Sales Leaders & Consultants Transition

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Sales Leaders & Consultants Transition

Collin Newton

Honors Project

Submitted to the Honors College at Bowling Green State University in partial fulfillment of the requirements for graduation with May 4th 2018 Graduation

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Dr. Greg Rich, Sales & Services, Advisor
Bethany Niese, Information Systems, Advisor
Executive Summary

History of Organization:

The Bowling Green American Marketing Association (BGAMA) has been recognized as one of the top 5% chapters in the world for 5 consecutive years. The Sales Leaders & Consultants (SLAC) is a sub group of the BGAMA founded in 2017. The vision was to form a group of elite, competent, engaged students who have an interest in developing professional selling skills. The group is built around shared ownership and empowerment, as well as an iterative, value driven culture.

Importance of Successful Transition:

In its first year, SLAC has reached 15 members, engaged 4 corporate partners, received recognition at regional and national sales competitions, and saved its members over $300 by actively encouraging rejection. Evaluating the graduating senior members, SLAC has achieved incredible feats. 100% of graduating seniors had accepted job offers prior to the beginning of their final spring semester, with average expected first year earnings of $72,500.

The SLAC has reached incredible feats after only one year. With a new generation of Sales Leaders eager to continue that success, ensuring a successful transition from the 2017-2018 to the 2018-2019 academic year is paramount.

Transition Process:

The SLAC is structured to have two facilitators, and the remaining sales leaders assuming responsibilities that enable organizational growth. The first part of the transition process was intense and purposeful conversations to determine best fits for different responsibilities. The second part of the transition process was providing materials that will allow next year’s group to hit the ground running. This includes corporate partners, a yearly calendar, additional initiatives, content information. The final part of the transition, is to ensure the new facilitators have the support system the need to perform and excel.

The Future:

Moving forward, the SLAC will be working to implement an alumni mentor system, further develop our corporate partners, compete in a greater number of competitions, and further develop and cultivate a culture and expectation of noble sales excellence. This document contains tools that are available to the new facilitators and continuing sales leaders. They are created to be used pragmatically, not academically. In addition to these documents and outlines, there are 55 documents and over 150 content related PowerPoint slides saved to the cloud under an account that is now owned by the new facilitators.
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Facilitator Selection

Process:

- Candidates Indicate Interest
- Current Facilitators have 1:1 conversations with all candidates
- King has 1:1 conversations with all candidates
- Evaluate engagement of all candidates
- Explore additional responsibilities candidates could hold that is not facilitator
- Engage in comprehensive conversation about who is the best fit for what responsibility

Traits:

- **Knowledge of Selling**
  - Grasp of sales process
  - Desire to be coached
  - Ability to communicate

- **Ability to Generate Value**
  - Ability to identify value added activities
  - Willingness to delegate and empower
  - Ability to articulate vision and mission
  - Ability to collaborate
  - Ability to iterate

- **Level of Care for Position**
  - Desire and ability to collaborate with King
  - Willingness to ask for help
  - Desire to develop and continue organization
SLAC Facilitator Interest Form

Please fill out this form to indicate your interest in facilitating the Sales Leaders & Consultants during the 2018-2019 Academic Year. Thank you!

What is your name?
Short answer text

What is your email?
Short answer text

What is your phone number?
Short answer text

Why would you like to become a SLAC Facilitator?
Long answer text
Organizational Responsibility

The sustainability and success of the Sales Leaders & Consultants is dependent upon each active member holding responsibility and having ownership of the group. This is the proposed outline of responsibilities, designed to develop as new ideas and members come around.

Responsibilities:

Shared

- Each Sales Leader will assume responsibility as account manager of various Corporate Partners. This management will include:
  - Setting up visits
  - Sustaining communication
  - Identifying employment opportunities
  - Ensuring they are finding value
- Each Sales Leader will actively identify top talent at the University to introduce to the program
- Each Sales Leader will be expected to present new sales related content to the group
Facilitators
There will be two facilitators who will facilitate the culture and administration of the group. Responsibilities include:

- Communication with Faculty Advisors
- Attendance tracking
- Value added content generation
- Facilitation of meetings
- Facilitation of all sales leaders
- Empower members to take ownership of new or existing responsibilities

Real Sales Applications
Real sales is defined as situations where sales leaders are going through the sales process with individuals outside of the university, not in a role play scenario.

