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# DDS Account Simulation Program

## **TURNOVER FILE**

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## 1.0 Introduction, Purpose, and Major Functions

The Telecommunications Professional Development Program (TPD) has traditionally been oriented around technology and technical solutions. While this orientation supports product knowledge and selection, it is fundamentally internally oriented, and does not directly support a service oriented environment. DDS is evolving to a service oriented company and as such, has come to realize that the TPD Program should provide service oriented training in conjunction with technical training. The Account Simulation Program was developed to provide this service (that is, externally) oriented training.

Account Simulation started as a minor effort based around several technical case studies. The case studies were selected from the various technologies taught at TPD Phase II, and the emphasis was on a single correct technical solution to each case study. Students were required to design technical solutions based upon given technical details with little or no information about the customer's business problems. In addition, there was little integration of the ancillary skills taught in orientation and Phase II into the case study process.

Account Simulation has now evolved to the point where it is currently 40 percent technically and 60 percent business oriented. Utilization of the ancillary skills taught in Phase II sessions are necessary for the student to successfully complete Account Simulation. As a result, Account Simulation is now a more integrated program within TPD Phase II. The Account Simulation Program is now a major learning process and constitutes a large portion of student effort during Phase II of the TPD Program.

### Purpose

The purpose of this document is to define and describe the Account Simulation Program so that the program can continue as personnel leave the Telecommunications Education group. As such, this document constitutes a turnover file, and will define and describe the following for the Account Simulation Program:

- the goal and objectives of Account Simulation
- the component parts
- the instructional methods utilized
- the instructional techniques utilized
- the procedures utilized
- the schedule
- supporting files and documents

### Major functions

The major functions performed by TPD staff during execution of the Account Simulation Program are:

- deliverable scheduling for each class
- participant expectation level setting
- ancillary skill integration
- deliverable management
- participant briefing on deliverables
- customer role play
- issues, information, and requirements clarification
- participant guidance
- instructor(s) guidance
- student mentoring
- deliverable grading

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- student debriefing on their deliverables
- performance tracking
- online document and spreadsheet update and/or maintenance

## 2.0 Account Simulation Overview

This section introduces the Account Simulation Program goal and objectives, and describes the major activities and deliverables required in Orientation and Phase II of the TPD Program.

### 2.1 Account Simulation Goal And Objectives

DDS is a service company. To be successful in the service industry, it is imperative that DDS professionals attain a high level of people interaction skills that center around and support a service orientation.

The goal of Account Simulation is to develop this service orientation in DDS professionals. The TPD program accepts applicants based upon technical knowledge and expertise, and Account Simulation develops an external, service oriented view of the world.

To achieve the goal of developing a service orientation in DDS professionals, three interrelated high-level attributes must be developed or attained. These are: a “boardroom presence”, “customer awareness”, and “professionalism”. Therefore, the three high-level objectives of Account Simulation are to develop a “boardroom presence”, develop “customer awareness”, and exercise and develop “professional skills”.

#### Boardroom presence

Boardroom presence refers to the ability to communicate effectively with a customer upper-level management audience or group. Communication with this audience generally requires a higher skill level than typically required to communicate with non-management or lower-level management. This communication may be in oral or written form.

Having a boardroom presence requires that a person communicate with the customer, rather than conduct a dialogue or presentation. This means listening, hearing, and understanding the customer’s issues and concerns. Presenting a positive image and taking positive actions are fundamental to achieving the boardroom presence; positive from the customer’s perspective.

Having the ability to handle adverse situations and maintain “professionalism” while under fire are important attributes of boardroom presence. This means that issues are not taken personally, and being flexible and having the ability to respond to the needs of others.

#### Customer awareness

Customer awareness is fundamental to acquiring a service orientation. Customer awareness means having the ability to view the business world from the customer’s perspective, not DDS’ (external view, not internal view). This means that the focus is on the customer’s business, business problem, issues and concerns, as well as the technical problem. Solutions to these problems are evaluated foremost in terms of benefits to the customer’s business, then as the capabilities that DDS can bring to the solution.

Customer awareness is demonstrated by a knowledge of the customer’s business, a striving for customer success, and championing customer issues and concerns, not DDS’. It is a realization that DDS’ success will flow from the customer’s success.

#### Professional skills

Professionalism is required in the business world today. Customers, suppliers, regulators, peers, and others will not maintain long term relationships with non-professional business people. Yet “professionalism” has no common definition nor standard set of attributes. However, people “know a professional when they see them”, and conversely, “know un-professionals when they see them”. Therefore, it’s critical that professionalism be developed to at least a local standard.

In the Account Simulation Program professionalism is defined as having the unique tangible and non-tangible attributes, behavior, and attitudes in people relations which others find positive.

The attributes, behaviors, and attitudes demonstrated by a professional are:

- technical proficiency
- seek responsibility

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- build team work
- demonstrates perseverance
- exercise resource management
- exercise conflict management
- actions and conduct
  - ethics
  - cultural awareness and sensitivity
  - personal and business integrity

The oral presentations and written documentation are vehicles for exercising and developing these professional skills.

### 2.2 TPD Orientation

During Orientation, the TPD students establish or develop ancillary skills that will be needed to meet the Account Simulation of Phase II. Two important sessions which lay the foundation for oral and written deliverables are the Meeting Business Challenges and the Proposal Skills sessions. These sessions establish concepts, expectations, perspectives, and some basic Account Simulation concepts.

In addition, some technical sessions delivered in Orientation provide the technical knowledge necessary to complete the technical case studies. Specifically, the Modem session lays the foundation for the first case study.

### 2.3 TPD Phase II Segment 1

In Phase II, Segment 1, the student teams exercise and focus on a technical perspective. This perspective is achieved by providing purely technical problems and stressing the capabilities of the technical solutions. Capabilities of proposed solutions are the focus in the deliverables.

The vehicles used to develop the technical solutions are case study #1 and #2. The technical problems are clearly defined and there are a limited number of technical solutions. The student teams develop solutions based upon the stated technical problem.

