
FIELD ASSIGNMENT #2

Cooper Carlsen

Sales Rep: Christopher Elder

Company: IBM

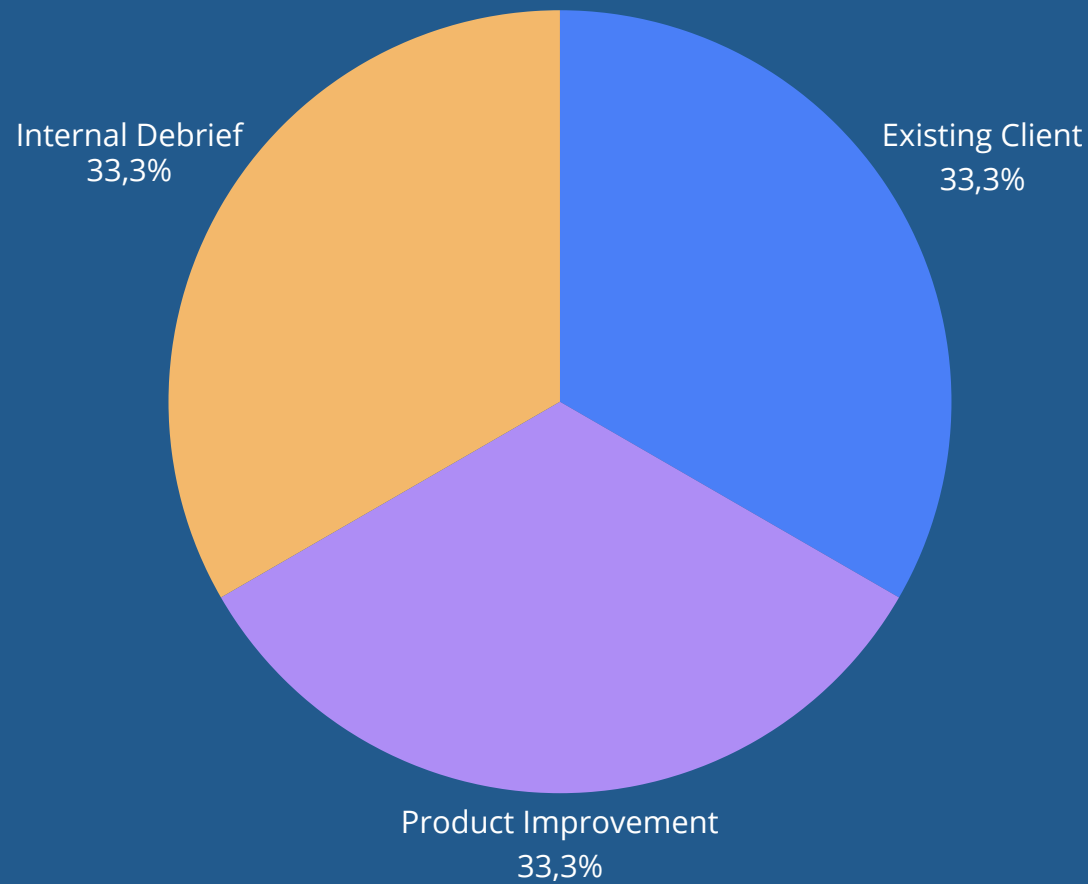
(949) 632-7566

christopher.elder@ibm.com

Fieldwork date: 4/15/26

CALL REPORT

Types of Meetings



3 in-person meetings

Average length of meetings:
30 minutes

EXISTING CLIENT

Meeting with Austin City College to discuss the adaptation of IBM's Watson AI tool to simplify student class registration. Focused on implementation needs and expectations.

30 min | 12:00 PM | Next meeting scheduled 4/21

INTERNAL DEBRIEF

Debrief with Christopher's IBM supervisor to review the Austin City College meeting and determine next steps. Supervisor asked for my input, which made the experience more immersive.

