

## Simulated Sales Call

The primary purpose of the simulated sales call as part of the hiring process is to see if the candidate knows how to sell in general and is not just able to sell whatever he or she already sells or has sold. In order to accomplish this, you want to use an appropriate sales scenario that puts the person outside of his or her usual selling environment. The two simulations we provide accomplish this and are deliberately simple and generic in nature. If the scenarios don't suit, simply make up your own.

Like the Mini Competency Quiz, the simulated sales call is best conducted by either a sales manager, a seasoned and trained salesperson, or someone who is familiar with professional selling and who will know what to watch out for during the sales simulation.

### Instructions:

#### The Set-Up

1. Decide which sales scenario is applicable and have a copy ready to give to the candidate:
  - Use Scenario 1 if the candidate currently sells, or has primarily sold, intangibles (services).
  - Use Scenario 2 if the candidate currently sells, or has primarily sold, tangibles (products).
  - If the candidate currently sells both tangibles and intangibles, you can use either scenario.
2. Explain to the candidate that you'd like to get some idea of his ability to sell and think on his feet and in order to do that, you are going to do a simulated sales call with him. (You can expect some candidates to start looking around for the nearest exit but the confident ones will stand their ground.)

We recommend you use the words "simulated sales call" and not the words "role play." Most people would rather sit around sticking pins in their eyes than do a role play! Simulated sales call sounds less threatening.
3. Tell the candidate that he will be given a sales scenario and 10 minutes to prepare.
4. Instruct the candidate to, as much as possible, treat the simulated sales call like a real sales call.
5. Point out that there are no tricks or hidden agendas. You will respond like a typical prospect to whatever questions he asks.

### The Execution

1. Give the candidate a copy of the simulated sales call scenario along with some note paper, and allow 10 minutes so he can prepare. (Note: Be sure to get the sheet back at the end of the simulation.)
2. Begin the simulated sales call by greeting the candidate as if he were a salesperson coming in to sell the product/service you have assigned.
3. The simulated sales call should be as realistic as possible and done in a kind and courteous manner.
4. Allow no more than 30 minutes for the simulation.
5. Once the simulated sales call and interview are over and the candidate has left, complete the checklist/scoring sheet. Calculate the candidate's score by adding up the numbers you circled. The maximum attainable score is 100. We consider a pass to be 60 (60%) or more.

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*Note:*

You might want to consider giving the candidate the option of NOT doing the simulated sales call . The results can be very telling. It will be your decision as to whether or not to move forward with the candidate should he or she decline to do the simulation.

This is an opportunity for the candidate to prove to you that he or she knows how to sell. In our view, if the candidate doesn't have the confidence to do the simulated sales call , I'd be very concerned about the person's ability to perform in the real world.

Our suggestion is that if the candidate declines to do the simulated sales call , politely terminate the process and send the person on his or her way.

If you decide to give the candidate the option of NOT doing the simulated sales call , you can do so by saying something like:

"I'm going to give you the option of doing or not doing a simulated sales call with me. What we do is give you a neutral sales situation and some time to prepare and then have you make a simulated sales call. The decision is yours. Will you do it?"  
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## Simulated Sales Call - Scenario 1

**For use with a salesperson who currently sells,  
or has primarily sold, intangibles (services)**

### **Scenario:**

You are selling promotional/ad specialty items (coffee cups, calendars, pens, etc).

We recently met at a networking event and I expressed an interest in meeting with you. You know the following about me:

- I own and operate a small flower shop.
- I've been successful in getting local business but there is room to expand.
- I do very little advertising and count primarily on walk-ins and call-ins.
- I'm looking for ways to expand the business.
- The business is split about 35% businesses and 65% individuals.

We made an appointment to get together and this is that meeting.

### **Note:**

- You have 10 minutes to prepare.
- As much as possible, treat the simulated sales call like a real sales call.
- There are no tricks or hidden agendas. I will respond like a typical prospect to whatever questions you ask.

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Upon completion of the simulated sales call,  
please return this sheet to the interviewer.  
Thank you.

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## Simulated Sales Call - Scenario 2

**For use with a salesperson who currently sells,  
or has primarily sold, tangibles (products)**

### **Scenario:**

You are selling temporary personnel services.