- Manage all current processes and opportunities for real sales
  - Train individuals on corporate partnerships
  - Manage Kroff Chemical calling
- Bring Sales Leaders meetings outside of collaboration space to engage the campus community
- Identify and develop alternative opportunities for sales leaders to engage in real sales

Sales Competitions

- Identify and track local, regional, and national competition opportunities
- Ensure all sales leaders who desire to participate in competitions are allocated to competitions
- Mentor competitors through competition process and preparation
- Manage registration and logistics of sales competitions

New Content Development

- Work with facilitators to develop effective presentations of material
- Work with other sales leaders to identify industry relevant topics to present on

New Member Development

- Actively communicate with new members
- Empower new members to assume responsibilities and risk
- Greet new members as they arrive and make them feel welcomed
- Follow up with new members after each meeting, making them feel valued
- Orchestrate classroom visits to BA 1500 class and Business District visits
- Create booth at College of Business Organization Fair
**Branding**

- Develop and manage outward communications
- Develop promotional materials for events and recruiting
- Manage LinkedIn Profile
  - Weekly pictures of meetings
  - Sales competition contenders and results
  - Group highlights and accomplishments
- Update and maintain whiteboard in CoB Hallway

**AMA Relations**

- Maintain communication between AMA General and Sales Leaders
- Ensure Sales Leaders have opportunities to attend AMA field trips
- Develop identity of Sales Leaders in AMA
- Ensure Sales Leaders maintain membership in AMA

**Bonding**

- Identify relevant, fun, and unique bonding activities

**Additional responsibilities for New Sales Leaders:**

- **Alumni Mentorship Program:** Work to partner prominent alumni with Sales Leaders to kick start the mentorship program

- **Community Service:** Identify opportunities for the Sales Leaders to become engaged in the community

- **Rejection Therapy:** Develop new rejections, and oversee discussions about rejections

- **Event Planning:** Chair all Sales Leaders & Consultants related events, and develop new events

- **Absent Member Engagement Initiative:** Work within existing framework to engage members who are unable to attend regular meetings
2018-2019 Predictive Calendar

September: 3 meetings
1. Syllabus, welcome back, yearly outlook, Value-Based selling
   a. Do NOT sell ice to an eskimo
2. Introduce Rejection Therapy, Value based selling continued, BGSU Competition Round 1 Prep and Role Play
3. Pre-Call/ Approach
   • Register for BGSU Sales Competition
   • BGSU Sales Competition Round 1
   • Register for AMA Outbound Competition: Sept 6th
   • Register for Ball State Competition
   • Register for Whitewater Competition
   • Register for Arora Competition
   • Register for ICSC
   • Get a table at Business Organization Fair

October: 4 meetings
1. Needs Identification
2. Product Presentation
3. BGSU Sales Comp Round 2: Case Review and Role Play
4. Overcoming Objections
   • Career Expo
   • BGSU Sales Competition Round 2
   • AMA National Outbound Competition Round 1
   • Ball State Competition: Oct 5-6
   • Whitewater Competition: Oct 13
   • Arora Competition: Oct 19-21
   • ICSC

November: 3 meetings
1. Case Study
2. Company/ Sales Leader Partner Presentation
3. Sales Leader Content Presentation
   • Professional Selling Job Fair
   • AMA National Outbound Competition Round 2
   • AMA National Outbound Competition Round 3
   • ICSC: November 7-10

December: 2 meetings
1. Company/ Sales Leader Partner Presentation
2. End of semester reflection, feedback, celebration
   • Send out Senior Survey
January: 1-2 meetings
1. Review goals, build hype
   • Register for NOLA Competition: Feb 1st
   • Register for Toledo Sales Competition
   • Register for Quicken Loans Competition
   • Quicken Loans Competition: Jan 21

February: 4 meetings
1. Company
2. Toledo Comp
3. Quicken Comp
4. Sales Leader Content Presentation
   • Toledo Competition: Feb 22-24

March: 4 meetings
1. Company
2. NCSC Competition
3. Sales Leader Content Presentation
4. Company

April: 4 meetings
1. NOLA Competition
2. Company
3. Transition
4. Sales Legacy Dinner
   • NOLA: April 10
   • NCSC: April 5-7
   • Send out Senior Survey
Graduating Senior Form

This form is to be administered in the final weeks of Spring and Fall semester to capture information about SLAC outbound seniors.

How many academic years were you involved with the Sales Leaders & Consultants?

- 1
- 2
- 3
- 4
- 5

Would you recommend the Sales Leaders & Consultants to a friend who is curious about sales, communication, and/or problem solving?

- Yes
- No

In 1-2 sentences, how would you summarize the Sales Leaders & Consultants impact on you?

Long answer text

What were the most valuable parts of your experience with the Sales Leaders & Consultants?