In addition, student teams develop and deliver a technical presentation to a role playing review audience. The audience is made up of experienced DDS guests and role plays an internal DDS technical review committee. The objective of this presentation is to develop and exercise the students' professional skills.

### 2.4 TPD Phase II Segment 2

In Phase II, Segment 2, the student teams focus on a customer business perspective. This perspective is achieved by stressing the value proposition. Capabilities are no longer the focus. Value to the customer, in customer units of measure, is of paramount importance.

The vehicles used to stress value are case study #3, and the business request for proposal (RFP). The technical solutions to these problems are given. The student teams develop the business solutions based upon the customer's problem.

During this segment, the students are introduced to an executive from the customer organization. The executive is an experienced DDS professional role playing the customer. This meeting provides the students with practice and information for the upcoming formal presentations. The objective here is to develop and exercise the students' boardroom presence, customer awareness, and professional skills in a meeting environment, prior to the formal presentation.

In addition, student teams develop and deliver a formal presentation to a role playing review audience. The audience is made up of experienced DDS guests who role play the customer's executive board. This is a high-level business meeting where the student teams attempt to win the customer's business, based upon the RFP and their proposals. The objective of this presentation is to develop and exercise the students' boardroom presence, customer awareness, and professional skills.

## 3.0 Component Parts of Account Simulation

Several TPD sessions form the foundation of training necessary to set the students at a level of skill required to complete Account Simulation. The instructional intent has been to integrate the skills learned in these sessions into the Account Simulation Program so that the students would have to utilize the session information and skills.

### 3.1 Meeting Business Challenges

The purpose of this session is to set the expectations of the TPD students. This session is an in-depth interactive briefing to define what Account Simulation is, and what is required of the students. The session defines the who, what, where, when, why, and how of the Account Simulation Program. In addition, this session establishes basic information regarding the value proposition.

### 3.2 Proposal Skills

- formal entry level course
- augmented with advanced techniques and information

### 3.3 DDS Values and Vision

- formal entry level course
- general philosophical information

### 3.4 Customer Relations

- marketeering oriented briefing
- get the students to think about the customer
- get the students to think about communication with the customer
- establishes key relationships and perspectives
- concepts referred to in several case studies

### 3.5 Systems Life Cycle

- formal entry level course
- general overview of DDS' methodology
- concepts referred to in several case studies

### 3.6 Presentation Skills

- formal entry level course
- advanced techniques taught ad hoc during Red Teams
- skills necessary for successful Account Simulation customer presentations

### 3.7 PC Skills

- formal entry level course
- advanced features and functions required for deliverables

### 3.8 Team Building

- formal entry level course
- team work required for students to be successful

### 3.9 Setting and Achieving Goals

- formal entry level course
- skills necessary for successful Account Simulation customer presentations

### 3.10 Technical Case Studies

- technical orientation required
- technical capabilities stressed
- specific technical solutions required
- creativity is limited
- teams must “sell” a technical solution based upon a technical problem

The technical case studies and presentations are based upon specific technical problems which have limited technical solutions. The students are required to get the solution right - technically and financially. Financials include only the cost of the technology. Implementation issues are addressed but not costed. Production support is not considered. Value to the customer is not relevant to the problems to be solved, only technical capabilities of the solutions.

Grading is based upon delivering defined types of information, according to the format defined in the Proposal Skills session, and the correct technical and financial solution. Financials are based upon cost, and profit or overhead are not considered.

### 3.11 Business Case Studies

- customer business problem orientation required
- value to the customer stressed
- many technical and business solutions possible - each with its own value proposition
- allow for creativity in solutions
- teams sell based upon the customer needs and value to the customer’s business

The business case study and RFP are based upon business problems occurring in the customer’s distributor base and manufacturing plant. The students are required to analyze and communicate the business problem in the customer’s vernacular. There is no one correct solution to the business problems. In fact, there are many technical solutions which will solve the business problem.

The LAN case study gives one feasible technical solution to the student teams in the documented problem definition. The student teams are not required to use the given solution - they may provide their own. The ECIS case study forms the basis of the RFP and has at least nine different technical solutions. None of these is documented in the case study - the students must interview the instructor to understand what they are.

The students are required to develop and deliver a business solution and “sell” it in writing based upon the value proposition to the business. Because different technical solutions bring different value, the student deliverables will often be fundamentally different from each other. Business solutions include implementation and support solutions, the price of which are part of the financials.

Grading is based upon delivering defined types of information, according to the format defined in the Proposal Skills session, and the correct technical and financial solution based upon the value proposition. Financials include profit and overhead. Management Plans include implementation and production support actions, tasks, resources, and costs.

### 3.12 Customer Introduction

- introduction to presentation day
- opportunity for students to

### **3.13 Red Teams**

opportunity for students to practice their presentation skills for objective audience.

meeting control

flexibility

fielding questions/concerns

team work

individual techniques

opportunity for critique:

style

content

agenda

visual aids

level of detail

perspective

team work critique/hints

### **3.14 Technical Presentations**

### **3.15 Business Presentations**

## 4.0 Account Simulation Instructional Methodology

This section defines and describes the instructional methods used in the Account Simulation Program, the technical and business perspectives, and the rationale for role plays and fictitious personalities.

### 4.1 Technical Case Studies

The methodology used for the technical case studies creates an environment where the student teams are attempting to resolve technical problems without regard to business problems. This is the support unit environment in which many DDS technical support personnel operate. The case studies present canned, focused problems, leaving little latitude for finding opportunities in the customer's business.

Deliverables are evaluated based upon the correct categories of information included in the deliverables, and the correct technical solution as defined in the case study answer sheet attachment. This includes specific technical solutions, correct costing for that solution, and a correct evaluation of the capabilities of the solution.

#### Instructional Methodology

Set the perspective: The instructor(s) stress and reiterate that there are specific technical solutions that will solve the technical problems, and only one for the lowest cost. The instructor(s) evaluate the solutions based upon the defined technically correct solutions.

