

**2017**  
**NCSC XIX**  
**Undergraduate Division**  
**Prospect Profiles**



**Round 1: *The Gillespie Law Firm***



**Wildcard Round: *The Gillespie Law Firm (2)***

**Quarter-Final Round: *Derry's Ascension Insurance***



**Semi-Final Round: *Jolley Family Dentistry, LLC***



A more human resource.™

**Official Product Sponsor of the NCSC**

**Disclaimer:** All prospect profiles are developed for educational purposes and to facilitate competition at NCSC 19. 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.

The NCSC is a 501c3 non-profit organization

Copyright © 2016 National Collegiate Sales Competition. All Rights Reserved

## Round 1

**The Gillespie Law Firm.****The Situation**

You have been with ADP for 4 months and have been aggressively prospecting small professional firms. Using the ReferenceUSA database you found the Gillespie Law Firm. Your search indicated the firm was established in 2010 with 4 employees and 1 additional employee was added in 2016. Annual sales Volume for the firm has been between \$400k to \$700k and is trending upward. Current Payroll and Benefits are estimated at between \$250k to \$500k. Their annual expense for Management and Admin is between \$5k and \$10k and their annual expense for Technology is between \$5k and \$10k. They also had annual expenses for Accounting of between \$2.5k and \$5k. Two executives were listed in the Management Directory: Erin A. Gillespie (owner) and Erik E. Canada (Associate).

**The Sales Call:**

You called the firm and spoke with Lisa, the receptionist, and after finding out that Tom Ingram is the person that handles payroll, secured an appointment with him. Lisa said the Erin and Erik were fairly “hands-on” and one or the other might also join Tom in the meeting. You are expecting to meet with Tom.

**What You Have Found ...****Company History from the Website**

**About:** *My name is Erin Gillespie. After 10 years developing a legal and litigation foundation from both the defense and plaintiff sides, I founded my own firm to better satisfy clients' needs. That means better outcomes, but just as important, it means a better experience for the client throughout the legal process.*



**Family Law:** *What you can expect working with us is experienced and*

*accomplished attorneys and individuals who will take the time to understand your objectives and concerns. Whether you are a sophisticated business owner or an individual new to legal proceedings, the process can be lengthy, confusing, and stressful. Our goal is to minimize those negative aspects of the process while achieving the best outcome for you.*

*Nothing impacts your life the way that relationships and family do. The Gillespie Law Firm understands how legal matters affect you personally and always seeks to provide legal assistance and strategic guidance that will bring the best possible outcome with the least personal intrusion. The Gillespie Law Firm uses a collaborative approach to sensitive legal matters, such as divorce and civil union dissolution, child custody, and pre/post-nuptial agreements. Legal resolutions to such matters CAN be accomplished civilly and to your satisfaction. Should the situation call for it, however, no one will advocate on your behalf more forcefully than The Gillespie Law Firm.*

**Firm Management:**

Owner: Erin A. Gillespie, Attorney  
Associate: Erik E. Canada, Attorney  
Other information not provided.



## Wildcard Round *The Gillespie Law Firm.*

### **The Situation** (Not associated with Rd 1 Profile)

You have been with ADP for 4 months and have been aggressively prospecting small professional firms. Using the ReferenceUSA database you found the Gillespie Law Firm. Your search indicated the firm was established in 2010 with 4 employees and 1 additional employee was added in 2016. Annual sales Volume for the firm has been between \$400k to \$700k and is trending upward. Current Payroll and Benefits are estimated at between \$250k to \$500k. Their annual expense for Management and Admin is between \$5k and \$10k and their annual expense for Technology is between \$5k and \$10k. They also had annual expenses for Accounting of between \$2.5k and \$5k. Two executives were listed in the Management Directory: Erin A. Gillespie (owner) and Erik E. Canada (Associate).

### **The Sales Call: Wildcard**

You called the firm and spoke with Lisa, the receptionist, and after finding out that Tom Ingram is the person that handles payroll, she indicated that he is not available. Lisa said that Erin and Erick (the Partners) had been discussing changing payroll and to hold on while she checked. After about 5 minutes, she got back on the phone and said you had the appointment, but she was not sure if it would be either Erin or Erick or both in the meeting. She seemed a bit flustered.

Upon entering the office you meet Lisa. She pointed to the office and said, “Good luck, not sure who will be there to meet you.”