Long answer text
What are some areas that the Sales Leaders & Consultants can improve on?

Long answer text

Are you employed at Graduation?

- Yes
- No

If yes, when did you accept your offer of employment?

Month, day, year

If yes, where are you employed?

Short answer text

If yes, what is your expected earnings for your first year of employment?

Short answer text

Did you have any internships while at BGSU?

- Yes
- No

If yes, how many internships?

Short answer text

If yes, where were your internship(s)?

Short answer text
Year One Outcomes:

Average Number of Years Involved: 1

Recommendations: 100% of graduating seniors would recommend the Sales Leaders & Consultants to a friend who is curious about sales, communication, and/or problem solving

Placement: 100% before Spring Semester

Average Expected 1st Year Earnings: $72,500

Internship Experiences: 100% of graduates have participated in at least 1 internship

Average Number of Internships Completed: 1.5

The impact of the Sales Leaders & Consultants:

“The Sales Leaders & Consultants really prepared me to enter the honorable professional sales world in a way that no other program could.”

“The Sales Leaders & Consultants Group helped me develop my leadership and facilitation skills, while allowing me to connect with valuable members of the area to grow my network.”

Most Valuable Parts of the Sales Leaders & Consultants:

“I loved the opportunity to talk to companies about their interest in sponsoring the Sales Leaders. It was neat seeing the smile on their face when they saw what a unique opportunity partnering with this organization is.”

“I really enjoyed developing the organization from an idea into a group that brings value to others. Members of the group said that the organization really was valuable to them, and that makes all effort involved worth it. Best of all, I did it with a great friend.”

Areas for Improvement:

“Need to complete the development of the mentor program.”

“We could improve the delegation of activities, member retention, participation activities for members who cannot attend meetings, and sponsor relationship generation.”
Corporate Partner Value Statement

- Bowling Green State University Chapter of the American Marketing Association is one of the top 5% chapters of over 370 in the world, for 5 consecutive years. We welcome businesses across every major industry with backstage access to the top sales and marketing students. We provide the opening to build mindshare among students; we provide first access to top talent; we provide professional development opportunities for our corporate partners.
## Corporate Partner Packages

<table>
<thead>
<tr>
<th>Service</th>
<th>Bronze Package ($1,000)</th>
<th>Silver Package ($2,500)</th>
<th>Gold Package ($4,000)</th>
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<tbody>
<tr>
<td>Resume book</td>
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<td>Social Media Engagement</td>
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<td>Opportunity to speak at a General Meeting</td>
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<td>Link to BGAMA Website</td>
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<td>Access to Avigation Student Marketers</td>
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<td>Professional Selling Job Fair &amp; Sales Competition Judge</td>
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<td>Host a Professional Workshop</td>
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<td>Host a Sales Leaders Workshop</td>
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<tr>
<td>Host a walk-through tour</td>
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<td>Classroom Speaking Opportunity</td>
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<td>Host Internal and External Job Shadowings</td>
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<tr>
<td>Logo on BGAMA Promotional Materials &amp; Powerpoint Slides</td>
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<tr>
<td>Provide Career Mentoring</td>
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<tr>
<td>Marketing Week Event Participation</td>
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<tr>
<td>Mentor Student Competitions</td>
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Corporate Partner Perks

- **Resume Book**: You will receive a resume collection of the officers and top performing members of BGAMA.
- **Social Media Engagement**: BGAMA will engage with your company’s Facebook, Twitter and LinkedIn conversations.
- **Opportunity to speak at a General Meeting**: BGAMA holds general meetings every other Wednesday at 8:00PM and you can have the opportunity to present your company to some of the top business students.
- **Link to BGAMA Website**: You will be provided space on a page of the newly-revamped BGAMA website to link to whatever promotional material you would like.
- **Serve as Sales Leaders & Consultants/Avigation Mentor**: You will have the opportunity to match your employees with Sales Leaders and Avigation students on a 1:1 basis to provide mentorship.
- **Access to Avigation Student Marketers for Projects**: You will have access to the student run marketing agency to assist your company with niche projects.
- **Professional Selling Job Fair & Sales Competition Judge**: You will have the opportunity to participate in an exclusive, sales-centric job fair, and have the opportunity to evaluate and recruit BGSU’s top sales students.
- **Host a Professional Workshop**: You will have the opportunity to host a workshop designed to teach BGAMA members about a certain professional skill. For example, a workshop on “How to Network”.
- **Host a Sales Leaders & Consultants Program Workshop**: You will have the opportunity to teach a part of your sales training to our Sales Leaders. You will have the opportunity to lead a training workshop and observe how the participants develop and respond to coaching.
- **Host a walk-through tour**: You will have the opportunity to have BGAMA members travel and tour your company’s facility on a predetermined date at your convenience.
- **Classroom speaking opportunity**: BGAMA can arrange for you to be a guest speaker in a Marketing course of your choice.
- **Host Sales Leaders & Consultants for Internal and External Job Shadowing’s**: You will have the opportunity to bring in the Sales Leaders to your office and allow them to shadow your employees.
- **Logo on all BGAMA Promotional Material & PowerPoint Slides**: BGAMA is constantly promoting events and will provide you with great exposure by placing your logo on our well-dispersed materials. Additionally, your logo will appear on all presentations slides produced by the BGAMA and Sales Leaders & Consultants.
- **Provide Career Mentoring**: You will have the opportunity to work with BGAMA students to assist in their interviewing, resumes, and career search.
- **Marketing Week Event Participation**: You will have the opportunity to participate in a Marketing Week event. BGAMA celebrates Marketing Week in October.
- **Mentor Student Competitions**: You will have the opportunity to serve as a mentor to students participating in a variety of competitions. These include marketing, sales, and various other competitions.
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</table>
Hey Elise!

