***Principles of Marketing***

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for High School of Business™

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**Table of Contents**

**Section Page**

**1** — [Course Narrative](#coursenarr) 1—01

[Introduction to *Principles* *of Marketing*](#intro) 1—02

[Goals](#goals) 1—03

[Program of Study: High School of Business™](#pos) 1—03

[Credit](#credit) 1—03

[Grade Level](#gl) 1—04

[Prerequisites](#prer) 1—04

[Student Characteristics](#stuchar) 1—04

[Student Organization](#stuorg) 1—04

**2** — [Course Description & Learning Outcomes](#sec2) 2—01

[Course Description](#desc) 2—02

[Learning Outcomes](#learno) 2—02

**3** — [Sequence of Instruction](#seque) 3—01

**4** — [Projects and Planning Guide Sheets](#sec4) 4—01

[Orientation](#orient) 4—02

[HSB™ Boot Camp](#HSBBoot) 4—02

[Project 1: Getting to Know You](#p1) 4—13

[Project 2: She Sells Cell Phones at the Cell Store](#p2) 4—68

[Project 3: Get the Word Out!](#p3) 4—119

[Project 4: To My Future Self](#p4) 4—190

[Project 5: Marketing Plan Analysis](#p5) 4—227

**5** — [*Principles of Marketing* LAP List](#projects) 5—01

**Appendices**

[**Appendix A:** HSB™ Course Descriptions](#appa) A—01

[**Appendix B:** *Principles of Marketing* Performance Indicators](#appb) B—01

[**Appendix C:** HSB™ Online National Exam Information](#appc) C—01

[**Appendix D:** HSB™ Program-Long Project](#appd) D—01

[**Appendix E:** HSB™ Observation Internship Guidelines](#appe) E—01

[**Appendix F:** HSB™ National College Credit Agreements](#appf) F—01

[**Appendix G:** Using Rubrics](#appg) G—01

[**Appendix H:** HSB™ LinkedIn Activities](#apph) H—01

[**Appendix I:** HSB™ Online Portfolio Tutorial](#appi) I—01

[**Appendix J:** Guideto the Business Administration Standards](#appj) J—01

[**Appendix K:** SCANS Competencies and Skills](#appk) K—01

[**Appendix L:** 21st Century Skills](#appL) L—01

**Color-Coded Pages**

The *Principles of Marketing* course guide binder provided by High School of Business™ contains several color-coded components. Those components include:

Sequence of Instruction Brown

Briefings Yellow

Project Information Blue

Rubrics Pink

Student Handouts Green

***Principles of Marketing***

**Course Narrative**

Section 1

**Introduction to *Principles of Marketing***

“Marketing” is defined and used differently by individuals and organizations. Some use it to mean exclusively “advertising/promotion,” while others focus on its research aspect. Others include a mix of activities that address product, place, price, and promotion considerations.

The American Marketing Association defines marketing as “the activity, set of institutions, and processes for creating, communicating, delivering, and exchanging offerings that have value for customers, clients, partners, and society at large,” while the United Kingdom’s Chartered Marketing Institute, the largest marketing organization in the world in terms of membership, defines marketing as the “management process of anticipating, identifying and satisfying customer requirements profitably.” These definitions indicate that marketing is a process that involves a variety of activities focused on customers and profitable execution of those activities, including, but not limited to, marketing research, promotion, pricing, product/service management, channel management, and selling.

Marketing, therefore, is a multi-faceted, critical business function that is under-girded by such social sciences as economics, psychology, and sociology. Its successful performance depends on the application of mathematics and English principles, the use of scientific problem solving, and the application of technology to marketing situations and problems.

The pace at which marketing activities are changing has accelerated due to environmental shifts taking place in the business world: downsizing, outsourcing, off-shoring, mergers, global competition, world markets, and technological innovations. These changes impact the skills, attitudes, and abilities needed for success in today’s workplace. Effective Marketing Education provides those skills. To that end, the *Principles of Marketing* course has been developed to introduce students to marketing functions and their application and impact on business operations.

Using a project-based course of study, students will master the performance indicators in Section 2 of this guide by conducting primary and secondary research, working in teams and as individual project members, and applying current technology for project completion.

**Goals**

The broad goals of the *Principles of Marketing* course are to accomplish the following:

* Reinforce academic skills in such areas as communication, reading, and writing
* Encourage creative thought, problem solving, and decision making
* Enable students to understand and appreciate marketing and its application in business
* Stimulate student interest in marketing careers
* Increase student awareness of the increasingly complex business world
* Assist students in developing appropriate attitudes about marketing
* Encourage the use of technology in classroom projects
* Assist students with enhancing their teamwork skills
* Stimulate reflection on processes, performance, and outcomes
* Apply project-based learning strategies
* Pave the way for student success in a business administration major

### ****Program of Study: High School of Business™****

In 2015, 13.4% of incoming freshmen at four-year colleges or universities chose to major in business. That figure does not consider students who chose a business major at two-year colleges. (Source: The American Freshman: National Norms Fall 2015, University of California at Los Angeles Higher Education Research Institute, [UCLA, 2015]).

Unfortunately, only a small percent of students has prepared for college business administration programs through high school business education and marketing education programs. This offers us an opportunity to prepare students to excel in college business programs.

The purpose of the High School of Business™ is to offer college-prep students the opportunity to excel in a near college-level business administration program while still in high school. It offers challenging, rigorous courses through a program that provides both breadth and depth of business knowledge and bridges the gap between academic learning and how it is used to solve complex business problems.

The High School of Business™ experience consists of a series of six required business administration courses, two optional courses, and an observational internship. The third core course is *Principles of Marketing.*

**Credit**

1 unit

### ****Grade Level****

11

### ****Prerequisites****

Students enrolled in *Principles of Marketing* should have successfully completed *Principles of Business* and *Business Economics.* In addition, completion of the two ninth-grade courses in the High School of Business™ program—*Leadership* and *Wealth Management*—is encouraged.

### ****Student Characteristics****

Students in Principles of Marketing represent a cross section of the student body in terms of gender, race, handicap, and academic ability. Students are 16- to 17-years old and have an interest in majoring in business in college.

**Student Organization**

A student career and technical organization should be an integral part of the *Principles of Marketing* course. Members of a student organization should develop respect for education that contributes to competence in the application of business knowledge and skills. In addition, membership should promote leadership development and an understanding of the responsibilities of citizens in a private-enterprise system.

**Course Description & Learning Outcomes**

Section 2

**Course Description**

This 67½-to-90-hour project-based business course develops student understanding and skills in such areas as channel management, marketing-information management, market planning, pricing, product/service management, promotion, and selling. Through the use of five projects, students acquire an understanding and appreciation of marketing activities. Current technology will be used to acquire information and to complete the projects. Throughout the course, students are presented problem-solving situations for which they must apply academic and critical-thinking skills. Formal reflection is an on-going component of the course.

**Instructional Area: Channel Management (CM)**

**Performance Element:** Acquire foundational knowledge of channel management to understand its role in marketing.

**Performance Indicator: CM:001 Explain the nature and scope of channel management (CS)   
LAP-CM-002**

**Objectives:**

a. Define the following terms: channel, channel intensity, channel length, distribution patterns, exclusive distribution, selective distribution, and intensive distribution.

b. Explain how channel members add value.

c. Discuss channel functions (e.g., information, promotion, contact, matching, negotiation, financing, and risk taking).

d. Explain key channel tasks (e.g., marketing, packaging, financing, storage, delivery, merchandising, and personal selling).

e. Describe when a channel will be most effective.

f. Distinguish between horizontal and vertical conflict.

g. Describe channel management decisions (i.e., selecting channel members, managing and motivating channel members, and evaluating channel members).

h. Explain channel design decisions (i.e., analyzing customer needs, setting channel objectives, identifying major alternatives—types of intermediaries, number of intermediaries, responsibilities of intermediaries).

i. Discuss the relationship between the product being distributed and the pattern of distribution it uses.

**Performance Indicator: CM:003 Explain the nature of channels of distribution (CS) LAP-CM-003**

**Objectives:**

a. Define the following terms: channels of distribution, producer, ultimate consumer, industrial user, middlemen, intermediaries, retailers, wholesalers, agents, direct channels, and indirect channels.

b. Identify types of channel members/intermediaries/middlemen.

c. Explain the importance of middlemen in the channel of distribution.

d. Describe types of channels for consumer goods and services.

e. Describe types of channels for industrial goods and services.

**Instructional Area: Marketing-Information Management (IM)**

**Performance Element:** Acquire foundational knowledge of marketing-information management to understand its nature and scope.

**Performance Indicator: IM:012 Describe the need for marketing data (CS) LAP-IM-012**

**Objectives:**

a. Define the following terms: facts, estimates, predictions, relationships, and marketing information.

b. Identify types of information used in marketing decision-making.

c. Identify types of marketing information useful to marketers.

d. Describe ways that marketers use marketing information.

e. Explain the impact of marketing information on marketers.

**Performance Indicator: IM:184 Identify data monitored for marketing decision making  (SP)   
LAP-IM-184**

**Objectives:**

a. Explain sources of sales data monitored for marketing decision-making (e.g., sales involves, call reports, sales reports, expense reports).  
b. Discuss sources of customer data that are monitored for marketing decision-making (e.g., customer records, customer complaints, digital marketing analytics).

c. Explain sources of product data monitored for marketing decision-making (e.g., product returns, service calls, product reviews).

d. Describe financial data monitored for marketing decision-making.

e. Explain sources and types of competitor data that are monitored for marketing decision-making (e.g., competitors' websites, competitors' financial information, salespeople, suppliers and distributors, observable changes in marketing strategies, market share).

f. Discuss sources of data about the external business environment used in marketing decision-making (e.g., trade publications, vendors, economic indicators).

**Instructional Area: Marketing-Information Management (IM)** (cont’d)

**Performance Element:** Acquire foundational knowledge of marketing-information management to understand its nature and scope.

**Performance Indicator: IM:001 Explain the nature and scope of the marketing-information management function  (SP) LAP-IM-002**

**Objectives:**

a. Define the following terms: marketing information, marketing-information management system, and marketing research.  
b. Describe the need for marketing information.  
c. Classify types of marketing information as primary or secondary.  
d. Describe the types of information marketers should obtain.  
e. Categorize internal sources of marketing information.  
f. Discuss external sources of marketing information.  
g. Explain why marketers should collect information.  
h. Describe the characteristics of useful marketing information.  
i. Describe reasons that marketers need to gather accurate information.  
j. Explain the functions of a marketing-information management system.  
k. Contrast marketing research with a marketing-information system.  
l. Describe the use of a marketing-information system.  
m. Explain the benefits of a marketing-information management system.  
n. Discuss the requirements of a marketing-information management system.  
o. Explain the role of marketing-information management in marketing.  
p. Describe limitations of marketing-information management systems.

**Performance Element:** Understand marketing-research activities to show command of their nature and scope.

**Performance Indicator: IM:010 Explain the nature of marketing research  (SP) LAP-IM-010**

**Objectives:**

a. Define the following terms: marketing research, secondary research, primary research, personal interview, mail interview, telephone interview, questionnaire, and focus group.  
b. Identify characteristics of effective marketing research.  
c. Describe the importance of marketing research.  
d. Explain how marketing research is carried out.  
e. Explain the uses of marketing research.  
f. Describe shortcomings of marketing research.  
g. Describe types of marketing research objectives.  
h. Describe the contents of a research plan or design.  
i. Classify types of marketing research data.  
j. Distinguish between internal and external sources of data.  
k. Describe types of data collection methods.  
l. Explain how data can be analyzed.  
m. Describe steps in the marketing research process.

**Instructional Area: Marketing-Information Management (IM)** (cont’d)

**Performance Element:** Understand marketing-research activities to show command of their nature and scope.

**Performance Indicator: IM:282 Discuss the nature of marketing research problems/issues  (SP)   
LAP-IM-282**

**Objectives:**

a. Define the term marketing research problem, decision problem, variables, unit of analysis, research objectives.  
b. Explain the importance of determining the actual marketing research problem/issue.  
c. Discuss the need to determine the “real” issue/problem rather than its symptoms.  
d. Describe the steps involved in determining the marketing research problem/issue (e.g., clarifying and identifying the information needs, redefining the decision problem as a research problem, and setting research objectives.  
e. Discuss activities involved in identifying the information needs (e.g., determining the purpose of the research, understanding the complete problem, identifying measurable symptoms, determining the unit of analysis, and determining relevant variables).  
f. Explain why researchers need to adjust the decision problem into a research problem.  
g. Describe the purposes of setting marketing research objectives.  
h. Explain the relationship between the research problem/issue and the marketing research objectives.  
i. Discuss how determining the marketing research problem/issue aids in determining whether to conduct the study.  
j. Describe situations in which conducting a marketing research study would be inappropriate.

**Performance Element:** Understand marketing-research design considerations to evaluate their appropriateness for the research problem/issue.

**Performance Indicator: IM:284 Describe methods used to design marketing research studies (i.e., descriptive, exploratory, and causal)  (SP) LAP-IM-284**

**Objectives:**

a. Define the following terms: research design, descriptive design, exploratory design, causal design.  
b. Describe general purposes of marketing research (e.g., explain, predict, monitor, discover, test hypotheses).  
c. Explain the relationship between the research design and the purpose of the research.  
d. Discuss the purposes of using descriptive research.  
e. Explain the purposes of using exploratory research.  
f. Distinguish between descriptive and exploratory research.  
g. Describe the purposes of using causal research.

**Instructional Area: Marketing-Information Management (IM)** (cont’d)

**Performance Element:** Understand marketing-research design considerations to evaluate their appropriateness for the research problem/issue.

**Performance Indicator: IM:281 Describe options businesses use to obtain marketing research data (i.e., primary and secondary research)  (SP) LAP-IM-015**

**Objectives:**

a. Distinguish between primary and secondary marketing research.  
b. Describe occasions for using primary sources of marketing research data.  
c. Discuss primary sources of marketing research data.  
d. Describe advantages/disadvantages of primary marketing research.  
e. Explain types of primary research (i.e., quantitative and qualitative).  
f. Explain occasions for using secondary sources of marketing research data.  
g. Describe secondary sources of marketing research data (i.e., internal and external).  
h. Describe advantages/disadvantages with using internal sources of secondary data.  
i. Explain reasons that businesses need to analyze external data.  
j. Explain advantages/disadvantages of secondary marketing research.  
k. Discuss reasons for outsourcing marketing research activities.

**Performance Indicator: IM:285 Discuss the nature of sampling plans (i.e., who, how many, how chosen)  (SP) LAP-IM-016**

**Objectives:**

a. Define the terms population, sample, probability sampling, non-probability sampling, and sampling plan.  
b. Discuss the advantages of using a sample to represent the population.  
c. Explain when it is appropriate to use a sample of the population.  
d. Distinguish between probability and non-probability sample designs.  
e. Explain types of non-probability sample designs.  
f. Describe types of probability sample designs.  
g. Explain types of sampling bias/errors.  
h. Discuss the purpose of sampling plans.  
i. Explain the components of a sampling plan.

**Instructional Area: Marketing-Information Management (IM)** (cont’d)

**Performance Element:** Understand data-collection methods to evaluate their appropriateness for the research problem/issue.

**Performance Indicator: IM:289 Describe data-collection methods (e.g., observations, mail, diaries, telephone, Internet, discussion groups, interviews, scanners, tracking tools)  (SP) LAP-IM-017**

**Objectives:**

a. Explain reasons for having a variety of data-collection methods.  
b. Describe forms of quantitative data collection (e.g., surveys, tracking, experiments).  
c. Describe forms of qualitative data collection (e.g., personal interviews, focus groups, observational research).  
d. Explain limitations associated with qualitative research.  
e. Explain advantages/disadvantages with using observational techniques to collect marketing data.  
f. Describe advantages/disadvantages associated with using mail techniques to collect marketing data.  
g. Discuss advantages/disadvantages associated with using telephone data-collection methods.  
h. Describe ways to use the Internet to collect data.  
i. Explain advantages/disadvantages associated with using the Internet as a data-collection method.  
j. Describe advantages/disadvantages of using discussion groups to collect data.  
k. Discuss advantages/disadvantages associated with using interviews to collect data.  
l. Explain advantages/disadvantages associated with using scanners to collect data.

**Instructional Area: Marketing (MK)**

**Performance Element:** Understand marketing's role and function in business to facilitate economic exchanges with customers.

**Performance Indicator: MK:001 Explain marketing and its importance in a global economy (CS)   
LAP-MK-004**

**Objectives:**

a. Define the following terms: marketing and marketing concept.

b. Identify marketing activities.

c. Categorize items that are marketed.

d. Explain where marketing occurs.

e. Explain the elements of the marketing concept.

f. Explain the role of marketing in a private enterprise system.

g. Describe ways in which consumers and businesses would be affected if marketing did not exist.

h. Explain how marketing benefits our society.

**Instructional Area: Marketing (MK)** (cont’d)

**Performance Element:** Understand marketing's role and function in business to facilitate economic exchanges with customers.

**Performance Indicator: MK:002 Describe marketing functions and related activities (CS) LAP-MK-001**

**Objectives:**

a. Define the following terms: channel management, marketing-information management, pricing, product/service management, promotion, and selling.

b. Explain the purposes of each marketing function.

c. Describe the importance of each marketing function to marketing.

d. Explain the interrelationships among marketing functions.

**Performance Indicator: MK:023 Describe the use of technology in the marketing functions (SP)**

**Objectives:**

a. Identify ways in which the use of technology impacts marketing functions.

b. Describe specific technology applications used in the marketing functions.

c. Describe benefits of the use of technology in the marketing functions.

d. Explain barriers to the use of technology in the marketing functions.

**Performance Indicator: MK:022 Explain legal and ethical considerations in marketing (SP)**

**Objectives:**

a. Explain legal considerations in channel management (e.g., exclusive dealing, tying agreements, full-line forcing, closed territories, etc.).

b. Describe ethical considerations in channel management (e.g., gray market, slotting allowances, exploitation, etc.).

c. Describe legal considerations in marketing-information management (e.g., privacy issues, SUGGING, FRUGGING, callbacks, automatic dialers, etc.).

d. Explain the role of ethics in marketing-information management (e.g., preserving the credibility, objectivity, integrity of information, etc.).

e. Explain legal considerations for pricing (e.g., bait-and-switch advertising, deceptive pricing, dumping, loss-leader pricing, price discrimination, etc.).

f. Describe ethical considerations in pricing (e.g., price fixing, predatory pricing, etc.).

g. Identify consumer protection provisions of appropriate agencies (e.g., consumer product safety, etc.).

h. Explain ethical considerations in product/service management (e.g., product packaging, planned obsolescence, product labeling, etc.).

i. Describe legal considerations in promotion (e.g., truthfulness, misleading statements, unwanted promotions, promoting to children, etc.).

j. Describe ethical considerations in promotion (e.g., fear-based advertising, sexism, stereotyping, sales promotions, stealth marketing, etc.).

k. Describe legal considerations in selling (e.g., unfair or deceptive sales practices, etc.).

l. Explain business ethics in selling (dealing with the company, coworkers, customers/clients, competition, salespeople, etc.).

m. Describe consequences of illegal marketing activities.

**Instructional Area: Market Planning (MP)**

**Performance Element:** Develop marketing strategies to guide marketing tactics.

**Performance Indicator: MP:001 Explain the concept of marketing strategies (CS) LAP-MP-002**

**Objectives:**

a. Define the following terms: marketing mix, product, place, promotion, price, goals, strategies, and tactics.

b. Identify the components of the marketing mix.

c. Describe the importance of each of the components of the marketing mix.

d. Explain the relationship of goals, strategies, and tactics.

e. Describe the importance of marketing strategies.

f. Explain the factors that may cause marketing strategies to change.

g. Explain the importance of strategies in the marketing mix.

**Performance Element:** Select target market appropriate for product/business to obtain the best return on marketing investment (ROMI).

**Performance Indicator: MP:003 Explain the concept of market and market identification (CS)   
LAP-MP-003**

**Objectives:**

a. Define the following terms: market, target market, mass marketing, marketing segments, market segmentation, demographic segmentation, geographic segmentation, psychographic segmentation, and behavioral segmentation.

b. Explain the importance of target markets to businesses.

c. Describe advantages and disadvantages of mass marketing.

d. Describe advantages and disadvantages of using market segments.

e. Explain why the use of market segments is increasing.

f. Describe demographic characteristics that are analyzed by marketers.

g. Explain the value of geographic segmentation.

h. Discuss the value of psychographic segmentation.

i. Describe types of behavioral segmentation.

**Performance Element:** Employ marketing-information to plan marketing activities.

**Performance Indicator: MP:007 Explain the nature of marketing plans  (SP) LAP-MP-007**

**Objectives:**

a. Define the terms marketing plan, situation analysis.  
b. Explain the benefits associated with having a marketing plan.  
c. Identify the components of marketing plans.  
d. Describe the purpose of each component of the marketing plan.

**Instructional Area: Pricing (PI)**

**Performance Element:** Develop a foundational knowledge of pricing to understand its role.

**Performance Indicator: PI:001 Explain the nature and scope of the pricing function  (SP) LAP-PI-002**

**Objectives:**

a. Describe the characteristics of effective pricing.  
b. Explain what is being priced when prices are set for products.  
c. List factors that affect a product's price.  
d. Describe how pricing affects product decisions.  
e. Explain how pricing affects place (distribution) decisions.  
f. Describe how pricing affects promotion decisions.  
g. Explain pricing objectives.

**Performance Indicator: PI:002 Explain factors affecting pricing decisions  (SP) LAP-PI-003**

**Objectives:**

a. Define the term selling price.  
b. Distinguish between price and selling price.  
c. Describe the importance of selling price.  
d. Identify factors affecting selling price.  
e. Explain how consumers can affect selling price.  
f. Describe how government affects selling price.  
g. Discuss how competition can affect selling price.  
h. Explain how the nature of a business can affect selling price.  
i. Identify pricing objectives.  
j. Explain how pricing objectives affect selling price.

**Instructional Area: Product/Service Management (PM)**

**Performance Element:** Acquire a foundational knowledge of product/service management to understand its nature and scope.

**Performance Indicator: PM:001 Explain the nature and scope of the product/service management function  (SP) LAP-PM-017**

**Objectives:**

a. Define the term product/service management.  
b. Explain who is responsible for managing products/services.  
c. Describe the benefits of product/service managing.  
d. Describe the phases of product/service managing.  
e. Describe factors affecting product/service managing.  
f. Explain the role product/service management plays in marketing.

**Instructional Area: Product/Service Management (PM)** (cont’d)

**Performance Element:** Acquire a foundational knowledge of product/service management to understand its nature and scope.

**Performance Indicator: PM:024 Identify the impact of product life cycles on marketing decisions  (SP) LAP-PM-018**

**Objectives:**

a. Define the following terms: product life cycle, introduction, growth, maturity, decline, pricing decisions, promotion decisions, place decisions, and product decisions.  
b. Identify stages of the product life cycle.  
c. Describe the characteristics of each stage of the product life cycle.  
d. Discuss the impact of each stage of the product life cycle on marketing decision-making.  
e. Explain how a company can extend a product's life cycle.

**Performance Element:** Apply quality assurances to enhance product/service offerings.

**Performance Indicator: PM:019 Describe the uses of grades and standards in marketing  (CS)   
LAP-PM-008**

**Objectives:**

a. Define the terms grades and standards.  
b. Explain the interrelationship of grades and standards.  
c. Describe what businesses do with products that fail to meet the lowest standards.  
d. Explain reasons for using grades and standards.  
e. Describe ways that grades and standards aid the buying and selling process.  
f. Explain the importance of grades and standards in global trade.  
g. Identify groups that develop grades and standards.  
h. Describe types of standards.  
i. Identify examples of graded products.

**Performance Indicator: PM:020 Explain warranties and guarantees  (CS) LAP-PM-004**

**Objectives:**

a. Define the following terms: warranty, express warranty, implied warranty, full warranty, limited warranty, and guarantee.  
b. Identify the provisions of a full warranty.  
c. Distinguish between warranties and guarantees.  
d. Identify the characteristics of an effective guarantee.  
e. Describe the purposes of warranties and guarantees.  
f. Explain the benefits of warranties and guarantees.  
g. Describe government regulation of warranties and guarantees.

**Instructional Area: Product/Service Management (PM)** (cont’d)

**Performance Element:** Employ product-mix strategies to meet customer expectations.

**Performance Indicator: PM:003 Explain the concept of product mix  (SP) LAP-PM-003**

**Objectives:**

a. Define the following terms: product mix, product item, product line, width, depth, consistency, expansion, contraction, alteration, trading up, trading down, and positioning.  
b. Identify ways in which product lines can be organized.  
c. Describe product mix dimensions.  
d. Identify reasons that a business would offer a narrow product mix.  
e. Identify reasons that a business would offer a broad product mix.  
f. Identify reasons that a business would offer a deep product mix.  
g. Identify reasons that a business would offer a shallow product mix.  
h. Explain the importance of a business's product mix.  
i. Describe advantages of expansion product-mix strategies.  
j. Describe disadvantages of expansion product-mix strategies.  
k. Describe advantages of contraction product-mix strategies.  
l. Describe disadvantages of contraction product-mix strategies.  
m. Describe advantages of alteration product-mix strategies.  
n. Describe disadvantages of alteration product-mix strategies.  
o. Describe advantages of trading up product-mix strategies.  
p. Describe disadvantages of trading up product-mix strategies.  
q. Describe advantages of trading down product-mix strategies.  
r. Describe disadvantages of trading down product-mix strategies.  
s. Describe advantages of positioning product-mix strategies.  
t. Describe disadvantages of positioning product-mix strategies.

**Performance Element:** Position company to acquire desired business image.

**Performance Indicator: PM:206 Explain the nature of corporate branding  (SP) LAP-PM-020**

**Objectives:**

a. Define the following terms: brand identity, values, brand cues, brand personality, touch points, brand promise, and corporate brands.  
b. Describe the elements that make up a corporate brand's identity.  
c. Explain the use of values in corporate brand development.  
d. Discuss the significance of a corporate brand's personality.  
e. Describe the use of corporate brand touch points.  
f. Distinguish between corporate and distributor brands.

**Instructional Area: Product/Service Management (PM)** (cont’d)

**Performance Element:** **Position products/services to acquire desired business image.**

**Performance Indicator: PM:042 Describe factors used by marketers to position products/services  (SP) LAP-PM-019**

**Objectives:**

a. Define the following terms: competitive advantage and positioning.  
b. Describe the purpose of positioning.  
c. Explain the relationship between the target market and positioning.  
d. Discuss the relationship between the competition and positioning.  
e. Describe types of positioning strategies (e.g., product attributes, benefits, usage occasions, users, competitive, product classes)  
f. Discuss how marketing mix elements can be differentiated to position products/businesses.

**Performance Indicator: PM:021 Explain the nature of product/service branding  (SP) LAP-PM-006**

**Objectives:**

a. Define the following terms: brand, brand name, brand symbol, trade character, brand recognition, brand preference, brand insistence, product brands, generic brand, national brand, private/distributor brand, brand strategies, family branding, individual branding, brand extensions, brand licensing, and co-branding.  
b. List the characteristics of a good brand name.  
c. Explain levels of brand loyalty.  
d. Identify types of brand strategies.  
e. Describe considerations for international branding.  
f. Explain the impact of the Internet on branding.  
g. Discuss employees' role in branding.

**Instructional Area: Promotion (PR)**

**Performance Element:** Acquire a foundational knowledge of promotion to understand its nature and scope.

**Performance Indicator: PR:001 Explain the role of promotion as a marketing function (CS) LAP-PR-002**

**Objectives:**

a. Define the term promotion.

b. List users of promotion.

c. Describe the benefits of using promotion.

d. Describe the costs associated with the use of promotion.

e. Describe types of promotional objectives.

f. Discuss the relationship of promotion and marketing.