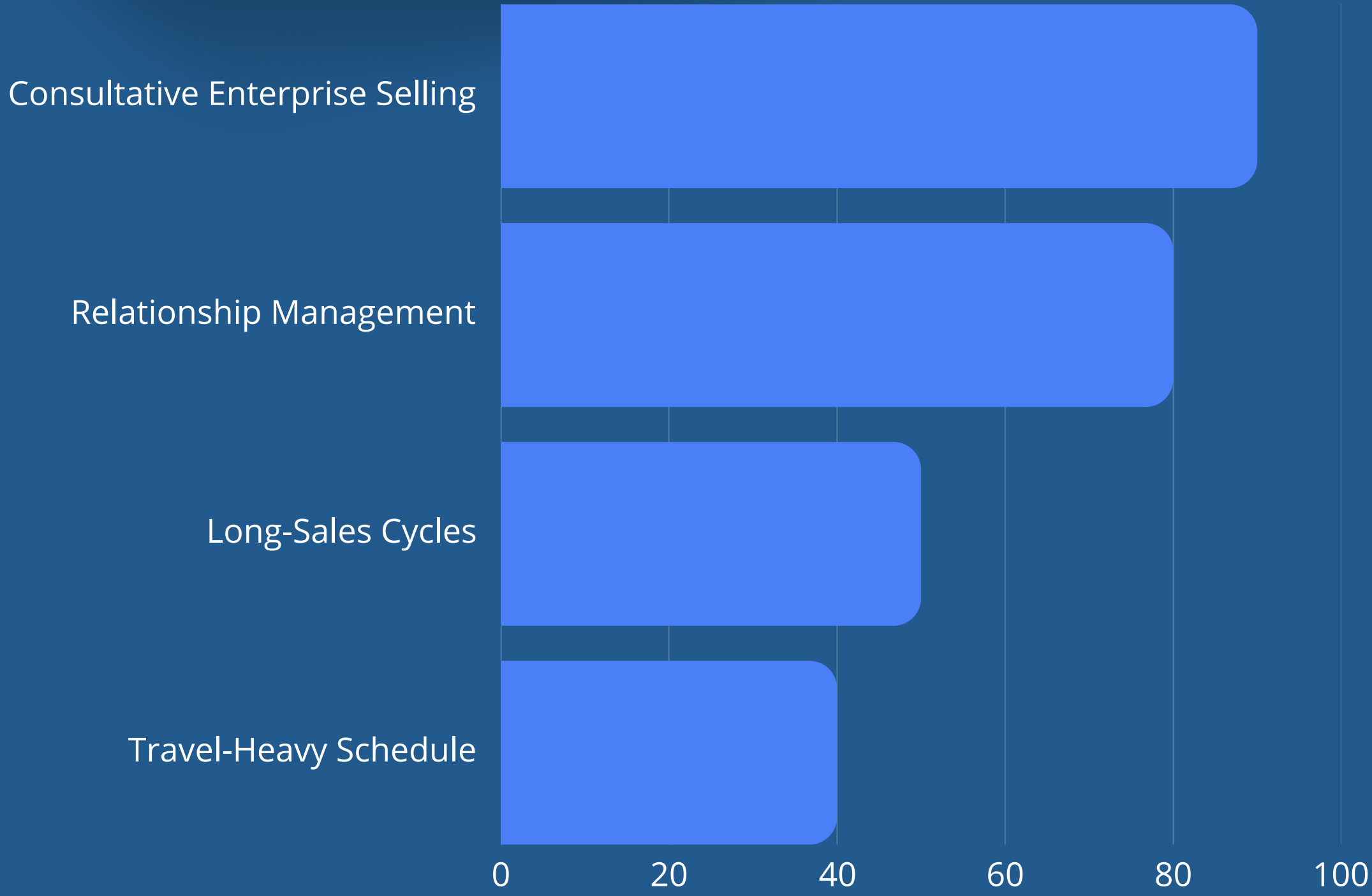
30 min | 1:00 PM | Next steps defined

PRODUCT IMPROVEMENT

Meeting with Ingram Micro and IBM AI technicians to discuss how to improve support and stability for the Watson AI tool.