Thank you very much for taking the time to meet with Cody and I yesterday, March 21. I really enjoyed talking to you about potential opportunities for Northwestern Mutual and the BGSU American Marketing Association to collaborate and grow. Northwestern Mutual's focus on engagement and support as you mentioned would be very beneficial for our organization as we develop our members. In return, our organization can offer you a direct line of business-focused, achievement oriented individuals through our various events. As promised, see attached for BGSU AMA’s Corporate Sponsorship Value Statement, Corporate Sponsorship Packages, and Corporate Partner Benefits.

On the Corporate Sponsorship Package page, I highlighted a few benefits that we talked about during our call. These include hosting workshops, gaining a resume book of engaged members, hosting a walk-through tour, and mentorship opportunities. Based on our conversation I believe that our silver package would be an excellent place for your company to begin, however all options are available based on your preferences. For example, we have additional benefits available in the gold package, such as the opportunity to join the BGSU AMA Career Panel, the option to participate in Marketing Week Events, and receiving an invitation to our Annual Banquet.

Please let me know if you have any questions regarding our sponsorship benefits, and I look forward to working with you soon!
How to Host a Corporate Partner

Evolving based on empirical evidence, trial and error, and continuous improvement.

1. Obtain corporate partner
   a. Identify main contact
   b. Identify their goals
2. Set up date for company to join meeting
   a. Communicate with main contact
   b. Confirm date with facilitators
3. Send reminder communications weekly, confirming the date and time
4. Send over topics that sales leaders would like to learn about from partner
5. Confirm what equipment, space, or preparation the guests need
6. Designate individual to meet guest at parking lot, ensure they call you when they park
7. Escort guest to meeting area
8. Introduce guest to sales leaders
9. Post meeting: provide each member with the email address of guest, to send follow up emails
10. Post meeting: solicit feedback from sales leaders & guest
Sales Leaders and Consultants Mentoring Program

Objectives of Program
- See the “Realities of the business”
  - Gain real world experience
  - Hear personal stories
- Mentoring Approach (2 Parts)
  - Group Mentoring
    - Have mentors attend SLAC meeting, host breakout sessions regarding topics of interest
  - 1 on 1 Mentoring
    - Have your own personal mentor, help them facilitate the breakout sessions
    - Students would schedule the mentor’s visit, show them around BG, etc.
- Connect student with mentor’s professional network
- Grow closer to Mentor on a personal level
  - Begin mentorship in a highly professional realm, but both people should attempt to grow mentorship into a friendship
- Learn key skills involved in the industry of the mentor’s background
  - Time management, multitasking methods especially!
- Meetings should be self-reflective in nature

Requirements of Students
- Attend all meetings with mentors in a timely manner or provide ample of notice
- Be first contact to member for SLAC
  - Always lead discussion on planning next meeting with mentor
- Communicate / check in with mentor 1-2 times a month
- Send a follow up email after every contact!
- Before each discussion, suggest 2 talking points that you would like to cover in the conversation
- Hold mentor’s accountable based on the standards below

Requirements of Mentors
- Before each discussion, suggest 2 talking points that you would like to cover in the conversation
- Give schedule of availability to students so that they can best request another meeting
- Strive to meet face to face with student if logistically possible
  - Meet student at BGSU at least once a year or host a Skype call
- Hold students accountable!
- Attend all meetings with students in a timely manner
  - Or provide ample notice if absence will occur
- Upon successful completion of Spring semester mentorship program, you will be invited to Sales Legacy Banquet
Sales Leaders and Consultants Job Shadowing Program