**Instructional Area: Promotion (PR)** (cont’d)

**Performance Element:** Acquire a foundational knowledge of promotion to understand its nature and scope.

**Performance Indicator: PR:002 Explain the types of promotion (i.e., institutional, product) (CS)   
LAP-PR-004**

**Objectives:**

a. Define the following terms: product promotion, primary product promotion, secondary product promotion, institutional promotion, public service, public relations, and patronage.

b. Identify types of product promotion.

c. Describe the uses of product promotion.

d. Identify types of institutional promotion.

e. Describe uses of institutional promotion.

f. Discuss the advantages of promotional activities.

g. Discuss the disadvantages of promotional activities.

**Performance Indicator: PR:003 Identify the elements of the promotional mix  (SP) LAP-PR-001**

**Objectives:**

a. Define the following terms: promotional mix, advertising, personal selling, publicity and sales promotion.  
b. Identify the elements of the promotional mix.  
c. Categorize examples of promotions according to the elements of the promotional mix.  
d. Describe the importance of the promotional mix.  
e. Identify factors affecting the promotional mix.  
f. Describe how the product being sold affects the promotional mix.  
g. Explain how the product's market affects the promotional mix.  
h. Discuss how the distribution system affects the promotional mix.  
i. Explain how the product's company affects the promotional mix.

**Instructional Area: Promotion (PR)** (cont’d)

**Performance Element:** Understand promotional channels used to communicate with targeted audiences.

**Performance Indicator: PR:007 Explain types of advertising media  (SP) LAP-PR-003**

**Objectives:**

a. Define the term advertising media.  
b. Categorize advertising media.  
c. Identify types of publications.  
d. Describe factors on which newspapers vary.  
e. Categorize types of magazines.  
f. Describe the two categories of broadcast media.  
g. Categorize purchase options for television advertising.  
h. Discuss the difference between local and network advertising.  
i. Describe types of direct-mail advertising.  
j. Explain types of Web advertising.  
k. Identify types of out-of-home media.  
l. Describe specialty advertising.  
m. Discuss the use of directory advertising.  
n. Explain the use of movie theater advertising.  
o. Describe the use of product placement for advertising.  
p. Discuss the use of telemarketing for advertising.  
q. Explain the use of videotapes, DVDs, and CD-ROM advertising.  
r. Explain trends that are affecting advertising media.

**Instructional Area: Selling (SE)**

**Performance Element:** Acquire a foundational knowledge of selling to understand its nature and scope.

**Performance Indicator: SE:017 Explain the nature and scope of the selling function (CS) LAP-SE-117**

**Objectives:**

a. Define the term selling.

b. Identify individuals, groups, or agencies that sell.

c. Explain reasons that customers buy goods and services.

d. Identify types of items that are sold.

e. Explain where selling occurs.

f. Describe how products are sold.

g. Describe the role of selling in a market economy.

h. Explain personal characteristics of salespeople that are essential to selling.

**Instructional Area: Selling (SE)** (cont’d)

**Performance Element:** Acquire a foundational knowledge of selling to understand its nature and scope.

**Performance Indicator: SE:076 Explain the role of customer service as a component of selling relationships (CS) LAP-SE-130**

**Objectives:**

a. Distinguish between customer service as a process and customer service as a function.

b. Describe how businesses can use customer service to beat their competition.

c. Discuss factors that influence customer expectations of customer service.

d. Explain how customer service facilitates sales relationships.

e. Identify pre-sales opportunities for providing customer service that can facilitate sales relationships.

f. Identify post-sales opportunities when customer service can be provided to facilitate sales relationships.

g. Discuss actions a salesperson can take to make the most of her/his customer service activities.

**Performance Indicator: SE:828 Explain key factors in building a clientele (SP) LAP-SE-115**

**Objectives:**

a. Identify company benefits of building a clientele.  
b. Identify salesperson benefits from building a clientele.  
c. Cite examples of costs that can be incurred by businesses for failing to build a clientele.  
d. Identify attitudes of salespeople that help to build a clientele.  
e. Describe ways that salespeople exhibit a service attitude.  
f. Describe the activities of salespeople that can help to build a clientele.

**Performance Indicator: SE:932 Explain company selling policies (CS) LAP-SE-121**

**Objectives:**

a. Define the following terms: selling policies, selling-activity policies, terms-of-sale policies and service policies.

b. Identify types of selling-activity policies.

c. Identify types of terms-of-sale policies.

d. Identify types of service policies.

e. Explain the importance of selling policies.

f. Describe the characteristics of selling policies.

g. Explain why selling policies are needed.

h. Describe external factors that affect selling policies.

i. Describe internal factors that affect selling policies.

j. Describe regulatory factors that affect selling policies.

k. Explain problems encountered with the use of selling policies.

**Instructional Area: Selling (SE)** (cont’d)

**Performance Element:** Acquire product knowledge to communicate product benefits and to ensure appropriateness of product for the customer.

**Performance Indicator: SE:062 Acquire product information for use in selling (CS) LAP-SE-131**

**Objectives:**

a. Identify sources of product information that provide information for use in selling.

b. Identify types of product information that can be useful in selling.

c. Cite occasions when product information can be used in sales presentations.

d. Describe guidelines to follow when acquiring product information.

e. Demonstrate procedures for acquiring product information for use in selling.

**Performance Element:** Understand sales processes and techniques to enhance customer relationships and to increase the likelihood of making sales.

**Performance Indicator: SE:048 Explain the selling process (CS) LAP-SE-048**

**Objectives:**

a. Identify the components of the selling process.

b. Describe the importance of establishing relationships with customers.

c. Describe ways to discover customer needs.

d. Describe the components of prescribing solutions to customer needs.

e. Explain the importance of reaching closure in sales situations.

f. Describe aspects of reaching closure in sales situations.

g. Describe the importance of reaffirming the buyer-seller relationship.

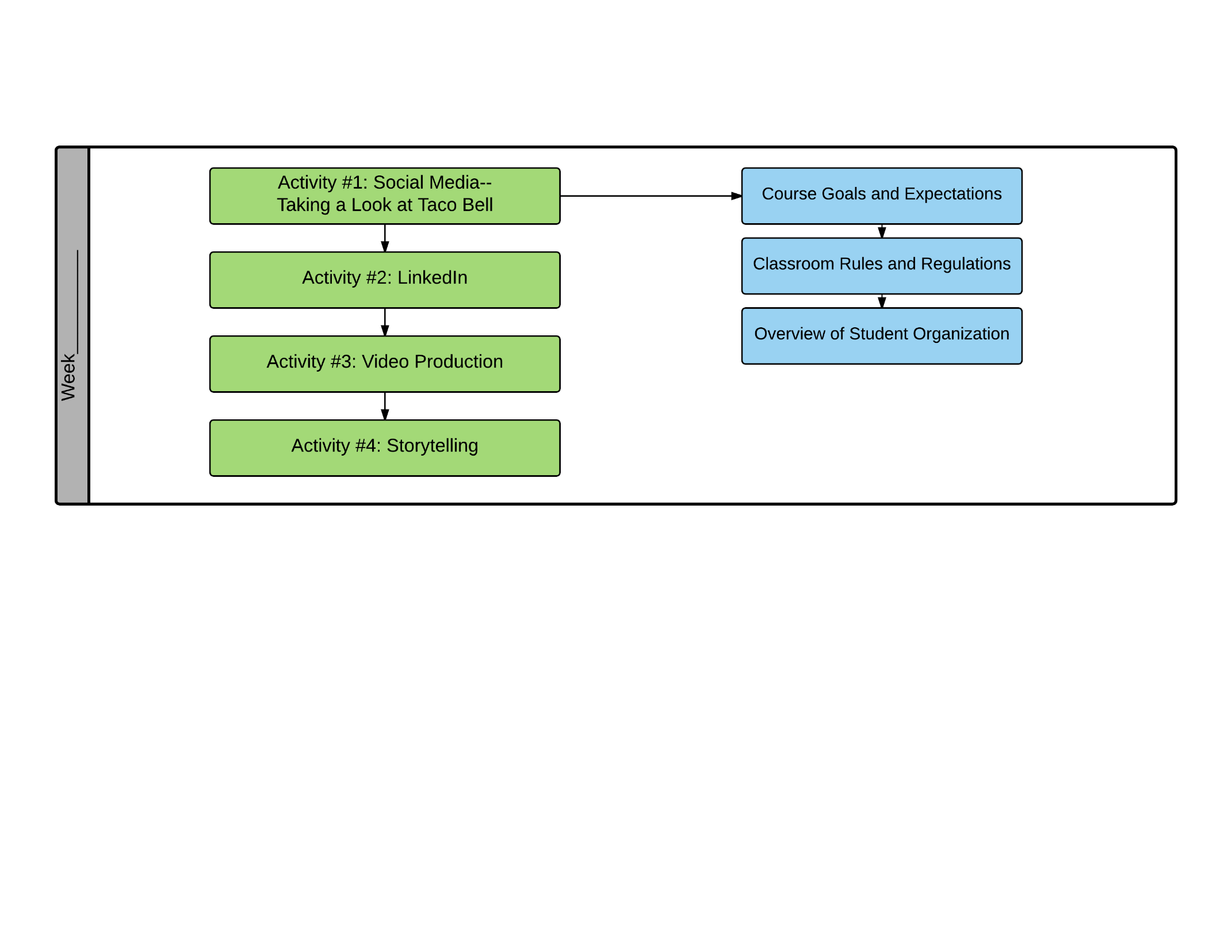
h. Describe ways to reaffirm the buyer-seller relationship.

i. Explain similarities/differences in the ways businesses implement the selling process.

j. Explain the importance of using a selling process.

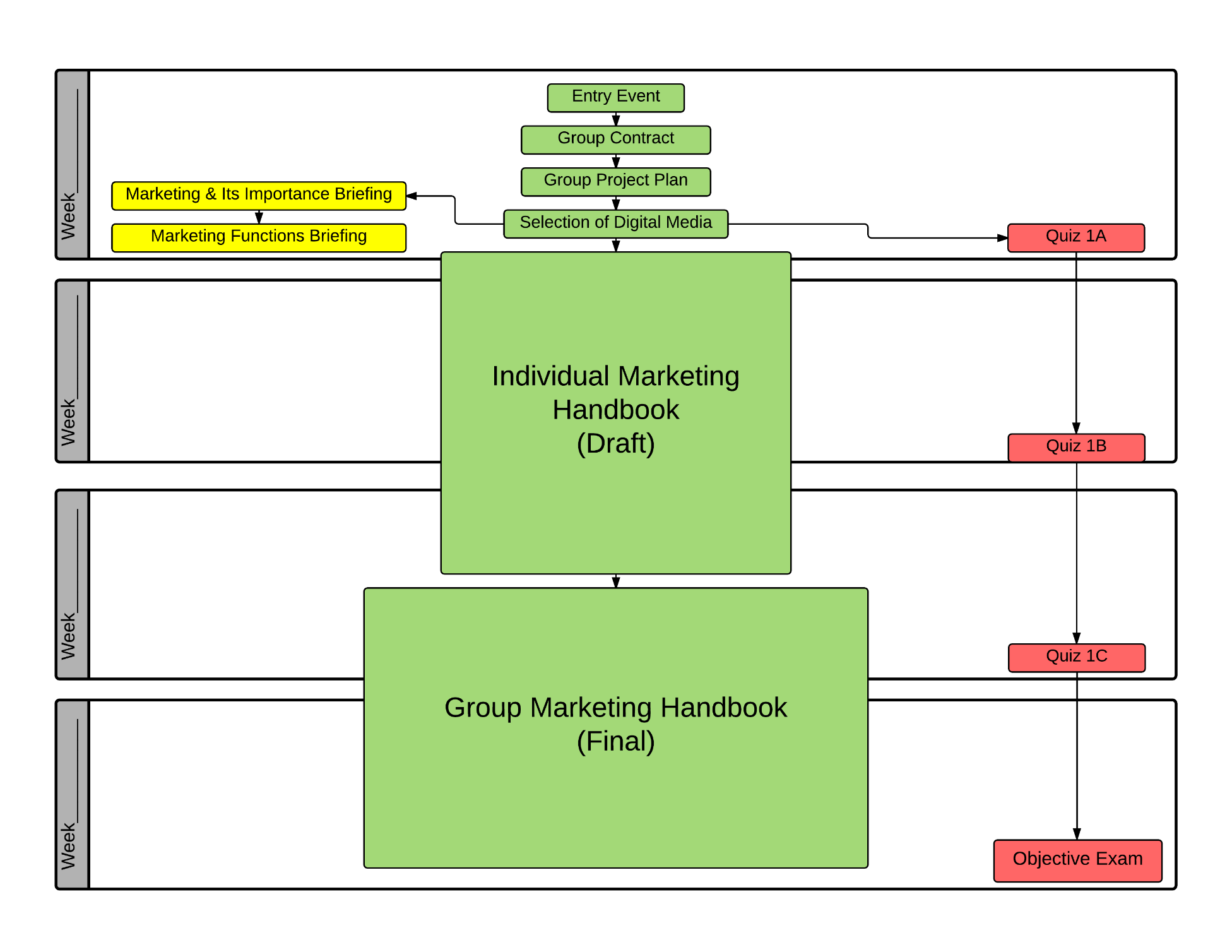
**Sequence of Instruction**

Section 3

**High School of Business™ Boot Camp**

**High School of Business™ Boot Camp**

|  |  |  |
| --- | --- | --- |
| **Week** | **HSB™ Boot Camp Activities** | **Course Orientation** |
| 1 | Activity #1: Social Media—Taking a Look at Taco Bell (pp. 4-4—4-5)  Activity #2: LinkedIn (pp. 4-6—4-7)  Activity #3: Video Production (pp. 4-8—4-9)  Activity #4: Storytelling (pp. 4-10—4-11) | Course Goals and Expectations  Classroom Rules and Regulations  Overview of Student Organization |

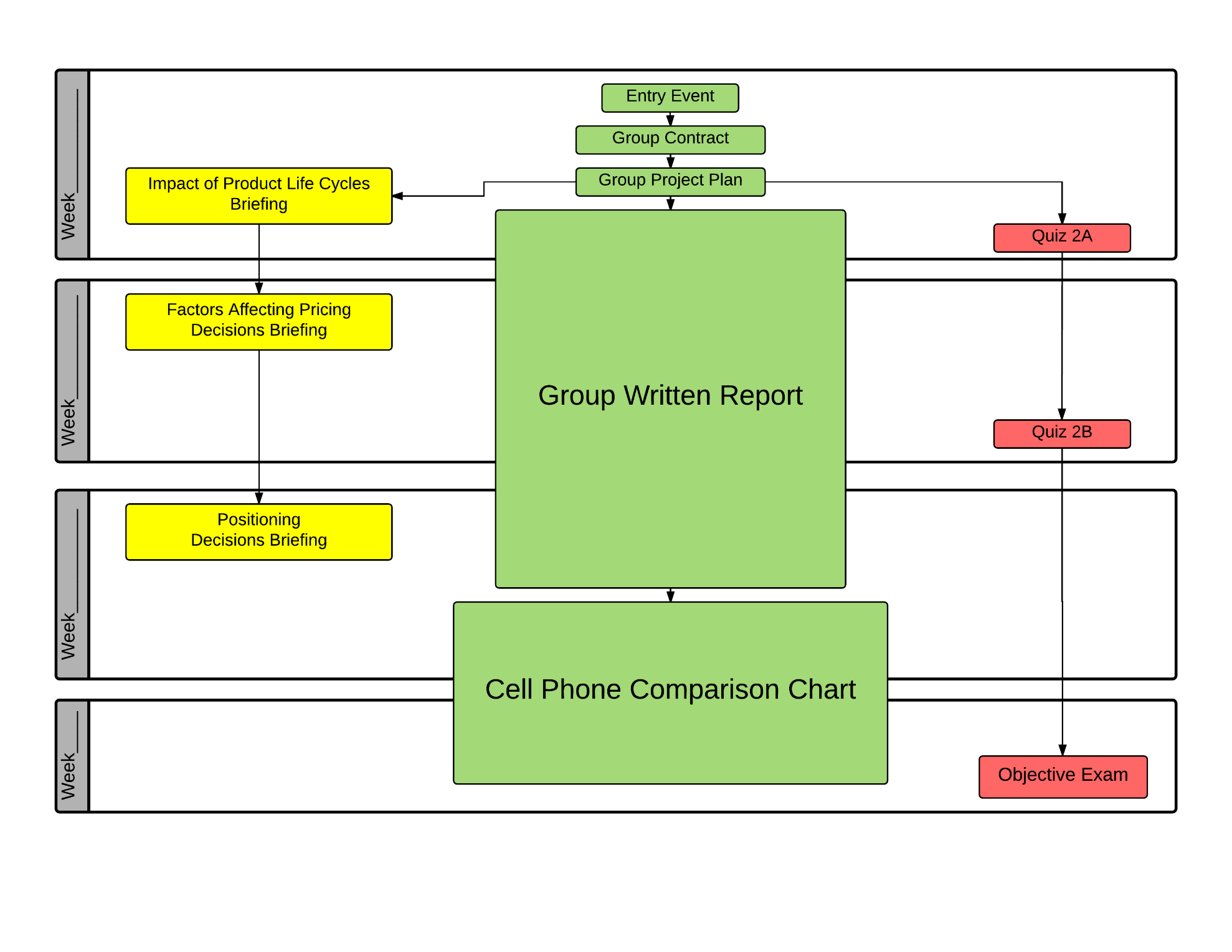
**Project 1: Getting to Know You**

**Project 1: Getting to Know You**What do marketers do that has to do with you?

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Week** | **Performance Indicators** | **Project Status** | **Briefing** | **Checkpoint** |
| 2 | MK:001 Explain marketing and its importance in a global economy (CS) LAP-MK-004  (pp. 4-41—4-44)  MK:002 Describe marketing functions and related activities (CS) LAP-MK-001 (pp. 4-45—4-46) | Project Start-Up  Determining Which Digital Media to Use  Research: Marketing Functions, including Technology &  Legal & Ethical Considerations | Marketing and Its Importance  (pp. 4-22—4-23)  Marketing Functions  (pp. 4-24—4-25) | Group Contract  Group Project Plan  Quiz 1A  (MK:001, MK:002) |
| 3 | IM:001 Explain the nature and scope of the marketing-information management function (SP) LAP-IM-002 (pp. 4-47—4-49)  PM:001 Explain the nature and scope of the product/service management function  (SP) LAP-PM-017 (pp. 4-50—4-51)  CM:001 Explain the nature and scope of channel management (CS) LAP-CM-002  (pp. 4-52—4-54) | Research: Marketing Functions, including Technology &  Legal & Ethical Considerations  Development of Individual Marketing Handbook Rough Drafts |  | Quiz 1B (IM:001, PM:001, CM:001) |

**Project 1: Getting to Know You** (cont’d)What do marketers do that has to do with you?

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Week** | **Performance Indicators** | **Project Status** | **Briefing** | **Checkpoint** |
| 4 | PI:001 Explain the nature and scope of the pricing function  (SP) LAP-PI-002 (pp. 4-55—4-56)  PR:001 Explain the role of promotion as a marketing function (CS) LAP-PR-002  (pp. 4-57—4-58)  SE:017 Explain the nature and scope of the selling function (CS) LAP-SE-117 (pp. 4-59—4-60) | Completion of Individual Marketing Handbook Rough Drafts  Development of Final Draft of Group’s Marketing Handbook |  | Rough Draft of Individual Marketing Handbook  Quiz 1C (PI:001, PR:001, SE:017) |
| 5 | MK:022 Explain legal and ethical considerations in marketing (SP) (pp. 4-61—4-64)  MK:023 Describe the use of technology in the marketing functions (SP) (pp. 4-65—4-67) | Completion of Final Draft of Group’s Marketing Handbook  Project Wrap-up |  | Final Draft of Group’s Marketing Handbook  Objective Exam |

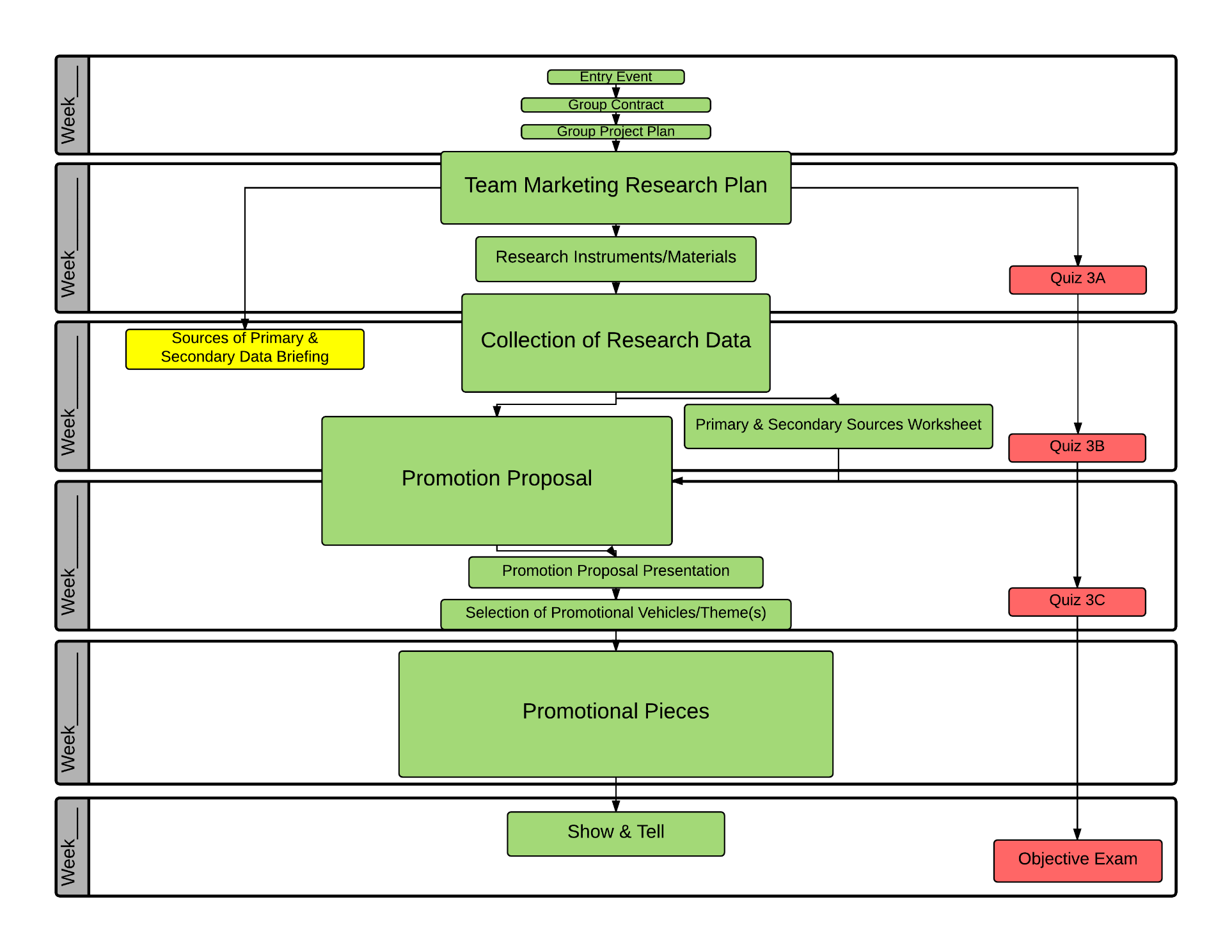
**Project 2: She Sells Cell Phones at the Cell Store**

**Project 2: She Sells Cell Phones at the Cell Store**How do cell phone companies successfully manage, price, and position their products?

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| --- | --- | --- | --- | --- |
| **Week** | **Performance Indicators** | **Project Status** | **Briefing** | **Checkpoint** |
| 6 | PM:019 Describe the uses of grades and standards in marketing  (CS) LAP-PM-008 (pp. 4-97—4-99)  PM:020 Explain warranties and guarantees  (CS) LAP-PM-004 (pp. 4-100—4-102)  PM:024 Identify the impact of product life cycles on marketing decisions  (SP) LAP-PM-018  (pp. 4-103—4-104) | Project Start-Up  Research: Assigned Cell Phone Company, Offerings, & Product Management Strategies | Impact of Product Life Cycles  (pp. 4-76—4-77) | Group Contract  Group Project Plan  Quiz 2A (PM:019, PM:020, PM:024) |
| 7 | PI:002 Explain factors affecting pricing decisions  (SP) LAP-PI-003 (pp. 4-105—4-106)  CM:003 Explain the nature of channels of distribution (CS) LAP-CM-003 (pp. 4-107— 4-108)  PM:003 Explain the concept of product mix  (SP) LAP-PM-003 (pp. 4-109—4-111) | Research: Assigned Cell Phone Company, Offerings, & Product Management Strategies  Development of Group Written Report | Factors Affecting Pricing Decisions  (pp. 4-78—4-79) | Quiz 2B (PI:002, CM:003, PM:003) |
| 8 | PM:042 Describe factors used by marketers to position products/services  (SP) LAP-PM-019 (pp. 4-112—4-114)  PM:021 Explain the nature of product/service branding  (SP) LAP-PM-006 (pp. 4-115—4-116)  PM:206 Explain the nature of corporate branding  (SP) LAP-PM-020 (pp. 4-117—4-118) | Completion of Group Written Report  Development of Cell Phone Comparison Chart | Positioning  (pp. 4-80—4-82) | Group Written Report |

**Project 2: She Sells Cell Phones at the Cell Store** (cont’d)How do cell phone companies successfully manage, price, and position their products?