The target audience of the deliverables are technical managers and engineers. The instructor(s) stress that the deliverables should communicate in a technical vernacular.

The instructors clarify issues in the case studies as questions are raised. Instructor answers to questions regarding business uses of the solutions should not affect the defined technical solutions.

Skills Development. The technical case studies target specific skills for development. The instructor(s) focus the evaluation of deliverables based upon these skills. The skills are:

- technical competence
- documentation
- communication
- implementation planning

### 4.2 Business Case Studies

The methodology used for the business case studies and the RFP creates a potential customer environment, where the student teams are required to look beyond the technical solutions and develop solutions that bring value to the customer's business. The case study and RFP present realistic, multi-faceted business problems, leaving lots of latitude for providing technical solutions and finding other opportunities in the customer's business.

Deliverables are evaluated based upon the correct categories of information included in the deliverables, correct costing for the proposed solution, and a logical evaluation of the value brought to the customer.

#### Instructional Methodology

Set the perspective: The instructor(s) stress and reiterate that there are many technical solutions that will solve the technical problems. Further, the instructor(s) stress and reiterate that the objective is to bring value to Eagle Manufacturing based upon the value proposition. Each technical solution will have an associated value, and it's up to the students to select a solution and articulate its value. This means that each team's deliverable will be different. The instructor(s) evaluate the solutions based upon the articulated value.

The target audience of the deliverables are business people. The instructor(s) stress that the deliverables should communicate in a business vernacular. This includes technical proposal documentation and presentations.

Establish a two dimensional problem: The business case study and RFP present a set of business problems which are symptoms (the first dimension) of an underlying, more fundamental business problem (the second dimension). The students will not discover (and therefore not address) the fundamental problems unless they proactively pursue additional information regarding Eagle Manufacturing's operations. This information is not given in the

documented case study - the information is in the instructor's head. The students require knowledge of the underlying problems to effectively solve the real customer problem (the second dimension). Obtaining this information requires the students to pursue and interview the instructor(s) regarding how the business operates.

Use the indirect approach method: The "indirect approach" is a method of accomplishing goals and objectives and is often cited when referring to strategy and tactics. It has the benefit of seeming to remove it's practitioner (the instructor) from causing events and can be fundamental to experiential learning. A loosely analogous approach is the "back door" approach.

The instructor(s) uses the indirect approach to maneuver the students into "discovering" that this customer has a whole set of business problems which DDS can resolve. The method forces the student to "go after the answers", and avoids instructors giving the answers without requiring the students to understand the customer's business. These actions are exactly the actions required in resolving customer business problems in the business world. The discovery process is also germane and fundamental to the Systems Life Cycle and DDS' stated way of doing business.

Using the indirect approach also removes instructor limitations (instructor defined solutions) from the students and allows for creativity in their solutions.

Precipitating student discovery: The instructor(s) set the stage to precipitate a team interview. This is accomplished by questioning the teams regarding their grasp of the business problems and knowledge of the customer's business. Using carefully crafted questions, the instructor causes the student teams to realize that they do not have all the information. Instructor questioning occurs two to three days after release of the case study and RFP. This allows the teams sufficient time to review the documented problem definitions, and time to react to new information.

It is imperative that the instructor(s) raise key the questions that will precipitate the interview process. As individual students approach the instructor with questions, the instructor(s) looks for the opportunity to precipitate the team interview. The instructor(s) require the entire team be present for extensive question and answer sessions, thereby precipitating a team interview.

Teams that do not pursue an interview or clarifications of Eagle Manufacturing issues will miss the underlying fundamental business problem. These teams will probably focus on the capabilities of their technical solution, or benefits to DDS rather than benefits and value realized by the customer. Capabilities and benefits to DDS are not required nor do they earn credit in the business case studies.

Skills Development. The instructor(s) target specific skills for development. The instructor(s) focus the evaluation of deliverables based upon these skills. The skills are:

- technical competence
- documentation
- communication
- business problem analysis
- business acumen
- value determination
- implementation planning
- production support planning

### **4.3 Technical versus Business Perspective**

The perspective utilized in Phase II, Segment 1 is technology oriented, with prescribed technical solutions to problems which are defined in technology terms and no definition of the customer's business problems. Solutions are few and specific, with few opportunities for creativity.

The technical case study perspective is characterized by the following assertions:

- Technology will fix this.

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- We're here to fix a technical problem, not fix a business.
- There's one correct solution based on technology.
- The best technology is brings the best value for the customer.
- The customer's customers are the customer's problem.

The perspective utilized in Phase II, Segment 2 is oriented around the customer's business success, not the technical problems. Solutions to the problems are many and different, each one feasible. The students are required to select a solution and differentiate their solution based upon business issues and the value proposition. Further, students are required to make value decisions between giving the customer what they say they want, and giving the customer what's needed to resolve the real problems. For example, the customer requires the lowest cost solution, which will not solve the real problem. The student must confront and deal with such issues.

The business perspective is characterized by the following assertions:

- We're here to help the business.
- The technology is not the deciding factor - many technologies will work.
- The technology supports the business, not vice versa.
- The objective is to solve business needs, not be "technically cutting edge".
- How can we help the customer be successful?
- Where are the business opportunities with this customer?
- Lots of vendors can do this - why pick DDS?
- Value is defined in customer terms, not highest speed/greatest throughput.

### 4.4 Role Plays and Relationships

Role plays in Account Simulation provide the vehicle to dynamically build and exercise a boardroom presence, customer awareness, and professionalism by exposing the students to customer perspectives. Specifically, the role plays give the students the opportunity to experience direct, dynamic customer interaction in a safe environment.

Role plays are utilized in the formal presentations (technical and business) and in the Customer Introduction session. In each instance, the students are required to "think on their feet", "get outside their own mindset", and serve the customer. This is accomplished by verbal interaction with the students through face-to-face encounters with the role players. Students are required to answer technology, DDS background, customer background, and business questions. In addition, the students are required to handle "tough questions", "hidden agendas", and hostile customers.

