

# Advanced Selling: A Comprehensive Course Sales Project

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## ABSTRACT

*A comprehensive project for the Advanced Selling course that has been tested at three universities is introduced. After selecting an industry and a company, students engage in a complete industry analysis, a company sales analysis, a sales-specific SWOT analysis, complete a ride day with a salesperson in that firm, then present their findings in a classroom oral presentation. Implications and suggestions for researchers and sales managers are provided as well as guidance for instructors who use the project in their course.*

**Keywords:** Advanced Selling; Industry Analysis; Sales Analysis; Ride Day; Shadowing; Course Sales Project

## INTRODUCTION

Studies have empirically demonstrated that effective college sales instruction can result in measurable improvements in actual sales results (e.g., Rocco & Whalen 2014). Cummins, et al (2013) called for more articles that describe new pedagogy, including projects that will help sales education to innovate and expand. While role playing is, and will continue to be, an important tool (Tanner & Castleberry 1995), Chapman & Avila (1991) noted the importance of including training that provides more of the real world and total sales experience.

A number of experiential activities and projects have been introduced in sales courses to provide more of this real world, total sales experience. Hagenbuch (2006) described how to incorporate service learning via a student group project in a sales course selling the services of various non-profit organizations. Neeley & Cherry (2010) used students in their advanced selling class to sell the concept of the new sales minor to several other departments across campus.

Some techniques integrate students from multiple courses. For example, Young & Hawes (2013) described how students in a sales management course managed students in a selling course who attempted to sell sponsorships, prizes, and group tickets to local business executives. In a similar vein, Bobbitt et al. (2000) described how to integrate students from three different marketing courses to work on a single project, with students in each course working on the specific skills they were learning in their particular course.

In an effort to help selling students better grasp the total sales experience, Peterson & Stapleton (1995) designed a course project that required students to study the life histories of successful salespeople (e.g., Joe Girard) and then to write about and discuss with the class the elements that contributed to that success. Factors to be considered by students included how the salesperson's background and experiences contributed to the salesperson's success; what techniques, principles, and philosophies helped the salesperson be successful; and what the student learned from this exercise that might help his/her sales presentations.

While this written life history pedagogy offered many advantages, we wondered if we could make it even more relevant and real world by having students spend significant time with currently practicing salespeople. As Loe & Inks (2014) stated, when evaluating advanced selling courses, "...the use of projects that put students in live or near-to-live sales situations is recommended." For that reason, the project described in this article was designed to get students in an advanced selling course into the real world of selling, specifically by doing a ride day with an actual

salesperson, strategically tied to other significant project elements, which results in a comprehensive project. Doing so also was an attempt to have the student more effectively learn the material by experiencing multiple stages of Kolb's experiential learning cycle (Kolb & Fry 1974; Kolb 1984), as will be described later.

Deeter-Schmelz & Kennedy (2011) examined individual components of selling classes. The comprehensive sales project described here offers the advantage in that it combines many learning outcomes and components of the typical advanced selling course into a unified, course-long project.

The Advanced Selling course on our campuses are designed as the second in a series to teach students advanced selling concepts and strategies currently used in the marketplace. Focused on helping students add depth to their skill set and increase their marketability, the course covers most topics described by Loe & Inks (2014), such as customer relationship building, contract negotiations, value analysis, and time/territory management. A variety of teaching techniques are used, including case studies, group exercises, role plays, and guest speakers. All students enrolled in the course have already taken courses in Principles of Marketing and Fundamentals of Selling.

### **Sales Project Objectives**

The objectives of the advanced selling project, which are consistent with important objectives identified by Michaels & Marshall (2002), are the following:

- *To improve students' skills in key basic salesperson abilities: prospect for customers, qualify prospects, present the sales message, close the sale, and service the account.* As early as 1950 when colleges were just starting to add selling courses, academic researchers (Beach & Wales 1950) were developing educational objectives for the sales course, tantamount to basic selling skills. While it is important to develop advanced selling skills, the basic selling skills should never be overlooked (e.g., Pelham and Kravitz 2013). In one study, for example, salespeople who exhibited an effective customer orientation (i.e., an advanced selling skill) without also having proper basic selling skills were found not to be effective at selling (Wachner et al. 2009).

Similar to Michaels & Marshall (2002), Rentz et al (2002) identified five key salesperson abilities: prospect for customers, qualify prospects, present the sales message, close the sale, and service the account. While students have started learning about and developing these skills in the basic selling course through lectures, assignments, guest speakers, and role playing, students in the advanced sales class still need more progress. We hypothesize that such development will occur in the project described here by having students find and qualify prospects for the ride day, secure that ride day by effectively presenting their sales message (selling to the practicing salesperson why the salesperson should agree to the ride day), and service the account (following up after the agreement to the ride day and after the ride day).