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Week** | **Performance Indicators** | **Project Status** | **Briefing** | **Checkpoint** |
| 1st Half of Week 9 |  | Completion of Cell Phone Comparison Chart  Project Wrap-up |  | Cell Phone Comparison Chart  Objective Exam |

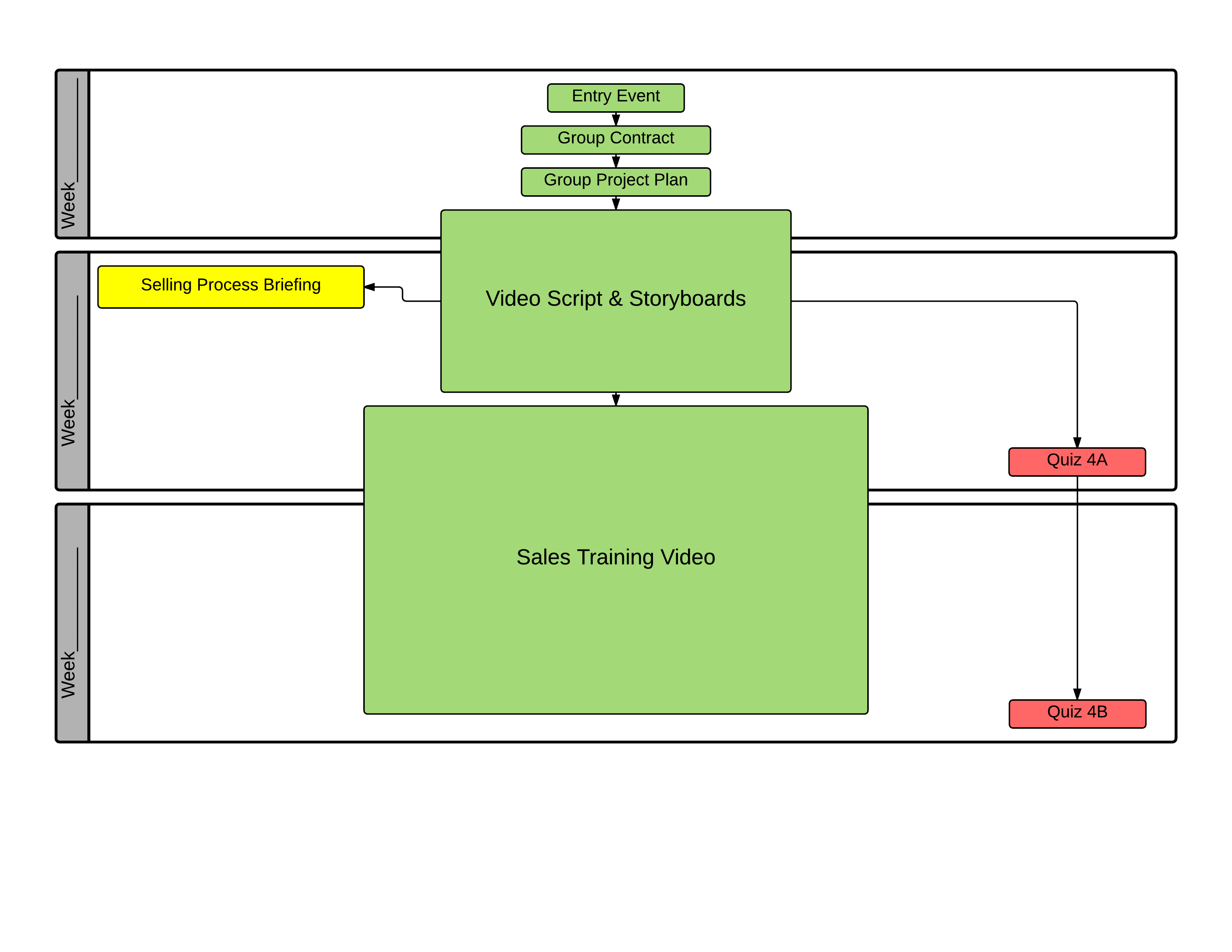
**Project 3: Get the Word Out!**

**Project 3: Get the Word Out!**What methods should we use to promote the HSB™ program to a targeted audience?

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| --- | --- | --- | --- | --- |
| **Week** | **Performance Indicators** | **Project Status** | **Briefing** | **Checkpoint** |
| 2nd Half of Week 9 | IM:012 Describe the need for marketing data (CS) LAP-IM-012 (pp. 4-157—4-159) | Project Start-Up  Development of Team Marketing Research Plan |  | Group Contract  Group Project Plan |
| 10 | IM:184 Identify data monitored for marketing decision making  (SP) LAP-IM-184  (pp. 4-160—4-163)  IM:010 Explain the nature of marketing research  (SP) LAP-IM-010 (pp. 4-164—4-166)  IM:282 Discuss the nature of marketing research problems/issues  (SP) LAP-IM-282  (pp. 4-167—4-169) | Completion of Team Marketing Research Plan  Development/ Completion of Research Instruments/ Materials  Collection of Research Data |  | Team Marketing Research Plan  Research Instruments/ Materials  Quiz 3A (IM:012, IM:184, IM:010, IM:282) |
| 11 | IM:281 Describe options businesses use to obtain marketing research data (i.e., primary and secondary research)  (SP) LAP-IM-015  (pp. 4-170—4-172)  IM:284 Describe methods used to design marketing research studies (i.e., descriptive, exploratory, and causal)  (SP) LAP-IM-284 (pp. 4-173—4-175) | Collection of Research Data  Completion of Primary & Secondary Sources Worksheet  Development of Promotion Proposal | Sources of Primary & Secondary Data  (pp. 4-131—4-133) | Research Data  Primary & Secondary Sources Worksheet  Quiz 3B (IM:281, IM:284) |

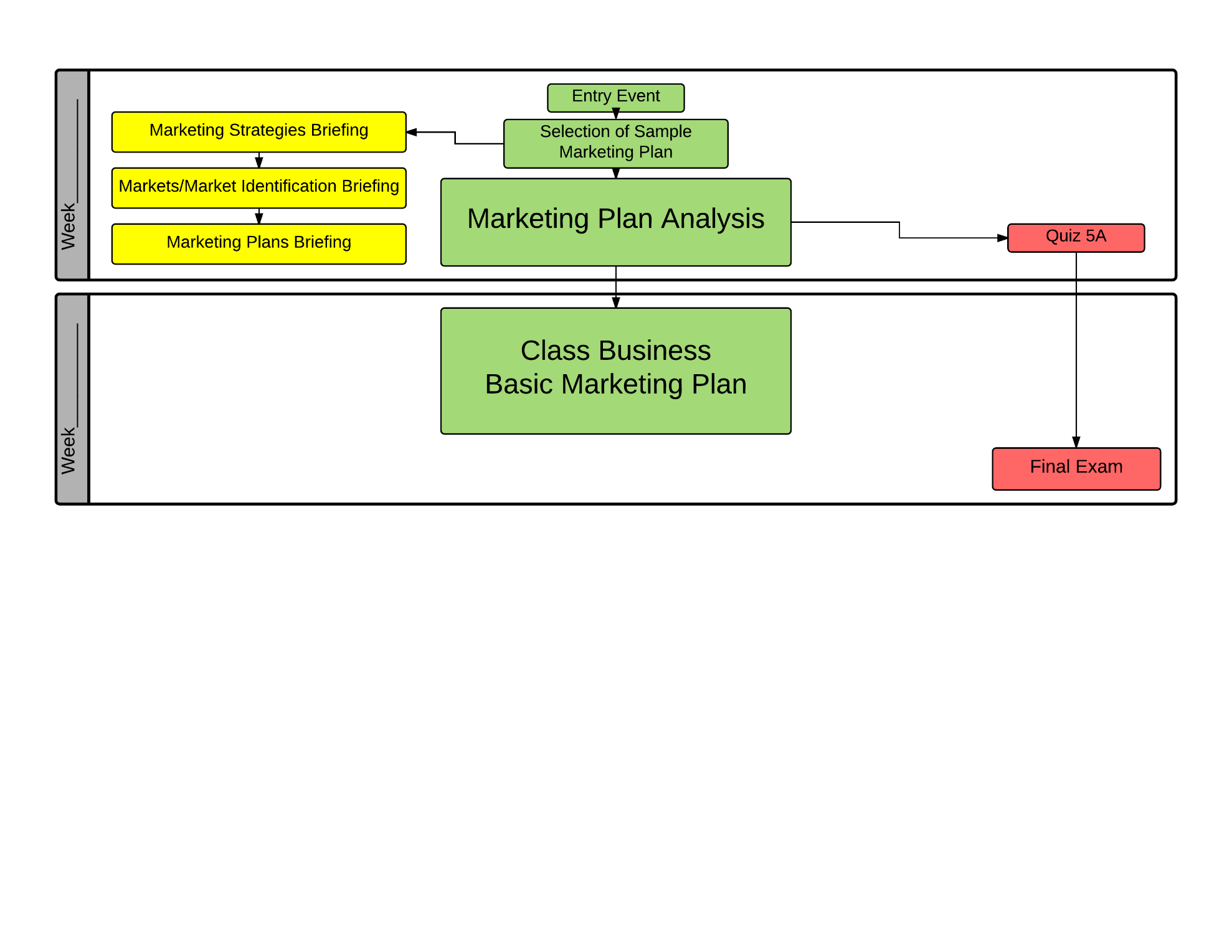
**Project 3: Get the Word Out!** (cont’d)What methods should we use to promote the HSB™ program to a targeted audience?

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Week** | **Performance Indicators** | **Project Status** | **Briefing** | **Checkpoint** |
| 12 | IM:285 Discuss the nature of sampling plans (i.e., who, how many, how chosen)  (SP) LAP-IM-016 (pp. 4-176—4-177)  IM:289 Describe data-collection methods (e.g., observations, mail, diaries, telephone, Internet, discussion groups, interviews, scanners, tracking tools)  (SP) LAP-IM-017  (pp. 4-178—4-180) | Completion of Promotion Proposal  Presentation of Promotion Proposal  Class Selection of Promotional Vehicles & Theme(s) |  | Promotion Proposal  Quiz 3C (IM:285, IM:289) |
| 13 | PR:002 Explain the types of promotion (i.e., institutional, product) (CS) LAP-PR-004 (pp. 4-181—4-182)  PR:003 Identify the elements of the promotional mix  (SP) LAP-PR-001 (pp. 4-183—4-186) | Development/Completion of Promotional Pieces |  | Promotional Pieces |
| 1st Half of Week 14 | PR:007 Explain types of advertising media  (SP) LAP-PR-003 (pp. 4-187—4-189) | Show & Tell  Project Wrap-up |  | Objective Exam |

**Project 4: To My Future Self**

**Project 4: To My Future Self**What will we need to know about selling to make our future class business a success?

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Week** | **Performance Indicators** | **Project Status** | **Briefing** | **Checkpoint** |
| 2nd Half of Week 14 | SE:062 Acquire product information for use in selling (CS) LAP-SE-131 (pp. 4-216—4-217) | Project Start-Up  Secondary Research  Development of Video Script & Storyboards |  | Group Contract  Group Project Plan |
| 15 | SE:048 Explain the selling process (CS) LAP-SE-048 (pp. 4-218—4-220)  SE:076 Explain the role of customer service as a component of selling relationships (CS)  LAP-SE-130 (pp. 4-221—4-222) | Completion of Video Script & Storyboards  Development of Team Sales Training Video | Selling Process  (pp. 4-197—4-201) | Video Script & Storyboards  Quiz 4A (SE:062, SE:048, SE:076) |
| 16 | SE:932 Explain company selling policies (CS)  LAP-SE-121 (pp. 4-223—4-224)  SE:828 Explain key factors in building a clientele  (SP) LAP-SE-115 (pp. 4-225—4-226) | Completion of Team Sales Training Video  Project Wrap-up |  | Team Sales Training Video  Quiz 4B (SE:932, SE:828) |

**Project 5: Marketing Plan Analysis**

**Project 5: Marketing Plan Analysis**What and how do marketers plan?

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Week** | **Performance Indicators** | **Project Status** | **Briefing** | **Checkpoint** |
| 17 | MP:001 Explain the concept of marketing strategies (CS) LAP-MP-002 (pp. 4-244—4-245)  MP:003 Explain the concept of market and market identification (CS) LAP-MP-003  (pp. 4-246—4-248)  MP:007 Explain the nature of marketing plans  (SP) LAP-MP-007 (pp. 4-249—4-251) | Project Start-Up  Selection of Sample Marketing Plan  Completion of Marketing Plan Analysis | Marketing Strategies  (pp. 4-232 — 4-235)  Markets & Market Identification  (pp. 4-236 — 4-238)  Marketing Plans  (p. 4-239) | Marketing Plan Analysis  Quiz 5A (MP:001, MP:003, MP:007) |
| 18 |  | Development/ Completion of Class Business Marketing Plan  Project Wrap-up |  | Class Business Marketing Plan  Final Exam |

**Getting Involved: A Course-Specific Guide for  
High School of Business™ Steering Teams**

**Course Preparation Forms:**

To aid in course planning, a Course Preparation Form is included at the end of Section 3. The form, which is designed to be shared with the school’s HSB™ Steering Team, outlines the outside resources (both human and material) that are needed for the course. Instructors and steering team members should discuss these outside resources well in advance of teaching the course. Steering team members should consider how they themselves or those in their professional network can fulfill the needs of the course. Instructors should encourage the steering team to suggest resources and take responsibility for securing them (see the final column on the chart).

**Principles of Marketing  
Project #1: Getting to Know You**

**Description:**

In this project, students will develop an understanding of six of the most important marketing functions—channel management, marketing-information management, pricing, product/service management, promotion, and selling. Each student will conduct secondary research to develop a rough draft of a marketing “handbook” which contains a description and pictures of each marketing function as well as a discussion of technology and legal and ethical considerations in each function.

After the individual rough drafts are completed, team members will compare their rough drafts to develop a final draft of the handbook for their team. Each team has the opportunity to choose the form of their handbook (e.g., word document, presentation, video, etc.), as long as the handbook can be delivered digitally. After completing their final draft, each team will share its work electronically with a college marketing professor who will select the best, most accurate marketing handbook. That handbook will then be distributed to college students.

|  |  |  |  |
| --- | --- | --- | --- |
| Needs for this Project | Describe How Need Will Be Met | | |
| Who/What | Date | Who/What | Person Responsible |
| College marketing faculty member. This person will:   * Attend day one of this project to kick-off the project/competition. * Review teams’ marketing handbooks, select the most accurate, and offer limited feedback on all handbooks. * Distribute copies of the winning handbook to college students in introductory-level marketing courses. |  |  |  |
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**Principles of Marketing  
Project #2: She Sells Cell Phones at the Cell Store**

**Description:**

This project introduces students to a number of marketing concepts, such as channels of distribution, pricing, and product/service management, in the context of the cellular phone industry. Each team pulls a slip of paper from a “hat.” That slip of paper will contain the name of a cell phone company in the local area. Each team should have a different cell phone company than other teams in the class. Each team conducts primary and secondary research to learn about the company, including the company’s product offerings, channels of distribution, positioning strategies, and branding tactics.

After conducting the research, each team develops a written report which contains detailed information about the assigned cell phone company. After all of the team reports are completed, the class works together to develop a cell phone comparison chart for distribution to local parents and students. Finally, students work in teams and as a whole class to determine a product mix, positioning, and channel management ideas for their non-profit business.

|  |  |  |  |
| --- | --- | --- | --- |
| Needs for this Project | Describe How Need Will Be Met | | |
| Who/What | Date | Who/What | Person Responsible |
| There are no outside needs for this project. |  |  |  |
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**Principles of Marketing  
Project #3: Get the Word Out!**

**Description:**

This project exposes students to two vital marketing functions—promotion and marketing-information management. Working individually, students will conduct marketing research to collect data re potential and current HSB™ stakeholders (e.g., prospective students, parents, administrators and guidance counselors, members of the business community, postsecondary instructors, etc.). Following this individual research, students will work in teams to analyze the research findings and then translate these findings into recommendations for a promotional campaign targeted at those stakeholders. Each team will present its proposal to the class, explaining which specific promotional vehicles (including social media) would be most effective in reaching the stakeholders, along with a recommended central theme or message for those promotions.

Following these presentations, the class will select, by popular vote, the promotional vehicles and central theme(s) or message(s) it wants to use to reach the targeted audience. Student groups will assume responsibility for creating the various promotional pieces (e.g., Facebook posts, posters, etc.). Each team will develop its assigned/selected promotional tools and create a timeline for sharing those materials with the targeted audience. If possible, students will implement their promotional campaign immediately.

|  |  |  |  |
| --- | --- | --- | --- |
| Needs for this Project | Describe How Need Will Be Met | | |
| Who/What | Date | Who/What | Person Responsible |
| Show & Tell Guests. At the end of the project, students will host a show & tell to share their promotional pieces with each other and members of their target audience. Given the steering team’s charge to promote the HSB™ program, steering team members should attend the event, examining the students’ work and providing them with feedback. |  |  |  |
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**Principles of Marketing  
Project #4: To My Future Self**

**Description:**

This project teaches students about selling while at the same time helping them to improve their class business’s chances for success during the *Business Strategies* course. Students will work in teams to become knowledgeable about the goods or services that their class business is planning to sell next year, as well as research specific sales concepts and skills. Following this research, each team will develop a script and storyboards for a sales training video. Each team’s video will be about a different assigned topic (e.g., selling policies, the selling process, etc.), and the audience for the videos will be the current *Principles of Marketing* students—who will view the videos again during *Business Strategies* class next year when preparing to sell their business’s products. After receiving instructor approval of its script and storyboards, each team will record its training video and submit it to the instructor and sales professionals for review.

|  |  |  |  |
| --- | --- | --- | --- |
| Needs for this Project | Describe How Need Will Be Met | | |
| Who/What | Date | Who/What | Person Responsible |
| One or more sales professionals. These individuals will review teams’ sales training videos and offer feedback and/or advice to students either in person or via Skype. |  |  |  |
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**Principles of Marketing  
Project #5: Marketing Plan Analysis**

**Description:**

This project acquaints students with marketing plans, their purposes, and their components. Drawing upon knowledge learned throughout this course, students analyze designated components of a sample marketing plan. Following this analysis, students will work in teams and then as a class to develop an informal, simple marketing plan for the class’s business that it will actualize during the *Business Strategies* course.

|  |  |  |  |
| --- | --- | --- | --- |
| Needs for this Project | Describe How Need Will Be Met | | |
| Who/What | Date | Who/What | Person Responsible |
| There are no outside needs for this project. |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

**Projects and Planning Guide Sheets**

Section 4

**Orientation**

High School of Business™, with its hands-on projects and accelerated business content, is a unique experience for students. Emphasize this by not starting the first day of class “as usual.” Instead, begin with the first HSB™ Boot Camp activity.

Then, at the end of the first class, begin the standard first day of class/week discussions (e.g., goals and expectations of the course, classroom rules and regulations, and the CTSO(s) associated with the HSB™ program). Intersperse other HSB™ Boot Camp activities among and following these discussions. Doing so will build students’ interest in the course and confirm your school’s marketing of the program as “hands-on, real world project based-learning”.

**HSB™ Boot Camp**

To help students to feel more “at home” in a PBL classroom and to facilitate student success in the course (indeed, on a broader scale, in the entire HSB™ program), the first week of *Principles of Marketing* is dedicated to orienting students with PBL tenets and concepts. The activities that students engage in during this week make up the HSB™ Boot Camp.

The boot camp consists of four engaging activities of varying lengths. Each of these activities helps students to develop and/or enhance skills that they will need when completing the five standards-based projects in this course.

The following pages include instructions for each of the four HSB™ Boot Camp activities to be completed during week one of *Principles of Marketing*. Instructors are strongly encouraged to utilize the activities in the order provided.

Upon completion of all four HSB™ Boot Camp activities, provide each student with a personalized boot camp certificate (located on p. 4-12).

|  |  |
| --- | --- |
| Weekly Planner | |
| **Monday** |  |
| **Tuesday** |  |
| **Wednesday** |  |
| **Thursday** |  |
| **Friday** |  |

**Activity #1:** **Social Media—Taking a Look at Taco Bell**

**Step 1: Taco Bell’s Social Media Strategy**

* [Taco Bell Behind the Brand](https://www.youtube.com/watch?v=wIv5WcFoofs) social media strategy
  + Tressie Lieberman, Director of Marketing
  + 15:15 minutes

**Step 2: Social Mention**

* + In the video, you heard Taco Bell’s Director of Marketing talk about the room in the company’s corporate headquarters that is devoted to monitoring social media. One tool anyone can use to monitor daily social media marketing is Social Mention. Let’s try it.
  + Go to <http://www.socialmention.com/>
  + Type in Taco Bell.

**What is Social Mention?**

Social Mention is a social media search platform that aggregates user generated content from across the web into a single stream of information.

**What social media properties does it support?**

Social Mention monitors 80+ social media properties directly including: Twitter, Facebook, FriendFeed, YouTube, Digg, Google etc.

**What services are provided?**

Social Mention currently provides a point-in-time social media search and analysis service, [daily social media alerts](http://socialmention.com/alerts/), and a third-party [API](http://socialmention.com/api/).

**What is "strength"?**

In the top left, find the strength number for Taco Bell. What is it today?

***Definition:*** Strength is the likelihood that your brand is being discussed in social media. A very simple calculation is used: phrase mentions within the last 24 hours divided by total possible mentions.

**What is "sentiment"?**

Find today’s sentiment ration. What is it today?

***Definition:*** Sentiment is the ratio of mentions that are generally positive to those that are generally negative.

**Activity #1:** **Social Media—Taking a Look at Taco Bell**

**What is "passion"?**

What is Taco Bell’s passion rating today?

***Definition:*** Passion is a measure of the likelihood that individuals talking about your brand will do so repeatedly. For example, if you have a small group of very passionate advocates who talk about your products or brand all the time you will have a higher Passion score. Conversely if every mention is written by a different author you will have a lower score. Most frequently used keywords and number of times mentioned. Number of mentions by sentiment.

**What is "reach"?**

What is Taco Bell’s Reach today?

***Definition:*** Reach is a measure of the range of influence. It is the number of unique authors referencing your brand divided by the total number of mentions.

**Source:** SocialMention. (2017). *Frequently asked questions.* Retrieved March 16, 2017, from <http://socialmention.com/faq>

**Discussion question:** How do you think companies like Taco Bell use these numbers?

**Step 3: Strategy in Action**

Now, let’s look at one social media campaign Taco Bell used: [Taco Bell- Social Media Blackout](https://www.youtube.com/watch?v=MGke7ifA_ww) (2:24)

What risks did Taco Bell take when they used this campaign?

How did they measure whether it was successful?

Would this same technique work if it was used tomorrow? Why or why not?

How does a company like Taco Bell use each media channel effectively? Or do they just post the same information to every social media tool? Go to the following and takes notes of the types of posts you find:

Taco Bell’s…

* Facebook page
* Twitter feed
* Instagram
* Snapchat

How did the posts differ from site to site? Discuss your thoughts on Taco Bell’s strategies for each social media site.

**Activity #2:** **LinkedIn**

**Add a photo to your LinkedIn profile.**

LinkedIn is a professional business tool that students can use to connect with their local and national peers, business professionals in their local community, and other business leaders. It is a place to create and develop their profile, access business resources, and stay on top of what’s going on in the business world.

1. Select the photo you would like from your computer or device and click Open.
2. Click Upload Photo
3. You can upload JPG, GIF or PNG files.
4. File size - 8MB maximum.
5. Your photo should be square.
6. The ideal pixel size for your photo is 400 x 400. If either width or height exceeds 20,000 pixels, your photo will not upload.
7. Select who you want the photo to be visible to (likely you want it to be visible to “your network”).
8. Click Save.
9. An appropriate profile picture should include your entire face. There should be no one else in the photo with you. A school photo or one in which you are clean and dressed well is acceptable.  
   Do not use a photo that is: grainy, out of focus, badly cropped, shows inappropriate slogans on your clothing, is not something you want an employer to see.
10. Go [here](https://www.linkedin.com/help/linkedin/answer/1615/adding-or-changing-your-profile-photo?lang=en) for more direction on uploading a photo.
11. Go [here](https://business.linkedin.com/talent-solutions/blog/2014/12/5-tips-for-picking-the-right-linkedin-profile-picture) for more guidelines to selecting an appropriate photo.

**Activity #2:** **LinkedIn**

**Add education/awards.**

1. In your profile, scroll down to Education, and click on the + sign on the right. (This will open a new window.)
2. Under “School,” add the name of your high school. Leave “Degree” and “Field of Study” blank. Under “Grade,” you can enter your cumulative GPA. Under “Activities and societies,” you can enter your various honors, clubs, leadership positions, etc. You can also enter your HSB™ courses to showcase that you’ve been taking part in this special program through your school. Please separate each activity by starting a new line and using bullet points.
3. You can also fill in the years you have been in high school as well as a description of your high school if you wish.
   1. Go [here](https://www.linkedin.com/help/linkedin/answer/381) for more direction on adding/editing education entries on your profile.

**Activity #3: Video Production**

**Preparation:**

Print three or four copies of the Video Production Storyboard handout (found on page 4-9) for each group. Provide access to the Internet and make arrangements for students to use their smartphones or tablets to produce videos.

**Optional:**

Provide selfie sticks or a tripod to hold phones or tablets. Provide microphones to produce audio.

### Process:

### Divide the class into groups of four to six students each.

### Instruct students to create a two-to-three-minute instructional video on how to tie a pair of shoes.

### Emphasize that the goal of the activity is to gain experience using video-editing tools.

### Encourage students to be creative. (For example, shooting one long continuous video is not acceptable.)

### Each two-to-three-minute submission must contain the following components:

### Voiced-over narration

### Two separate video segments

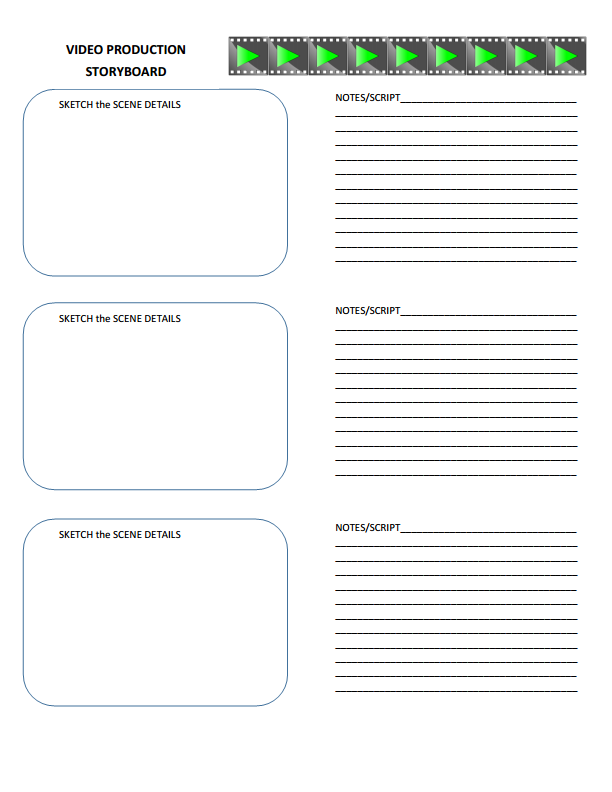
### Text

### At least five still shots

### When the videos are complete, ask students to share them with the class.

### Note:

### For helpful hints on shooting video, view the TECH TALK video, “How to Film & Edit on Your Smartphone:” <https://www.youtube.com/watch?v=vpZvc8vtHvo> (9:24)

****

**Activity #4:** **Storytelling**

The power of an engaging story has been demonstrated by Steve Jobs, world-class TED talk speakers, and numerous filmmakers like Pixar Animation. In his book *To Sell is Human*, Daniel Pink reveals the “Pixar Pitch,” which is considered Pixar’s formula for developing its films. The technique is useful for selling everything from yourself, to products, to ideas because it uses the power of storytelling. In this exercise, your students will learn how to use the Pixar Pitch to share a life experience and create an engaging PowerPoint presentation without the bullets and the boredom.

**Preparation:**

Print the handout *Present It Like a Story*—one per student. Provide access to the Internet, presentation software, and audio visual equipment.

**Process:**

1. Using the provided outline, students should create a three-to-five-minute presentation about how joining a club, group, team, or organization helped them experience success.

For an example, instruct students to review Matt McCarty’s article, “Use the Pixar Pitch to Structure Your Stories” at <https://www.linkedin.com/pulse/use-pixar-pitch-structure-your-stories-matt-mccarty>.

1. Instruct students to create six PowerPoint slides with limited text and effective images to complement their presentation.

If tips are needed, view the Inspirio Tutorial, “Less is More in PowerPoint Presentations”: <https://www.youtube.com/watch?v=AAiiu26iebY> (3:52)

1. Pair students with partners to practice their presentations.

Instruct students to focus on facing the audience, using eye contact, effective body language, and good speaking volume, pace, and expression.

1. After students have practiced a few times with their partner, ask them to share their presentations with the class.

**Present It Like a Story**

**Directions:** In his book *To Sell is Human*, Daniel Pink reveals the “Pixar Pitch,” which is considered Pixar’s formula for developing its films. The technique is useful for selling everything from yourself, to products, to ideas because it uses the power of storytelling.

Use the six-step story framework below to share how joining a club, group, team, or organization helped you experience success. Then create a three-to-five-minute PowerPoint presentation to share your personal story with others. Keep the following guidelines in mind:

* Make your video engaging! In other words, no bullets or boring stuff!
* Also, limit yourself to six slides and minimum text.

**The Six-Step Story Framework:**

1. Once upon a time . . .

* Possible starts: I was . . . My typical day consisted of . . . I had a problem . . .

1. Every day . . .

* Possible starts: I dreamed of . . . I felt . . . I thought . . . I dreaded . . .

1. One day . . .

* Possible starts: I decided . . . I joined . . .