The role players are drawn from a pool of experienced DDS professionals with backgrounds in communications technology, management, business, and customer environments. The role players develop and play scenarios based upon experiences they've had in the business world. This has the dual benefit of exercising the student's people interaction skills and previewing tough situations that do occur in the business world.

It is important to continue to recruit role players from outside of the TPD staff. The TPD staff form close relationships with the students, and this familiarity undermines the "sense of the unknown", apprehension, and formality that often pervade customer meetings. Providing this atmosphere is very important in developing people who can "think on their feet" and "get outside their own mindset". Saying this another way, the staff needs to be the student's mentors, not the challenge.

In addition, although the staff may have had previous non-academic experience, they are not currently working in a customer environment. They are not current on the experiences and issues which occur daily in customer environments. Guest role players can be and should be selected based upon customer environment experience.

### 4.5 Fictitious Persons

Fictitious personalities are a vehicle to build basic people interaction and communications skills in the students, and as a vehicle to seed details of the overall case study problem. The skills targeted for building are:

- Hearing what is said (or written).
- Discerning wants from needs.
- Discerning opinion from fact.
- Identifying/isolating prejudices.
- Identifying conflicts and compatibilities.
- Identifying opportunities.

The indirect approach method used to build and exercise these skills by using a series of fictitious personalities in each case study. These personalities are similar to those that are encountered in the everyday business world, and they provide a people environment similar to the everyday business world.

Each personality is described in a series of information bullets. The information bullets (and therefore, the personalities) display wants, prejudices, false requirements, valid requirements, hopes, ambition, and fears. The instructor determines the skills learned or details of the problem by controlling the information bullets associated with each personality. Information is added or deleted based upon the particular targeted skill.

The students must analyze these personalities to make value judgements regarding what is important, what has to be addressed, and what is incidental to the task at hand. Just as in the real world, the personalities have requirements of the vendor (DDS). The students must consider these requirements in their business deliverables.

## 5.0 Instructional Techniques

This section describes the instructional techniques used when interfacing with the students. The section addresses role plays, fictitious information, guiding students, and experiential learning.

### 5.1 Role Plays

The role plays are conducted during the two formal presentations and the Customer Introduction session. The key to a successful learning experience as a result of the role plays is to prepare in advance, to control the role players through pre-set objectives, and to fully debrief the students.

Prepare. Prepare in advance means to set up the events in advance, notify the participants, and set expectations. Section 6 of this document contains the set up procedures.

Selecting and recruiting role players should be based upon providing four distinct roles, corresponding to the four types of buyers:

- technical (technical experts/consultants)
- economic (financial expert/officer)
- user (manager of using group of the solution)
- coach (executive(s)/management)

A minimum of six guest role players should be selected and recruited for formal presentations. Establish role play objectives with the role players. The objectives are centered around the following:

1. Establish the instructional intent. The role players are here to teach the students how to communicate with and handle customers in sometimes difficult situations. It is imperative that the role players realize that they are the teachers for this event, and the students will react accordingly.
2. Technical expert (technical). The technical expert is concerned that the technical solution will work as advertised.
3. Financial expert (economic). The financial expert is concerned about the bottom line and dollars.
4. User of the solution (user). The user is concerned that the solution solves the business problem, i.e., gets the job done.
5. Business person(s) (coach). The coach is typically a person of much influence who is concerned about overall aspects of the business, customer, or the future.

Brief the role players. Prior to the start of role plays, brief the role players on the do's and don'ts of role playing. These are:

1. Things to do:
  - a. have fun being creative in the roles
  - b. use your experiences - they're really valuable
  - c. target the students - as per staff intelligence
  - d. target the topics - as per staff intelligence
  - e. ask tough questions
  - f. ask "no win" questions
  - g. set up no win scenarios
  - h. use your emotions where appropriate
  - i. defend "your business"

2. Things not to do. There are several things to avoid in the role plays:
  - a. limit the “antics” - roles must have an educational purpose
  - b. limit the extremes - ensure it’s feasible (no paper airplanes)
  - c. develop “thick skins” in students - DDS needs sensitive professionals
  - d. fail to debrief the students on how to “handle it” - how can they do better next time?

Conduct an After Activity Review (AAR). Plan, prepare, schedule, and conduct an AAR after each student team delivers it’s presentation. The AAR is where the students learn how to do it better next time. One instructor is designated as the facilitator of the AAR. The instructor guides and facilitates the discussion between the role players and the students. The facilitator uses the marker board to organize and record three types of feedback information during the AAR. These are:

- “What we did well”
- “What we didn’t do well”
- “What we’ll do next time”

As the information is being recorded, the facilitator asks the students “Are you recording this before I erase it?” (the AAR comments on the marker board). The purpose of this question is to remind the students that this information is for their benefit and to induce them to retain it.

Guest introductions. Introduce the role playing guests to the students AFTER all role plays and AARs are completed. Ask the guests to introduce themselves, where they’re from, what do they do, and what are their business experiences. This establishes their “bonafides” in the eyes of the students. Have the guests “pep talk” the students regarding their performance during the role plays. Ask the guests to address the validity and value of the role play scenarios just experienced by the class. This will reinforce the value of the experience. Finally, entertain questions and comments from the students interactively.

## 5.2 Fictitious Information

The fictitious information is disseminated in the case study documents, RFP, and orally from the instructor. The key to a successful learning experience using the information is to prepare details in advance, ensure the information is complete enough to allow students to resolve the problem, and ensure that the information is realistic and germane to the customer’s problem.

The fictitious information establishes the details of the customer’s environment and problem. This includes details regarding:

- the customer
- the players
- the problem
- limitations on scope

The fictitious information also provides clues to help the students establish who are the “types of buyers” at Eagle Manufacturing.

The technique used to provide the information is to seed information piecemeal and spread it out in the documentation or instructor interviews. This forces the students to work to find all the pieces to the puzzle. The instructor does not give the information away without student questions - the instructor makes the students work at finding the information. The instructor precipitates this by asking carefully crafted questions based upon details of the case study problem.

## 5.3 Grading Papers

Techniques for grading written deliverables are categorized as preparation, grading, and post-grading.

Preparation. Preparing for the grading of written deliverables involves setting the students expectations regarding grading and getting copies of the appropriate documentation assembled for the graders.

## ACCOUNT SIMULATION

Setting the student expectations involves briefing the students on grading procedures at the time the case study is assigned. The grading requirements are discussed in detail and the class is informed that the instructor will be “wearing two hats” during the grading process. The “two hats” are defined so that the student are not confused by instructor grading comments. The “two hats” are defined below.

When the deliverables are turned in for grading each team’s deliverable is photocopied with one copy for each grader. Each copy is packaged with a copy of the case study answer sheet, and one package is delivered to each grader. The graders make their notations on the photocopy of the student deliverables. The instructor archives the original deliverable from each team.

Grading. During the grading process, the graders “wear two hats”: an academic hat, and a customer hat.

The academic hat refers to comments and grading which is based upon the case study answer sheet. Graders document ALL point losses to include the reason WHY points were lost. Lost points are directly correlated to criteria on the answer sheet.

The customer hat refers to comments made by a grader reading the deliverable from a customer perspective. Customer hat comments are not gradable. However, this is where the students will find the most long-term value.

When grading deliverables with the customer hat, graders react emotionally to what’s said (written). Depending upon the language, the graders react with hostility, anger, flippancy, happiness, etc. Graders look for opportunities to ask “what’s in this for me?” and “why should I buy from you?”. Graders nitpick on quality, and get confused on confusing deliverable passages.

The customer hat perspective exemplified by the attitude that: Eagle is the only thing of importance. The grader adopts the attitude that: Eagle’s people are the best, Eagle bicycles are the best, and “convince me”.

When documenting their feedback, the graders clearly differentiate (identify) all “customer hat” comments from “academic hat” comments.

Post-grading. Post-grading activities consist of recording grades in the Account Simulation grading spreadsheet (refer to Section 6), and reporting of grades to the class manager. Then the instructor return all graded photocopies and the original answer sheets to the student teams for their review and future reference.

### 5.4 Guiding Students

Account Simulation causes cultural shock in many of the students. This results from many of the students expecting a technical telecommunications curriculum and being confronted with something quite different. In addition, many DDS employees have been sheltered from meeting customer requirements and providing satisfaction, and as a result, have little idea of how to communicate and conduct themselves. These students need guidance and mentoring through the Account Simulation Program.

Therefore, the instructor(s) must be ready to:

- explain what deliverables are required and details of the deliverables
- communicate how a business works
- communicate how technical solutions work
- communicate how implementation of the technical solutions work
- communicate how the case studies and solutions relate to the business
- define details of Eagle Manufacturing
- define details of fictitious personalities

The rule of thumb when guiding and mentoring students is to keep the Account Simulation goal and objectives in mind. Restated, these are:

1. The goal of Account Simulation is to develop a service orientation in DDS professionals.
2. The objectives are:
  - a. Develop a “boardroom presence”.

- b. Develop “customer awareness”.
- c. Exercise and develop “professional skills”.

As questions and issues arise, the instructor(s) frame the answers based upon the goal and objectives.

## **5.5 Experiential Learning**

- experience is the best teacher
- have the students experience
- require students to have goals and objectives and agendas for meetings.
- all participants in all meetings have agenda
- all participants have goals

## 6.0 Account Simulation Procedures

This section describes the procedures to be followed to successfully implement Account Simulation for each class. The procedures are presented in general chronological order, although some overlap and simultaneous events occur. Refer to each specific class schedule for specific sequence and dates.

### 6.1 Preliminary Organization For Each Class

Preliminary organization and preparation for each class consists of preparing the class manager's schedule, case study files, and project schedule (Time Line) for the upcoming class.

#### PROCEDURE:

The following items must be completed prior to assigning case studies to the students:

1. Coordinate deliverable dates with the class manager. Meet with the class manager and establish the dates that case studies, RFPs, and other deliverables are given to the students and when the student deliverables are due.
2. Establish staff graders for student deliverables. This will be affected by staff availability. Convene a meeting with the class manager and the delivery supervisor to determine and decide which staff members grade what deliverables.
3. Build a Time Line schedule. Build a Time Line schedule for each class in directory: H:\USERS\TPD\PROJECTS. A template file currently exists in that directory under the name of: ACCTTEMP.T\$0. This file is effort driven with dependencies already established. Do not overwrite this template file. Name each new Time Line schedule according to the following key:

ACCNT_15.T\$0	Class of April 1992
ACCNT_16.T\$0	Class of August 1992
ACCNT_17.T\$0	Class of January 1993

etc.

4. Create class performance spreadsheet. Update Symphony file H:\USERS\TPD\CASES\ACCS\_GRD.WR1 to include the grading spreadsheet for the upcoming class. This is accomplished by:
  - a. Inserting the appropriate number of rows (200) at cell A1.
  - b. Copy the last class' spreadsheet at cells A201..P400 to cells A1..P200.
  - c. Edit the copied spreadsheet to include the names of the new students by team number and the names of graders. Get the list of new students by team number and names of graders from the class manager.
  - d. Edit row A1 header information to contain the correct class designation.
  - e. Create range names for the new class using the following format:
 

TPD_nnn	entire class spreadsheet (cells A1..P200)
TPD_nnn_SUMMARY	summary printout (cells A13..P69)where nnn = XVI, XVII, XVIII, etc.
  - f. Change the print source setting to point to the summary printout range defined in item e, above.
5. Incorporate changes into each case study. Edit the case studies and/or RFP to incorporate any identified changes as a result of the previous class debriefings and performance. These changes constitute version changes and must be reflected in the version numbers of the updated documents. Version numbers are found in the footers of all Account Simulation Microsoft Word documents.

## 6.2 Meeting Business Challenges

The purpose of this session is to set student expectations for the Account Simulation Program. This is accomplished by conducting an informal, scheduled briefing on:

- what the program is
- who are the players
- how is it conducted
- what are the component parts
- what is the sequence of events
- why we're doing Account Simulation
- what is expected of the students

The briefing establishes key concepts such as the Value Proposition, the Solution Provider, and why customers hire help. In addition, the session differentiates between capabilities and benefits.

### PROCEDURE:

1. Implement topics into case studies. Refer to the session language and concepts when briefing students on case studies and deliverables. In particular, differentiate between capabilities and benefits and refer to the value proposition at every opportunity.
2. Critique based upon topics. Critique subsequent written and oral deliverables based upon the language and concepts. Look for value language and concepts in the student deliverables and critique accordingly. Where the language and concepts are ignored or not presented, call attention to that fact.

## 6.3 Proposal Skills

- Establish Baseline Knowledge during presentation
  - RFPs
  - types of proposals
  - how to implement
  - how to present

### PROCEDURE:

1. Distribute the Proposal Skills student handout. Edit and print the student handout for the Proposal Skills session and distribute a copy to each student. The handout is part of file: H:\USERS\MANCHEST\DATAFILE\PROP\_SK2.DOC.
2. Refer to the session language and concepts when briefing students on case studies and deliverables. In particular, the case studies require deliverables to be organized similar to the proposal organization defined in this session.
3. Critique subsequent written and oral deliverables based upon the language and concepts. Look for value language and concepts in the student deliverables and critique accordingly. Where the language and concepts are ignored or not presented, call attention to that fact.

## 6.4 DDS Values and Vision

- Establish Baseline Knowledge
- critique subsequent written deliverables based upon the concepts of DDS Values and Vision

PROCEDURE:

1. Refer to the session language and concepts when briefing students on case studies and deliverables. In particular, look for opportunities within the case studies for discussion by the students of the topics defined in this session.
2. Critique subsequent written and oral deliverables based upon the language and concepts. Look for value language and concepts in the student deliverables and critique accordingly. Where the language and concepts are ignored or not presented, call attention to that fact.

## 6.5 Customer Relations

- Establish Baseline Knowledge
  - who is the customer
  - 4 buyers
  - value proposition
  - shifting buyer concerns
  - customer expectations
  - knowledge of customer
  - customer satisfaction

PROCEDURE:

1. Refer to the session language and concepts when briefing students on case studies and deliverables. In particular, look for opportunities within the case studies for discussion by the students of the topics defined in this session.
2. Critique subsequent written and oral deliverables based upon the language and concepts. Look for value language and concepts in the student deliverables and critique accordingly. Where the language and concepts are ignored or not presented, call attention to that fact.

## 6.6 Systems Life Cycle

The concepts developed in the Systems Life Cycle (SLC) session are fundamental to implementing business solutions. This session establishes the base line knowledge of the SLC concepts which can be incorporated into subsequent Account Simulation deliverables.

PROCEDURE:

1. Utilize SLC concepts. Refer to the SLC language and concepts when briefing students on case studies and deliverables.
2. Critique subsequent written and oral deliverables based upon the concepts of the SLC. Look for SLC language and concepts in the student deliverables and critique accordingly. Where the language and concepts are ignored or not presented, call attention to that fact.

## 6.7 Presentation Skills

- Establish Baseline Knowledge

PROCEDURE:

1. Students critique staff presenters. Have the students evaluate staff presentation skills and techniques during formal staff presentations. Debrief with the class after the formal presentation. Record and maintain the class critique on a flipchart. Repeat this process for subsequent staff presentations. However, prohibit the students from using any previously identified critique points.

2. Critique student presentations. Foster student team critiques of team member presentation performance.
3. Interact with student presenters. Interrupt student presenter with questions and comment during their presentation. In addition, use techniques such as the water glass, the foot print map, and the hand-in-the-pocket to help student presenters build skills.

## 6.8 PC Skills

- Establish Baseline Knowledge

### PROCEDURE:

1. Require sophisticated written deliverables. Require student deliverables to use headers, footers, varying fonts and features, and advanced word processing techniques in their written deliverables.
2. Critique subsequent written and oral deliverables based upon the capabilities of the available PC tools.

## 6.9 Team Building

use issues and techniques discussed in Meeting Business Challenges and Proposal Skills sessions to foster team building

### PROCEDURE:

1. Establish desired team behavior. Discuss and give examples of the desired team behavior and interaction during the Meeting Business Challenges and Proposal Skills sessions. Debrief each team after case studies, red teams, and formal presentations regarding each team's apparent level of team work.
2. Interface through teams. Communicate RFP and case study information formally to teams or team representatives and not individual students. Require the team representatives to disseminate information to the teams.
3. Require team decisions. Require each team to determine their plans, goals, agendas, procedures, etc. Render feedback to each team on how apparent their team work is or is not.

## 6.10 Setting and Achieving Goals

- require student teams to set objectives and plan their agenda for the customer meeting, the Red Teams, and the formal presentations.

### PROCEDURE:

1. Require goal setting. Require each team to plan and establish objectives, plans, and agendas for red teams and formal presentations. In addition, require the class to plan, set objectives, and establish an agenda for the Customer Introduction session.

## 6.11 Technical Case Studies

### PROCEDURE:

Preparation for presentation to the class:

1. Prepare graders. Present one copy of each complete case study to each staff grading the case study one week prior to release for grader comments and/or changes.
2. Schedule case study briefing. Schedule one hour of class time to brief class on each case study.
3. Prepare copies. Prepare and present one copy of each case study to each student in class at the scheduled briefing.

### PRESENTATION TO THE CLASS:

4. Brief class. Brief the class and step through each case study, defining the problems, the content, and context.
5. Define grading requirements. Step class through the grading requirements in detail.
6. Set expectations. Stress that we're looking for a technical solution. Establish graders expectations of student deliverables to include length, level of detail, and costing details.

### POST-PRESENTATION:

7. Clarify issues. Answer questions and clarify issues as required by the students. Communicate the answers to the other teams if appropriate.
8. Grade papers. Graders grade papers individually, not as a team. This provides the students with diverse feedback. Document all rationale for grading on the answer sheets. Make copies of the graded papers and the answer sheets and return the originals to the student teams
9. Deliver grades. Record grades in file: H:\USERS\TPD\CASES\ACCS\_GRD.WR1. Communicate the grades to the class manager for credit to the students.
10. Conduct an After Activity Review (AAR). Debrief the class on how well they did or didn't communicate with this deliverable. Establish positives and negatives regarding team performance for customer relations, DDS values and vision, PC skills, and proposal skills.

## 6.12 Business Case Studies and RFP

### PROCEDURE:

Preparation for presentation to the class:

1. Prepare graders. Present one copy of each complete case study to each staff grading the case study and RFP one week prior to release for grader comments and/or changes.
2. Schedule case study briefing. Schedule one hour of class time to brief class on each case study and the RFP.
3. Prepare copies. Prepare and present one copy of each case study and RFP to each student in class at the scheduled briefing.

### PRESENTATION TO THE CLASS:

4. Brief class. Brief the class and step through each case study and the RFP, defining the problems and the content and context.
5. Define grading requirements. Step class through the grading requirements in detail.
6. Set expectations. Stress that we're looking for a business solution. Establish graders expectations of student deliverables to include length, level of detail, and costing details.

### POST-PRESENTATION:

7. Clarify issues for case studies. Answer questions and clarify issues informally (orally) for the case studies as required by the students. Communicate the answers to the other teams if appropriate.
8. Clarify issues for RFP. Answer questions and clarify issues for the case studies RFP formally in writing. This reflects clarification procedures in the real world. All questions are recorded and answered formally in writing. Questions and answers are inserted into file: H:\USERS\TPD\CASES\BP\_QUEST.DOC, and cover letter information is updated. The file is then printed out, signed, and one copy is delivered to each team. All "bidders" then have equal

information. Repeat this function as necessary. Questions are not allowed nor answered after the cutoff time stipulated in the RFP.

9. Grade papers. Graders grade papers individually, not as a team. This provides the students with diverse feedback. Document all rationale for grading on the answer sheets. Make copies of the graded papers and the answer sheets and return the originals to the student teams

10. Deliver grades. Record grades in file: H:\USERS\TPD\CASES\ACCS\_GRD.WR1. Communicate the grades to the class manager for credit to the students.

11. Conduct an After Activity Review (AAR). Debrief the class on how well they did or didn't communicate with this deliverable. Establish positives and negatives regarding team performance for customer relations, DDS values and vision, PC skills, and proposal skills.

## 6.13 Customer Introduction

### PROCEDURE:

1. Prepare student notice. Edit, print, and deliver one copy of the meeting notice memo to each team a minimum of three days prior to the meeting. The meeting notice is in file: H:\USERS\TPD\CASES\BP\_MEET.DOC.

2. Brief guest(s). Schedule time to brief guest(s) that role plays the customer prior to the Customer Introduction session.

3. Set expectations of the class. Hold one meeting for entire class, not one meeting for each team. For logistics purposes, the teams are not competing for this meeting. This is to be viewed as a high level meeting: the customer may not have detailed knowledge of the problems.

4. Conduct an After Activity Review. Debrief the class on how well they did or didn't communicate with this customer.

5. Introduce the guest role player(s). Facilitate an informal introduction and discussion between the guest(s) and the students. This helps the students "wind down" and establishes the value of the role plays with the students.

## 6.14 Technical Presentations

### PROCEDURE:

Preparation for presentation day:

1. Prepare student notice. Edit, print, and deliver one copy of the meeting notice memo to each team a minimum of three days prior to the meeting. The meeting notice is in file: H:\USERS\TPD\CASES\TP\_PRESEN.DOC.

2. Prepare Red Team notice. Edit, print, and deliver one copy of the meeting notice memo to each team a minimum of three days prior to Red Team day. The Red Team notice is in file: H:\USERS\TPD\CASES\TP\_REDTM.DOC.

3. Prepare evaluation forms. Edit and print oral evaluation forms for staff graders. The forms are in file: H:\USERS\TPD\CASES\TP\_OEVAL.DOC.

4. Brief graders. Schedule time and brief the staff on grading prior to the presentations. Review the evaluation form in detail to ensure graders understand the definition and requirements of each gradable category.

5. Set expectations. Set the expectation of the student teams. There will be one presentation per team. The guests will select order of presentations on presentation day. All other teams will observe the team presenting.

6. Conduct Red Teams. Schedule and conduct the Red Teams for each student team. Conduct an AAR to critique each team on: team work, setting and achieving goals, proposal and presentation skills, customer relations, and professionalism.

### **Presentation day:**

7. Brief guests. Schedule time prior to the first presentation to brief guests (role plays the customer) on presentation day. Set the learning objectives, limits on the guests, and specific roles desired.
8. Conduct an After Activity Review. Facilitate a AAR for each student team on how well they did or didn't communicate with this customer. Ensure that team work, setting and achieving goals, proposal and presentation skills, customer relations, and professionalism are addressed.
9. Introduce the guest role player(s). Facilitate an informal introduction and discussion between the guest(s) and the students AFTER all presentations and AARs. This helps the students "wind down" and establishes the value of the role plays with the students.

### **Post-presentation:**

10. Record grades. Collect, compile, and record grades in the file: H:\USERS\TPD\CASES\ACCS\_GRD.WR1. Communicate the grades to the class manager for credit to the students.