- *To help students learn about the differences in selling jobs in various industries and specific companies.* There are vastly different kinds of selling jobs available in terms of types of activities performed on a usual basis as well as differences based on the industry and specific company (Castleberry & Tanner 2014; Avlonitis and Panagopoulos 2006). While most advanced selling classes have numerous guest speakers, the proposed sales project will allow selling students to investigate the companies and the industries more fully in which *they* are most interested. Then sharing that information with others in the course will increase class exposure to more industries/companies/types of sales jobs.
- *To improve students' ability to critically evaluate selling opportunities.* As students interview for selling jobs, they often ask instructors and others their opinions of a particular company/industry (Smith 2011). Due to the structure of the assignments, the proposed sales project will help students develop skills in evaluating industries, companies, and specific sales job themselves. Students will learn where to gather information and how to evaluate that information to make an informed decision.

## THE SALES PROJECT

### Preliminary Steps

The first step for students is the selection of the industry they would like to research. It is strongly recommended that students choose an industry in which they might like to work upon graduation. For students having difficulty in even knowing what industries exist, NAICS links are provided (<http://www.naics.com/search.htm>). Next, students select a specific company within their chosen industry. To find enough information to complete the project successfully, students are encouraged to select a for-profit organization that sells a product or service. Furthermore, students are informed that data collection will be much easier if the organization is publicly traded on a major stock exchange. The remainder of the project consists of five parts described below.

### Project Part 1 – Industry Analysis

Students, using at least four credible sources, write an industry analysis of not more than five pages, which answers each of the following questions.

1. What is the name of the industry, and how is it defined?
2. What types of companies are included in the industry, and what types of products or services are sold? What types of organizations do they typically sell to, i.e. who are their target market customers?
3. What are the industry financial trends over the last three years (specific revenue dollars and percentage growth or decline for each year)? Graphs, which are preferable to spreadsheets or text, should be labeled clearly.
4. What is the analysts' explanation for any trends (revenues increased, decreased or flat), and what do the analysts predict the future trends will be?
5. Who are the key competitors within the industry, and what share of the market do they each hold?
6. How have the key competitors' sales and profits trended in the past few years compared to the industry (please supply specific data)?

At this point, students are encouraged to note that in the SWOT analysis (Project Part 4), they will need to understand the *key strengths and weaknesses of the key competitors in the industry* compared to their selected company, so they may wish to capture some of this information while they are doing the industry research.

### Project Part 2 – Company Sales Analysis

Students, using at least four credible sources, write a sales analysis of not more than five pages that answers each of the following questions.

1. Analyze the company's financial sales and profit results over the last three reported years, comparing sales revenue and profits. Provide as much detail as possible (e.g., the three-year financial analysis by total revenue and profit as well as by product segment and geographic area (if available and applicable). Identify and discuss the trends and the causes for these trends. [The financial information can generally be found in the company's annual report. The product and geography breakouts are usually found in the latter part of the financial section of the annual report.]
2. What products and/or services does the company sell?
3. How does the company segment or structure their product line?
4. What geographies does the company cover?
5. What markets does the company seem to be targeting?
6. How would you describe the company's marketing strategy?
7. What can you tell about the company's sales model and coverage model? (For example: Do they use a direct sales force, inside sales, business partners, etc.? If they use multiple sales channels, can you tell how they approach their markets by channel?)
8. What can you tell about the company's growth strategy going forward?
9. Provide any other information you deem appropriate to include.

To keep the project on track, the first draft of the financial analysis (item 1 above) can be assigned as a homework task that is due early in the course. This homework assignment can be discussed in class at that time and be part of the lecture on financial issues in selling.

**Project Part 3 – SWOT Sales Analysis**

Students complete a one-page chart examining how their chosen company is currently positioned for future sales success. In other words, students analyze what they find to be the company’s Strengths, Weaknesses, Opportunities and Threats in relation to how they are currently poised to compete for sales. Note that this is not a general SWOT analysis for the firm as a whole; this SWOT is specific to the sales point of view. A template as well as an example of this SWOT are shown in Exhibits 1 and 2, respectively.