We recently met at a networking event and I expressed an interest in meeting with you. You know the following about me:

- I operate a seasonal landscape design business.
- I use the winter months to prepare for the upcoming year's activity.
- We get lots of leads from local trade shows.
- My salespeople do the lead follow-up and set their own appointments.
- I need more sales but I have problems finding additional salespeople. The ones I have now are good and I don't want to lose them.

We made an appointment to get together and this is that meeting.

### **Note:**

- You have 10 minutes to prepare.
- As much as possible, treat the simulated sales call like a real sales call.
- There are no tricks or hidden agendas. I will respond like a typical prospect to whatever questions you ask.

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Upon completion of the simulated sales call,  
please return this sheet to the interviewer.  
Thank you.

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## Simulated Sales Call – Checklist & Scoring Sheet

**Candidate:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Interviewed by:** \_\_\_\_\_

*To be completed after the simulated sales call is over and the candidate has left.*

WRONG OR INAPPROPRIATE  
 NOT ACCEPTABLE  
 MINIMUM ACCEPTABLE  
 REASONABLE  
 OUTSTANDING OR EXCEPTIONAL

### GENERAL

**Approach:** Greeting should be warm and friendly.  
Handshake should be firm but not excessive. 0 1 2 3 4

**Introduction:** Did the salesperson give a brief introduction of the company and himself. 0 1 2 3 4

**Eye Contact:** Is eye contact natural and often. Watch for excessive blinking or looking away that would indicate a lack of confidence or insincerity. 0 1 2 3 4

**Voice & Verbal Skills:** Doesn't speak in a monotone.  
Uses complete sentences and good grammar. 0 1 2 3 4

**Uses Prospect's Name:** Does the salesperson use but not overuse the prospect's name? 0 1 2 3 4

### QUALIFYING THE PROSPECT

**Listening Skills:** Acknowledges and responds appropriately to the prospect's responses. Give full marks if the person takes notes. 0 1 2 3 4

**Determining Prospect's Needs:** How well did the salesperson uncover the prospect's needs? 0 1 2 3 4

**Timing Issues:** Did the salesperson determine when a decision to make a purchase would be made. 0 1 2 3 4

**Competition:** Did the salesperson ask who he/she was competing with? 0 1 2 3 4

**Budget/Funding:** Did the salesperson determine how much the prospect was prepared to spend? 0 1 2 3 4

**Authority:** Did the salesperson ask who would make the final purchasing decision? 0 1 2 3 4

WRONG OR INAPPROPRIATE  
NOT ACCEPTABLE  
MINIMUM ACCEPTABLE  
REASONABLE  
OUTSTANDING OR EXCEPTIONAL

**SALES PRESENTATION**

<b>Structure:</b> Did the presentation follow a logical sequence?	0	1	2	3	4
<b>Prospect Involvement:</b> Did the salesperson get the prospect involved in the presentation?	0	1	2	3	4
<b>Feature/Benefits:</b> Was there a relationship established between the facts/features and the prospect's needs?	0	1	2	3	4
<b>Credibility:</b> Did the benefits make sense?	0	1	2	3	4
<b>Creativity:</b> Was she/he creative?	0	1	2	3	4
<b>Objection Handling:</b> How effectively did the salesperson deal with the prospect's objections or concerns?	0	1	2	3	4

**ASKING FOR THE BUSINESS**

<b>Transition:</b> Did the salesperson move steadily towards closing the sale?	0	1	2	3	4
<b>Summary:</b> Did the salesperson summarize key points?	0	1	2	3	4
<b>Close:</b> Did the salesperson ask for the business or, at a minimum, use a trial close?	0	1	2	3	4

**OVERALL IMPRESSIONS**

<b>Personality:</b> Is the salesperson's personality typical of that of successful salespeople?	0	1	2	3	4
<b>Attitude:</b> Is the salesperson self-assured and self-confident?	0	1	2	3	4
<b>Enthusiasm:</b> Does the salesperson exhibit a natural enthusiasm?	0	1	2	3	4
<b>Impression:</b> Would you do business with this person?	0	1	2	3	4
<b>Referrals:</b> Would you give this person the names of your friends?	0	1	2	3	4

**Score = \_\_\_\_\_ or \_\_\_\_\_% (score ÷ 100 x 100 = %)**  
**Maximum score is 100. Minimum acceptable score is 60 (60%).**