



CAREER CLUSTER
Marketing

INSTRUCTIONAL AREA
Emotional Intelligence

MARKETING MANAGEMENT SERIES EVENT

PARTICIPANT INSTRUCTIONS

PROCEDURES

1. The event will be presented to you through your reading of these instructions, including the Performance Indicators and Event Situation. You will have up to 10 minutes to review this information to determine how you will handle the role-play situation and demonstrate the performance indicators of this event. During the preparation period, you may make notes to use during the role-play situation.
2. You will give an ID label to your adult assistant during the preparation time.
3. You will have up to 10 minutes to role-play your situation with a judge (you may have more than one judge).
4. You will be evaluated on how well you meet the performance indicators of this event.
5. Turn in all your notes and event materials when you have completed the role-play.

PERFORMANCE INDICATORS

1. Explain the nature of effective communications.
2. Coach others.
3. Foster positive working relationships.
4. Explain the nature of positive customer/client relations.
5. Demonstrate a customer-service mindset.



EVENT SITUATION

You are to assume the role of operations manager at UNION STATE BANK. You will retrain a new cashier (judge) on customer relations.

UNION STATE BANK is a small, independently owned bank that has been the financial backbone of its community for over 70 years. As a member of management, you just overheard a conversation between a new cashier (judge) and a customer. The customer wants to make a deposit of \$20.00 into his/her checking account with a \$100.00 bill. The cashier (judge) sarcastically asked the customer, “Is that all you’re going to deposit?” and appeared to be irritated with the customer.

You are concerned by the cashier’s (judge’s) lack of professionalism, and you have decided to retrain the cashier on the following:

- proper employee/customer etiquette
- the importance of image
- communication skills
- interpersonal skills
- nonverbal communication

You will meet with the cashier (judge) in a role-play to take place in the bank’s training room. The cashier (judge) will begin the role-play by greeting you and asking you the purpose of the meeting. Once you have conducted your training and have answered the cashier’s (judge’s) questions, the cashier (judge) will conclude the role-play by thanking you for your help.

JUDGE'S INSTRUCTIONS

DIRECTIONS, PROCEDURES AND JUDGE'S ROLE

In preparation for this event, you should review the following information with your event manager and other judges:

1. Procedures
2. Performance Indicators
3. Event Situation
4. Judge Role-play Characterization
Participants may conduct a slightly different type of meeting and/or discussion with you each time; however, it is important that the information you provide and the questions you ask be uniform for every participant.
5. Judge's Evaluation Instructions
6. Judge's Evaluation Form
Please use a critical and consistent eye in rating each participant.

JUDGE ROLE-PLAY CHARACTERIZATION

You are to assume the role of cashier at UNION STATE BANK. The bank's operations manager (participant) will retrain you on customer relations.

UNION STATE BANK is a small, independently owned bank that has been the financial backbone of its community for over 70 years. The bank's operations manager (participant) just overheard a conversation between you and a customer. The customer wanted to make a deposit of \$20.00 into his/her checking account with a \$100.00 bill. You sarcastically asked the customer, "Is that all you're going to deposit?" and appeared to be irritated with the customer.

The manager (participant) is concerned by your lack of professionalism, and has decided to retrain you on the following:

- proper employee/customer etiquette
- the importance of image
- communication skills
- interpersonal skills
- nonverbal communication

The operations manager (participant) will meet with you in a role-play to take place in the bank's training room. You will begin the role-play by greeting the manager (participant) and asking what the purpose of the meeting is.

During the course of the role-play, you are to ask the following questions of each participant:

1. I was just having a bad day. How can you expect me to be nice to people all the time?
2. How can I show that I am paying attention to the customers?
3. Shouldn't I concentrate more on doing a good job than on being nice?

Once the manager (participant) has conducted the training and has answered your questions, you will conclude the role-play by thanking the manager (participant) for his/her help.

You are not to make any comments after the event is over except to thank the participant.