**Exhibit 1. SWOT Template**  
 Sale-Specific SWOT Template: Types of questions to answer

<b>Subject:</b> The creation of ABC’s own distributor company to target additional end-user sectors.	
<b>Internal</b>	
Strengths – examples of questions that would be answered: <ul style="list-style-type: none"> <li>- Advantages of this proposition?</li> <li>- Capabilities to accomplish it?</li> <li>- Competitive advantages?</li> <li>- USPs (unique selling points)?</li> <li>- Resources, Assets, People?</li> <li>- Experience, knowledge, data?</li> <li>- Financial reserves, likely returns?</li> <li>- Marketing - reach, distribution, awareness?</li> <li>- Innovative aspects?</li> <li>- Location and geographical?</li> <li>- Price, value, quality?</li> <li>- Accreditations, qualifications, certifications?</li> <li>- Processes, systems, IT, communications?</li> <li>- Cultural, attitudinal, behavioral?</li> <li>- Management cover, succession?</li> </ul>	Weaknesses – examples of questions that would be answered: <ul style="list-style-type: none"> <li>- Disadvantages of this proposition?</li> <li>- Gaps in capabilities to accomplish it?</li> <li>- Lack of competitive strength?</li> <li>- Reputation, presence, and reach?</li> <li>- Financials?</li> <li>- Own known vulnerabilities?</li> <li>- Timescales deadlines and pressures?</li> <li>- Cash flow, start-up cash-drain?</li> <li>- Continuity, supply chain robustness?</li> <li>- Effects on core activities, distraction?</li> <li>- Reliability of data, plan predictability?</li> <li>- Morale, commitment, leadership?</li> <li>- Accreditations, etc.?</li> <li>- Processes and systems, etc.?</li> <li>- Management cover, succession?</li> </ul>
<b>External</b>	
Opportunities – examples of questions that would be answered: <ul style="list-style-type: none"> <li>- Market developments?</li> <li>- Competitors' vulnerabilities?</li> <li>- Industry or lifestyle trends?</li> <li>- Technology development and innovation?</li> <li>- Global influences?</li> <li>- New markets, vertical, horizontal?</li> <li>- Niche target markets?</li> <li>- Geographical, export, import?</li> <li>- New USPs?</li> <li>- Tactics - surprise, major contracts, etc.?</li> <li>- Business and product development?</li> <li>- Information and research?</li> <li>- Partnerships, agencies, distribution?</li> <li>- Volumes, production, economies?</li> <li>- Seasonal, weather, fashion influences?</li> </ul>	Threats – examples of questions that would be answered: <ul style="list-style-type: none"> <li>- Political effects?</li> <li>- Legislative effects?</li> <li>- Environmental effects?</li> <li>- IT developments?</li> <li>- Competitor intentions – various?</li> <li>- Market demand?</li> <li>- New technologies, services, ideas?</li> <li>- Vital contracts and partners?</li> <li>- Sustaining internal capabilities?</li> <li>- Obstacles faced?</li> <li>- Insurmountable weaknesses?</li> <li>- Loss of key staff?</li> <li>- Sustainable financial backing?</li> <li>- Economy – home, abroad?</li> <li>- Seasonality, weather effects?</li> </ul>

The template shown here is to give students an idea of what kind of information might be analyzed and included in each portion of the sales-specific SWOT.

**Exhibit 2. Sales-Specific SWOT Analysis: An Example:**

**Subject:** The creation of ABC’s own distributor company to target additional end-user sectors.

<b>Internal</b>	
<p><b>Strengths</b></p> <ul style="list-style-type: none"> <li>- End-user sales control and direction.</li> <li>- Right products, quality, and reliability.</li> <li>- Superior product performance vs. competitors.</li> <li>- Better product life and durability.</li> <li>- Spare manufacturing capacity.</li> <li>- Some staff have experience of end-user sector.</li> <li>- Have customer lists.</li> <li>- Direct delivery capability.</li> <li>- Product innovations ongoing.</li> <li>- Can serve from existing sites.</li> <li>- Products have required accreditations.</li> <li>- Processes and IT should cope.</li> <li>- Management is committed and confident.</li> </ul>	<p><b>Weaknesses</b></p> <ul style="list-style-type: none"> <li>- Customer lists not tested.</li> <li>- Some gaps in range for certain sectors.</li> <li>- We would be a small player.</li> <li>- No direct marketing experience.</li> <li>- We cannot supply end-users abroad.</li> <li>- Need more sales people.</li> <li>- Limited budget.</li> <li>- No pilot or trial done yet.</li> <li>- Don't have a detailed plan yet.</li> <li>- Delivery staff needs training.</li> <li>- Customer service staff needs training.</li> <li>- Processes and systems, etc.</li> <li>- Management coverage insufficient.</li> </ul>
<b>External</b>	
<p><b>Opportunities</b></p> <ul style="list-style-type: none"> <li>- Could develop new products.</li> <li>- Local competitors have poor products.</li> <li>- Profit margins will be good.</li> <li>- End-users respond to new ideas.</li> <li>- Could extend to overseas.</li> <li>- New specialist applications.</li> <li>- Can surprise competitors.</li> <li>- Support core business economies.</li> <li>- Could seek better supplier deals.</li> </ul>	<p><b>Threats</b></p> <ul style="list-style-type: none"> <li>- Legislation could impact negatively.</li> <li>- Environmental effects would favor larger competitors.</li> <li>- Existing core business distribution risk.</li> <li>- Market demand very seasonal.</li> <li>- Retention of key staff critical.</li> <li>- Could distract from core business.</li> <li>- Possible negative publicity.</li> <li>- Vulnerable to reactive attack by major competitors.</li> </ul>