## **6.15 Business Presentations**

### **PROCEDURE:**

Preparation for presentation day:

1. Prepare student notice. Edit, print, and deliver one copy of the meeting notice memo to each team a minimum of three days prior to the meeting. The meeting notice is in file: H:\USERS\TPD\CASES\TP\_PRESN.DOC.
2. Prepare Red Team notice. Edit, print, and deliver one copy of the meeting notice memo to each team a minimum of three days prior to Red Team day. The Red Team notice is in file: H:\USERS\TPD\CASES\BP\_REDTM.DOC.
3. Prepare evaluation forms. Edit and print oral evaluation forms for staff graders. The forms are in file: H:\USERS\TPD\CASES\BP\_OEVAL.DOC.
4. Brief graders. Schedule time and brief the staff on grading prior to the presentations. Review the evaluation form in detail to ensure graders understand the definition and requirements of each gradable category.
5. Set expectations. Set the expectation of the student teams. There will be one presentation per team. The guests will select order of presentations on presentation day. All other teams will observe the team presenting.
6. Conduct Red Teams. Schedule and conduct the Red Teams for each student team. Conduct an AAR to critique each team on: team work, setting and achieving goals, proposal and presentation skills, customer relations, and professionalism.

### **PRESENTATION DAY:**

7. Brief guests. Schedule time prior to the first presentation to brief guests (on their role plays of the customer) on presentation day. Set the learning objectives, limits on the "role play behavior", i.e., limit the "antics" of the guests, and specific roles desired.
8. Conduct an After Activity Review. Facilitate a AAR for each student team on how well they did or didn't communicate with this customer. Ensure that team work, setting and achieving goals, proposal and presentation skills, customer relations, and professionalism are addressed.

9. Introduce the guest role player(s). Facilitate an informal introduction and discussion between the guest(s) and the students AFTER all presentations and AARs. This helps the students “wind down” and establishes the value of the role plays with the students.

POST-PRESENTATION:

10. Record grades. Collect, compile, and record grades in the file: H:\USERS\TPD\CASES\ACCS\_GRD.WR1. Communicate the grades to the class manager for credit to the students.

## 6.16 Recording Grades

PROCEDURE:

1. Update performance file. Update the Account Simulation performance file, H:\USERS\TPD\CASES\ACCS\_GRD.WR1, to include each grader’s name for each deliverable and the grade awarded for each deliverable.
2. Deliver grades to class manager. Present the class manager with a print out copy of the current class grades from the Symphony performance file. Print the current class grades by specifying range name TPD\_nnn\_SUMMARY in the Symphony print setting source statement, where nnn = the current class number in Roman numerals.

## 7.0 Account Simulation Schedule

- establish with class manager for each class

### Orientation

- Meeting Business Challenges
- Proposal Skills

### Segment 1

- two technical case studies
  - CS\_NET\_I.DOC
  - CS\_NETII.DOC
- one oral technical presentation

### Segment 2

- one business case study
  - CS\_OPCST.DOC
- one Proposal
  - BP\_RFP2.DOC contains CS\_ECIS.DOC
- one oral business presentation
- make changes with class manager
- see Appendix B for Gantt chart

## Appendix A

### List of Files Currently In Use

Legend:

- .WR1 Symphony spreadsheet in directory: H:\USERS\TPD\CASES
- .DOC Microsoft Word Document in directory: H:\USERS\TPD\CASES
- .T\$0 Time Line schedule in directory: H:\USERS\TPD\PROJECTS

Support Files:

ACCS\_GRD.WR1 Performance records for each individual and teams by class in directory:  
H:\USERS\TPD\CASES\ACC\_PRSN.DOC

View foil masters for the Meeting Business Challenges session in directory:  
H:\USERS\MANCHEST\DATAFILE\PROP\_SK2.DOC

View foil masters for the Proposal Skills session in directory:  
H:\USERS\MANCHEST\DATAFILE\ACCNT\_nn.T\$0

Time Line schedule by class in directory: H:\USERS\TPD\PROJECTS\ (nn equals the sequential class number: 15, 16, 17,...).Case Studies:

CS\_NETII.DOC Multiplexer case study document

CS\_NETII.WR1 Costing spreadsheet

CS\_NET\_I.DOC Modem case study document

CS\_NET\_I.WR1 Costing spreadsheet

CS\_ECIS.DOC Invoicing case study document

CS\_ECIS.WR1 Costing spreadsheet

CS\_OPCST.DOC Operating cost case study document

CS\_OPCST.WR1 Costing spreadsheet

Technical Proposal:

TP\_CVRLT.DOC Oral presentation notification memorandum to guest participants

TP\_PRESENT.DOC Oral presentation notification memorandum to student teams

TP\_REDTM.DOC Red Team notification memorandum to student teams

TP\_GUIDE.DOC Oral presentation guidelines to guest participants

TP\_OEVAL.DOC Oral presentation evaluation form Business Proposal:

EAGL\_LOC.DOC Chart depicting Eagle locations by division

BP\_MEET.DOC Eagle customer meeting notification to student teams

BP\_RFP.DOC Business RFP from Eagle

BP\_CVRLT.DOC Cover letter for student proposals shipped to guest participants

BP\_PRESENT.DOC Oral presentation notification memorandum to student teams

BP\_REDTM.DOC Red Team notification memorandum to student teams

BP\_GUIDE.DOC Oral presentation agenda and guidelines to guest participants

## Account Simulation Turnover Document

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BP\_QUESTION.DOC Written response to RFP questions

BP\_OEVAL.DOC Oral presentation evaluation form

BP\_CHG1.DOC Written change letter for RFP changes

**List of Files No Longer Used**

CS\_ACD.DOC

CS\_ACD.WR1

CS\_VID.DOC

TP\_QUEST.DOC

TP\_WEVAL.DOC

TP\_RFP.DOC

RFP\_SUM.DOC

CASEEVAL.DOC

RFPSUM.DOC

EVAL\_GUI.DOC

EAG\_PERS.DOC

EVAL\_OLD.DOC

CS\_PURCH.DOC

PROP\_EVA.DOC

ACD\_FORM.WR1



