

NCSC XXIII Case Profiles

2021

Rd1 & WC

↑↑↑ **The**
↑↑↑ **American**
↑↑↑ **Group**



Qtr Final



Semi-Final



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Disclaimer: All prospect profiles are developed for educational purposes and to facilitate competition at NCSC XXIII. While some organizations represented in the profiles resemble actual companies, the profiles and situations are purely fictitious and any comments or remarks made in this document or by participants during the NCSC do not reflect the views, opinions or facts about any actual organization.

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Round 1 Salesperson Info

Case Info

Dormant account. Information about The American Group from the Gartner CRM system. The last record from a Gartner representative was input in 2013. Family-owned business since 1972. Customers: Retail & Industrial

Operating Revenue: \$145m

Technology Expenditures: \$1.5m

The American Group (TAG) consists of 3 divisions: American Pharmacies (48 locations) | American Lubricants (Distributor) | Speed Mart (137 locations)

What you Found

The American Group info from the website

American Lubricants: Top regional supplier of quality industrial, transport, aviation, equipment, and basic retail lubricant products to a broad spectrum of customers. Our four warehouses serve markets in Alabama, Mississippi, Tennessee and Louisiana.

American Pharmacies: Retail Pharmacy located in Speed Mart Locations. Pharmacies are an integral part of the local communities we serve, often reaching far beyond the walls of the store. Our loyal customers return because they trust us to provide friendly, personable service while meeting their pharmacy needs.

Speed Mart: In response to the ever-growing demand for convenience and accessibility, we choose convenient locations to offer the products and services that meet our customers' daily needs. As a result, The American Group and its various business partners are recognized as market leaders in the markets served.

Administrative Team from website:

President: Sterling Bone (1972)

Chief Financial Officer: Judy Bone (1972)

Chief Operations Officer: Val McGehee (2019)

Chief Information Officer: Robbie Hammond (2020)

The Sales Call

After making several unsuccessful calls to Robbie Hammond, the American Group CIO, he/she finally accepted your LinkedIn invitation. Robbie did not message you or respond to your messages. There was no photo.

You viewed TAG's web site and found the social media links (Facebook, Twitter, Instagram) sent you to error pages. None of the pages worked. You sent an email to Robbie sharing about the non-working links and indicated Gartner might be able to help make TAG technology more efficient. Beyond these emails you had no other communication with Robbie, but he/she agreed to a virtual call via email.

Prospect Background

From LinkedIn: Robbie Hammond

Experienced fuel and convenience retail marketer with a demonstrated history of working in the fuel & convenience industry. Skilled in Strategy Development and Implementation, Brand-Building, Market Planning, Operations Management, Sales, and Multi-Channel Retail. Graduated from Stetson University and earned an MBA from University of South Florida, Tampa.

Previous Work Experience

Marketing/Operations, Stanley Black & Decker (1yr)
Dir. of Sales Stanley Black & Decker (1 yr 5 mos)
National Account Mgr Stanley Black & Decker (3 yrs 7 mos)

Education

Stetson University, BS Communications, Minor Information Technology
Certificates: Social Media & Digital Marketing





Wildcard Round Salesperson Info

Case Info

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You viewed TAG's web site and found the social media links (Facebook, Twitter, Instagram) sent you to error pages. None of the pages worked. You sent an email to Robbie sharing about the non-working links and indicated Gartner might be able to help make TAG technology more efficient. You never spoke with Robbie, but he/she agreed to a virtual call with Jess Ogilvie, the Associate Director of IT, via email.

Prospect Background

From LinkedIn: Jess Ogilvie

Has no LinkedIn or other social media presence.





Penguin Supplemental Insurance

Quarter-Final Round Salesperson Info

Case Info

You became aware of Penguin Supplemental Insurance through an advertisement on Facebook. During the Gartner insurance renewal period you became interested in Supplemental Critical Care insurance. Your family has a history of cancer and you thought it would be a good idea to explore.

After doing some research on Dun & Bradstreet you found that Penguin might be a good lead for Gartner solutions.