### **What You Have Found ...**

#### **Website**

***About:** My name is Erin Gillespie. After 10 years developing a legal and litigation foundation from both the defense and plaintiff sides, I founded my own firm to better satisfy clients' needs. That means better outcomes, but just as important, it means a better experience for the client throughout the legal process.*

***Family Law:** What you can expect working with us is experienced and accomplished attorneys and individuals who will take the time to understand your objectives and concerns. Whether you are a sophisticated business owner or an individual new to legal proceedings, the process can be lengthy, confusing, and stressful. Our goal is to minimize those negative aspects of the process while achieving the best outcome for you.*

*Nothing impacts your life the way that relationships and family do. The Gillespie Law Firm understands how legal matters affect you personally and always seeks to provide legal assistance and strategic guidance that will bring the best possible outcome with the least personal intrusion. The Gillespie Law Firm uses a collaborative approach to sensitive legal matters, such as divorce and civil union dissolution, child custody, and pre/post-nuptial agreements. Legal resolutions to such matters CAN be accomplished civilly and to your satisfaction. Should the situation call for it, however, no one will advocate on your behalf more forcefully than The Gillespie Law Firm.*

#### **Firm Management:**

Owner: Erin A. Gillespie, Attorney  
Associate: Erik E. Canada, Attorney  
Other information not provided.



# Quarter-Final Round

## Derry's Ascension Insurance, Inc.

### The Situation

As you were going into your meeting with the Gillespie Law Firm, you made note of several businesses in the same building. One, Ascension Insurance, Inc. seemed interesting (very nice office front and several doors). After the Gillespie meeting you went to your car to take notes and debrief yourself. After wrapping up your session you did a quick search on ReferenceUSA and found Ascension's Business demographics and management directory:

Business Demographics			
Location Employees	25	Location Sales Volume	\$5,148,000
Corporate Employees	Not Available	Corporate Sales Volume	Not Available
Type of Business	Private	Location Type	Branch
Affiliated Records	Not Available	Affiliated Locations	Not Available
Parent Company	Ascension Insurance Inc	Foreign Parent	Not Available
EIN 1	Not Available	Fortune 1000 Ranking	Not Available
Credit Cards Accepted	Not Available	Last Updated On	October, 2016
Years in Database	15	Year Established	Not Available
Square Footage	40,000 - 99,999	IUSA Number	24-111-1475
Home Business	No	Credit Rating Score	A+

Management Directory			
Name	Executive Title	Gender	Executive Ethnicity
Chris Derry	Manager	??	Western Europe
Sam Williams	Sales Exec	??	Western Europe
Shawn Green	Finance	??	Western Europe

### Location Info

**Derry's Ascension, Insurance, Inc.**

5825 Medlock Bridge Pkwy # 200  
 Alpharetta, GA 30022  
**Phone** (678) 740-0236  
**Fax** (678) 740-0111  
**Toll Free Number** (888) 780-9905

### What You Found ...

After researching ReferenceUSA, you searched their web site and found that Derry's Ascension is a part of a much larger parent company with multiple offices around the U.S., but this agency was the only one in Georgia. The web site revealed that Derry's Ascension was named to Insurance Business America's annual list of "Elite Agencies" and that

Ascension's agencies were independent agents, which meant that they probably operate as stand alone businesses and have to manage their own payroll and HR.

### Other information from the Website

Derry's Ascension offers Employee Benefits, Property & Casualty, Retirement Consulting, Personal Lines and specializes in "Collegiate Solutions," which includes student health plans, intercollegiate student athletics, faculty & staff benefits, amateur sports & recreation programs and collegiate risk management solutions.

### We Don't Do Business As Usual

*When you think about an insurance broker, perhaps images of people in grey suits punching a clock comes to mind. That's not us. We are a thriving, dynamic company filled with folks who really care. Every day we come to work, ready to dig in, asking ourselves how we can best serve you. We've been a trusted partner to hundreds of organizations like yours, and countless individuals across the state. We collaborate with our partners to create and deliver smart and elegantly simple insurance solutions for all of your insurance needs, which reduce your total cost of risk and give you the competitive edge you need to succeed. It's why we love coming to work. For you.*

### The Sales Call:

You called the number listed and reached Keshana, the administrative assistant for the office. Keshana told you that Chris Derry is the person responsible for payroll and HR and that Chris was in, but kind of busy, but that Chris might still see you, since you are just outside. After Keshana put you on hold for a couple of minutes, she said that Chris would see you. After entering the office and very briefly introducing yourself to Keshana, she sent you to Chris' office.