This analysis, depicted in chart form, should demonstrate that the student has fully analyzed many aspects of the company’s sales operation, strategy, and results. Bullet points listed by the student should be specific and have enough verbiage to be understandable on their own.

**Project Part 4 – Ride Day Report**

Each student schedules a ride day with a professional salesperson (not a sales manager) in the industry chosen and prepares a written report of no more than five pages. The ride day is intended to be at least a half-day (approximately four hours) spent with the salesperson and include at least two customer sales calls. During this ride day, students should observe the salesperson “in action” and prepare information in order to answer the following questions.

1. What makes this salesperson successful?
2. How can a student better prepare him/herself for this sales position?
3. How is technology used by this salesperson?
4. What are some challenges this salesperson faces?
5. How is the salesperson measured?
6. How does the salesperson identify new sales opportunities?
7. What does this salesperson like the most about her/his job?
8. Describe the sales calls and how each went. Did the salesperson give you objectives for the calls in advance, and were the objectives achieved?
9. To what extent does theory (as learned in our selling courses) relate to the actual practices you observed or that were described by this salesperson?

The student is also encouraged to ask other questions, which could help in his/her research of the industry and company and to collect copies of any sales literature. For verification that the ride day actually occurred, the student must supply the names of the companies that the salesperson visited during the ride day as well as the business card of the salesperson.

**Project Part 5 – Oral Class Presentation**

Near the end of the course, students share the learned information with the class so that all students can learn about other industries and companies that potentially hire college students for sales positions.

The oral presentation, not lasting more than ten minutes in length, includes the following (see Exhibit 3 for a sample grading rubric):

- **Presentation Agenda**
- **Overview** - the presentation should include a basic overview of the industry and company, including some, but not necessarily all, of the information from the student’s written report. Some company sales financials should be included.
- **Critical analysis** - the presentation should include the student’s critical analysis of the company’s position for future sales growth using the SWOT research, ride day information and other findings. Taking all the information gathered from research and the ride day, this critical analysis looks at the total company from the student’s perspective and how the company is positioned for future sales success. This piece should demonstrate critical thinking that is original, not obvious.
- **Summary**

**Exhibit 3. Oral Presentation Rubric**

<b>Element</b>	<b>Description</b>	<b>Points</b>
Audience interest	Kept the attention of the audience through the use of visual tools (color, graphics, animation, etc.) and verbal tools (stories, analogies, humor, etc.).	10
Content & flow	Content fulfilled the presentation objectives (Agenda, Overview, Critical Analysis, Summary)  <ul style="list-style-type: none"> <li>- Information flow was logical and understandable</li> <li>- Followed instructions on format and length</li> <li>- Analysis was thoughtful and thorough</li> <li>- Charts were well labeled</li> <li>- No errors on slides</li> </ul>	30
Oral Delivery	<ul style="list-style-type: none"> <li>- Well prepared</li> <li>- Smooth and clear delivery</li> <li>- Very little use of notes</li> </ul>	10
Total		50

**Kolb’s Experiential Learning Cycle**

The project outlined above helps students learn the material by touching on all four stages of the Kolb’s learning cycle (Kolb & Fry 1974). *Concrete experience* occurs as students work through the industry and sales analysis, develop the SWOT analysis, and engage in the ride day with a salesperson. *Reflective observation* occurs as students write up this analysis and reflect upon what they are finding, particularly as they spot inconsistencies between what they found and what they thought to be the case before gathering the information. As they prepare and present their oral presentation, students engage in *abstract conceptualization*, developing new thoughts and ideas about the sales profession and what a typical sales day is like. Finally, students experience *active experimentation* as they then listen to other student’s presentations and attempt to apply what they have learned to what they see and hear about other sales occupations. Plus, due to the variety of experiences in the project, such as watching, thinking logically, finding practical uses for classroom theories, and evaluating other students’ analyses, students are able to encounter the selling world through their preferred learning styles (Kolb & Fry 1974; Kolb 1984).