30 min | 2:00 PM | Follow-up to be scheduled

HOW I “FIT” INTO THIS ROLE



Consultative Enterprise Selling: 90%
Relationship Management: 80%
Long Sales Cycles: 50%
Travel-Heavy Schedule: 40%

I enjoy how this role feels like a blend of Outside and Inside selling. Working for a company as reputable as IBM, with such a large portfolio of products and solutions, would make the prospecting side of the role much easier.

SALES PROCESS

Call: Austin City College

Problem

- Poor advising scheduling
- Past vendors underdelivered

Discovery

- Deep Dive into Past Issues
- Identified gaps in support

Solution

- Tailored system for advising
- Strong support & AI tools

Objections

- Proven security & reliability
- Not a first-time user of the AI

VALUE PROPOSITION

“Schools don’t want to be the guinea pig when it comes to AI, they want to see proven success”

— Christopher Elder

Using Value Proposition

- Leverage reputation and brand to build instant credibility
- Simplify complex tools, like AI, using analogies and metaphors
- Use relevant customer examples to show clear, real-world value
- Overly-discover pain points
- Keep buyers actively involved to create a collaborative conversation



READING CONCEPTS DISPLAYED

THE CHALLENGER SALE

LEAD THE
CONVERSATION

TAILOR THE PITCH

TEACH THE BUYER

REFRAME THE
PROBLEM

ASSERT YOUR
EXPERTISE

CREATE
CONSTRUCTIVE
TENSION

THE GO-GIVER

ADD VALUE FIRST

SERVE LONG-
TERM

BUILD THE
RELATIONSHIP

PRIORITIZE THEIR
NEEDS

BE
AUTHENTICALLY
PRESENT

GIVE BEFORE
RECEIVING

MASTERING THE COMPLEX SALE

OVER-DISCOVER
NEEDS

DIAGNOSE
BEFORE
PRESCRIBING

MULTI-
STAKEHOLDER
ALIGNMENT

MANAGE THE
BUYING PROCESS

REFERENCE
SIMILAR CLIENTS

QUANTIFY THE
SOLUTION

APPENDIX

APPENDIX PG. 1

BM Shadow Confirmation Summarize

 Carlsen, Cooper ☰ ☺ ↶ ↷ ↲ ↳ 📧 ☰ ⋮
To: christopher.elder@ibm.com Tue 4/13/2026 5:08 AM

Chris,

Thank you for offering the time for me to shadow with you this Wednesday.

This message is to confirm that we will meet on Wednesday, 4/15, at 11am in Austin, TX. If there are any changes or updates, please let me know.

Best,
Cooper

Cooper Carlsen
Baylor University 2028 | Finance & Professional Selling
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Cooper_Carlsen1@baylor.edu

↶ Reply ↷ Forward

IBM Shadow Follow-up Summarize

 Carlsen, Cooper ☰ ☺ ↶ ↷ ↲ ↳ 📧 ☰ ⋮
To: christopher.elder@ibm.com Wed 4/15/2026 8:52 PM

Chris,

Thank you again for the opportunity to shadow you today. I enjoyed observing your client meetings, and it gave me a better insight into how the sales process works at IBM. The advice and tips you shared with me were very helpful and I will definitely keep them in mind as I continue through school and eventually start my career.

I appreciate you taking the time and I'll be sure to keep in touch!

Best,
Cooper

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APPENDIX PG. 2



Cooper Carlsen · You

Finance and ProSales Student at Baylor University | Incoming Summer Inter...

16h ·

Yesterday, I had the privilege of shadowing [Christopher Elder](#) with [IBM](#) .

I gained valuable insights such as the importance of presentation and personal brand, and how the way you show up in every interaction shapes the way others perceive and trust you.