The Sales Call

During the Gartner health insurance enrollment you spoke with John Riggs, the Penguin representative. You found that the person responsible for technology budget decisions at Penguin is Petie Kelso, the CIO. However, you would have to probably speak with Tam Sanders, the Assistant CIO first.

You searched for both Petie and Tam on LinkedIn. You sent both an invitation to connect, but only Tam connected and provided an email address. After exchanging several emails, Tam agreed to this meeting, but was a little cryptic in the email exchange.

What you Found

Fifty-eight percent of Americans have less than \$1,000 to spend on out-of-pocket expenses. When you have to withstand the cold of unexpected healthcare costs, there's Penguin.

Penguin Inc. is a privately held supplemental insurance company and one of the fastest growing supplemental insurance companies in the United States. The company was founded in 2014 and is based in Santa Maria, Georgia.

With Penguin, whether you're a large business or a small one, you can provide your employees with the kind of benefits they'd expect from a bigger company, helping your business stand out from the crowd.

Annual Revenue: \$750m | Technology
Expenditures: \$11.4m
Advertising Exp: \$6.75m | Employees: 832

CEO: Daniel Amos COO: Fred Crawford
CIO: Petie Kelso CFO: Jamie Lee
Asst CIO: Tam Sanders

Prospect Background

Petie Kelso (since 2014): Executive officer over information security technology, services, and operations. Eighteen years of experience in information security management with specialization in financial services security. Worked at various levels in the industry, with focus on security program management, and cybersecurity operations. Always looking for more contacts in information security and in financial services to stay on top of what's new.

Tam Sanders (since 2019): "Creative leadership" best describes my approach to work: a unique balance between the art of the possible and the need of the practical. I am a transformational leader with experience delivering unique technology solutions that achieve strategic business goals. I have experience in nearly all aspects of technology delivery and enjoy leading teams in the execution of organizational strategic plans.





Semi-Final Round Salesperson Info

Case Info

During the lockdown you have been working mostly from home. You found Dolphin in Gartner's CRM system, but they had discontinued their relationship with Gartner in 2019. Dolphin was a Gartner client for 3 years. However, last week someone from Dolphin, downloaded a report on customer retention. "How to Improve Customer Loyalty & Retention"

Your research revealed their revenues went from \$900 million in 2019 to less than \$700 million in 2020.

The Sales Call

Within an hour of the download, you emailed the person, who you found was Dana Jacob, the CIO at Dolphin. Dana downloaded: *How to Improve Customer Loyalty and Retention*: www.gartner.com/en/customer-service-support/insights/customer-loyalty and from the Gartner website: *How to Communicate the Value of Information Security in Business Terms* <https://www.gartner.com/en/doc/728406-how-to-communicate-the-value-of-information-security-in-business-terms>.

After exchanging emails with Dana's admin, you set up this virtual call. You gained no additional insights from the emails.

What you Found

Dolphin Inc. founded in 2005 is a regional air conditioning company headquartered in Fort Myers, FL with warehouses in FL, GA, AL, TN, NC and SC. Dolphin HVAC equipment and supplies can be found through contractors and at Lowe's, Home Depot and other big box home improvement retailers.

Heating, Air Conditioning, and Indoor Air Quality Solutions to help detect, visualize and act on addressing common indoor air quality issues. No matter the environment or climate, Dolphin offers solutions to make inside air feel perfect. Air Intelligence offers new technologies that raise the bar for the HVAC industry.

Annual Rev: \$685m
Employees: 750 - 900

CEO: Mike Schwartz (since 2005)
CFO: Judith A. Lee (since 2009)
CIO: Dana Jacob (since 2019)
CDIO: Michael Chill (since 2019)

Prospect Background

Dana Jacob

An Executive IT Transformation Leader and strategy execution professional with deep experience leading teams across global organizations, partnering with business executives to drive stakeholder alignment, identifying IT solutions and processes to improve operational efficiency, customer engagement and employee satisfaction to improve bottom-line business results. I exhibit integrity and credibility as a high-performance leader that delivers quality solutions to solve high-value business challenges and achieve results.

I am highly motivated to develop and support people to realize their personal and professional goals. I have earned a reputation as a driven and compassionate leader who values everyone for their unique personality, skills and contributions they can make towards achieving a common goal.