Objectives of Program
- Help students determine preferred career path
- Observe level of autonomy of employees
- Learn how decisions are made in a company
- See day to day work of desired position
- Connect students with recruiters
- Observe company culture
- Become familiar with technology used by firm
- Compare studies to real world issues
- Ask employees: What did you learn in college that has helped you in your professional career?
- Meet with employees of company
- Experience a tour of the company, then shadow an employee

Requirements of Students
- Be respectful to host’s work: Keep in mind that employees have a job to do!
- Do not bad-mouth positions/companies: Be positive!
- Send follow up email to all contacts met during shadowing program
- Match dress code of employees
- Bring name tags
- Take notes on job shadow
- Post on social media at least once regarding the company: Make it a positive post!
- Research company prior to visit
- In the future, be available for company to reach out to student to help them connect with students on campus
- Bring resume to shadowing experience

Requirements of Hosts
- Provide contact information of at least one employee by the end of the shadowing experience
- Make sure a recruiter is available to speak with students
- 2:1 Student to employee ratio when shadowing employee work
- Give relevant point of contact to students based on expectations set before shadowing experience
- Allow students to see different employees and departments
- Establish clear expectations before the shadowing experience, especially regarding:
  - Date / Time of shadow
  - Food / Lodging options
  - Agenda / Itinerary of day
    - Check in procedure at beginning of the day
Sales Leaders and Consultants Admission Standards
To earn membership after Fall semester, and to maintain membership for each semester following:

**Academic**
Prospective and Current Members are challenged to maintain a 3.0 GPA.

**Attendance**
Prospective and Current Members are challenged to be present at every SLAC meeting. In the event a Prospective and Current Member cannot attend they are to notify the current organization facilitators.

**Contribution**
Prospective and Current Members are challenged to provide meaningful contributions to the meetings. Contributions will be evaluated by the individual’s personal reflections.

**Rejection Log**
Prospective and Current Members are challenged to maintain a bi-weekly log of instances in which they were rejected. Members are encouraged to reflect and submit these logs through our online forms.

**Personal**
Prospective and Current Members under no circumstances are to show up to an SLAC meeting, function, or event under the influence of drugs/alcohol.

Prospective and Current Members are expected to follow the BGSU student code of conduct.

**Present to Peers or Connect SLAC with Sales Professional**
Per semester, Prospective and Current Members are expected to plan and execute a presentation to their SLAC peers on a sales topic of their choice. Presentations are to be approximately 10-15 minutes and will take place during regularly scheduled meetings.

Or

Per Semester, Prospective and Current Members are expected to engage the business community and connect the SLAC with a professional salesperson who is willing to mentor, present, or allow students to shadow.
Sales Leaders and Consultants Non Attending Members Standards

To earn membership after Fall semester, and to maintain membership for each semester following:

**Academic**

Non Attending Members (NAMs) are challenged to maintain a 3.0 GPA.

**Attendance**

NAMs are **not** expected to be present at every SLAC meeting. Members who are unable to attend meetings must **make this clear** at the beginning of the semester.

If NAMs can attend meeting due to temporary or permanent schedule change, they are invited to do so.

NAMs will receive all meeting notes and be invited to all job shadows or other special events.

NAMs will be assigned a facilitator to meet with bi-weekly to discuss content, updates, and value.

**Contribution**

NAMs are challenged to provide meaningful contributions to **developing content for** the meetings. Contributions will be evaluated by the individual’s personal reflections.

NAMs will be assigned a partner to collaborate with to conduct research on anticipated meeting topics. Research will focus around theories, application, controversy, or anything else the NAMs desire.

NAMs will create an e-lecture/pre-recorded presentation on this subject, to be played during the meeting in which the member did research for. The content of these presentations will then be discussed by the members who are in attendance.

**Rejection Log**

NAMs are challenged to maintain a bi-weekly log of instances in which they were rejected. Members are encouraged to reflect and submit these logs through our online forms.

**Personal**

NAMs under no circumstances are to show up to an SLAC meeting, function, or event under the influence of drugs/alcohol.

NAMs are expected to follow the BGSU student code of conduct.

**Connect with Company or Connect SLAC with Sales Professional**

NAMs will attempt to establish 1 job shadow per academic year. They will work as the main liaison with corporate contacts.

Or

Per Semester, NAMs are expected to engage the business community and connect the SLAC with a professional salesperson who is willing to mentor, present, or allow students to shadow.