What stood out most from my time with Chris was the value of time, and understanding that how you choose to spend your time within a meeting can make a major impact on the relationship with the buyer and the overall sale.

Thank you to Chris for generously sharing his time and wisdom, and to [Stephanie Bear Mangus](#) and [Baylor_ProSales](#) for the consistent encouragement and guidance into professional opportunities like this.



APPENDIX PG. 3

Role context:

Christopher Elder works in Data Platform Sales at IBM. His day blends enterprise outside selling with significant internal collaboration. The Austin City College meeting was immediately followed by an internal debrief and then a technical partner call, illustrating how IBM outside reps coordinate across stakeholders to move deals forward.

Fit observation:

The consultative nature of the role pairs well with my strengths (90% consultative, 80% relationship). Long sales cycles (50%) and heavy travel (40%) are the elements I'd want to weigh most carefully when evaluating fit long-term.

Value prop insight:

Christopher's "guinea pig" quote captures why IBM's reference-selling approach works. Risk-averse institutional buyers (like schools) need proof IBM has solved similar problems before. This is why anchoring on case studies and analogies is so effective in this role and product category.

1. APPENDIX PG. 4 – THE CHALLENGER SALE

LEAD THE CONVERSATION

Definition: Guide the discussion with confidence instead of waiting for the buyer to direct it.

TAILOR THE PITCH

Definition: Adjust your message so it fits the buyer's specific goals, pain points, and situation.

TEACH THE BUYER

Definition: Share new insight that helps the buyer think about their problem in a better or different way.

REFRAME THE PROBLEM

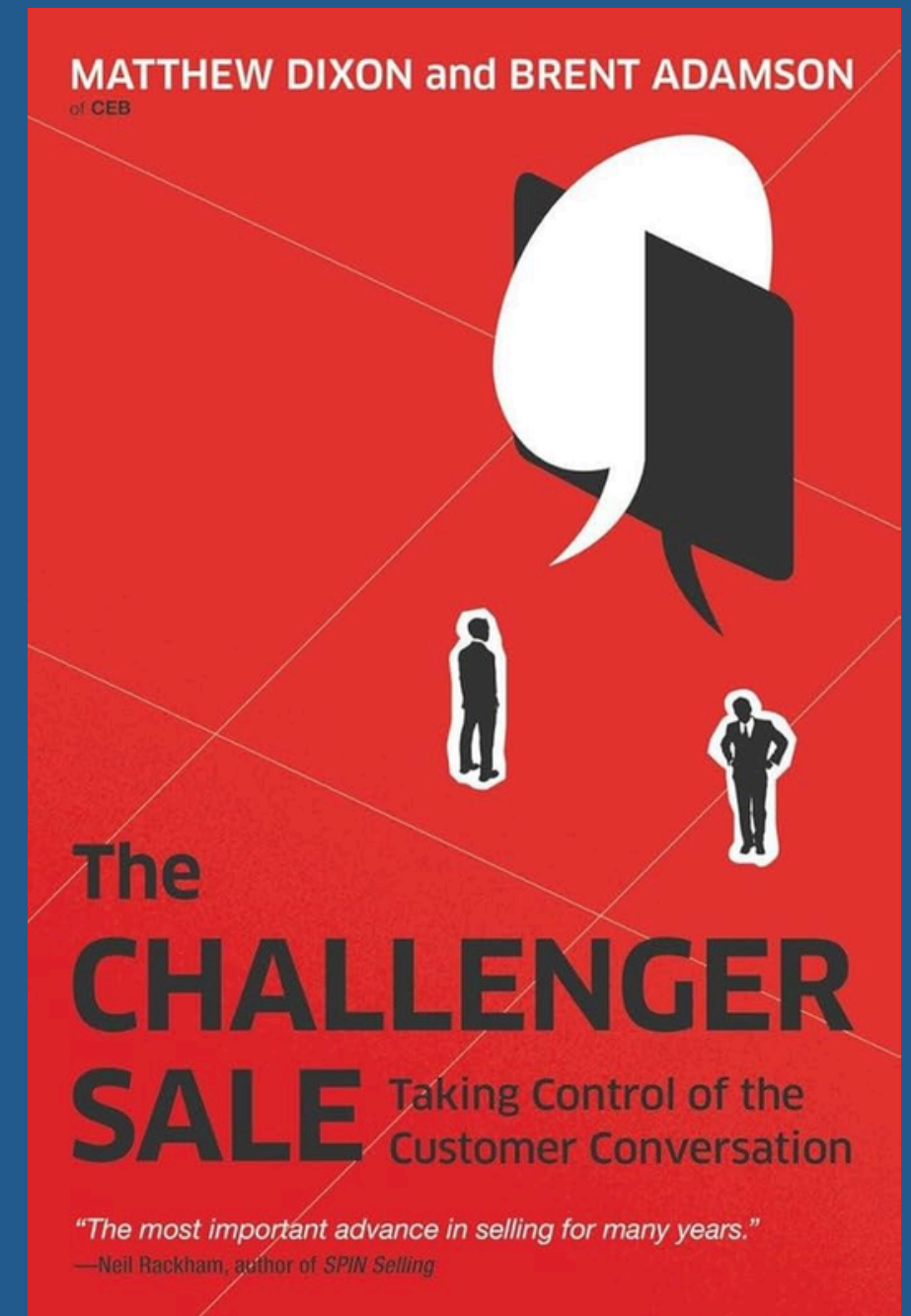
Definition: Shift the buyer's perspective so they see the issue from a more important or strategic angle.