1. Because of that . . . describe what happened next
2. Because of that . . . describe how one event led to another
3. Until finally . . . describe an achievement, a future goal, or something important that you learned



**Performance Indicators:**

* Explain marketing and its importance in a global economy (MK:001, LAP-MK-004) (CS)   
  (pp. 4-41—4-44)
* Describe marketing functions and related activities (MK:002, LAP-MK-001) (CS) (pp. 4-45—4-46)
* Explain the nature and scope of the marketing-information management function (IM:001,   
  LAP-IM-002) (SP) (pp. 4-47—4-49)
* Explain the nature and scope of the product/service management function (PM:001, LAP-PM-017) (SP) (pp. 4-50—4-51)
* Explain the nature and scope of channel management (CM:001, LAP-CM-002) (CS) (pp. 4-52—4-54)
* Explain the nature and scope of the pricing function (PI:001, LAP-PI-002) (SP) (pp. 4-55—4-56)
* Explain the role of promotion as a marketing function (PR:001, LAP-PR-002) (CS) (pp. 4-57—4-58)
* Explain the nature and scope of the selling function (SE:017, LAP-SE-117) (CS) (pp. 4-59—4-60)
* Explain legal and ethical considerations in marketing (MK:022) (SP) (pp. 4-61—4-64)
* Describe the use of technology in the marketing functions (MK:023) (SP) (pp. 4-65—4-67)

**Project Description:**

In this project, students will develop an understanding of six of the most important marketing functions—channel management, marketing-information management, pricing, product/service management, promotion, and selling. Each student will conduct secondary research to develop a rough draft of a marketing “handbook” which contains a description and pictures of each marketing function as well as a discussion of technology and legal and ethical considerations in each function.

After the individual rough drafts are completed, team members will compare their rough drafts to develop a final draft of the handbook for their team. Each team has the opportunity to choose the form of their handbook (e.g., word document, presentation, video, etc.), as long as the handbook can be delivered digitally. After completing their final draft, each team will share its work electronically with a college marketing professor who will select the best, most accurate marketing handbook. That handbook will then be distributed to college students.

**Driving Question:**

What do marketers do that has to do with you?

**Timeframe:** 4 weeks

**Entry Event:**

Ask the class to think about the following questions: When you meet new people, what impression do you want to make on these individuals? What image do you want people to associate with you? How would you like people to describe you to others? Then, each student should write down three words that describe or represent the image that s/he wants to project to the world. Divide the class into small groups so that each student can explain his/her personal image to classmates.

After completing this activity, ask the students to imagine that they all work for Nike and are planning the release of a running shoe. Each group should select three words that describe or represent the image that they would like customers to associate with these new shoes. Then, each group should share its three words with the class and explain why it believes that the image is a “good fit” for new running shoes.

Following this exercise, explain to the students that businesses also work hard to develop an image or brand to associate with a particular person, product, or company. Branding is an aspect of one marketing activity. Explain that in this project, students will learn about many different marketing activities and will share that knowledge with others. Ask the driving question.

**Briefings:**

To augment the project, briefings should be provided during the week specified.

|  |  |
| --- | --- |
| **Week** | **Topic** |
| 2 | Marketing and Its Importance Briefing (pp. 4-22—4-23)  Marketing Functions Briefing (pp. 4-24—4-25) |

**Step-by-Step Guide:**

|  |  |  |  |
| --- | --- | --- | --- |
| **Checkpoint** | **Week** | **Details** | **Assessment** |
| **Group Contract** | 2 | Each team develops a contract for how the team will operate, including how to handle conflict and consequences for team members that don’t participate. A sample group contract is provided on pages 4-26— 4-27. | Complete/ Incomplete |
| **Project Plan** | 2 | Team develops a written project plan to be used as a guide for completing tasks within the project. A sample project plan is provided on pages 4-28—4-31, and a blank project plan form is provided on pages 4-32— 4-33. | Developing a Project Plan Rubric (pp. 4-34—4-36) |
| **Determining Which Digital Media to Use** | 2 | Each team determines what medium it wants to use for its marketing handbook. The handbook could be in the form of a Word document, a Power Point presentation, a video, etc., as long as the final draft can be delivered digitally. | Complete/ Incomplete |
| **Quiz 1A** | 2 | At the end of week 2, students take a brief quiz covering the following performance indicators:   * Explain marketing and its importance in a global economy (MK:001, LAP-MK-004) (CS) * Describe marketing functions and related activities (MK:002, LAP-MK-001) (CS) | To create this quiz, use multiple-choice items provided on this course guide direct download link. |

|  |  |  |  |
| --- | --- | --- | --- |
| **Checkpoint** | **Week** | **Details** | **Assessment** |
| **Rough Draft of Individual Marketing Handbook** | 3 - 4 | After conducting extensive research, each student develops a rough draft of her/his marketing handbook. The handbook contains a description and pictures of each marketing function, as well as a discussion of technology and ethical and legal issues associated with each marketing function. Keep in mind that the intended audience is entry-level college marketing students. The handbook should teach these students about the marketing functions and encourage them to become responsible, ethical business professionals. The handbook should have a similar feel to the public service announcements (PSAs) that we see on TV and in magazines. For examples showing how PSAs are used, visit the following websites:   * Ad Council Campaigns: <http://www.adcouncil.org/Our-Campaigns> * Heifer International: <https://www.heifer.org/> * American Heart Association PSA Videos: [http://www.localheart.org/branding/ VideoContentAssets /GeneralVideosPSAEssenceVideos/General-Videos-PSAEssence-Videos\_UCM\_465825\_SubHomePage.jsp](http://www.localheart.org/branding/VideoContentAssets/GeneralVideosPSAEssenceVideos/General-Videos-PSAEssence-Videos_UCM_465825_SubHomePage.jsp) | Complete/ Incomplete |
| **Quiz 1B** | 3 | At the end of week 3, students take a brief quiz covering the following performance indicators:   * Explain the nature and scope of the marketing-information management function (IM:001,  LAP-IM-002) (SP) * Explain the nature and scope of the product/service management function (PM:001, LAP-PM-017) (SP) * Explain the nature and scope of channel management (CM:001, LAP-CM-002) | To create this quiz, use multiple-choice items provided on this course guide direct download link. |

|  |  |  |  |
| --- | --- | --- | --- |
| **Checkpoint** | **Week** | **Details** | **Assessment** |
| **Final Draft of  Group’s  Marketing  Handbook** | 4 & 5 | After each team member has finished his/her rough draft of the marketing handbook, team members compare their work to create a final version of the marketing handbook for their team. The team should create the final draft using the medium that they chose early in the project. After completing their final product, the teams should share their handbooks with their teacher and a college marketing professor. The college professor selects the best team handbook from the class, and that handbook is distributed to college students in introductory marketing courses. | Marketing Handbook Rubric (pp. 4-37—4-40) |
| **Quiz 1C** | 4 | At the end of week 4, students take a brief quiz covering the following performance indicators:   * Explain the nature and scope of the pricing function (PI:001, LAP-PI-002) (SP) * Explain the role of promotion as a marketing function (PR:001, LAP-PR-002) (CS) * Explain the nature and scope of the selling function (SE:017, LAP-SE-117) (CS) | To create this quiz, use multiple-choice items provided on this course guide direct download link. |
| **Objective Exam** | 5 | At the end of week 5, students take a multiple-choice objective exam covering performance indicators from quizzes 1A, 1B, and 1C, along with the following additional performance indicators:   * Explain legal and ethical considerations in marketing (MK:022) (SP) * Describe the use of technology in the marketing functions (MK:023) (SP) | To create this exam, use multiple-choice items provided on this course guide direct download link. |

**Teacher Tips:**

* Encourage students to be creative when determining what form their team’s final product will be. Offer them a variety of software programs to choose from (e.g., wording processing, presentation, desktop publishing, etc.), and make digital cameras and video cameras available to the students.
* Invite the college marketing professor to class to kickoff and to conclude this project. Knowing that their final product will be seen and used by college students will push students to excel.

|  |  |
| --- | --- |
| Weekly Planner | |
| **Monday** |  |
| **Tuesday** |  |
| **Wednesday** |  |
| **Thursday** |  |
| **Friday** |  |

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| --- | --- |
| Weekly Planner | |
| **Monday** |  |
| **Tuesday** |  |
| **Wednesday** |  |
| **Thursday** |  |
| **Friday** |  |

|  |  |
| --- | --- |
| Weekly Planner | |
| **Monday** |  |
| **Tuesday** |  |
| **Wednesday** |  |
| **Thursday** |  |
| **Friday** |  |

|  |  |
| --- | --- |
| Weekly Planner | |
| **Monday** |  |
| **Tuesday** |  |
| **Wednesday** |  |
| **Thursday** |  |
| **Friday** |  |

**Definition of marketing**

The activity, set of institutions, and processes for creating, communicating, delivering, and exchanging offerings that have value for customers, clients, partners, and society at large

**Marketing activities**

* **Channel management:** Identifying, selecting, monitoring, and evaluating sales channels; processes by which marketers ensure that products are distributed to customers efficiently and effectively
* **Marketing-information management:** Gathering, accessing, synthesizing, evaluating, and disseminating information to aid in business decisions
* **Market planning:** Creating strategies to attract the customer to a business, including setting goals, selecting target markets, creating budgets, forecasting sales, and performing analyses
* **Pricing: D**etermining and adjusting prices to maximize return and meet customers’ perceptions of value
* **Product/Service management:** Obtaining, developing, maintaining, and improving a product or service mix in response to market opportunities
* **Promotion:** Communicating information about goods, services, images, and/or ideas to achieve a desired outcome
* **Selling:** Determining client needs and wants and responding through planned, personalized communication that influences purchase decisions and enhances future business opportunities

**Where does marketing take place?**

Marketing can take place wherever there are customers.

**What kinds of things are marketed?**

* Goods (Durable and nondurable)
* Services
* Organizations
* Places
* Ideas
* People

**What is the marketing concept?**

A philosophy of conducting business that is based on the belief that all business activities should be aimed toward satisfying consumer wants and needs while achieving company goals

**Elements of the marketing concept**

* **Customer orientation:** Do it their way.
* **Company commitment:** Do it better.
* **Company goals:** Do it with success in mind.

**What is the role of marketing in a private enterprise system?**

Marketing fits into every facet of our lives. It provides benefits that make our lives, promote using natural resources more wisely, and encourage international trade. Without marketing, we would be forced to be self-sufficient.

**What would happen if marketing didn’t exist?**

Without marketing, our nation would have difficulty linking producers with customers. Without marketing, our own routines would be different because marketing shapes even the little things we do.

**How does marketing work?**

Marketing is composed of seven interrelated activities that must work together to get goods and services from producers to customers. Together, the marketing functions attract target customers to the business.

**Marketing activities**

* **Channel management:** Identifying, selecting, monitoring, and evaluating sales channels; processes by which marketers ensure that products are distributed to customers efficiently and effectively
* **Marketing-information management:** Gathering, accessing, synthesizing, evaluating, and disseminating information to aid in business decisions
* **Market planning:** Creating strategies to attract the customer to a business
* **Pricing: D**etermining and adjusting prices to maximize return and meet customers’ perceptions of value
* **Product/Service management:** Obtaining, developing, maintaining, and improving a product or service mix in response to market opportunities
* **Promotion:** Communicating information about goods, services, images, and/or ideas to achieve a desired outcome
* **Selling:** Determining client needs and wants and responding through planned, personalized communication that influences purchase decisions and enhances future business opportunities

**Channel Management**

* Determines who will offer products and where they will be offered
* Develops relationships with channel members
* Assesses quality of vendor performance

**Marketing-Information Management**

* Provides data that can be used for business decision-making
* Provides data about effectiveness of marketing efforts
* Provides data about customer satisfaction, customer loyalty, needs, and wants

**Market Planning**

* Sets goals
* Selects target markets
* Creates budgets
* Forecasts sales
* Performs analyses

**Pricing**

* Establishes products’ prices
* Determines whether prices need to be adjusted
* Sets policies and objectives for prices

**Product/Service Management**

* Helps to determine which products a business will offer and in what quantities
* Aids in determining and developing a company’s/product’s image
* Provides direction for other marketing activities based on changes in a product’s life cycle

**Promotion**

* Reminds customers about products/businesses
* Informs customers about products/businesses
* Persuades customers about products/businesses

**Selling**

* Creates a following of loyal customers
* Completes the exchange transaction
* Provides services for customers

**Group Constitution**

**Members:** Carlie, Otis, Neff, Rennie, Joe, Vince

**Forward:** This contract is a binding legal document and governs the group until the assigned project deadline. If the group separates, or a member is fired, the basic contract laws remain intact for both parties. However, being fired may cause work responsibilities to shift.

**Article I: Absence Policy**

1. If a group member will be absent on a day in which work is due, they must tell another group member a day in advance and have all work that they are responsible for turned in. All group members must stick to the provided agenda to have the assignments completed on time. If there will be an unexpected absence, the group member is to complete the work from home and email another group member to let them know they are gone for the day.
2. Group members will contact one another if they are absent for any amount of period during the time allotted for working on the projects.

**Article II: Work Policy**

1. Any member that is mentally or physically disabled and can prove that they cannot complete the work assigned to them alone may acquire assistance from other group members to help complete it. This will only apply for work that is group work and not individual work, and work will only be finished by that group member, and the assisting group member will not write it.
2. Each group member will work to the best of their ability, making sure the completed work is up to standards, and that they complete it with punctuality.
3. If a group member commits plagiarism, they are solely responsible and incur the punishment on their own.

**Article III: Leadership**

1. At the beginning of the project, a leader will be voted upon democratically. If a group member is absent at the time of voting, they waive their right to participate in voting. The person who wins the most votes becomes the leader. If there is an unclear outcome (same number of votes for different people), the group will have no leader until one can be chosen by a revote.
2. By being elected leader, the person must perform the following duties:
3. Organize group meetings.
4. Create and enforce a group agenda to govern group progress.
5. Organize any out-of-school project efforts.
6. Provide communication between group members in order to help individuals work towards the project goal.
7. If they fail to perform these duties, or another person is also carrying them out, a revote may be taken to determine whether to obtain a new leader.

**Article IV: Work Ethics**

1. If a group member does not complete work they were assigned, the punishment for the infringement will be of detriment solely to the group member at fault. No negative grading shall be given to any other group members.

**Article V: Member Dismissal**

1. The following conducts will result in a group member being able to be dismissed:
2. Incomplete or missing group work
3. Plagiarism or any form of cheating
4. If group member decides to leave under his or her own will
5. Any group member leaving under their own will may submit all their own work, while the other group members may not. Any group member fired for breaking any of the conducts under Article V-a (i-iii) will have their work taken from their possession to be used at the discretion of the original group, but not for the individual being fired. In addition, any fired member may not use any work completed by other group members, subject to punishment under Article 2-c.
6. If a group member leaves under the stipulation of Article V-a (iv), they retain all the work they have already provided for the group. The original group cannot use this work or it is subject to punishment under Article 2-c.

**Article VI: Signature**

By signing this contract, the following group members abide to the articles above. If any member fails to abide by the articles of this contract, they may be fired from the group given at least a 50% vote in favor of firing the individual.

**Signatures:**

Source: Novel Approach Consulting Group

**This document serves two purposes in every project:**

* Project planning guide
* Project status report

**Instructions:**

* Each team works together to determine:
  + Project objective
  + Tasks to be completed for a successful fulfillment of the project objective
  + Resources needed to complete each task (if any)
  + Person(s) responsible for completing each task
  + Due date for each task
* The first four columns of the table below (task, responsible, resources, and due date) serve as the guiding document through the end of the project. Make one copy of the table per week the project lasts (for a five-week project, make five copies)
* At the end of each week, use one copy to fill in the last three columns of the table. This serves as a weekly status report for your teacher.

|  |  |
| --- | --- |
| **Members of my group:** | Hannah, Cole, Zoe, Bryce |
| **Project Name:** | Spanish Club Recruitment Brochure |
| **Project Objective:** | Design an informative brochure for 9-11 graders that will raise their interest in joining the Spanish Club and direct them to get more information from Mrs. Gonzalez. Design must be ready-to-print in four weeks. |

| **Task** | **Who Is Responsible** | **Resources Needed** | **Due** | **Status** | **Date turned in** | **Check-off box** |
| --- | --- | --- | --- | --- | --- | --- |
| Initial meeting with Mrs. Gonzalez: gather information on club projects, requirements, etc., as well as brochure details (color? photos? etc.) | Team | n/a | Wk 1 |  |  |  |
| Attend Spanish Club meeting. Interview current club members & take digital pictures | Cole & Zoe | Digital camera | Wk 1 |  |  |  |
| Check printing costs at 3 print shops | Hannah | n/a | Wk 1 |  |  |  |
| Team meeting: update on week’s tasks | Team | n/a | Wk 1 |  |  |  |
| Questionnaire developed, distributed, and results compiled to determine why students would join Spanish Club | Team | n/a | Wk 2 |  |  |  |
| Create pencil sketch of brochure | Bryce | n/a | Wk 2 |  |  |  |
| Team comments on pencil sketch and changes made as needed | Team | n/a | Wk 2 |  |  |  |
| Team meeting: update on week’s tasks | Team | n/a | Wk 2 |  |  |  |
| Pencil sketch to Mrs. Gonzalez for comments | Bryce | n/a | Wk 3 |  |  |  |
| Pencil sketch changes made and resubmitted to Mrs. Gonzalez | Bryce | n/a | Wk 3 |  |  |  |
| Quotes obtained from Spanish Club members as needed | Zoe | n/a | Wk 3 |  |  |  |
| First draft of brochure completed in Microsoft Publisher | Hannah & Cole | Microsoft Publisher | Wk 3 |  |  |  |
| Team meeting: update on week’s tasks | Team | n/a | Wk 3 |  |  |  |
| Comments from team and changes made as needed | Team | n/a | Wk 4 |  |  |  |
| Submitted to Mrs. Gonzalez mid-week to allow time for changes if needed | Team | n/a | Wk 4 |  |  |  |
| Final to Mrs. Gonzalez | Team | n/a | Wk 4 |  |  |  |

**Team Signatures:**

Hannah **Cole**

Bryce ZOË

**This document serves two purposes in every project:**

* Project planning guide
* Project status report

**Instructions:**

* Each team works together to determine:
  + Project objective
  + Tasks to be completed for a successful fulfillment of the project objective
  + Resources needed to complete each task (if any)
  + Person(s) responsible for completing each task
  + Due date for each task
* The first four columns of the table below (task, responsible, resources, and due date) serve as the guiding document through the end of the project. Make one copy of the table per week the project lasts (for a five-week project, make five copies)
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|  |  |
| --- | --- |
| **Members of my group:** |  |
| **Project Name:** |  |
| **Project Objective:** |  |

| **Task** | **Who Is Responsible** | **Resources Needed** | **Due** | **Status** | **Date turned in** | **Check-off box** |
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**Team Signatures:**

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| **Criteria** | **Professional** | **Experienced** | **Developing** | **Novice** |
| **Content**  The information communicated by the project plan  40 points | ❑ All components of the project plan were complete and in writing. | ❑ All components of the project plan were addressed in writing, but some aspects needed further description. | ❑ Most of the project plan’s components were in writing; the missing elements diminished the plan’s effectiveness. | ❑ Many of the project plan’s components lacked sufficient detail to take action or were missing altogether. |
| ❑ The project plan’s objective gave a clear, comprehensive description of the project’s scope and schedule. | ❑ The project plan’s objective gave a clear description for the most part, but one of the items needed some clarification. | ❑ The project plan’s objective descriptions were difficult to follow/understand. | ❑ The project plan’s objectives were neither attainable nor measurable. |
| ❑ Needed resources were clearly identified. | ❑ Most resources were clearly identified. | ❑ Some critically needed resources were not identified. | ❑ Needed resources were too incomplete or were missing altogether. |
| ❑ The project plan contained specific activities/tasks. | ❑ For the most part, the project plan contained specific activities/tasks. | ❑ The project plan did not specifically contain all activities/tasks. | ❑ The project plan contained very few activities/tasks. |
| ❑ The project plan clearly specified persons responsible for each task. | ❑ For the most part, the project plan specified persons responsible for each task. | ❑ The project plan did not clearly specify persons responsible for each task. | ❑ The project plan did not specify persons responsible for each task. |
| ❑ The project plan contained specific deadlines. | ❑ For the most part, the project plan contained specific deadlines. | ❑ The project plan did not contain specific deadlines. | ❑ The project plan did not contain deadlines. |

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| **Criteria** | **Professional** | **Experienced** | **Developing** | **Novice** |
| **Content** (cont’d) | ❑ The project plan included easy-to-follow table or sequence-of-events flow chart. | ❑ The project plan included table or sequence-of-events flow chart, but some sections were not easy to follow. | ❑ The project plan included table or sequence-of-events flow chart, but it was too broad; important, smaller steps were omitted. | ❑ The project plan omitted table or flow chart; did not list sequence-of-events. |
| **Appropriateness**  Suitability; compatibility of one part of the plan with all other parts  35 points | ❑ The project plan’s objective was clear, attainable, and measurable. | ❑ The project plan’s objective was clear and measurable, but difficult to attain. | ❑ The project plan’s objective was stated in measurable terms. | ❑ The project plan’s objective was unclear and not stated in measurable terms. |
| ❑ All activities were logically sequenced and supported the project plan’s objective. | ❑ Most activities were logically sequenced and supported the project plan’s objective. | ❑ Several activities had gaps in sequence, were not in logical order, and/or did not support the project plan’s objective. | ❑ The sequence of activities made no sense and did not support the project plan’s objective. |
| ❑ Individual activity deadlines were realistic for achieving goals. | ❑ Most individual activity deadlines were realistic for achieving goals. | ❑ Several individual activity deadlines were not realistic for achieving goals. | ❑ Most individual activity deadlines were totally unreasonable. |

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| **Criteria** | **Professional** | **Experienced** | **Developing** | **Novice** |
| **Organization**  How the information is put together; the flow of the project plan  10 points | ❑ Main points were easy to follow and logical with points building on each other. | ❑ Main points were generally easy to follow and logical. | ❑ Main points were generally logical but difficult to follow. | ❑ Main points were so difficult to follow that their logic could not be determined, or they were illogical. |
| **Communication Skills**  Ability to express oneself so as to be understood by others  15 points | ❑ Ideas were expressed clearly in language that was easy to understand. | ❑ Ideas were expressed clearly with only a few words being difficult to understand. | ❑ Both ideas and words required much effort to understand. | ❑ Ideas were vague and elusive, and language was difficult to understand. |
| ❑ The project plan was neat, grammatically correct, and error-free. | ❑ The project plan was neat but contained minor errors that did not detract from the total plan. | ❑ The project plan contained some spelling and gram-matical errors that were distracting. | ❑ The project plan was messy, with many errors in spelling and grammar. |

| **Criteria** | **Professional** | **Experienced** | **Developing** | **Novice** |
| --- | --- | --- | --- | --- |
| **Content**  The information shared in the marketing handbook  70 points | ❑ Handbook included an accurate, comprehensive description of channel management. | ❑ Handbook included a comprehensive description of channel management, but some details were inaccurate. | ❑ The description of channel management in the handbook lacked significant detail and/or was grossly inaccurate. | ❑ Handbook did not include a description of channel management. |
| ❑ Handbook included an accurate, comprehensive description of marketing-information management. | ❑ Handbook included a comprehensive description of marketing-information management, but some details were inaccurate. | ❑ The description of marketing-information management in the handbook lacked significant detail and/or was grossly inaccurate. | ❑ Handbook did not include a description of marketing-information management. |
| ❑ Handbook included an accurate, comprehensive description of pricing. | ❑ Handbook included a comprehensive description of pricing, but some details were inaccurate. | ❑ The description of pricing in the handbook lacked significant detail and/or was grossly inaccurate. | ❑ Handbook did not include a description of pricing. |
| ❑ Handbook included an accurate, comprehensive description of product/service management. | ❑ Handbook included a comprehensive description of product/service management, but some details were inaccurate. | ❑ The description of product/service management in the handbook lacked significant detail and/or was grossly inaccurate. | ❑ Handbook did not include a description of product/service management. |

| **Criteria** | **Professional** | **Experienced** | **Developing** | **Novice** |
| --- | --- | --- | --- | --- |
| **Content** (cont’d)  The information shared in the marketing handbook  70 points | ❑ Handbook included an accurate, comprehensive description of promotion. | ❑ Handbook included a comprehensive description of promotion, but some details were inaccurate. | ❑ The description of promotion in the handbook lacked significant detail and/or was grossly inaccurate. | ❑ Handbook did not include a description of promotion. |
| ❑ Handbook included an accurate, comprehensive description of selling. | ❑ Handbook included a comprehensive description of selling, but some details were inaccurate. | ❑ The description of selling in the handbook lacked significant detail and/or was grossly inaccurate. | ❑ Handbook did not include a description of selling. |
| ❑ Handbook included appropriate, high-quality pictures of all six of the above marketing functions. | ❑ Handbook included appropriate, high-quality pictures of four or five of the above marketing functions. | ❑ Handbook included appropriate, high-quality pictures of one to three of the above marketing functions. | ❑ Handbook did not include appropriate, high-quality pictures of any marketing functions. |
| ❑ Legal issues were current, fully supported by research, and addressed all marketing functions. | ❑ Legal issues were current and addressed all marketing functions but lacked supporting documentation in a few cases. | ❑ Legal issues were current and addressed all marketing functions, but not supporting documentation was provided. | ❑ Legal issues were not provided for all marketing functions, and they lacked supporting documentation.. |

| **Criteria** | **Professional** | **Experienced** | **Developing** | **Novice** |
| --- | --- | --- | --- | --- |
| **Content** (cont’d)  The information shared in the marketing handbook  70 points | ❑ Ethical issues were current, fully supported by research, and addressed all marketing functions. | ❑ Ethical issues were current and addressed all marketing functions but lacked supporting documentation in a few cases. | ❑ Ethical issues were current and addressed all marketing functions, but no supporting documentation was provided. | ❑ Ethical issues were not provided for all marketing functions, and they lacked supporting documentation. |
| ❑ Technology identified for all marketing functions and fully supported by research. | ❑ Technology was identified for all marketing functions but lacked supporting documentation in a few cases. | ❑ Technology was identified for all marketing functions, but no supporting documentation was provided. | ❑ Technology was not identified for all marketing functions, and no supporting documentation was provided. |
| **Communication**  Ability to express oneself so as to be understood by others  15 points | ❑ Ideas were expressed clearly in the audience’s own language and were easy to understand. | ❑ Ideas were expressed clearly with only a few words being difficult to understand. | ❑ Both ideas and words required effort to understand. | ❑ Ideas were vague and elusive, and language was difficult to understand. |
| ❑ Report was neat, grammatically correct, and error-free. | ❑ Report was neat but contained minor errors that did not detract from total report. | ❑ Report contained slight spelling or grammatical errors that were distracting. | ❑ Report was messy, with many errors in spelling and grammar. |

| **Criteria** | **Professional** | **Experienced** | **Developing** | **Novice** |
| --- | --- | --- | --- | --- |
| **Organization**  How the information is put together; the flow of the marketing handbook as public service announcements  15 points | ❑ Sections were clearly identified and titled, and material was easily located. | ❑ Sections were clearly identified and title; only a few items were difficult to locate. | ❑ Some sections were not identified or titled, and several items were difficult to locate. | ❑ Sections ran together or were not identified or titled; and material was difficult to locate. |
| ❑ Number of words in the public service announcement was appropriately targeted for the designated timeframe (i.e., 20-25 words for 10 seconds, 30-35 words for 15 seconds, 40-50 words for 20 seconds, or 60-75 words for 30 seconds). | ❑ Number of words in the public service announcement were slightly above/below the number designated for the timeframe but could fit the parameters without damaging the message’s clarity. | ❑ Number of words in the public service announcement was slightly above/below the number designated for the timeframe, and the message’s clarity was slightly hindered. | ❑ Number of words in the public service announcement was greatly over/under the designated timeframe, and the message’s clarity was damaged. |

**MK:001 Explain marketing and its importance in a global economy**

**LAP**: LAP-MK-004 Have It Your Way (Nature of Marketing)  
© **LAP:** 2016

**Curriculum Planning Level:** CS

**Objectives:**

a. Define the following terms: marketing and marketing concept.  
b. Identify marketing activities.  
c. Categorize items that are marketed.  
d. Explain where marketing occurs.  
e. Explain the elements of the marketing concept.  
f. Explain the role of marketing in a private enterprise system.  
g. Describe ways in which consumers and businesses would be affected if marketing did not exist.  
h. Explain how marketing benefits our society.

