The graduate integrates and synthesizes competencies from across the degree program and thereby demonstrates the ability to participate in and contribute value to the chosen professional field.

Strategic Sales Force Management

Your study of strategic sales force management will explore the marketing system and, more particularly, the important role that a sales force plays in a company's success.

This section will also examine the critical nature of customer relationships, which the sales force is responsible for building and managing.

CSE Sales: Strategic Sales Force Management

In the CSE preparatory program, read the following from Sales Management:

- chapter 2 ("The Sales Function and Multi-Sales Channels")

As you read and review this material, focus on the following concepts:

- what the sales function consists of and how salespeople affect a firm’s supply chain
- channels in which the sales function can be carried out
- how effective sales management efforts can align a firm’s sales strategy in a
multi-channel environment

Sales Force Organization

Your study of organizing a sales force will begin with a sound foundation of principles for determining the most effective and profitable ways to organize a sales team, taking a wide variety of needs and trends into consideration.

This will be followed by a review of sales person profiling and recruiting methods that will be particularly useful as a sales manager keeps pace with the company's needs.

Finally, you will study the art of designing effective and efficient sales territories, which can create dramatic results when done properly.

CSE Sales: Sales Force Organization

In the CSE preparatory program, read the following from Sales Management:

- pages 134–145 of chapter 7 ("Designing and Organizing the Sales Force")

As you read and review this material, focus on the following concepts:

- how a firm’s goals affect the organization of its sales force
- how a sales force can be organized to match the way customers want to buy

CSE Sales: Profiling and Recruiting Salespeople

In the CSE preparatory program, read the following from Sales Management:

- chapter 8 ("Recruiting and Selecting the Right Salespeople")

As you read and review this material, focus on the following concepts:

- why having a formal selection process improves the quality of newly hired salespeople
- why it's important to analyze the skills a salesperson needs to succeed and include that information in a job description
- sources from which salespeople can be recruited both within and outside of a firm
- the five steps of the selection process
- why it’s important to have a diverse sales force
- common recruiting mistakes and ways to avoid them

CSE Sales: Sales Territories

In the CSE preparatory program, read the following from Sales Management:

- pages 146–159 of chapter 7 ("Designing and Organizing the Sales Force")

As you read and review this material, focus on the following concepts:

- advantages and disadvantages of different sales force organizational structures
typical sales force relationships
advantages and disadvantages of outsourcing a firm’s sales force

Motivation and Compensation

Sales managers spend a good deal of their day-to-day activities determining effective ways to motivate and fair ways to compensate their sales team.

Compensation, in and of itself, is often one of the chief motivators for a salesperson. It is well known that people will generally behave in accordance with the incentives they are given.

Few things motivate people like compensation. Appropriate compensation can help motivate employees to give their very best and then some.

Competencies covered by this subject:

- Competency 981.1.1: Capstone
  The graduate integrates and synthesizes competencies from across the degree program and thereby demonstrates the ability to participate in and contribute value to the chosen professional field.

Motivation and Compensation

In this topic section, you will do the following:

- You will begin your study of this topic by learning about motivational theories and their application in sales force management.
- You will look at influences for individuals and learn about selecting the motivational tools most effective for getting the best from both individual sales representatives and sales teams.
- You will learn about compensation models, which can play an integral part in motivating sales representatives.
- You will learn how to develop a sound compensation plan that gets the most from your sales force and achieves company goals.

CSE Sales: Motivating a Sales Force

In the CSE preparatory program, read the following from Sales Management:

- pages 260–271 of chapter 12 ("Motivating and Rewarding Salespeople")

As you read and review this material, focus on the following concepts:

- how motivation has been conceptualized and how the contributions of past studies can be incorporated into managerial activities
- models of motivation and how sales managers can utilize them
- generational differences in motivation and how to adapt motivational approaches for each group
- how managers can utilize different motivational elements available to sales
In the CSE preparatory program, read the following from *Sales Management*:

- pages 272–289 of chapter 12 ("Motivating and Rewarding Salespeople")

As you read and review this material, focus on the following concepts:

- situations in which financial and nonfinancial rewards should be used to motivate salespeople
- how compensation systems can be utilized to address different motivational needs

**Final Steps**

Congratulations! You have completed the course for the crowning assessment to your bachelor's program in sales management.

You have reviewed the content of the certifications you should have earned in previous assessments and should be ready to practice them on this case study.

**The Performance Assessment**

The performance assessment is made up of several separate performance tasks. The directions for each task are located in TaskStream. Remember to double-check your work against the rubric before submitting it in TaskStream.

You will complete the following tasks in TaskStream as part of the RZT1 performance assessment:

- RZT1: Task 1
- RZT1: Task 2
- RZT1: Task 3

Click on the link located in the "Assessment" tab in the upper left-hand side of your screen to preview expectations for each task. Task instructions and evaluation rubrics are available by clicking the title of the course in the navigation options.

**RZT1 Task 1**

Task 1 requires that you submit a digital slide presentation complete with detailed notes. The notes should be written in paragraph style so the evaluator can easily understand your thoughts on the particular material in the slide.

To prepare your work for Task 1, please be sure to read

- the task instructions in TaskStream and
- the Blue Ridge Coffee Case Study from MindEdge.
You will want to pay special attention to the material mentioned in these subject areas from the course:

- Evaluating Sales Performance
- Customer Relationship Management
- Leading a Sales Force
- Sales and Selling

**RZT1 Task 2**

Task 2 requires that you submit a 2- to 3-page memo. Your memo should be single-spaced.

To prepare your work for Task 2, please be sure to read

- the task instructions in TaskStream and
- the Blue Ridge Coffee Case Study from MindEdge.

You will want to pay special attention to the material mentioned in these subject areas of the course:

- Sales and Selling
- Sales Forecasting
- Marketing Factors

**RZT1 Task 3**

Task 3 requires that you submit a report to senior management. The report should be single-spaced.

To prepare your work for Task 3, please be sure to read

- the task instructions in TaskStream and
- the Blue Ridge Coffee Case Study from MindEdge.

You will want to pay special attention to the material mentioned in these subject areas of the course:

- Evaluating Sales Performance
- Customer Relationship Management
- The Strategic Sales Force
- Motivation and Compensation

**Student Support**

WGU values your input! Please submit any feedback you have using the following form:
Access the WGU Library 24 hours a day, 7 days a week:

Visit the Student Success Center to access a variety of topics that will help you succeed at WGU:

Contact the WGU Writing Center for help with any part of the writing or revision process: