

BA Study Session 1 - Tasks

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German American
Chambers of Commerce
Deutsch-Amerikanische
Handelskammern

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Scenario:

You own a small landscaping and houseplant business, called Planted LP. Alongside plants grown onsite at your nursery and in your greenhouse, you sell various indoor and outdoor planters, raised garden beds, handcrafted shelving units for greenhouses, potting soils, and other products used for outdoor gardening and raising houseplants. Your primary business is wholesaling products to local shops and landscaping consultations and services. Your clients and customers are located throughout the Midwest.

Task 1

Business really picked up in 2025. You want to get a better overview of your clients and customers by evaluating their purchase volumes and track record for on-time versus late payments for invoices.

Formulas to use: VLOOKUP, SUMIF, COUNTIF, IF(...(AND...)), IF

1A. Start by assigning a ranking (Gold, Silver, Bronze) to each of your customers who placed an order or orders in 2025. Open the “Data” Excel and fill in the table in tab “Rankings” using the data from tabs “Customers” and “Payments”.

1B. To summarize your findings, create a bar graph displaying purchasing volumes for 2025 and a pie chart for the proportions. The horizontal axis for the bar graph should display the customer names. The pie chart legend should also show the customer names. Overlay the percentages on top of the pie chart and give both the pie chart and the bar graph appropriate titles.

1C. Now you need to determine which contract(s) may need to be reassessed. Using the information from the “Rankings” tab, fill out the table on the “Evaluation” tab. A client relationship should be reviewed if **both** of the following criteria are met:

- a. The customer must be Gold-level.
- b. The proportion of late payments must be over 40%.

If both criteria are met, a “Yes” should appear in column “G”, otherwise a “No” should appear.

Task 2

Being a Gold-level customer with your company comes with certain privileges, like lower late-payment penalties and priority shipping waivers, which can encourage repeat business and a positive business relationship.

2A. Why is it important to periodically evaluate relationships with customers?

2B. What information about the relationships with your customers can you determine from the evaluation you completed?

2C. What could be the advantages(s) of having a tiered ranking system? What are the potential disadvantages? Name 3 potential advantages and 3 potential disadvantages.

2D. How would you communicate with a customer or client about changing contract terms? What should you keep in mind? Draft a brief email to the “Yes” customer from **1C** to initiate conversations about your business relationship.

Task 3

You decide to hire someone to help with the day-to-day administrative tasks so you can focus on expanding your property to build more greenhouses. One major duty involved in this role is managing and developing new products like innovative shelving and planters. Choose a candidate for the role from the following list and explain why they seem to be a good fit.

Frankie Walker – Has 5 years of seasonal experience working in a café as a barista. Interned at the county parks and recreation department over the summer. Recent college graduate with a bachelor's degree in architecture.

Chuck Juarez – Has worked for 2 years as a builder for a local contracting company. Has been taking night classes in accounting and is a hobby carpenter.

Lori Daunis – Worked in her father's furniture store for 10 years. Primarily worked in the warehouse but also began working directly alongside her father about 3 months ago. Her father has retired from the business, but Lori is not interested in taking over full ownership.

Task 4

Since none of the applicants have a strong background working directly with customers, you will need to train them up a bit to meet the demands of your operation. You introduce your new hire to the following terms regarding typical consulting phases: *introduction*, *fact-finding*, *consultation/solution*, *conclusion/wrap-up*. Briefly describe what should happen during each phase.