**Activity:**

Review and present the Marketing and Its Importance Briefing (starting on page 4-22) to students in a lecture or discussion format. Instruct each student to identify ways in which local businesses apply the marketing concept domestically and abroad and determine how this affects the businesses’ customers. Then, s/he should write an article depicting his/her findings and compete with classmates to have the best paper selected for publication in the school/local paper.

**Other Activity Options:**

Instruct students to keep a journal for one day to identify how marketing affects their lives. Students should start the journal the moment that they wake up. When finished, have students underline areas that are impacted by global marketing. Discuss the students’ journal entries as a class.

Have each student locate an article about global marketing in the newspaper or on the Internet, summarize the article, and present it to the class.

Instruct students to develop a list of ways that a school-based enterprise or a local business could apply the marketing concept. Each student should write a one-page report of his/her recommendations and provide a rationale for those recommendations.

**Ethics Case for Students:**Ricardo works in marketing for a soft drink company. His new outdoor advertising plan involves placing billboards geared toward children near schools and playgrounds. Ricardo’s goal is to increase consumption of the soft drink by children ages 5-11. He knows that the drink is not necessarily healthy for young children, but he knows that they can increase sales if they target this market segment. Is Ricardo’s marketing strategy ethical? Why or why not? *(Ethical Principles Involved: Integrity, Accountability, Transparency, Rule of Law)*

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**Author:** Grewal, D., & Levy, M.  
**References:** (pp. 4-7, 12-14, 20-26)  
**Publisher:** New York: National Council on Economic Education  
**Copyright:**2008

**Title:** Basic marketing: A marketing strategy planning approach (16th ed.)  
**Author:** Perreault, W.D., Cannon, J.P., & McCarthy, E.J.  
**References:** [pp. 4-27]  
**Publisher:** Boston: Irwin/McGraw-Hill  
**Copyright:**2008

**Title:** Business in action (4th ed.)  
**Author:** Bovée, C.L., & Thill, J.V.  
**References:** [pp. 217-218, 270]  
**Publisher:** Upper Saddle River, NJ: Pearson Prentice Hall  
**Copyright:**2008

**Title:** Marketing (3rd ed.)  
**Author:** Burrow, J.L.  
**References:** [pp. 6-12, 18-29]  
**Publisher:** Mason, OH: South-Western Cengage Learning  
**Copyright:**2012

**Title:** Contemporary business (12th ed.)  
**Author:** Kurtz, D.L.  
**References:** [pp. 382-384]  
**Publisher:** Mason, OH: South-Western Cengage Learning  
**Copyright:**2009

**Title:** Intro to business (7th ed.)  
**Author:** Dlabay, L.R., Burrow, J.L., & Kleindl, B.  
**References:** [pp. 236-238]  
**Publisher:** Mason, OH: South-Western Cengage Learning  
**Copyright:**2009

**Title:** Business (9th ed.)  
**Author:** Pride, W. M., Hughes, R. J., & Kapoor, J. R.  
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**Title:** Marketing dynamics (3rd ed.)  
**Author:** Clark, B., Basteri, C.G., Gassen, C., & Walker, M.  
**References:** [pp. 6-8, 24-26, 32-33]  
**Publisher:** Tinley Park, IL: Goodheart-Willcox.  
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**Title:** Contemporary marketing: 2013 edition  
**Author:** Kurtz, D.  
**References:** (pp. 5-11)  
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**Copyright:**2013

**Title:** Marketing essentials 2012  
**Author:** Farese, L.S., Kimbrell, G., & Woloszyk, C.A.  
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**Author:** Aim High  
**URL:** <https://www.youtube.com/watch?v=deSgjT-L2W8>  
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**Author:** Albertini, J.  
**URL:** <https://www.youtube.com/watch?v=X-iBXEqbz4Y>  
**Copyright:** 2013, May 28  
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**Author:** American Marketing Association  
**URL:** <https://www.ama.org/AboutAMA/Pages/Definition-of-Marketing.aspx>  
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**Accessed on:** 2017-06-01

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**Author:** Bell, A.  
**URL:** <http://www.articles3k.com/article/296/59001/Are_You_A_Marketing_Octopus_or_A_Marketing_Worm/>  
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**Title:** Business success depends upon successful marketing.  
**Author:** Business Owner's Toolkit.  
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**Author:** Daniloff, A.  
**URL:** <http://ezinearticles.com/?Marketing-And-Its-Role-In-Society&id=2511207>  
**Copyright:** 2009, June 22  
**Accessed on:** 2017-06-01

**Title:** 4 P's of marketing. [Video].  
**Author:** Foley, K.  
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**Author:** Friesner, T.  
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**Title:** What is marketed for consumers (10 types of entities)?  
**Author:** Ghose, S.  
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**URL:** <http://smallbusiness.chron.com/marketing-activities-list-15690.html>  
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**Author:** Hartman, D.  
**URL:** <http://smallbusiness.chron.com/value-marketing-society-21508.html>  
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**URL:** <http://www.knowthis.com/what-is-marketing/role-of-marketing>  
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**Author:** Lake, L.  
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**Author:** NetMBA  
**URL:** <http://www.netmba.com/marketing/concept/>  
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**Author:** NetMBA  
**URL:** <http://www.netmba.com/marketing/mix/>  
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**MK:002 Describe marketing functions and related activities**

**LAP**: LAP-MK-001 Work the Big Seven (Marketing Functions)  
© **LAP:** 2017

**Curriculum Planning Level:** CS

**Objectives:**

a. Define the following terms: channel management, marketing-information management, pricing, product/service management, promotion, and selling.  
b. Explain the purposes of each marketing function.  
c. Describe the importance of each marketing function to marketing.  
d. Explain the interrelationships among marketing functions.

**Activity:**

Review and present the Marketing Functions Briefing (starting on page 4-24) to students in a lecture or discussion format. Then instruct students to make a list of all of the goods and services that they have used in the past 24 hours and respond to the following questions:

* How did you come to use these goods/services?
* How did you find out about these goods/services?
* Where did you obtain these goods/services?
* How much did these goods/services cost?

**Reference Books**

**Title:** Marketing (3rd ed.)  
**Author:** Burrow, J.L.  
**References:** [pp. 6-12, 19]  
**Publisher:** Mason, OH: South-Western Cengage Learning  
**Copyright:**2012

**Title:** Intro to business (7th ed.)  
**Author:** Dlabay, L.R., Burrow, J.L., & Kleindl, B.  
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**Publisher:** Mason, OH: South-Western Cengage Learning  
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**Title:** Marketing dynamics (3rd ed.)  
**Author:** Clark, B., Basteri, C.G., Gassen, C., & Walker, M.  
**References:** [pp. 26-27, 33-36]  
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**Author:** KnowThis.com  
**URL:** <http://www.knowthis.com/principles-of-marketing-tutorials/managing-products/>   
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**Title:** Pricing decisions.  
**Author:** KnowThis.com  
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**URL:** <https://blog.udemy.com/marketing-functions/>  
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**IM:001 Explain the nature and scope of the marketing-information management function**

**LAP**: LAP-IM-002 Get the Facts Straight (Marketing-Information Management)  
© **LAP:** 2016

**Curriculum Planning Level:** SP

**Objectives:**

a. Define the following terms: marketing information, marketing-information management system, and marketing research.  
b. Describe the need for marketing information.  
c. Classify types of marketing information as primary or secondary.  
d. Describe the types of information marketers should obtain.  
e. Categorize internal sources of marketing information.  
f. Discuss external sources of marketing information.  
g. Explain why marketers should collect information.  
h. Describe the characteristics of useful marketing information.  
i. Describe reasons that marketers need to gather accurate information.  
j. Explain the functions of a marketing-information management system.  
k. Contrast marketing research with a marketing-information system.  
l. Describe the use of a marketing-information system.  
m. Explain the benefits of a marketing-information management system.  
n. Discuss the requirements of a marketing-information management system.  
o. Explain the role of marketing-information management in marketing.  
p. Describe limitations of marketing-information management systems.

**Activity:**

Invite a guest speaker to discuss her/his company’s marketing-information management system, its components, and how the components work together. Each student should write a synopsis of the presentation.

**Reference Books**

**Title:** Basic marketing: A marketing strategy planning approach (16th ed.)  
**Author:** Perreault, W.D., Cannon, J.P., & McCarthy, E.J.  
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**Copyright:**2008

**Title:** Marketing (3rd ed.)  
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**Copyright:**2012

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**Author:** Dlabay, L.R., Burrow, J.L., & Kleindl, B.  
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**Author:** Clark, B., Basteri, C.G., Gassen, C., & Walker, M.  
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**Publisher:** Tinley Park, IL: Goodheart-Willcox.  
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**Title:** Contemporary marketing: 2013 edition  
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**Author:** McNamera, C.  
**URL:** <http://managementhelp.org/marketing/market-research.htm>   
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**PM:001 Explain the nature and scope of the product/service management function**

**LAP**: LAP-PM-017 Rapping Up Products (Nature of Product/Service Management)  
© **LAP:** 2015

**Curriculum Planning Level:** SP

**Objectives:**

a. Define the term product/service management.  
b. Explain who is responsible for managing products/services.  
c. Describe the benefits of product/service managing.  
d. Describe the phases of product/service managing.  
e. Describe factors affecting product/service managing.  
f. Explain the role product/service management plays in marketing.

**Activity:**

Divide the class into groups of three or four. Each team should identify a consumer product that it wants to put on the market in two years. The team should determine what the product is, why it is needed, who could use it, and what steps the team will take in product planning. Team members should propose product-related services that need to be considered for the product and other products the company might add to this product’s line. Each team should appoint a group representative to present the team’s recommendations to the class.

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**Publisher:** Tinley Park, IL: Goodheart-Willcox.  
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**Author:** Mahner, M.  
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**Author:** McGee, M. & Fritsky, L.  
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**Author:** Product Management School  
**URL:** <http://productmanagementschool.com/w1/Activities_Within_Product_Management>   
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**Author:** Ying, A.  
**URL:** <http://www.inc.com/alan-ying/why-product-management-is-everything.html>   
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**CM:001 Explain the nature and scope of channel management**

**LAP**: LAP-CM-002 Chart Your Channels (Channel Management)  
© **LAP:** 2015

**Curriculum Planning Level:** CS

**Objectives:**

a. Define the following terms: channel, channel intensity, channel length, distribution patterns, exclusive distribution, selective distribution, and intensive distribution.  
b. Explain how channel members add value.  
c. Discuss channel functions (e.g., information, promotion, contact, matching, negotiation, financing, and risk taking).  
d. Explain key channel tasks (e.g., marketing, packaging, financing, storage, delivery, merchandising, and personal selling).  
e. Describe when a channel will be most effective.  
f. Distinguish between horizontal and vertical conflict.  
g. Describe channel management decisions (i.e., selecting channel members, managing and motivating channel members, and evaluating channel members).  
h. Explain channel design decisions (i.e., analyzing customer needs, setting channel objectives, identifying major alternatives—types of intermediaries, number of intermediaries, responsibilities of intermediaries).  
i. Discuss the relationship between the product being distributed and the pattern of distribution it uses.

**Activity:**

Students should identify examples of channel-management activities that take place at local businesses and discuss similarities and differences across types of businesses and industries.

**Ethics Case for Students:**Hassan works for a food manufacturer, and his job is to make sure that grocery stores are doing their part to sell his company’s products. When he visits one store, he notices that his products are not in a prominent position – they are on the bottom shelf, and they are hidden behind other products. When Hassan confronts the store manager, she tells him that his competitors are selling their products to the store at a lower price. Because of the discount, the competitors are getting better shelf placement. The manager implies that if Hassan is willing to offer a discount, his products might be displayed more prominently. What should Hassan do? Is offering a discount an ethical way to motivate the retailer? Or is this an unethical practice? *(Ethical Principles Involved: Fairness, Viability)*

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**Author:** Grewal, D., & Levy, M.  
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**Author:** Perreault, W.D., Cannon, J.P., & McCarthy, E.J.  
**References:** [pp. 290-309]  
**Publisher:** Boston: Irwin/McGraw-Hill  
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**Title:** Entrepreneurial small business (3rd ed.)  
**Author:** Katz, J. & Green, R.  
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**Copyright:**2011

**Title:** Marketing (3rd ed.)  
**Author:** Burrow, J.L.  
**References:** [pp. 9, 112, 369-373]  
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**Author:** Dlabay, L.R., Burrow, J.L., & Kleindl, B.  
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**Author:** Clark, B., Basteri, C.G., Gassen, C., & Walker, M.  
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**URL:** <http://www.mondaq.com/unitedstates/x/79136/marketing/Channel+Conflict+Management+How+To+Manage+Through+It+And+Win>  
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**Author:** LearnLoads  
**URL:** <https://www.youtube.com/watch?v=ALoo4vrKKUw>  
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**Author:** McCarthy, B.K.  
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**URL:** <http://smallbusiness.chron.com/examples-horizontal-conflict-32871.html>  
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**Author:** Time, F.  
**URL:** <http://smallbusiness.chron.com/direct-channel-distribution-42213.html>  
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**PI:001 Explain the nature and scope of the pricing function**

**LAP**: LAP-PI-002 The Price Is Right (Nature of Pricing)  
© **LAP:** 2015

**Curriculum Planning Level:** SP

**Objectives:**

a. Describe the characteristics of effective pricing.  
b. Explain what is being priced when prices are set for products.  
c. List factors that affect a product's price.  
d. Describe how pricing affects product decisions.  
e. Explain how pricing affects place (distribution) decisions.  
f. Describe how pricing affects promotion decisions.  
g. Explain pricing objectives.

**Activity:**

Students should prepare and deliver brief presentations about the goals of pricing. The presentations should be targeted to a group of elementary or middle-school students who are involved in a service-learning project.

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**Title:** Marketing  
**Author:** Grewal, D., & Levy, M.  
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**Copyright:**2008

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**Author:** Perreault, W.D., Cannon, J.P., & McCarthy, E.J.  
**References:** [pp. 456-510]  
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**Copyright:**2011

**Title:** Entrepreneurship: Theory, process, practice (8th ed.)  
**Author:** Kuratko, D.F.  
**References:** [pp. 302-305]  
**Publisher:** Mason, OH: Thomson/South-Western  
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**Title:** Marketing (3rd ed.)  
**Author:** Burrow, J.L.  
**References:** [pp. 6, 9, 96-97, 102-103, 180, 321-322, 378-379, 392-394, 524-525]  
**Publisher:** Mason, OH: South-Western Cengage Learning  
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**Author:** Greene, C.L.  
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**Publisher:** Mason, OH: South-Western Cengage Learning  
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**Author:** Bamford, C.E., & Bruton, G.D.  
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**Author:** KnowThis.com  
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**Author:** KnowThis.com  
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**PR:001 Explain the role of promotion as a marketing function**

**LAP**: LAP-PR-002 Razzle Dazzle (Nature of Promotion)  
© **LAP:** 2016

**Curriculum Planning Level:** CS

**Objectives:**

a. Define the term promotion.  
b. List users of promotion.  
c. Describe the benefits of using promotion.  
d. Describe the costs associated with the use of promotion.  
e. Describe types of promotional objectives.  
f. Discuss the relationship of promotion and marketing.

**Activity:**

Divide the class into three groups and assigned one of the following promotional objectives to each: to inform, to persuade, to remind. Each group should focus on its promotional objective, locating and/or identifying promotional messages targeted at accomplishing the group’s objective. Each group should identify at least four promotional messages for the objective and present its findings to the class.

**Ethics Case for Students:**Wanda works in marketing for a health food company. For the latest ad campaign, Wanda wants to focus on the benefits of eating healthy food, such as weight loss and improved immune system. When casting people to be in her ads, Wanda chooses extremely thin, fit actors because she believes they will persuade people to buy the company’s products. If viewers see these people eating the food in the commercial, they will think that they can achieve the same look from buying and eating her company’s products. Is this an ethical promotional technique? Or is it deceptive? *(Ethical Principles Involved: Integrity, Transparency, Viability)*

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**Author:** Perreault, W.D., Cannon, J.P., & McCarthy, E.J.  
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**Publisher:** Boston: Irwin/McGraw-Hill  
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**Author:** Kotler, P., & Armstrong, G.  
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**Author:** Katz, J. & Green, R.  
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**Title:** Marketing (3rd ed.)  
**Author:** Burrow, J.L.  
**References:** [pp. 6, 9, 424-427, 433-439]  
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**Author:** Bamford, C.E., & Bruton, G.D.  
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**URL:** <http://www.knowthis.com/promotion-decisions/objectives-of-marketing-promotions>  
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**Author:** Alanis Business Academy  
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**SE:017 Explain the nature and scope of the selling function**

**LAP**: LAP-SE-117 Sell Away (Nature of Selling)  
© **LAP:** 2014

**Curriculum Planning Level:** CS

**Objectives:**

a. Define the term selling.  
b. Identify individuals, groups, or agencies that sell.  
c. Explain reasons that customers buy goods and services.  
d. Identify types of items that are sold.  
e. Explain where selling occurs.  
f. Describe how products are sold.  
g. Describe the role of selling in a market economy.  
h. Explain personal characteristics of salespeople that are essential to selling.

**Activity:**

Each student should write a brief paper about how selling affects economic decision making in society and submit the paper for review.

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**Author:** Perreault, W.D., Cannon, J.P., & McCarthy, E.J.  
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**Author:** Ingram, T.N., LaForge, R.W., Avila, R.A., Schwepker, C.H., & Williams, M.R.  
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**Title:** Marketing (3rd ed.)  
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**MK:022 Explain legal and ethical considerations in marketing**

**Curriculum Planning Level:** SP

**Objectives:**

a. Explain legal considerations in channel management (e.g., exclusive dealing, tying agreements, full-line forcing, closed territories, etc.).

b. Describe ethical considerations in channel management (e.g., gray market, slotting allowances, exploitation, etc.).

c. Describe legal considerations in marketing-information management (e.g., privacy issues, SUGGING, FRUGGING, callbacks, automatic dialers, etc.).

d. Explain the role of ethics in marketing-information management (e.g., preserving the credibility, objectivity, integrity of information, etc.).

e. Explain legal considerations for pricing (e.g., bait-and-switch advertising, deceptive pricing, dumping, loss-leader pricing, price discrimination, etc.).

f. Describe ethical considerations in pricing (e.g., price fixing, predatory pricing, etc.).

g. Identify consumer protection provisions of appropriate agencies (e.g., consumer product safety, etc.).

h. Explain ethical considerations in product/service management (e.g., product packaging, planned obsolescence, product labeling, etc.).

i. Describe legal considerations in promotion (e.g., truthfulness, misleading statements, unwanted promotions, promoting to children, etc.).

j. Describe ethical considerations in promotion (e.g., fear-based advertising, sexism, stereotyping, sales promotions, stealth marketing, etc.).

k. Describe legal considerations in selling (e.g., unfair or deceptive sales practices, etc.).

l. Explain business ethics in selling (dealing with the company, coworkers, customers/clients, competition, salespeople, etc.).

m. Describe consequences of illegal marketing activities.

**Activity:**

Instruct students to talk with a business partner about legal and ethical considerations that s/he has encountered in marketing. Students should write a summary of their findings and share them with the class. As a class, draw conclusions about the nature of law and ethics in marketing activities and the frequency with which illegal and/or unethical practices occur.

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**Author:** Williams, K.  
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**MK:023 Describe the use of technology in the marketing functions**

**Curriculum Planning Level:** SP

**Objectives:**

a. Identify ways in which the use of technology impacts marketing functions.

b. Describe specific technology applications used in the marketing functions.

c. Describe benefits of the use of technology in the marketing functions.

d. Explain barriers to the use of technology in the marketing functions.

**Activity:**

Instruct students to talk with a business partner about legal and ethical considerations that s/he has encountered in marketing. Students should write a summary of their findings and share them with the class. As a class, draw conclusions about the nature of law and ethics in marketing activities and the frequency with which illegal and/or unethical practices occur.

In groups, students should visit a local business or email a business partner to discuss how the use of technology has impacted the marketing functions at that business. Each group should determine the types of technology the business uses and how their use has benefited the business. When finished, each group should report its findings to the class

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**Author:** Farese, L.S., Kimbrell, G., & Woloszyk, C.A.  
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**Title:** Professional selling: A trust-based approach (4th ed.)  
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**Title:** How to conduct market research online **Author:** Ray, L. **URL:**<http://www.ehow.com/how_16595_conduct-market-research.html> **Copyright:** n.d. **Accessed on:** 2017-06-01

**Performance Indicators:**

* Describe the uses of grades and standards in marketing  (CS) (PM:019, LAP-PM-008)   
  (pp. 4-97—4-99)
* Explain warranties and guarantees (PM:020, LAP-PM-004) (CS) (pp. 4-100—4-102)
* Describe the impact of product life cycles on marketing decisions (PM:024, LAP-PM-018) (SP)   
  (pp. 4-103—4-104)
* Explain factors affecting pricing decisions (PI:002, LAP-PI-003) (SP) (pp. 4-105—4-106)
* Explain the nature of channels of distribution (CM:003, LAP-CM-003) (CS) (pp. 4-107—4-108)
* Explain the concept of product mix (PM:003, LAP-PM-003) (SP) (pp. 4-109—4-111)
* Describe factors used by marketers to position products/services (PM:042, LAP-PM-019) (SP)   
  (pp. 4-112—4-114)
* Explain the nature of product/service branding (PM:021, LAP-PM-006) (SP) (pp. 4-115—4-116)
* Explain the nature of corporate branding (PM:206, LAP-PM-020) (SP) (pp. 4-117—4-118)

**Project Description:**

This project introduces students to a number of marketing concepts, such as channels of distribution, pricing, and product/service management, in the context of the cellular phone industry. Each team pulls a slip of paper from a “hat.” That slip of paper will contain the name of a cell phone company in the local area. Each team should have a different cell phone company than other teams in the class. Each team conducts primary and secondary research to learn about the company, including the company’s product offerings, channels of distribution, positioning strategies, and branding tactics.

After conducting the research, each team develops a written report which contains detailed information about the assigned cell phone company. After all of the team reports are completed, the class works together to develop a cell phone comparison chart for distribution to local parents and students. Finally, students work in teams and as a whole class to determine a product mix, positioning, and channel management ideas for their non-profit business.

**Driving Question:**

How do cell phone companies successfully manage, price, and position their products?

**Timeframe:** 3½ weeks

**Entry Event:**

Quiz students about their tastes in cell phones. What style do different students prefer? What color cell phones do the students have? What are some of the ringtones that they use? Go to the following websites to find out what students’ cellphones and other digital devices say about their personalities:

* Quiz: What Does Your Phone Say About You?:  
  <https://discover.rbcroyalbank.com/quiz-what-does-your-phone-say-about-you/>
* What Does Your Smartphone Say About You? Find Out Now!: <https://www.phone.instantcheckmate.com/dialed-in/what-smartphone-says-about-you/>
* Quiz: What Does Your Phone Case Say About You?:  
  <http://tigerbeat.com/2016/10/cameron-dallas-phone-case-style-personality-quiz/>
* What Your Ringtone Says About You: <http://channels.isp.netscape.com/whatsnew/package.jsp?name=fte/ringtone/ringtone&floc=wn-nx>

Have fun discussing what students say about cell phones. Ask the driving question.

**Briefings:**

To augment the project, briefings should be provided during the week specified.

|  |  |
| --- | --- |
| **Week** | **Topic** |
| 6 | Impact of Product Life Cycles Briefing (pp. 4-76—4-77) |
| 7 | Factors Affecting Pricing Decisions Briefing (pp. 4-78—4-79) |
| 8 | Positioning Briefing (pp. 4-80—4-82) |

**Step-by-Step Guide:**

|  |  |  |  |
| --- | --- | --- | --- |
| **Checkpoint** | **Week** | **Details** | **Assessment** |
| **Group Contract** | 6 | Each team develops a contract for how the team will operate, including how to handle conflict and consequences for team members that don’t participate. A sample group contract is provided on pages 4-84— 4-85. | Complete/ Incomplete |
| **Project Plan** | 6 | Team develops a written project plan to be used as a guide for completing tasks within the project. A sample project plan is provided on pages 4-86—89, and a blank project plan form is provided on pages 4-90—4-91. | Developing a Project Plan Rubric (pp. 4-92—4-94) |
| **Quiz 2A** | 6 | At the end of week 6, students take a brief quiz covering the following performance indicators:   * Describe the uses of grades and standards in marketing (PM:019, LAP-PM-008) (CS) * Explain warranties and guarantees (PM:020,  LAP-PM-004) (CS) * Describe the impact of product life cycles on marketing decisions (PM:024, LAP-PM-018) (SP) | To create this quiz, use multiple-choice items provided on this course guide direct download link. |
| **Group Written Report** | 7 & 8 | Each team conducts primary and secondary research to develop a written report about the team’s assigned cell phone company. The written report should contain detailed information about the cell phone company, its offerings, and its product management strategies. See  p. 4-83 for questions that each team should answer in its report. | Written Report Rubric (pp. 4-95—4-96) |
| **Quiz 2B** | 7 | At the end of week 7, students take a brief quiz covering the following performance indicators:   * Explain factors affecting pricing decisions (PI:002, LAP-PI-003) (SP) * Explain the nature of channels of distribution (CM:003, LAP-CM-003) (CS) * Explain the concept of product mix (PM:003,  LAP-PM-003) (SP) | To create this quiz, use multiple-choice items provided on this course guide direct download link. |

|  |  |  |  |
| --- | --- | --- | --- |
| **Checkpoint** | **Week** | **Details** | **Assessment** |
| **Cell Phone Comparison Chart** | 8 & 9 | After each team has completed and turned in its written report, the class develops a detailed chart which compares the teams’ cell phone companies. (The students should determine as a class what criteria should be used on the chart for comparison of the cell phone companies.) After the cell phone comparison chart is complete, distribute it to local parents and students so that they can comparison-shop among the various cellular phone companies. | Complete/ Incomplete |
| **Objective Exam** | 9 | During week 9, students take a multiple-choice objective exam covering performance indicators from quizzes 2A and 2B, along with the following additional performance indicators:   * Describe factors that marketers use to position products/services (PM:042, LAP-PM-019) (SP) * Explain the nature of product/service branding (PM:021, LAP-PM-006) (SP) * Explain the nature of corporate branding (PM:206, LAP-PM-020) (SP) | To create this exam, use multiple-choice items provided on this course guide direct download link. |

**Teacher Tips:**

* Prior to starting this project, instructors may find it useful to conduct a bit of research to identify what cell phone companies offer service in the local area. Select these cell phone companies for team research.
* Encourage teams to visit local cell phone stores/kiosks to conduct primary research about their assigned cell phone companies.
* If possible, post teams’ reports and the class’s cell phone comparison chart on the Internet. That way more people can benefit from the students’ research into the different cell phone companies and their products.
* Keep in mind that due to time constraints, students need to complete aspects of the project at home/outside of class.

|  |  |
| --- | --- |
| Weekly Planner | |
| **Monday** |  |
| **Tuesday** |  |
| **Wednesday** |  |
| **Thursday** |  |
| **Friday** |  |

|  |  |
| --- | --- |
| Weekly Planner | |
| **Monday** |  |
| **Tuesday** |  |
| **Wednesday** |  |
| **Thursday** |  |
| **Friday** |  |

|  |  |
| --- | --- |
| Weekly Planner | |
| **Monday** |  |
| **Tuesday** |  |
| **Wednesday** |  |
| **Thursday** |  |
| **Friday** |  |

|  |  |
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| Weekly Planner | |
| **Monday** |  |
| **Tuesday** |  |
| **Wednesday** |  |
| **Thursday** |  |
| **Friday** |  |

**Definition of product life cycle**

The marketing theory that a product moves through different stages of life from its birth to its death.

**Stages of the product life cycle**

1. **Introduction:** A product is introduced to the market, and usually, sales growth is slow. Early adopters, or innovators, are the primary buyers of the product or brand.
2. **Growth:** The product is growing up, and sales are quickly increasing. Copycat products are hitting the market, so competition is building. Early adopters continue to buy the product and are joined by followers.
3. **Maturity:** The product can be compared to adulthood: Sales are steady. Competition is probably the fiercest. It’s become difficult to tell the differences among competing products. The supply of the product now exceeds demand.
4. **Decline:** This stage of the product’s life could be considered its golden years. Product sales decrease due to shifts in consumer preference or technological innovations. The only way to make money on the product is to sell large volumes since prices have been cut so much. Eventually, the product may need to be removed from the market.

**Impact of each stage on marketing decision-making**

**Pricing decisions:** What price will we charge?

1. **Introductory stage**—Prices are set high to recover investment in the product; there are few to no competitors.
2. **Growth stage**—Prices are lowered to attract customers and compete with copycat products.
3. **Maturity stage**—Prices are stabilized to maintain market share.
4. **Decline**—Prices are lowered to get rid of stock on hand.

**Promotion decisions:**

1. **Introductory stage**—The level of promotion is high with the intent being to “get the word out” about the product so that customers know about its existence and features. The business promotes the product to its channel members to get them to carry the product.
2. **Growth stage**—The level of promotion remains high or increases, but its focus shifts to persuading customers of its benefits over those of the competition.
3. **Maturity stage**—The level of promotion is steady with funds directed to advertising and sales promotion to remind customers about the product or brand.
4. **Decline**—The level of promotion is reduced and eventually trails off.

**Place decisions:** Where will the product be offered?

1. **Introductory stage**—Efforts are made to get good channel members to offer the product. The business may offer exclusive distribution rights.
2. **Growth stage**—The business increases the number of distribution outlets.
3. **Maturity stage**—The business works on building intensive distribution—getting the product in as many outlets as possible.
4. **Decline**—The business phases out the product in unprofitable distribution outlets, thereby becoming more selective with its distribution efforts. Selective distribution occurs when businesses deliberately seek to limit the locations at which the product is sold.

**Product decisions:** What assortment of products will be offered?

1. **Introductory stage**—The business offers a basic product.
2. **Growth stage**—The business increases its assortment of products and offers new features and models.
3. **Maturity stage**—The business modifies the product to appeal to new customers.
4. **Decline**—The business alters or gets rid of the product. Manufacturers drop the product from their offerings.

**How can a company extend a product’s life cycle?**

Product modifications are used to extend the life of the products. This entails changing product quality or packaging. Businesses also modify their markets by increasing the frequency with which present customers use the product, by finding new customers, or by creating new uses for the product.

**Definition of selling price**

The amount a seller charges for a good or service; usually thought of as the dollar figure shown on the price tag of products or quoted as the price of services

**Examples of selling prices**

* Dues for an organization’s membership
* Automobile insurance premium
* Toll for driving on certain roads
* College tuition
* Bus or taxi fare
* Fee for legal advice or medical attention
* Salaries of professional athletes

**Characteristics associate with selling prices**

* They can’t be pulled out of thin air. (Each business must carefully determine and adjust selling prices.)
* They change. (Example: Gasoline prices fluctuate with the price of crude oil.)

**Why do businesses only get to keep a portion of the money that customers pay?**

* Businesses have to pay all the costs associated with the products they sell.
* They have to pay their operating expenses (e.g., utilities, salaries, lease/rent, etc.).

**Importance of selling price**

* Businesses and customers use selling price as a way to compare products when making buying decisions.
* Businesses and customers use selling price as a way to decide how to allocate their money (i.e., since they can’t buy everything they want, they look at selling price to decide which items they can afford).
* Businesses use selling price to determine the amount of income from sales they’ll receive (i.e., businesses determine how much markup they’ll apply to the cost of products to pay current expenses and to provide for the business’s future growth.)

**Why do pricing objectives and marketing objectives need to be compatible?**

Businesses need to set their marketing objectives first, and then determine the pricing objectives that will most likely help them achieve the marketing objectives. As marketing objectives change, pricing objectives will need to be reviewed and possibly changed.

**Primary categories of pricing objectives**

**Sales-oriented objectives.** Sales-oriented objectives are focused on increasing total income from sales and can be accomplished in two ways:

* Charge low prices to increase the volume of sales so that the business has more total income because it sells more products
* Charge high prices to increase the dollar value of each sale

**Profit-oriented objectives.** Profit-oriented objectives are focused on creating profit for a business.

* Some businesses set prices that result in the greatest amount of profit.
* Other businesses set prices to recover their costs and earn a reasonable profit.

**Definition of competitive advantage**

A competitive advantage is an advantage over competitors gained by offering consumers greater value, either by means of lower prices or by providing greater benefits and service that justifies higher prices.

**Definition of positioning**

Positioning is how your target market defines you in relation to your competitors.

**Purpose of positioning**

The purpose of positioning is to make your product or service stand out in a crowd. Positioning is important because you are competing with all the noise out there competing for your potential customers’ attention. If you can stand out with a unique benefit, you have a chance at getting their attention.

Positioning is about how products are perceived in the minds of consumers. How a company sees itself and sees its products are not always the way that customers and potential customers view the products.

**Relationship between the target market and positioning**

When positioning your product/service, it is important to focus on how your target market perceives you. After all, the target market makes up those consumers that are most likely to purchase your product/service. Key tip: You can never make everyone happy, but you must make your target market happy to survive.

**Relationship between the competition and positioning**

* Is our product the first in its market?
* If not, how are our competitors positioned?
* Do we have enough money to position our product/service similarly to the market leader and thus take over as the market leader?
* If not, we must find an unoccupied position in the market that the target market cares about.
* Example: Target was certainly not the first mass merchandiser, but it was the first to successfully position itself as the “trendy, hip mass merchandiser” in the eyes of its target market.

**Types of positioning strategies**

* **Product Attributes:** What are the specific product attributes?
* **Benefits:** What are the benefits to the customers?
* **Usage Occasions:** When/how can the product be used?
* **Users:** Identify a class of users.
* **Against a Competitor:** Positioned directly against a competitor.
* **Away from a Competitor:** Positioned away from competitor.
* **Product Classes:** Compared to different classes of products.

**How can the marketing mix elements be differentiated to position products/businesses?**

Each of the 4 P’s should be examined as potential tactics for differentiating your product/service and reinforcing its positioning in the minds of the target market.

For example, Krispy Kreme doughnuts were originally available to consumers only at Krispy Kreme bakeries. In the early 2000’s, the company decided to alter its distribution (Place) strategy to include supermarkets and gas stations. While that decision radically increased sales potential by making the product available to more consumers, it also changed how the target market perceived the Krispy Kreme brand. (Think about it: do you view a sandwich that you buy at a gas station differently from a sandwich that you purchase at a casual dining restaurant?)

The questions below can be used to thoughtfully decide how each element of the 4 P’s is affected by (and can affect) a product/service’s positioning.

**Product/Service:**

* What does the customer want from the product/service? What needs does it satisfy?
* How and where will the customer use it?
* How is it differentiated versus your competitors’ products/services?

**Place:**

* Where do buyers look for your product or service?
* If they look in a store, what kind? A specialist boutique or in a supermarket, or both? Or online? Or direct, via a catalogue?
* How can you access the right distribution channels?
* Do you need to use a sales force? Or attend trade fairs? Or make online submissions? Or send samples to catalogue companies?
* What do your competitors do, and how can you learn from that and/or differentiate what you do from them?

**Price:**

* What is the value of the product or service to the buyer?
* Are there established price points for products or services in this area?
* Is the customer price sensitive? Will a small decrease in price gain you extra market share? Or will a small increase be indiscernible, and so gain you extra profit margin?
* What discounts should be offered to trade customers, or to other specific segments of your market?
* How will your price compare with your competitors?

**Promotion:**

* Where and when can you get across your marketing messages to your target market?
* Will you reach your audience by advertising in the press, or on TV, or radio, or on billboards? By using direct mail? Through PR? On the Internet?
* When is the best time to promote? Is there seasonality in the market? Are there any wider environmental issues that suggest or dictate the timing of your market launch, or the timing of subsequent promotions?
* How do your competitors do their promotions? And how does that influence your choice of promotional activity?

**Positioning activity**

Ever wonder about the laundry detergent product category? Why do several companies produce the majority of laundry brands? For example, Procter & Gamble markets Tide, Gain, Era, Cheer, Ivory, and Bold. . . among others. How does P&G differentiate these brands? How many different messages can you develop about laundry detergent?

Using the Web and a little research at a retail outlet that sells laundry detergent, conduct an analysis of the P&G brands of laundry detergent. What are the distinguishing features of each brand -- and are they clearly communicated to the consumer? What are the target markets for each brand? Are the positions different enough to avoid cannibalization?

**Assigned Cell Phone Company:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Grades and Standards**

1. What cell phone grade and/or standard does this cellular company use?
2. What are the advantages and disadvantages of this grade and/or standard?

**Warranties and Guarantees**

1. Does this cellular company offer warranties on its products?
2. What are the terms of its most commonly offered warranty?
3. Does this cellular company offer guarantees on its products?
4. What are the terms of its most commonly offered guarantee?

**Product Life Cycles**

1. What has been the impact of product life cycles on the cell phone company’s marketing decisions?
2. How has the cell phone company extended the life cycle of one of its products?

**Pricing**

1. What factors do you think affect the company’s pricing decisions?
2. What makes you think that these factors affect the company’s pricing decisions?
3. What are the cell phone company’s pricing objectives?
4. Why do you think that these are the company’s pricing objectives?

**Channels of Distribution**

1. What channels of distribution does the cell phone company use to get its products to consumers?

**Product Mix**

1. What are the company’s product lines?
2. For each product line, what are the product items?
3. What is the company’s product mix?
4. What are the advantages and disadvantages of this product mix?
5. What type of product mix does this company offer—narrow, broad, deep, and/or shallow?
6. Why does the company offer this type of product mix?
7. What type of product-mix strategy does the company employ?

**Positioning**

1. What type(s) of positioning strategies does this company use?
2. How does the company use marketing mix elements to position its products and/or company?

**Branding**

1. What characteristics make this company’s brand name effective?
2. What is the brand’s stage of brand loyalty?
3. What symbols, names, and/or characters are associated with this brand identity?
4. What are the brand values?
5. What is the brand personality?
6. How does the company use touch points to build its brand?

**Group Constitution**

**Members:** Carlie, Otis, Neff, Rennie, Joe, Vince

**Forward:** This contract is a binding legal document and governs the group until the assigned project deadline. If the group separates, or a member is fired, the basic contract laws remain intact for both parties. However, being fired may cause work responsibilities to shift.

**Article I: Absence Policy**

1. If a group member will be absent on a day in which work is due, they must tell another group member a day in advance and have all work that they are responsible for turned in. All group members must stick to the provided agenda to have the assignments completed on time. If there will be an unexpected absence, the group member is to complete the work from home and email another group member to let them know they are gone for the day.
2. Group members will contact one another if they are absent for any amount of period during the time allotted for working on the projects.

**Article II: Work Policy**

1. Any member that is mentally or physically disabled and can prove that they cannot complete the work assigned to them alone may acquire assistance from other group members to help complete it. This will only apply for work that is group work and not individual work, and work will only be finished by that group member, and the assisting group member will not write it.
2. Each group member will work to the best of their ability, making sure the completed work is up to standards, and that they complete it with punctuality.
3. If a group member commits plagiarism, they are solely responsible and incur the punishment on their own.

**Article III: Leadership**

1. At the beginning of the project, a leader will be voted upon democratically. If a group member is absent at the time of voting, they waive their right to participate in voting. The person who wins the most votes becomes the leader. If there is an unclear outcome (same number of votes for different people), the group will have no leader until one can be chosen by a revote.
2. By being elected leader, the person must perform the following duties:
3. Organize group meetings.
4. Create and enforce a group agenda to govern group progress.
5. Organize any out-of-school project efforts.
6. Provide communication between group members in order to help individuals work towards the project goal.
7. If they fail to perform these duties, or another person is also carrying them out, a revote may be taken to determine whether to obtain a new leader.

**Article IV: Work Ethics**

1. If a group member does not complete work they were assigned, the punishment for the infringement will be of detriment solely to the group member at fault. No negative grading shall be given to any other group members.

**Article V: Member Dismissal**

1. The following conducts will result in a group member being able to be dismissed:
2. Incomplete or missing group work
3. Plagiarism or any form of cheating
4. If group member decides to leave under his or her own will
5. Any group member leaving under their own will may submit all their own work, while the other group members may not. Any group member fired for breaking any of the conducts under Article V-a (i-iii) will have their work taken from their possession to be used at the discretion of the original group, but not for the individual being fired. In addition, any fired member may not use any work completed by other group members, subject to punishment under Article 2-c.
6. If a group member leaves under the stipulation of Article V-a (iv), they retain all the work they have already provided for the group. The original group cannot use this work or it is subject to punishment under Article 2-c.

**Article VI: Signature**

By signing this contract, the following group members abide to the articles above. If any member fails to abide by the articles of this contract, they may be fired from the group given at least a 50% vote in favor of firing the individual.

**Signatures:**

Source: Novel Approach Consulting Group

**This document serves two purposes in every project:**

* Project planning guide
* Project status report

**Instructions:**

* Each team works together to determine:
  + Project objective
  + Tasks to be completed for a successful fulfillment of the project objective
  + Resources needed to complete each task (if any)
  + Person(s) responsible for completing each task
  + Due date for each task
* The first four columns of the table below (task, responsible, resources, and due date) serve as the guiding document through the end of the project. Make one copy of the table per week the project lasts (for a five-week project, make five copies)
* At the end of each week, use one copy to fill in the last three columns of the table. This serves as a weekly status report for your teacher.

|  |  |
| --- | --- |
| **Members of my group:** | Hannah, Cole, Zoe, Bryce |
| **Project Name:** | Spanish Club Recruitment Brochure |
| **Project Objective:** | Design an informative brochure for 9-11 graders that will raise their interest in joining the Spanish Club and direct them to get more information from Mrs. Gonzalez. Design must be ready-to-print in four weeks. |

| **Task** | **Who Is Responsible** | **Resources Needed** | **Due** | **Status** | **Date turned in** | **Check-off box** |
| --- | --- | --- | --- | --- | --- | --- |
| Initial meeting with Mrs. Gonzalez: gather information on club projects, requirements, etc., as well as brochure details (color? photos? etc.) | Team | n/a | Wk 1 |  |  |  |
| Attend Spanish Club meeting. Interview current club members & take digital pictures | Cole & Zoe | Digital camera | Wk 1 |  |  |  |
| Check printing costs at 3 print shops | Hannah | n/a | Wk 1 |  |  |  |
| Team meeting: update on week’s tasks | Team | n/a | Wk 1 |  |  |  |
| Questionnaire developed, distributed, and results compiled to determine why students would join Spanish Club | Team | n/a | Wk 2 |  |  |  |
| Create pencil sketch of brochure | Bryce | n/a | Wk 2 |  |  |  |
| Team comments on pencil sketch and changes made as needed | Team | n/a | Wk 2 |  |  |  |
| Team meeting: update on week’s tasks | Team | n/a | Wk 2 |  |  |  |
| Pencil sketch to Mrs. Gonzalez for comments | Bryce | n/a | Wk 3 |  |  |  |
| Pencil sketch changes made and resubmitted to Mrs. Gonzalez | Bryce | n/a | Wk 3 |  |  |  |
| Quotes obtained from Spanish Club members as needed | Zoe | n/a | Wk 3 |  |  |  |
| First draft of brochure completed in Microsoft Publisher | Hannah & Cole | Microsoft Publisher | Wk 3 |  |  |  |
| Team meeting: update on week’s tasks | Team | n/a | Wk 3 |  |  |  |
| Comments from team and changes made as needed | Team | n/a | Wk 4 |  |  |  |
| Submitted to Mrs. Gonzalez mid-week to allow time for changes if needed | Team | n/a | Wk 4 |  |  |  |
| Final to Mrs. Gonzalez | Team | n/a | Wk 4 |  |  |  |

**Team Signatures:**

Hannah **Cole**

Bryce ZOË

**This document serves two purposes in every project:**

* Project planning guide
* Project status report

**Instructions:**

* Each team works together to determine:
  + Project objective
  + Tasks to be completed for a successful fulfillment of the project objective
  + Resources needed to complete each task (if any)
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* The first four columns of the table below (task, responsible, resources, and due date) serve as the guiding document through the end of the project. Make one copy of the table per week the project lasts (for a five-week project, make five copies)
* At the end of each week, use one copy to fill in the last three columns of the table. This serves as a weekly status report for your teacher.

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| **Members of my group:** |  |
| **Project Name:** |  |
| **Project Objective:** |  |

| **Task** | **Who Is Responsible** | **Resources Needed** | **Due** | **Status** | **Date turned in** | **Check-off box** |
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**Team Signatures:**

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| **Criteria** | **Professional** | **Experienced** | **Developing** | **Novice** |
| **Content**  The information communicated by the project plan  40 points | ❑ All components of the project plan were complete and in writing. | ❑ All components of the project plan were addressed in writing, but some aspects needed further description. | ❑ Most of the project plan’s components were in writing; the missing elements diminished the plan’s effectiveness. | ❑ Many of the project plan’s components lacked sufficient detail to take action or were missing altogether. |
| ❑ The project plan’s objective gave a clear, comprehensive description of the project’s scope and schedule. | ❑ The project plan’s objective gave a clear description for the most part, but one of the items needed some clarification. | ❑ The project plan’s objective descriptions were difficult to follow/understand. | ❑ The project plan’s objectives were neither attainable nor measurable. |
| ❑ Needed resources were clearly identified. | ❑ Most resources were clearly identified. | ❑ Some critically needed resources were not identified. | ❑ Needed resources were too incomplete or were missing altogether. |
| ❑ The project plan contained specific activities/tasks. | ❑ For the most part, the project plan contained specific activities/tasks. | ❑ The project plan did not specifically contain all activities/tasks. | ❑ The project plan contained very few activities/tasks. |
| ❑ The project plan clearly specified persons responsible for each task. | ❑ For the most part, the project plan specified persons responsible for each task. | ❑ The project plan did not clearly specify persons responsible for each task. | ❑ The project plan did not specify persons responsible for each task. |
| ❑ The project plan contained specific deadlines. | ❑ For the most part, the project plan contained specific deadlines. | ❑ The project plan did not contain specific deadlines. | ❑ The project plan did not contain deadlines. |

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| **Criteria** | **Professional** | **Experienced** | **Developing** | **Novice** |
| **Content** (cont’d) | ❑ The project plan included easy-to-follow table or sequence-of-events flow chart. | ❑ The project plan included table or sequence-of-events flow chart, but some sections were not easy to follow. | ❑ The project plan included table or sequence-of-events flow chart, but it was too broad; important, smaller steps were omitted. | ❑ The project plan omitted table or flow chart; did not list sequence-of-events. |
| **Appropriateness**  Suitability; compatibility of one part of the plan with all other parts  35 points | ❑ The project plan’s objective was clear, attainable, and measurable. | ❑ The project plan’s objective was clear and measurable, but difficult to attain. | ❑ The project plan’s objective was stated in measurable terms. | ❑ The project plan’s objective was unclear and not stated in measurable terms. |
| ❑ All activities were logically sequenced and supported the project plan’s objective. | ❑ Most activities were logically sequenced and supported the project plan’s objective. | ❑ Several activities had gaps in sequence, were not in logical order, and/or did not support the project plan’s objective. | ❑ The sequence of activities made no sense and did not support the project plan’s objective. |
| ❑ Individual activity deadlines were realistic for achieving goals. | ❑ Most individual activity deadlines were realistic for achieving goals. | ❑ Several individual activity deadlines were not realistic for achieving goals. | ❑ Most individual activity deadlines were totally unreasonable. |

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| **Criteria** | **Professional** | **Experienced** | **Developing** | **Novice** |
| **Organization**  How the information is put together; the flow of the project plan  10 points | ❑ Main points were easy to follow and logical with points building on each other. | ❑ Main points were generally easy to follow and logical. | ❑ Main points were generally logical but difficult to follow. | ❑ Main points were so difficult to follow that their logic could not be determined, or they were illogical. |
| **Communication Skills**  Ability to express oneself so as to be understood by others  15 points | ❑ Ideas were expressed clearly in language that was easy to understand. | ❑ Ideas were expressed clearly with only a few words being difficult to understand. | ❑ Both ideas and words required much effort to understand. | ❑ Ideas were vague and elusive, and language was difficult to understand. |
| ❑ The project plan was neat, grammatically correct, and error-free. | ❑ The project plan was neat but contained minor errors that did not detract from the total plan. | ❑ The project plan contained some spelling and gram-matical errors that were distracting. | ❑ The project plan was messy, with many errors in spelling and grammar. |

| **Criteria** | **Professional** | **Experienced** | **Developing** | **Novice** |
| --- | --- | --- | --- | --- |
| **Content**  Description of the cell phone company, its offerings, and its product management strategies.  40 points | ❑ The information sufficiently summarized the issue/topic. | ❑ Overall, the information adequately summarized the topic/issue. | ❑ The information left some gaps in the issue/topic. | ❑ The information failed to summarize the issue/topic. |
| ❑ Conclusions reached were logical and fully supported by research. | ❑ Conclusions reached were reasonable but lacked supporting documentation in a few cases. | ❑ Conclusions reached were inconsistent in their logic and lacked supporting documentation. | ❑ Questionable conclusions were reached that were not supported by the research. |
| ❑ The conclusions were based on the most recent documentation available. | ❑ The conclusions were based, overall, on current information. | ❑ The conclusions were based on outdated information that was still relevant. | ❑ The conclusions were based on outdated information that was no longer relevant. |
| **Communication**  Ability to express oneself so as to be understood by others  30 points | ❑ Ideas were expressed clearly in language that was easy to understand. | ❑ Ideas were expressed clearly with only a few words being difficult to understand. | ❑ Both ideas and words required much effort to understand. | ❑ Ideas were vague and elusive, and language was difficult to understand. |
| ❑ Report was neat, grammatically correct, and error-free. | ❑ Report was neat but contained minor errors that did not detract from total report. | ❑ Report contained slight smudges, blurred letters, and grammatical errors that were distracting. | ❑ Report was messy, with many errors in spelling and grammar. |

| **Criteria** | **Professional** | **Experienced** | **Developing** | **Novice** |
| --- | --- | --- | --- | --- |
| **Organization**  How the information is put together; the flow of the written report  30 points | ❑ Main points were easy to follow and logical with points building on each other. | ❑ Main points were generally easy to follow and logical. | ❑ Main points were logical but difficult to follow. | ❑ Main points were so difficult to follow that their logic could not be determined, or they were illogical. |
| ❑ Sections were clearly identified, and material was easily located. | ❑ Sections were clearly identified and only a few items were difficult to locate. | ❑ Some sections were not identified, and several items were difficult to locate. | ❑ Sections ran together or were not identified, and material was difficult to locate. |
| ❑ Supporting documentation was complete and clearly labeled. | ❑ Supporting documentation was clearly labeled, but some items were missing. | ❑ Some supporting documentation was missing, and some was inaccurately labeled. | ❑ Supporting documentation was not provided. |

**PM:019 Describe the uses of grades and standards in marketing**

**LAP**: LAP-PM-008 Raise the Bar (Grades and Standards)  
© **LAP:** 2017

**Curriculum Planning Level:** CS

**Objectives:**

a. Define the terms grades and standards.  
b. Explain the interrelationship of grades and standards.  
c. Describe what businesses do with products that fail to meet the lowest standards.  
d. Explain reasons for using grades and standards.  
e. Describe ways that grades and standards aid the buying and selling process.  
f. Explain the importance of grades and standards in global trade.  
g. Identify groups that develop grades and standards.  
h. Describe types of standards.  
i. Identify examples of graded products.

**Activity:**

Students should participate in a scavenger hunt to find and collect as many grades and standards for goods and services as possible. For each, students should identify its purpose and the agency responsible (if applicable). Examine and discuss the students' collections as a class.

**Reference Books**

**Title:** Basic marketing: A marketing strategy planning approach (16th ed.)  
**Author:** Perreault, W.D., Cannon, J.P., & McCarthy, E.J.  
**References:** [pp. 10, 246-247]  
**Publisher:** Boston: Irwin/McGraw-Hill  
**Copyright:**2008

**Title:** Essentials of services marketing  
**Author:** Lovelock, C., Wirtz, J., & Chew, P.  
**References:** (pp. 369-374)  
**Publisher:** Singapore: Prentice Hall  
**Copyright:**2009

**Title:** Marketing dynamics (3rd ed.)  
**Author:** Clark, B., Basteri, C.G., Gassen, C., & Walker, M.  
**References:** [p. 284]  
**Publisher:** Tinley Park, IL: Goodheart-Willcox.  
**Copyright:**2014

**Title:** Contemporary marketing: 2013 edition  
**Author:** Kurtz, D.  
**References:** (pp. 23-24)  
**Publisher:** Mason, OH: South-Western Cengage Learning  
**Copyright:**2013

**Title:** Marketing essentials 2012  
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**PM:020 Explain warranties and guarantees**

**LAP**: LAP-PM-004 Promises, Promises (Warranties and Guarantees)  
© **LAP:** 2017

**Curriculum Planning Level:** CS

**Objectives:**

a. Define the following terms: warranty, express warranty, implied warranty, full warranty, limited warranty, and guarantee.  
b. Identify the provisions of a full warranty.  
c. Distinguish between warranties and guarantees.  
d. Identify the characteristics of an effective guarantee.  
e. Describe the purposes of warranties and guarantees.  
f. Explain the benefits of warranties and guarantees.  
g. Describe government regulation of warranties and guarantees.

**Activity:**

Students should find and read a product warranty and then answer the following questions:

a.    Is the warranty full or limited?

b.    If a manufacturer defect is found, how is the purchaser protected?

c.    What is the procedure for obtaining repairs?

d.    What disclaimers are cited?

e.    Does the warranty expire? If so, when?

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**URL:** <http://consumer.findlaw.com/consumer-transactions/what-are-express-and-implied-warranties.html>    
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**PM:024 Identify the impact of product life cycles on marketing decisions**

**LAP**: LAP-PM-018 Get a Life (Cycle) (Product Life Cycles)  
© **LAP:** 2013

**Curriculum Planning Level:** SP

**Objectives:**

a. Define the following terms: product life cycle, introduction, growth, maturity, decline, pricing decisions, promotion decisions, place decisions, and product decisions.  
b. Identify stages of the product life cycle.  
c. Describe the characteristics of each stage of the product life cycle.  
d. Discuss the impact of each stage of the product life cycle on marketing decision-making.  
e. Explain how a company can extend a product's life cycle.

**Activity:**

Review and present the Impact of Product Life Cycles Briefing (starting on page 4-76) to students in a lecture or discussion format. As a class, students should select a product to sell at school. Students should then sell the product, observe its product life cycle, and write a summary of their observations depicting each phase.

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**PI:002 Explain factors affecting pricing decisions**

**LAP**: LAP-PI-003 Make Cents (Factors Affecting Selling Price)  
© **LAP:** 2016

**Curriculum Planning Level:** SP

**Objectives:**

a. Define the term selling price.  
b. Distinguish between price and selling price.  
c. Describe the importance of selling price.  
d. Identify factors affecting selling price.  
e. Explain how consumers can affect selling price.  
f. Describe how government affects selling price.  
g. Discuss how competition can affect selling price.  
h. Explain how the nature of a business can affect selling price.  
i. Identify pricing objectives.  
j. Explain how pricing objectives affect selling price.

**Activity:**

Review and present the Factors Affecting Pricing Decisions Briefing (starting on page 4-78) to students in a lecture or discussion format. Then, give the students a list of 10 grocery items that can be found in grocery stores, convenience stores, warehouse clubs, etc. Students should determine the price of each product at the locations specified and discuss reasons for the differences in prices at the various locations.

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**CM:003 Explain the nature of channels of distribution**

**LAP**: LAP-CM-003 Channel It (Channels of Distribution)  
© **LAP:** 2016

**Curriculum Planning Level:** CS

**Objectives:**

a. Define the following terms: channels of distribution, producer, ultimate consumer, industrial user, middlemen, intermediaries, retailers, wholesalers, agents, direct channels, and indirect channels.  
b. Identify types of channel members/intermediaries/middlemen.  
c. Explain the importance of middlemen in the channel of distribution.  
d. Describe types of channels for consumer goods and services.  
e. Describe types of channels for industrial goods and services.

**Activity:**

Each student should select a product of interest, chart its distribution from the point of production to the final consumer/user, and explain his/her chart to the class.

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**Author:** KnowThis.com  
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**PM:003 Explain the concept of product mix**

**LAP**: LAP-PM-003 Mix and Match (The Nature of the Product Mix)  
© **LAP:** 2015

**Curriculum Planning Level:** SP

**Objectives:**

a. Define the following terms: product mix, product item, product line, width, depth, consistency, expansion, contraction, alteration, trading up, trading down, and positioning.  
b. Identify ways in which product lines can be organized.  
c. Describe product mix dimensions.  
d. Identify reasons that a business would offer a narrow product mix.  
e. Identify reasons that a business would offer a broad product mix.  
f. Identify reasons that a business would offer a deep product mix.  
g. Identify reasons that a business would offer a shallow product mix.  
h. Explain the importance of a business's product mix.  
i. Describe advantages of expansion product-mix strategies.  
j. Describe disadvantages of expansion product-mix strategies.  
k. Describe advantages of contraction product-mix strategies.  
l. Describe disadvantages of contraction product-mix strategies.  
m. Describe advantages of alteration product-mix strategies.  
n. Describe disadvantages of alteration product-mix strategies.  
o. Describe advantages of trading up product-mix strategies.  
p. Describe disadvantages of trading up product-mix strategies.  
q. Describe advantages of trading down product-mix strategies.  
r. Describe disadvantages of trading down product-mix strategies.  
s. Describe advantages of positioning product-mix strategies.  
t. Describe disadvantages of positioning product-mix strategies.

**Activity:**

Instruct students to access a company’s website to identify its product lines as well as product items for each product line. Each student should print the information obtained and write a one-page report about the company’s product mix and its advantages and disadvantages for the company.

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**References:** (pp. 271-274)  
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**Copyright:**2008

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**Title:** Marketing: Real people, real choices (5th ed.)  
**Author:** Soloman, M.R., Marshall, G.W., & Stuart, E.W.  
**References:** [pp. 273-278]  
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**Publisher:** New York: McGraw-Hill/Irwin  
**Copyright:**2011

**Title:** Marketing (3rd ed.)  
**Author:** Burrow, J.L.  
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**Publisher:** Mason, OH: South-Western Cengage Learning  
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**Author:** Clark, B., Basteri, C.G., Gassen, C., & Walker, M.  
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**PM:042 Describe factors used by marketers to position products/services**

**LAP**: LAP-PM-019 Getting Piece of Mind (Factors Used to Position Products/Services)  
© **LAP:** 2014

**Curriculum Planning Level:** SP

**Objectives:**

a. Define the following terms: competitive advantage and positioning.  
b. Describe the purpose of positioning.  
c. Explain the relationship between the target market and positioning.  
d. Discuss the relationship between the competition and positioning.  
e. Describe types of positioning strategies (e.g., product attributes, benefits, usage occasions, users, competitive, product classes)  
f. Discuss how marketing mix elements can be differentiated to position products/businesses.

**Activity:**

Review and present the Positioning Briefing (starting on page 4-80) to students in a lecture or discussion format. Then, instruct each student to select two automobile manufacturers: one offers luxury cars, the other offers economy cars. Students should identify factors that the two companies use to position the cars and participate in a small-group activity to discuss their responses.

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**Author:** Burrow, J.L.  
**References:** [pp. 171-174]  
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**Author:** Perreault, W.D., Cannon, J.P., & McCarthy, E.J.  
**References:** [pp. 48, 54, 81-84]  
**Publisher:** Boston: Irwin/McGraw-Hill  
**Copyright:**2008

**Title:** Contemporary marketing 2013  
**Author:** Boone, G., & Kurtz, D.L.  
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**Title:** Entrepreneurial small business (3rd ed.)  
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**Author:** Clark, B., Basteri, C.G., Gassen, C., & Walker, M.  
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**Title:** Marketing essentials 2012  
**Author:** Farese, L.S., Kimbrell, G., & Woloszyk, C.A.  
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**Copyright:**2012

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**Author:** KnowThis.com  
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**PM:021 Explain the nature of product/service branding**

**LAP**: LAP-PM-006 It’s a Brand, Brand, Brand World! (Nature of Product Branding)  
© **LAP:** 2015

**Curriculum Planning Level:** SP

**Objectives:**

a. Define the following terms: brand, brand name, brand symbol, trade character, brand recognition, brand preference, brand insistence, product brands, generic brand, national brand, private/distributor brand, brand strategies, family branding, individual branding, brand extensions, brand licensing, and co-branding.  
b. List the characteristics of a good brand name.  
c. Explain levels of brand loyalty.  
d. Identify types of brand strategies.  
e. Describe considerations for international branding.  
f. Explain the impact of the Internet on branding.  
g. Discuss employees' role in branding.

**Activity:**

Each student should select a brand name and identify the characteristics that make it an effective brand name. Then, s/he should determine the brand’s stage of brand loyalty: recognition, preference, or insistence; prepare visuals featuring symbols, names, and characters associated with the product/service’s brand identity; and discuss the visual with a classmate.

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**Title:** Marketing  
**Author:** Grewal, D., & Levy, M.  
**References:** (pp. 274-276, 281-290, 290-292)  
**Publisher:** New York: National Council on Economic Education  
**Copyright:**2008

**Title:** Basic marketing: A marketing strategy planning approach (16th ed.)  
**Author:** Perreault, W.D., Cannon, J.P., & McCarthy, E.J.  
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**Publisher:** Boston: Irwin/McGraw-Hill  
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**Title:** Marketing (3rd ed.)  
**Author:** Burrow, J.L.  
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**Title:** Intro to business (7th ed.)  
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**Title:** Contemporary marketing: 2013 edition  
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**Author:** Farese, L.S., Kimbrell, G., & Woloszyk, C.A.  
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**Author:** McCarthy, B.K.  
**URL:** <https://www.youtube.com/watch?v=THQxPG34Ry0>   
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**Author:** Wedell, G.  
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**PM:206 Explain the nature of corporate branding**

**LAP**: LAP-PM-020 Corporate Identity (Nature of Corporate Branding)  
© **LAP:** 2015

**Curriculum Planning Level:** SP

**Objectives:**

a. Define the following terms: brand identity, values, brand cues, brand personality, touch points, brand promise, and corporate brands.  
b. Describe the elements that make up a corporate brand's identity.  
c. Explain the use of values in corporate brand development.  
d. Discuss the significance of a corporate brand's personality.  
e. Describe the use of corporate brand touch points.  
f. Distinguish between corporate and distributor brands.

**Activity:**

Using the visual developed for the previous activity, each student should add to the visual by featuring its brand values, brand personality, and touch points. Students should discuss their visuals with classmates.

**Reference Books**

**Title:** Marketing (3rd ed.)  
**Author:** Burrow, J.L.  
**References:** [pp. 270-271, 428]  
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**Author:** Dlabay, L.R., Burrow, J.L., & Kleindl, B.  
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**URL:** <https://www.brandingstrategyinsider.com/2013/10/brand-relationships-are-built-on-shared-values.html#.WTV2aGjDGM8>   
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**Author:** Glatstein, S.  
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**Author:** InfoGraphics Design  
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**Author:** Sheikh, U.  
**URL:** <http://usmansheikh.wordpress.com/2008/09/04/what-is-your-brand-personality-type>   
**Copyright:** 2008, September 4  
**Accessed on:** 2017-06-05

**Performance Indicators:**

* Describe the need for marketing data (IM:012, LAP-IM-012) (CS) (pp. 4-157—4-159)
* Identify data monitored for marketing decision making (IM:184, LAP-IM-184) (SP)   
  (pp. 4-160—4-163)
* Explain the nature of marketing research (IM:010, LAP-IM-010) (SP) (pp. 4-164—4-166)
* Discuss the nature of marketing research problems/issues (IM:282, LAP-IM-282) (SP)   
  (pp. 4-167—4-169)
* Describe options businesses use to obtain marketing-research data (i.e., primary and secondary research, quantitative and qualitative research) (IM:281, LAP-IM-015) (SP) (pp. 4-170—4-172)
* Describe methods used to design marketing-research studies (i.e., descriptive, exploratory, and causal) (IM:284, LAP-IM-284) (SP) (pp. 4-173—4-175)
* Discuss the nature of sampling plans (IM:285, LAP-IM-016) (SP) (pp. 4-176—4-177)
* Describe data-collection methods (e.g., observations, mail, diaries, telephone, Internet, discussion groups, interviews, scanners, tracking tools, etc.) (IM:289, LAP-IM-017) (SP) (pp. 4-178—4-180)
* Explain the types of promotion (i.e., institutional, product) (PR:002, LAP-PR-004) (CS)   
  (pp. 4-181—4-182)
* Identify the elements of the promotional mix (PR:003, LAP-PR-001) (CS) (pp. 4-183—4-186)
* Explain types of advertising media (PR:007, LAP-PR-003) (SP) (pp. 4-187—4-189)

**Project Description:**

This project exposes students to two vital marketing functions—promotion and marketing-information management. Working individually, students will conduct marketing research to collect data re potential and current HSB™ stakeholders (e.g., prospective students, parents, administrators and guidance counselors, members of the business community, postsecondary instructors, etc.). Following this individual research, students will work in teams to analyze the research findings and then translate these findings into recommendations for a promotional campaign targeted at those stakeholders. Each team will present its proposal to the class, explaining which specific promotional vehicles (including social media) would be most effective in reaching the stakeholders, along with a recommended central theme or message for those promotions.

Following these presentations, the class will select, by popular vote, the promotional vehicles and central theme(s) or message(s) it wants to use to reach the targeted audience. Student groups will assume responsibility for creating the various promotional pieces (e.g., Facebook posts, posters, etc.). Each team will develop its assigned/selected promotional tools and create a timeline for sharing those materials with the targeted audience. If possible, students will implement their promotional campaign immediately.

**Driving Question:**

What methods should we use to promote the HSB™ program to a targeted audience?

**Timeframe:** 5 weeks

**Entry Event:**

Explain to the class that you have a story to share with them. Ask them to suspend reality for a minute as they listen to the following tale:

“Imagine that you have an Uncle Hershel who works at the Hershey Company’s corporate headquarters in Hershey, Pennsylvania. During a recent family reunion, you told your uncle about High School of Business™. Uncle Hershel was so impressed with what he heard that he invited you and your entire class to visit him in Pennsylvania for an exclusive tour of Hershey’s corporate office—provided that you can come up with the money to pay for the trip. You’re happy about the possibility of seeing where Uncle Hershel works, and you’re even more excited about maybe getting to go to Hersheypark amusement park, which is just down the street from his office.

The challenge that you face is fourfold: 1) Convincing your overly-protective parents/guardians to let you go on the trip—and to pay for your portion of the cost; 2) Recruiting enough classmates to make the trip worthwhile; 3) Talking your HSB™ teacher into chaperoning the trip; and 4) Getting your principal’s permission to make the trip possible.”

At this point, instruct students to form teams of three or four students each. Explain that each team is responsible for figuring out what to say (in 50 words or less) to their parents, to their friends, to you (as their teacher), and to their principal—four messages in all per team—to make this trip come true. In addition, students need to determine how they should share these messages with the targeted individuals (e.g., face-to-face conversation, email, text message, snail mail, etc.). Give students approximately 15-20 minutes to complete this work.

After all of the teams have finished, ask students to share their work with the class. Each time that you hear a good idea, give that student and his/her team some Hershey Kisses and talk about why that particular message or form of communication would be especially effective.

Next, ask the class what factors they considered when crafting their messages and selecting their communication channels. Explain that marketing professionals use a similar thought process—supported by sound research—when developing their promotional campaigns. Tell students that they could use the same method (including the research) to promote the HSB™ program. Finally, ask the driving question.

**Briefings:**

To augment the project, briefings should be provided during the week specified.

|  |  |
| --- | --- |
| **Week** | **Topic** |
| 11 | Sources of Primary and Secondary Data Briefing (pp. 4-131— 4-133) |

**Step-by-Step Guide:**

|  |  |  |  |
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| **Checkpoint** | **Week** | **Details** | **Assessment** |
| **Selection of Target Market** | Prior to Project | **NOTE:** Prior to initiating this project, the instructor is responsible for selecting the stakeholder audience (e.g., prospective students, parents, administrators and guidance counselors, members of the business community, postsecondary instructors, etc.) that students will target in their promotional campaign. | |
| **Group Contract** | 9 | Each team develops a contract for how the team will operate, including how to handle conflict and consequences for team members that don’t participate. A sample group contract is provided on pages 4-142—4-143. | Complete/ Incomplete |
| **Project Plan** | 9 | Team develops a written project plan to be used as a guide for completing tasks within the project. A sample project plan is provided on pages 4-144—4-147, and a blank project plan form is provided on pages 4-148—4-149 | Developing a Project Plan Rubric (pp. 4-150— 4-152) |
| **Team Marketing Research Plan** | 9 & 10 | Each team creates a basic marketing research plan that specifies the marketing research problem/issue; research objectives; secondary and primary data-collection methods; time required; and materials needed for its research. | Marketing Research Plan Rubric (pp. 4-153— 4-154) |
| **Research Instruments/ Materials** | 10 | Working with their teams, students develop research instruments (e.g., questionnaires, etc.) and/or gather work materials to aid in their marketing research. | Complete/ Incomplete |

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| **Checkpoint** | **Week** | **Details** | **Assessment** |
| **Quiz 3A** | 10 | At the end of week 10, students take a brief quiz covering the following performance indicators:   * Describe the need for marketing data (IM:012,  LAP-IM-012) (CS) * Identify data monitored for marketing decision making (IM:184, LAP-IM-184) (SP) * Explain the nature of marketing research (IM:010, LAP-IM-010) (SP) * Discuss the nature of marketing research problems/issues (IM:282, LAP-IM-282) (SP) | To create this quiz, use multiple-choice items provided on this course guide direct download link. |
| **Research Data** | 10 & 11 | Individually, students conduct primary and secondary research to collect data re 1) which promotional vehicles would be most effective in reaching the desired audience, and 2) what messages would be most effective in gaining the target audience’s interest in/support of HSB™. | Complete/ Incomplete |
| **Individual Primary & Secondary Sources Worksheet** | 11 | Following the briefing on sources on primary and secondary data, each student completes the *Primary & Secondary Data Seek & Find* worksheet found on pages 4-134—4-137. Students will need access to the Internet to complete the assignment. | Primary & Secondary Data Seek & Find Answer Key  (pp. 4-138— 4-141) |
| **Quiz 3B** | 11 | At the end of week 11, students take a brief quiz covering the following performance indicators:   * Describe options businesses use to obtain marketing-research data (i.e., primary and secondary research, quantitative and qualitative research) (IM:281, LAP-IM-015) (SP) * Describe methods used to design marketing-research studies (i.e., descriptive, exploratory, and causal) (IM:284, LAP-IM-284) (SP) | To create this quiz, use multiple-choice items provided on this course guide direct download link. |
| **Promotion Proposal** | 11 & 12 | Team members compile their research data, analyze the data as a team, and then develop a team proposal detailing their recommendations re specific promotional vehicles to use with the target audience as well as the central theme(s) or message(s) of the promotions. The proposal should take the form of a two-to-four-minute presentation to the class. | Team Proposal Rubric  (pp. 4-155— 4-156) |
| **Checkpoint** | **Week** | **Details** | **Assessment** |
| **Class Selection of Promotional Vehicles & Theme(s)** | 12 | Following the teams’ presentations of their proposals to their classmates, the class should determine which recommendations to adopt. Through a popular vote or other means, the class should select the best forms of promotion and central theme(s) to utilize to promote the HSB™ program to the targeted audience. | Complete/ Incomplete |
| **Quiz 3C** | 12 | At the end of week 12, students take a brief quiz covering the following performance indicators:   * Discuss the nature of sampling plans (IM:285,  LAP-IM-016) (SP) * Describe data-collection methods (e.g., observations, mail, diaries, telephone, Internet, discussion groups, interviews, scanners, tracking tools, etc.) (IM:289, LAP-IM-017) (SP) | To create this quiz, use multiple-choice items provided on this course guide direct download link. |
| **Promotional Pieces** | 12 & 13 | Either in their original groups or in different teams (organized according to student interest, talent, etc.), students will assume responsibility for certain promotional pieces (e.g., Facebook posts, posters, mailers, etc.), develop those pieces, and devise a timeline for sharing those promotions with the targeted audience. | Complete/ Incomplete |
| **Show & Tell** | 14 | To wrap up the project, students should organize a show and tell of sorts to share their creations with each other and select members of their targeted audience. | Complete/ Incomplete |
| **Objective Exam** | 14 | During week 14, students take a multiple-choice objective exam covering performance indicators from quizzes 3A, 3B, and 3C, along with the following additional performance indicators:   * Explain the types of promotion (i.e., institutional, product) (PR:002, LAP-PR-004) (CS) * Identify the elements of the promotional mix (PR:003, LAP-PR-001) (CS) * Explain types of advertising media (PR:007,  LAP-PR-003) (SP) | To create this exam, use multiple-choice items provided on this course guide direct download link. |

**Teacher Tips:**

* Prior to starting this project, instructors should determine what stakeholder audience (e.g., prospective students, parents, administrators and guidance counselors, members of the business community, postsecondary instructors, etc.) would be most appropriate for students to target in their promotional campaign.
* Since different social media platforms may be more popular for certain target audiences and not others, insist that students consider and include specific social media platforms in their promotional campaign.
* If the class’s promotional campaign will require more time to execute than allowed by this project, organize an HSB™ student marketing committee to continue the campaign outside the class. Encourage members of this committee to monitor the effectiveness of the campaign, especially online using the app that students used during this course’s boot camp.
* If desired, change the scope of this project slightly to require students to analyze and improve past Principles of Marketing class’s promotional materials rather than developing entirely new promotional pieces every time.

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| Weekly Planner | |
| **Monday** |  |
| **Tuesday** |  |
| **Wednesday** |  |
| **Thursday** |  |
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| Weekly Planner | |
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| Weekly Planner | |
| **Monday** |  |
| **Tuesday** |  |
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| **Thursday** |  |
| **Friday** |  |

**What is the difference between primary and secondary data?**

**Primary data** are collected for the problem/issue that needs to be resolved.

**Secondary data** are existing data that were collected for another purpose but can be mined for data that address the problem/issue that needs to be resolved.

**Sources of primary data**

* Current customers
* Vendors
* Employees
* Management
* Former customers
* Channel members
* Prospective customers

**Advantages of primary data**

* Provides researcher a greater level of control over data collection
* Improves likelihood that research money will be spent effectively
* Eliminates others’ access to data
* Provides current data

**Disadvantages of primary data**

* Costly to collect
* Hard to recruit participants
* Sporadic availability of data
* Declining quality with lengthy data collection

**Internal sources of secondary data (sources that are inside the company)**

* Financial statements (income statements and balance sheets)
* Customer databases
* Ad campaign results
* Data from the use of loyalty cards
* Sales activity reports
* Product returns and exchanges
* Customer complaints
* Company blogs
* Customer comment cards

**External sources of secondary data (sources that are outside the company)**

* **Government sources**
  + U.S. Census Data
  + U.S. Census Reports
  + U.S. Department of Commerce Data
  + Federal Reserve data
  + Economic indicators
* **Directories**
  + Examples: Standard & Poor’s Registry of Corporations; Thomas’ Register of American Manufacturers, Fortune Magazine Directory, Million Dollar Directory, Sales and Marketing Management’s Survey of Buying Power, Source Book of Demographics and Buying Power for Every Zip Code in the USA
* **Statistical sources**
  + Examples: Standard and Poor’s Industrial Surveys, American Statistics Index, Statistical Reference Index, Federal
* **Trade associations and publications**
* **Newspapers**
* **Competitors’ websites**
* **Competitors’ annual reports**
* **Media Panel Data Sources**
  + Examples: Nielsen Media Research (TV); Arbitron, Inc. (radio); Roper Starch (magazine ads); and Simmons Annual Report on Media & Markets
* **Syndicated data sources** (companies that compile and then sell data to others)
  + Examples: Consumer panels about product purchase behavior and consumer attitudes that are conducted by such organizations as J.D. Power, National Family Opinion (NFO), and National Purchase Diary (NPD); store audits that assess product and brand movement at the retail level; conducted by Nielsen Retail Index
* **Search engines such as Google and Yahoo!**

**How to learn more about primary and secondary sources**

A good online resource that contains information about primary and secondary sources can be found at <http://www.knowthis.com/principles-of-marketing-tutorials/>. The following three data collection-related tutorials are especially useful:

* Data Collection: Primary Research Methods:   
  <https://www.knowthis.com/data-collection-primary-research-methods>
* Data Collection: Low-Cost Secondary Research:  
  <https://www.knowthis.com/data-collection-low-cost-secondary-research>
* Data Collection: High-Cost Secondary Research:  
  <https://www.knowthis.com/data-collection-high-cost-secondary-research>

**Advantages of secondary data**

* Less costly than primary data since they already exist
* Quick to obtain—save time
* Available on an ongoing basis

**Disadvantages of secondary data**

* May be out of date
* May provide an incomplete picture
* Will probably not contain sensitive information that could be used for competitive advantage
* May be presented in a wrong or unusable format

**Directions**

For each of the following questions, determine whether primary or secondary data are needed. If primary data are needed, determine the best method of collecting that data, and describe the method in the space titled *Process for locating the answer*.

If the data can be gathered using online secondary sources, write an answer in the space provided. Also record the source of the information, its URL, and the process you used to locate the answer in the URL.

Finally, determine how you, as a marketer, could use this information, regardless of whether it is primary or secondary data. Print and attach a copy of your findings for each question.

**1. What were the top five rated broadcast network TV shows among all adult 18-49 viewers last week?**

**Show #1: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Show #2: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Show #3: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Show #4: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Show #5: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**URL accessed:**

**Process for locating the answer:**

**How could a marketer use this information?**

**2. What were the top three best-selling motor vehicles in America last year?**

**Vehicle #1: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Vehicle #2: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Vehicle #3: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**URL accessed:**

**Process for locating the answer:**

**How could a marketer use this information?**

**3. Which five states in 2010 were home to the largest number of persons who are 65-years-old or older?**

**State #1: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**State #2: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**State #3: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**State #4: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**State #5: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**URL accessed:**

**Process for locating the answer:**

**How could a marketer use this information?**

**4. What are the top three magazines for teenagers?**

**Magazine #1: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Magazine #2: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Magazine #3: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**URL accessed:**

**Process for locating the answer:**

**How could a marketer use this information?**

**5. Compile a list of people in your county who purchased a new home in the last month.**

**URL accessed:**

**Process for locating the answer:**

**How could a marketer use this information?**

**6. What are three of the hottest fashion trends for women predicted for next season?**

**Fashion trend #1: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Fashion trend #2: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Fashion trend #3: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**URL accessed:**

**Process for locating the answer:**

**How could a marketer use this information?**

**7. How satisfied with their stay last week were the guests of the Sheraton Columbus Hotel at Capitol Square in Columbus, Ohio?**

**URL accessed:**

**Process for locating the answer:**

**How could a marketer use this information?**

**8. Which area of your local grocery store receives the most traffic (number of shoppers   
passing by)?**

**URL accessed:**

**Process for locating the answer:**

**How could a marketer use this information?**

**1. What were the top five rated broadcast network TV shows among all adult 18-49 viewers last week?**

**Show #1: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Show #2: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Show #3: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Show #4: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Show #5: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**URL accessed:** <http://tvbythenumbers.zap2it.com/weekly-ratings/week-36-broadcast-top-25-and-network-rankings-may-22-28-2017/>

**Process for locating the answer:** Entered “top rated broadcast network TV shows last week” into Google. *TV by the Numbers Weekly Ratings* page was among the first few options to appear. Clicked on that option, and then scrolled down the page to the most recent broadcast Top 25 and network rankings article.

**How could a marketer use this information?** Marketers could use the information to select the most viewed shows for determining time-slots for their TV advertising. They can more effectively target the right audience during the right time.

**2. What were the top three best-selling motor vehicles in America last year?**

**Vehicle #1: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Vehicle #2: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Vehicle #3: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**URL accessed:** <http://www.businessinsider.com/best-selling-cars-trucks-vehicle-america-2016-2017-1>

**Process for locating the answer:** Entered “top selling motor vehicles in 2016” into Google. Clicked on one of the first options (*The 20 best-selling cars and trucks in America - Business Insider*) and scrolled down the page to see a list of the top 20 best-selling cars in America in 2016.

**How could a marketer use this information?** Marketers who work for automobile manufacturers could determine what features/attributes the best-selling autos have in common and then ensure that their own products also contain these same attributes. Also, if a marketer works for a company that manufactures one of the top-selling vehicles, s/he can use that fact as a promotional message to demonstrate the value of the product. Marketers who work for used-car dealerships could use the information to determine what autos to seek out to put in their inventory.

**3. Which five states in 2010 were home to the largest number of persons who are 65-years-old or older?**

**State #1:** California

**State #2:** Florida

**State #3:** New York

**State #4:** Texas

**State #5:** Pennsylvania

**URL accessed:** <http://www.census.gov/prod/cen2010/briefs/c2010br-09.pdf>

**Process for locating the answer:** A great resource for demographic data in the United States is the U.S. Census Bureau whose homepage is <http://www.census.gov/>. At the top of the U.S. Census homepage, searched for “2010 65+”. Selected the first search, which was *The Older Population: 2010* (<http://www.census.gov/prod/cen2010/briefs/c2010br-09.pdf>). Scrolled down to page 9 to access a table showing the population by selected age groups for the United States, regions, states, and Puerto Rico in 2010.

**How could a marketer use this information?** Marketers whose target audience includes 65+ Americans can focus their efforts in these states where potential customer bases are larger.

**4. What are the top three magazines for teenagers?**

**Magazine #1: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Magazine #2: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Magazine #3: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**URL accessed:** <https://www.amazon.com/Best-Sellers-Magazines-Teen/zgbs/magazines/602368>

**Process for locating the answer:** Entered “top three magazines for teenagers” into Google. Clicked on *Amazon Best Sellers: Best Teen Magazines* which was one of the first options, and found a listing of the top-selling magazines in the *Teen* category.

**How could a marketer use this information?** Marketers whose target audience is teenagers could use the information to select the most popular teenage-oriented magazines for their advertisements.

**5. Compile a list of people in your county who purchased a new home in the last month.**

**URL accessed:** <http://apps.franklincountyauditor.com/dailyconveyance> (Will vary based on location.)

**Process for locating the answer:** Entered “Franklin County Real Estate Purchases” into the search engine. (County will vary.) Clicked on “Franklin County Auditor – Real Estate.” Then, clicked on “Property Search” under the heading “Real Estate.” Chose Online Tools from top of page and then clicked on Daily Conveyances.

**How could a marketer use this information?** Marketers could use this information to target new homeowners with associated products and services, such as furniture, insurance, paint, home improvement services, coupons to local businesses, etc. The marketer can then send direct mail, use telemarketing, etc. to solicit business.

**6. What are three of the hottest fashion trends for women predicted for next season?**

**Fashion trend #1: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Fashion trend #2: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Fashion trend #3: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**URL accessed:** <http://www.whowhatwear.com/spring-summer-2017-fashion-trends>

**Process for locating the answer:** Entered “fashion trends women summer 2017” into Google. Selected “Spring Summer 2017 Fashion Trends” from WhoWhatWear, which was one of the first options. Then, scrolled down to see all of the trends.