# Semi-Final Round

## Jolley Family Dentistry



### The Situation

You have been with ADP for 4 months and have been aggressively prospecting small professional firms. Using LeadFerret.com you found the Jolley Family Dentistry. After reviewing what you found on LeadFerret.com you did a search on ReferenceUSA. Finally you checked out the web site.

Company Details		Company Socials	
Company:	Jolley Family Dentistry, LLC		
Address:	3999 Austell Rd Ste 304		
City:	Austell		
State:	GA		
Zip:	30106		
Company Phone:			
Domain:	jolleydentistry.com		
Revenue (in millions):	0		
Employees:	7		
SIC:	8021		
NAICS:			
Top 1000 Rank:			
Alexa Rank:			

Contact Details		Contact Socials	
Name:	Dale Jolley		
Title:	General Practice		
Phone:	(770) 948-1111		
Email:	doctor@jolleydentistry.com		
Score:	76		

### Business Demographics

Location Employees	5	Location Sales Volume	\$685,000
Corporate Employees	Not Available	Corporate Sales Volume	Not Available
Type of Business	Private	Location Type	Single Loc
Credit Cards Accepted	MV	Last Updated On	September, 2016
Years in Database	26	Year Established	Not Available
Square Footage	5,000 - 9,999	IUSA Number	12-819-6706
Home Business	No	Credit Rating Score	A+

### Business Expenditures

These expenditures are an estimated annual expense.

Accounting	\$2,500 to \$5,000	Advertising	\$5,000 to \$10,000
Contract Labor	Not Available	Insurance	\$5,000 to \$10,000
Legal	\$1,000 to \$2,500	Management/Administration	\$5,000 to \$10,000
Office Equipment & Supplies	\$50,000 to \$100,000	Package/Container	Less than \$500
Payroll & Benefits	\$250,000 to \$500,000	Purchased Print	\$1,000 to \$2,500
Rent & Leasing	\$25,000 to \$50,000	Technology	\$2,500 to \$5,000
Telecommunications	\$5,000 to \$20,000	Utilities	\$2,000 to \$5,000

### What You Have Found ...

#### Welcome to Creating Smiles!

Since 1983, Dr. Dale Jolley has been providing stellar smiles through exceptional orthodontic care to the families of the Roswell, Alpharetta, and Woodstock, Georgia, communities. With our dedicated and friendly staff always on hand, Dr. Jolley has made it the practice's mission to foster a caring and welcoming environment where your family will enjoy receiving the highest quality of orthodontic care available.

Our practice is proud to service our patients with the advanced and effective SureSmile® braces system. SureSmile braces have redefined the orthodontic field, and they are the proven choice for faster and more effective results.

We look forward to working with you and helping you achieve a lifetime of the brightest and healthiest smiles. We even offer complimentary consultations to patients under the age of 19. So, if you're looking for an unmatched orthodontic experience that will leave you with a beautiful and healthy smile, contact our office to take the first step.

#### The Team:

Dr. Dale Jolley  
 Bonnie Guy, Treatment Coordinator  
 Michelle Boisclair, Accounts Manager  
 Micheline Anstey, Lab Technician  
 Ellen Daniels, Certified Orthodontic Asst.  
 Ginger Killian, Certified Orthodontic Asst.  
 Jessica Obilvie, Certified Orthodontic Asst.  
 Stefanie Boyer, Patients Relations Coordinator  
 Leigh-Ann Fingland, Front Office Coordinator



### The Sales Call:

You called at the beginning of January and spoke with Leigh-Ann to find out more about the practice and to see about arranging an appointment. You asked who was responsible for payroll and HR and she indicated that Dr. Jolley actually did that, but that they were happy with what they were doing. You asked if it would be okay if you checked back later in the year. You called back in February and March with the same results.

Finally, yesterday, you called and Leigh-Ann, said, "Okay, I will get you in to see Dr. Jolley. Come by Sunday afternoon, Dr. Jolley will be here catching up on some work."

When you arrived, no one was in the front office, but you found Dr. Jolley's office in the back off of the lobby.