ASSERT YOUR EXPERTISE

Definition: Show credible knowledge and confidence so the buyer trusts your recommendation.

CREATE CONSTRUCTIVE TENSION

Definition: Push the buyer to rethink their current approach without making the interaction adversarial.



1. APPENDIX PG. 5 – THE GO-GIVER

ADD VALUE FIRST

Definition: Offer useful insight or help before asking for anything in return.

SERVE LONG-TERM

Definition: Focus on building lasting success for the buyer, not just winning one deal.

BUILD THE RELATIONSHIP

Definition: Create trust and connection so the partnership can grow over time.

PRIORITIZE THEIR NEEDS

Definition: Keep the buyer's goals and challenges at the center of the conversation.

BE AUTHENTICALLY PRESENT

Definition: Be fully engaged, genuine, and attentive in the interaction.

GIVE BEFORE RECEIVING

Definition: Lead with generosity by helping first rather than immediately seeking personal gain.

UPDATED WITH A NEW INTRODUCTION, AUTHOR Q&A,
AND A FOREWORD BY ARIANNA HUFFINGTON

"The Go-Giver is the most important parable about business—and life—of our time."
—ADAM GRANT, *New York Times* bestselling author of *Give and Take*

OVER
ONE MILLION
COPIES SOLD
GLOBALLY

The GO-GIVER



A LITTLE STORY ABOUT A
POWERFUL BUSINESS IDEA

Bob Burg *and* John David Mann

1. APPENDIX PG. 6 – MASTERING THE COMPLEX SALE

OVER-DISCOVER NEEDS

Definition: Go deeper than surface-level questions to fully understand the buyer's problems and priorities.

DIAGNOSE BEFORE PRESCRIBING

Definition: Understand the root issue before recommending a solution.

MULTI-STAKEHOLDER ALIGNMENT

Definition: Make sure the different people involved in the decision are on the same page.

MANAGE THE BUYING PROCESS

Definition: Help move the deal forward by guiding the steps, timing, and decision flow.

REFERENCE SIMILAR CLIENTS

Definition: Use relevant examples from similar organizations to build trust and credibility.

QUANTIFY THE SOLUTION

Definition: Show the measurable business value or impact of your recommendation.