### **Implications for Sales Managers**

To achieve the most effective outcomes from the project, students need to accomplish the ride day. Sales managers should welcome the opportunity for selling students to do a ride day and encourage their salespeople to agree to such ventures if approached by a selling student. Managers might even want to contact university sales professors and make clear that their salespeople welcome ride days.

Managers should realize that selling students, as part of their university instruction, are increasing their skills in evaluating selling opportunities. Certainly for those industries/companies where data is not readily available (for example, companies that are not publicly traded), managers may want to provide selling students insight into how the company's products/services are selling competitively.

While not a direct implication from the findings of this study, managers may want to take opportunities offered them, or create opportunities themselves, to learn more about selling programs at college. Just as students in this project have learned about companies, sales managers should try to learn as much as they can about university selling programs to assist in the best recruiting source decisions. Much like the students in the project, managers could spend a half day at the university attending selling classes with the students and talking to professors. This opportunity would provide insight into what students are being taught and how it is being accomplished. Many university selling professors would probably welcome these types of interactions and would help facilitate them.

### **Suggestions for Implementation of the Comprehensive Project**

This project has been used in numerous advanced selling courses at three different universities. It is important to give students the assignment early in the semester (the very first day, if possible). As quickly as possible, students are encouraged to identify an industry and a company in that industry that might appeal as a potential selling job when they graduate. Students are clearly informed that it is their responsibility, not the instructor's, to locate a salesperson for a ride day. Students are encouraged to realize that this is an exercise in real-world selling skills, since they will be engaging in prospecting (initial and subsequent if the first does not succeed), dealing with rejection, attempting to gain a solid commitment versus a verbal commitment that falls through, and so forth.

One approach to implementing the project is to assign each portion of the project (Part 1, Part 2, etc.) a separate due date, as opposed to having the entire project due at the end of the term. Assigning each part as a separate entity spreads out the workload and seems to help the students manage the project better.

This project has been described as not being easy but rather meaningful. Momentum for the project can increase if instructors can provide examples of students from prior classes who have secured a full-time job in the industry and/or company of their dreams, directly due to the project.

Students who have struggled the most with the project are the following four types.

1. *Those who put it off until later in the semester.* Early in the semester, students should be warned of the consequences of procrastinating. Using parts of the project as multiple assignments with due dates throughout the semester (one such example was included in the project description in this paper), could combat the procrastination. For example, for a fifteen-week course, by week three, the students must tell the instructor the name and contact information of their salesperson; by week seven, the students must tell the instructor the date/time/place where they are meeting their salesperson with the date to be within the next two weeks; and by week ten, the students must provide verification that the meeting actually occurred. The assignments and deadlines, however, should reflect the timing of topics covered in the course.
2. *Those who have chosen a tough industry or company.* It is harder for students to get a ride day with an industry or company that doesn't normally recruit sales students directly from colleges or from that specific college. Such companies perhaps do not feel that spending the time on a ride day will provide any payback on their time. Students need to be made aware of this possibility, as they choose their industry and company. Therefore, instructors could suggest companies that have a longstanding

- association with the college (e.g., Northwestern Mutual, as they hire a large number of our graduates and are always looking to increase their campus presence). Of course, students can also sharpen sales skills by crafting messages on the benefit of a ride day to salespeople in companies that don't hire from their college.
3. *Those who have poor networking skills.* Since the ride day oftentimes requires students to assertively apply their networking skills, those who are extremely uncomfortable in this arena will struggle. Offering assistance to help students strategize their approach in identifying a ride day prospect may help. Additionally, teaching a class module on successful networking or assigning a reading on the topic of networking also would be beneficial to increase students' networking skills.
  4. *Those who just don't put forth the effort.* This, of course, is a problem that is not unique to this project. One way to help resolve this issue is to make the project count significantly enough toward the students' final course grade. Our experience is that the project should count toward at least 15% of a student's grade, but it could be a much larger percentage. Instructors also should set the right perspective by describing the project as a major course project and not merely as an assignment or exercise.

In summary, the comprehensive project described here offers instructors the opportunity to help students improve their basic selling skills, deepen their understanding of business sales through an in-depth study of a single company and its associated industry, and see the application of sales theory to real selling situations in the ride day. Moreover, students learn about various types of sales jobs and improve their abilities in critically evaluating selling opportunities. Instructors are encouraged to consider adding this project to their advanced selling courses.

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**NOTES**