JUDGE'S EVALUATION INSTRUCTIONS

Evaluation Form Information

The participants are to be evaluated on their ability to perform the specific performance indicators stated on the cover sheet of this event and restated on the Judge's Evaluation Form. Although you may see other performance indicators being demonstrated by the participants, those listed in the Performance Indicators section are the critical ones you are measuring for this particular event.

Evaluation Form Interpretation

The evaluation levels listed below and the evaluation rating procedures should be discussed thoroughly with your event chairperson and the other judges to ensure complete and common understanding for judging consistency.

Level of Evaluation	Interpretation Level
Exceeds Expectations	Participant demonstrated the performance indicator in an extremely professional manner; greatly exceeds business standards; would rank in the top 10% of business personnel performing this performance indicator.
Meets Expectations	Participant demonstrated the performance indicator in an acceptable and effective manner; meets at least minimal business standards; there would be no need for additional formalized training at this time; would rank in the 70-89 th percentile of business personnel performing this performance indicator.
Below Expectations	Participant demonstrated the performance indicator with limited effectiveness; performance generally fell below minimal business standards; additional training would be required to improve knowledge, attitude and/or skills; would rank in the 50-69 th percentile of business personnel performing this performance indicator.
Little/No Value	Participant demonstrated the performance indicator with little or no effectiveness; a great deal of formal training would be needed immediately; perhaps this person should seek other employment; would rank in the 0-49 th percentile of business personnel performing this performance indicator.

JUDGE'S EVALUATION FORM
MMS SAMPLE

DID THE PARTICIPANT:

1. Explain the nature of effective communications?

Little/No Value

0, 2

Explanation of the nature and scope of effective communications was inadequate.

Below Expectations

4, 6, 8

Adequately explained the nature and scope of effective communications.

Meets Expectations

10, 12, 14

Effectively explained the nature and scope of effective communications.

Exceeds Expectations

16, 18

Very effectively explained the nature and scope of effective communications.

2. Coach others?

Little/N Value

0, 2

Attempts at coaching others were inadequate or weak.

Below Expectations

4, 6, 8

Displayed adequate skills for coach others.

Meets Expectations

10, 12, 14

Displayed effective skills for coaching others.

Exceeds Expectations

16, 18

Displayed very effective skills for coaching others.

3. Foster positive working relationships?

Little/No Value

0, 2

Attempts at fostering positive working relationships weak or unclear.

Below Expectations

4, 6, 8

Adequately fostered positive working relationships.

Meets Expectations

10, 12, 14

Effectively fostered positive working relationships..

Exceeds Expectations

16, 18

Very effectively fostered positive working relationships.

4. Explain the nature of positive customer/client relations?

Little/No Value

0, 2

Attempts at explaining the nature of positive customer/client relations were ineffective or unclear.

Below Expectations

4, 6, 8

Adequately explained the nature of positive customer/client relations.

Meets Expectations

10, 12, 14

Effectively explained the nature of positive customer/client relations.

Exceeds Expectations

16, 18

Very effectively and clearly explained the nature of positive customer/client relations.

5. Demonstrate a customer-service mindset?

Little/No Value

0, 2

Attempts at demonstrating a customer-service mindset were inadequate or unclear.

Below Expectations

4, 6, 8

Adequately demonstrated a customer-service mindset.

Meets Expectations

10, 12, 14

Effectively demonstrated a customer-service mindset.

Exceeds Expectations

16, 18

Very effectively and clearly demonstrated a customer-service mindset.

6. Overall impression and response to the judge's questions.

Little/No Value

0, 1

Demonstrated few skills; could not answer the judge's questions.

Below Expectations

2, 3, 4

Demonstrated limited ability to link skills; answered the judge's questions adequately.

Meets Expectations

5, 6, 7

Demonstrated the specified skills; answered the judge's questions effectively.

Exceeds Expectations

8, 9, 10

Demonstrated skills confidently and professionally; answered the judge's questions very effectively and thoroughly.

Judge's Initials _____

TOTAL SCORE _____