**How could a marketer use this information?** Marketers could use this information to dress a spokesmodel appearing in an upcoming advertisement and/or to decide which items and/or trends to feature on department store’s website, print advertisement, commercial, catalog, etc.

**7. How satisfied with their stay last week were the guests of the Sheraton Columbus Hotel at Capitol Square in Columbus, Ohio?**

**URL accessed:** <https://www.tripadvisor.com/Hotel_Review-g50226-d95252-Reviews-or15-Sheraton_Columbus_at_Capitol_Square_Hotel-Columbus_Ohio.html#REVIEWS>

**Process for locating the answer:** Create a questionnaire/survey to distribute to last week’s hotel guests via postal mail, telephone, e-mail, or website. Alternatively, check websites such as TripAdvisor.com, Yelp, or Hotels.com and look at any customer reviews from the past week.

**How could a marketer use this information?** Marketers could use the information to make improvements to the hotel itself and its services; to reward past customers and encourage them to stay at the hotel again; to improve relationships with unhappy customers; and/or to use guests’ favorable responses as testimonials in advertising, on websites, etc.

**8. Which area of your local grocery store receives the most traffic (number of shoppers   
passing by)?**

**URL accessed:**

**Process for locating the answer:** Conduct observational research at the grocery store to determine the high traffic areas and most common traffic patterns.

**How could a marketer use this information?** Marketers could use the information to decide where to place a new product display and/or to determine where to position a booth for distributing product samples.

**Group Constitution**

**Members:** Carlie, Otis, Neff, Rennie, Joe, Vince

**Forward:** This contract is a binding legal document and governs the group until the assigned project deadline. If the group separates, or a member is fired, the basic contract laws remain intact for both parties. However, being fired may cause work responsibilities to shift.

**Article I: Absence Policy**

1. If a group member will be absent on a day in which work is due, they must tell another group member a day in advance and have all work that they are responsible for turned in. All group members must stick to the provided agenda to have the assignments completed on time. If there will be an unexpected absence, the group member is to complete the work from home and email another group member to let them know they are gone for the day.
2. Group members will contact one another if they are absent for any amount of period during the time allotted for working on the projects.

**Article II: Work Policy**

1. Any member that is mentally or physically disabled and can prove that they cannot complete the work assigned to them alone may acquire assistance from other group members to help complete it. This will only apply for work that is group work and not individual work, and work will only be finished by that group member, and the assisting group member will not write it.
2. Each group member will work to the best of their ability, making sure the completed work is up to standards, and that they complete it with punctuality.
3. If a group member commits plagiarism, they are solely responsible and incur the punishment on their own.

**Article III: Leadership**

1. At the beginning of the project, a leader will be voted upon democratically. If a group member is absent at the time of voting, they waive their right to participate in voting. The person who wins the most votes becomes the leader. If there is an unclear outcome (same number of votes for different people), the group will have no leader until one can be chosen by a revote.
2. By being elected leader, the person must perform the following duties:
3. Organize group meetings.
4. Create and enforce a group agenda to govern group progress.
5. Organize any out-of-school project efforts.
6. Provide communication between group members in order to help individuals work towards the project goal.
7. If they fail to perform these duties, or another person is also carrying them out, a revote may be taken to determine whether to obtain a new leader.

**Article IV: Work Ethics**

1. If a group member does not complete work they were assigned, the punishment for the infringement will be of detriment solely to the group member at fault. No negative grading shall be given to any other group members.

**Article V: Member Dismissal**

1. The following conducts will result in a group member being able to be dismissed:
2. Incomplete or missing group work
3. Plagiarism or any form of cheating
4. If group member decides to leave under his or her own will
5. Any group member leaving under their own will may submit all their own work, while the other group members may not. Any group member fired for breaking any of the conducts under Article V-a (i-iii) will have their work taken from their possession to be used at the discretion of the original group, but not for the individual being fired. In addition, any fired member may not use any work completed by other group members, subject to punishment under Article 2-c.
6. If a group member leaves under the stipulation of Article V-a (iv), they retain all the work they have already provided for the group. The original group cannot use this work or it is subject to punishment under Article 2-c.

**Article VI: Signature**

By signing this contract, the following group members abide to the articles above. If any member fails to abide by the articles of this contract, they may be fired from the group given at least a 50% vote in favor of firing the individual.

**Signatures:**

Source: Novel Approach Consulting Group

**This document serves two purposes in every project:**

* Project planning guide
* Project status report

**Instructions:**

* Each team works together to determine:
  + Project objective
  + Tasks to be completed for a successful fulfillment of the project objective
  + Resources needed to complete each task (if any)
  + Person(s) responsible for completing each task
  + Due date for each task
* The first four columns of the table below (task, responsible, resources, and due date) serve as the guiding document through the end of the project. Make one copy of the table per week the project lasts (for a five-week project, make five copies)
* At the end of each week, use one copy to fill in the last three columns of the table. This serves as a weekly status report for your teacher.

|  |  |
| --- | --- |
| **Members of my group:** | Hannah, Cole, Zoe, Bryce |
| **Project Name:** | Spanish Club Recruitment Brochure |
| **Project Objective:** | Design an informative brochure for 9-11 graders that will raise their interest in joining the Spanish Club and direct them to get more information from Mrs. Gonzalez. Design must be ready-to-print in four weeks. |

| **Task** | **Who Is Responsible** | **Resources Needed** | **Due** | **Status** | **Date turned in** | **Check-off box** |
| --- | --- | --- | --- | --- | --- | --- |
| Initial meeting with Mrs. Gonzalez: gather information on club projects, requirements, etc., as well as brochure details (color? photos? etc.) | Team | n/a | Wk 1 |  |  |  |
| Attend Spanish Club meeting. Interview current club members & take digital pictures | Cole & Zoe | Digital camera | Wk 1 |  |  |  |
| Check printing costs at 3 print shops | Hannah | n/a | Wk 1 |  |  |  |
| Team meeting: update on week’s tasks | Team | n/a | Wk 1 |  |  |  |
| Questionnaire developed, distributed, and results compiled to determine why students would join Spanish Club | Team | n/a | Wk 2 |  |  |  |
| Create pencil sketch of brochure | Bryce | n/a | Wk 2 |  |  |  |
| Team comments on pencil sketch and changes made as needed | Team | n/a | Wk 2 |  |  |  |
| Team meeting: update on week’s tasks | Team | n/a | Wk 2 |  |  |  |
| Pencil sketch to Mrs. Gonzalez for comments | Bryce | n/a | Wk 3 |  |  |  |
| Pencil sketch changes made and resubmitted to Mrs. Gonzalez | Bryce | n/a | Wk 3 |  |  |  |
| Quotes obtained from Spanish Club members as needed | Zoe | n/a | Wk 3 |  |  |  |
| First draft of brochure completed in Microsoft Publisher | Hannah & Cole | Microsoft Publisher | Wk 3 |  |  |  |
| Team meeting: update on week’s tasks | Team | n/a | Wk 3 |  |  |  |
| Comments from team and changes made as needed | Team | n/a | Wk 4 |  |  |  |
| Submitted to Mrs. Gonzalez mid-week to allow time for changes if needed | Team | n/a | Wk 4 |  |  |  |
| Final to Mrs. Gonzalez | Team | n/a | Wk 4 |  |  |  |

**Team Signatures:**

Hannah **Cole**

Bryce ZOË

**This document serves two purposes in every project:**

* Project planning guide
* Project status report

**Instructions:**

* Each team works together to determine:
  + Project objective
  + Tasks to be completed for a successful fulfillment of the project objective
  + Resources needed to complete each task (if any)
  + Person(s) responsible for completing each task
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* The first four columns of the table below (task, responsible, resources, and due date) serve as the guiding document through the end of the project. Make one copy of the table per week the project lasts (for a five-week project, make five copies)
* At the end of each week, use one copy to fill in the last three columns of the table. This serves as a weekly status report for your teacher.

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| **Members of my group:** |  |
| **Project Name:** |  |
| **Project Objective:** |  |

| **Task** | **Who Is Responsible** | **Resources Needed** | **Due** | **Status** | **Date turned in** | **Check-off box** |
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**Team Signatures:**

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| **Criteria** | **Professional** | **Experienced** | **Developing** | **Novice** |
| **Content**  The information communicated by the project plan  40 points | ❑ All components of the project plan were complete and in writing. | ❑ All components of the project plan were addressed in writing, but some aspects needed further description. | ❑ Most of the project plan’s components were in writing; the missing elements diminished the plan’s effectiveness. | ❑ Many of the project plan’s components lacked sufficient detail to take action or were missing altogether. |
| ❑ The project plan’s objective gave a clear, comprehensive description of the project’s scope and schedule. | ❑ The project plan’s objective gave a clear description for the most part, but one of the items needed some clarification. | ❑ The project plan’s objective descriptions were difficult to follow/understand. | ❑ The project plan’s objectives were neither attainable nor measurable. |
| ❑ Needed resources were clearly identified. | ❑ Most resources were clearly identified. | ❑ Some critically needed resources were not identified. | ❑ Needed resources were too incomplete or were missing altogether. |
| ❑ The project plan contained specific activities/tasks. | ❑ For the most part, the project plan contained specific activities/tasks. | ❑ The project plan did not specifically contain all activities/tasks. | ❑ The project plan contained very few activities/tasks. |
| ❑ The project plan clearly specified persons responsible for each task. | ❑ For the most part, the project plan specified persons responsible for each task. | ❑ The project plan did not clearly specify persons responsible for each task. | ❑ The project plan did not specify persons responsible for each task. |
| ❑ The project plan contained specific deadlines. | ❑ For the most part, the project plan contained specific deadlines. | ❑ The project plan did not contain specific deadlines. | ❑ The project plan did not contain deadlines. |

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| **Criteria** | **Professional** | **Experienced** | **Developing** | **Novice** |
| **Content** (cont’d) | ❑ The project plan included easy-to-follow table or sequence-of-events flow chart. | ❑ The project plan included table or sequence-of-events flow chart, but some sections were not easy to follow. | ❑ The project plan included table or sequence-of-events flow chart, but it was too broad; important, smaller steps were omitted. | ❑ The project plan omitted table or flow chart; did not list sequence-of-events. |
| **Appropriateness**  Suitability; compatibility of one part of the plan with all other parts  35 points | ❑ The project plan’s objective was clear, attainable, and measurable. | ❑ The project plan’s objective was clear and measurable, but difficult to attain. | ❑ The project plan’s objective was stated in measurable terms. | ❑ The project plan’s objective was unclear and not stated in measurable terms. |
| ❑ All activities were logically sequenced and supported the project plan’s objective. | ❑ Most activities were logically sequenced and supported the project plan’s objective. | ❑ Several activities had gaps in sequence, were not in logical order, and/or did not support the project plan’s objective. | ❑ The sequence of activities made no sense and did not support the project plan’s objective. |
| ❑ Individual activity deadlines were realistic for achieving goals. | ❑ Most individual activity deadlines were realistic for achieving goals. | ❑ Several individual activity deadlines were not realistic for achieving goals. | ❑ Most individual activity deadlines were totally unreasonable. |

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| **Criteria** | **Professional** | **Experienced** | **Developing** | **Novice** |
| **Organization**  How the information is put together; the flow of the project plan  10 points | ❑ Main points were easy to follow and logical with points building on each other. | ❑ Main points were generally easy to follow and logical. | ❑ Main points were generally logical but difficult to follow. | ❑ Main points were so difficult to follow that their logic could not be determined, or they were illogical. |
| **Communication Skills**  Ability to express oneself so as to be understood by others  15 points | ❑ Ideas were expressed clearly in language that was easy to understand. | ❑ Ideas were expressed clearly with only a few words being difficult to understand. | ❑ Both ideas and words required much effort to understand. | ❑ Ideas were vague and elusive, and language was difficult to understand. |
| ❑ The project plan was neat, grammatically correct, and error-free. | ❑ The project plan was neat but contained minor errors that did not detract from the total plan. | ❑ The project plan contained some spelling and gram-matical errors that were distracting. | ❑ The project plan was messy, with many errors in spelling and grammar. |

| **Criteria** | **Professional** | **Experienced** | **Developing** | **Novice** |
| --- | --- | --- | --- | --- |
| **Content**  The information contained in and communicated by the marketing research plan  60 points | ❑ All components of the marketing research plan were complete and in writing. | ❑ All components of the marketing research plan were addressed in writing, but some aspects needed further description. | ❑ Most of the marketing research plan’s components were in writing; the missing elements diminished the proposal’s effectiveness. | ❑ Many of the marketing research plan’s components lacked sufficient detail to take action or were missing altogether. |
| ❑ The marketing research plan’s marketing problem clearly and concisely described the focus of the research. | ❑ The marketing research plan’s marketing problem described the focus of the research well, but some clarification was required. | ❑ The marketing research plan’s marketing problem was difficult to follow/understand. | ❑ The marketing research plan’s marketing problem was incomplete or missing altogether. |
| ❑ Research objectives were clearly identified and appropriately described the research project goals. | ❑ Research objectives were identified and appropriately described the research project goals for the most part, but some clarification was necessary. | ❑ The research objectives were difficult to follow/understand. | ❑ The research objectives were not attainable or missing. |
| ❑ Primary and secondary data collection method(s) were clearly identified, explained in detail, and appropriate for the research project. | ❑ Primary and secondary data collection method(s) were clearly identified, somewhat explained, and appropriate for the research project, but further detail was required. | ❑ Primary and secondary data collection method(s) were identified and appropriate for the research project, but no explanation was provided. | ❑ Primary and secondary data collection method(s) were inappropriate or missing. |
| **Content** (cont’d) | ❑ The marketing research plan clearly specified time and materials needed to carry out the marketing research. | ❑ For the most part, the marketing research plan clearly specified time and materials needed to carry out the marketing research. | ❑ The marketing research plan did not clearly specify time and materials needed to carry out the marketing research. | ❑ The marketing research plan did not contain a listing of time and materials needed to carry out the marketing research. |
| **Communication Skills**  The ability to express oneself so as to be understood by others  20 points | ❑ Information was clear and easy to understand. | ❑ Information was clear with only a few items being difficult to understand. | ❑ Information was not clear and took much effort to understand. | ❑ Information was too vague to understand. |
| ❑ Completed marketing research plan was neat, grammatically correct, and error-free. | ❑ Completed marketing research plan was neat but contained minor errors. | ❑ Completed marketing research plan contained spelling and grammatical errors that were distracting. | ❑ Completed marketing research plan was messy, with many errors in spelling and grammar. |
| **Organization**  The way in which the information is put together  20 points | ❑ Marketing research plan components were clearly identified. | ❑ Marketing research plan components were identified, but not always clearly. | ❑ Marketing research plan components were identified, but not clearly. | ❑ Marketing research plan components were not identified at all. |
| ❑ Information presented was logical and easy to follow. | ❑ Information presented was generally logical and easy to follow. | ❑ Information presented was sometimes difficult to follow. | ❑ Information was difficult to follow and illogical. |

| **Criteria** | **Professional** | **Experienced** | **Developing** | **Novice** |
| --- | --- | --- | --- | --- |
| **Content**  Information communicated by the proposal  60 points | ❑ Recommendations for specific promotional vehicles are clearly and concisely explained. | ❑ Recommendations for specific promotional vehicles are explained relatively well, but some clarification is required. | ❑ Recommendations for specific promotional vehicles are difficult to follow and understand. | ❑ Recommendations for specific promotional vehicles are incomplete or missing altogether. |
| ❑ Recommendations for specific promotional vehicles are logical and fully supported. | ❑ Recommendations for specific promotional vehicles are reasonable but lack some support. | ❑ Recommendations for specific promotional vehicles are inconsistent in their logic and lack support. | ❑ Recommendations for specific promotional vehicles are highly questionable and not supported. |
| ❑ Recommendations for promotional theme/message are clearly and concisely explained. | ❑ Recommendations for promotional theme/message are explained relatively well, but some clarification is required. | ❑ Recommendations for promotional theme/message are difficult to follow and understand. | ❑ Recommendations for promotional theme/message are incomplete or missing altogether. |
| ❑ Recommendations for promotional theme/message are logical and fully supported. | ❑ Recommendations for promotional theme/message are reasonable but lack some support. | ❑ Recommendations for promotional theme/message are inconsistent in their logic and lack support. | ❑ Recommendations for promotional theme/message are highly questionable and not supported. |

| **Criteria** | **Professional** | **Experienced** | **Developing** | **Novice** |
| --- | --- | --- | --- | --- |
| **Communication Skills**  The ability to express oneself so as to be understood by others  20 points | ❑ Ideas were expressed clearly and were easy to understand. | ❑ Ideas were expressed clearly with only a few words being difficult to understand. | ❑ Ideas and words required effort to understand. | ❑ Ideas were vague and elusive, and language was difficult to understand. |
| ❑ Visual aids supported, focused, clarified, and reinforced information given. | ❑ Visual aids added some support to the information given. | ❑ Visual aids were related to the information given but did not clarify or reinforce it. | ❑ Visual aids detracted from the information given, raising many questions. |
| **Organization**  The way in which the information is put together  20 points | ❑ Main points were logically sequenced and easy to follow with points building on each other. | ❑ Main points were logically sequenced and generally easy to follow. | ❑ Main points were logically sequenced but difficult to follow. | ❑ Main points were so difficult to follow that their logic could not be determined. |

**IM:012 Describe the need for marketing data**

**LAP**: LAP-IM-012 Data Do It (The Need for Marketing Data)  
© **LAP:** 2016

**Curriculum Planning Level:** CS

**Objectives:**

a. Define the following terms: facts, estimates, predictions, relationships, and marketing information.  
b. Identify types of information used in marketing decision-making.  
c. Identify types of marketing information useful to marketers.  
d. Describe ways that marketers use marketing information.  
e. Explain the impact of marketing information on marketers.

**Activity:**

Each student should identify a current problem in marketing and ask another student to describe types of marketing information that could be obtained to resolve the problem. Finally, the class should react to the recommendations.

**Ethics Case for Students:**You are in charge of a project to identify your customers’ risk of identity theft. The goal of the project is to determine ways to protect customers’ personal information. You have hired a very reputable cyber-security solution company that needs access to customers’ personal data to identify possible security risks. You're tempted not to reveal to customers that their information is going to be shared with another organization. After all, new privacy protection laws no longer require consumers to be informed if their information is shared with third-party organizations. Is it ethical to share your customers’ personal information without their consent? *(Ethical Principles Involved: Integrity, Trust, Transparency, Rule of Law)*

**Reference Books**

**Title:** Basic marketing: A marketing strategy planning approach (16th ed.)  
**Author:** Perreault, W.D., Cannon, J.P., & McCarthy, E.J.  
**References:** [pp. 208-209]  
**Publisher:** Boston: Irwin/McGraw-Hill  
**Copyright:**2008

**Title:** Essentials of marketing research (10th ed.)  
**Author:** Zikmund, W.G., & Babin, B.  
**References:** [pp. 35-36]  
**Publisher:** Mason, OH: South-Western Cengage Learning  
**Copyright:**2010

**Title:** Marketing (3rd ed.)  
**Author:** Burrow, J.L.  
**References:** [pp. 127-128, 134-135]  
**Publisher:** Mason, OH: South-Western Cengage Learning  
**Copyright:**2012

**Title:** Marketing dynamics (3rd ed.)  
**Author:** Clark, B., Basteri, C.G., Gassen, C., & Walker, M.  
**References:** [pp. 34-35, 188-189, 102-194, 200-201]  
**Publisher:** Tinley Park, IL: Goodheart-Willcox.  
**Copyright:**2014

**Title:** Contemporary marketing: 2013 edition  
**Author:** Kurtz, D.  
**References:** (pp. 240-243)  
**Publisher:** Mason, OH: South-Western Cengage Learning  
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**Title:** Marketing essentials 2012  
**Author:** Farese, L.S., Kimbrell, G., & Woloszyk, C.A.  
**References:** (pp. 656, 658-660)  
**Publisher:** Columbus, OH: Glencoe/McGraw-Hill  
**Copyright:**2012

**Reference Websites**

**Title:** Estimate.  
**Author:** ARDictionary  
**URL:** <http://ardictionary.com/Estimate>  
**Copyright:** 2004-2010  
**Accessed on:** 2017-06-01

**Title:** Three types of information needed by marketing managers.  
**Author:** Bhasin, H.  
**URL:** <http://www.marketing91.com/3-types-information-needed-marketing-managers/>  
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**Author:** Business Case Studies  
**URL:** <http://businesscasestudies.co.uk/jd-sports/using-market-research-to-support-decision-making/what-is-market-research.html#axzz34XKF3D00>  
**Copyright:** 1995-2017  
**Accessed on:** 2017-06-01

**Title:** Fact.  
**Author:** BusinessDictionary.com  
**URL:** <http://www.businessdictionary.com/definition/fact.html>  
**Copyright:** 2017  
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**Title:** Chapter 9: Marketing information systems.  
**Author:** FAO Corporate Document Repository  
**URL:** <http://www.fao.org/docrep/W3241E/w3241e0a.htm>  
**Copyright:** n.d.  
**Accessed on:** 2017-06-01

**Title:** Importance of marketing research.  
**Author:** KnowThis.com  
**URL:** <http://www.knowthis.com/marketing-research/importance-of-marketing-research>  
**Copyright:** 2017  
**Accessed on:** 2017-06-01

**Title:** What marketers do.  
**Author:** KnowThis.com  
**URL:** <http://www.knowthis.com/what-is-marketing/what-marketers-do>  
**Copyright:** 2017  
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**Title:** Why sales and marketing reports are important to your business.  
**Author:** Lewinter, H.  
**URL:** <http://www.talkbusinesswithhoward.com/business/why-sales-and-marketing-reports-are-important-to-your-business/>  
**Copyright:** 2009, December 1  
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**Title:** Market research.  
**Author:** MMC Learning.  
**URL:** <http://multimediamarketing.com/mkc/marketresearch/>  
**Copyright:** 2015  
**Accessed on:** 2017-06-01

**Title:** Q&A--What are the main uses of market research?  
**Author:** Riley, J.  
**URL:** <https://www.tutor2u.net/business/blog/qa-what-are-the-main-uses-of-market-research>  
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**Title:** Intro to marketing: Managing marketing information—Flipped classroom. [Video].  
**Author:** Tan, T.S.  
**URL:** <https://www.youtube.com/watch?v=a1BJU8Rcnl4>  
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**Title:** Strategic management - Domino's Pizza managing marketing information. [Video].  
**Author:** Young, T. L.  
**URL:** <https://www.youtube.com/watch?v=IN9Gk0pPhr0>  
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**Accessed on:** 2017-06-01

**IM:184 Identify data monitored for marketing decision making**

**LAP**: LAP-IM-184 Data Diving (Identifying Marketing Data)  
© **LAP:** 2017

**Curriculum Planning Level:** SP

**Objectives:**

a. Explain sources of sales data monitored for marketing decision-making (e.g., sales involves, call reports, sales reports, expense reports).  
b. Discuss sources of customer data that are monitored for marketing decision-making (e.g., customer records, customer complaints, digital marketing analytics).

c. Explain sources of product data monitored for marketing decision-making (e.g., product returns, service calls, product reviews).

d. Describe financial data monitored for marketing decision-making.

e. Explain sources and types of competitor data that are monitored for marketing decision-making (e.g., competitors' websites, competitors' financial information, salespeople, suppliers and distributors, observable changes in marketing strategies, market share).

f. Discuss sources of data about the external business environment used in marketing decision-making (e.g., trade publications, vendors, economic indicators).

**Activity:**

Each student should talk with a businessperson about how her/his company monitors competitors’ activities. Students should be sure to find out what activities are monitored, what techniques are used to monitor them, and how web sites are being used to monitor competitors. Each student should write a one-page report of his/her findings.

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**Title:** Marketing  
**Author:** Grewal, D., & Levy, M.  
**References:** (pp. 242-250)  
**Publisher:** New York: National Council on Economic Education  
**Copyright:**2008

**Title:** Sales management: Building customer relationships and partnerships  
**Author:** Hair, J.F., Anderson, R.E., Mehta, R., & Babin, B.J.  
**References:** (pp. 391-399)  
**Publisher:** Boston: Houghton Mifflin  
**Copyright:**2009

**Title:** Sales force management (9th ed.)  
**Author:** Johnston, M.W., & Marshall, G.W.  
**References:** [pp. 164-167, 171-172, 444-446]  
**Publisher:** New York: McGraw-Hill/Irwin  
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**Author:** Hair, J.F., Wolfinbarger, M., Ortinau, D.J., & Bush, R.P.  
**References:** (pp. 64-65)  
**Publisher:** New York: McGraw-Hill/Irwin  
**Copyright:**2008

**Title:** Selling today: Creating customer value (11th ed.)  
**Author:** Manning, G.L., Reece, B.L., & Ahearne, M.  
**References:** [pp. 197, 335, 359-362]  
**Publisher:** Upper Saddle River, NJ: Prentice Hall  
**Copyright:**2010

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**Author:** Boone, G., & Kurtz, D.L.  
**References:** (p. 252)  
**Publisher:** Mason, OH: South-Western Cengage Learning  
**Copyright:**2013

**Title:** Marketing (3rd ed.)  
**Author:** Burrow, J.L.  
**References:** [pp. 128-131]  
**Publisher:** Mason, OH: South-Western Cengage Learning  
**Copyright:**2012

**Title:** Marketing essentials 2012  
**Author:** Farese, L.S., Kimbrell, G., & Woloszyk, C.A.  
**References:** (p. 280)  
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**Title:** Competitor analysis—A brief guide.  
**Author:** Aware  
**URL:** <http://www.marketing-intelligence.co.uk/resources/competitor-analysis.htm>   
**Copyright:** 2013, April 7  
**Accessed on:** 2017-06-05

**Title:** Market research enhances business decision-making.  
**Author:** Barrios, A.  
**URL:** <http://www.georgiasbdc.org/pdfs/barrios04.pdf>   
**Copyright:** n.d.  
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**Title:** Conducting market research? Here are 5 official sources of free data that can help  
**Author:** Beesley, C.  
**URL:** <https://www.sba.gov/blogs/conducting-market-research-here-are-5-official-sources-free-data-can-help>   
**Copyright:** 2016, March 8  
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**Title:** Marketing Information Systems  
**Author:** Bsaikrishna  
**URL:** <https://brandalyzer.wordpress.com/2011/09/02/marketing-information-systems>   
**Copyright:** 2011, Sept. 2  
**Accessed on:** 2017-06-05

**Title:** Without market research you will miss valuable opportunities.  
**Author:** Business Owner's Toolkit  
**URL:** <http://www.bizfilings.com/toolkit/sbg/marketing/market-research/market-research-to-not-miss-opportunities.aspx>   
**Copyright:** 2012, May 24  
**Accessed on:** 2017-06-05

**Title:** How to monitor your competitor products.  
**Author:** BusinessKnowledgeSource.com  
**URL:** <http://www.businessknowledgesource.com/marketing/_how_to_monitor_competitor_products_023883.html>   
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**Accessed on:** 2017-06-05

**Title:** Source of marketing research: Internal, external source of marketing research  
**Author:** Chand, S.  
**URL:** <http://www.yourarticlelibrary.com/marketing/sources-of-marketing-research-a-internal-b-external-sources-of-marketing-research/25860>   
**Copyright:** 2016  
**Accessed on:** 2017-06-05

**Title:** The social media analytics compass: What and how to measure  
**Author:** Cleary, I.  
**URL:** <http://www.razorsocial.com/social-media-analytics-tools>   
**Copyright:** 2017, January 26  
**Accessed on:** 2017-06-05

**Title:** 10 Tips on How to Research Your Competition  
**Author:** Dahl, D.  
**URL:** <http://www.inc.com/guides/201105/10-tips-on-how-to-research-your-competition.html>   
**Copyright:** 2011, May 11  
**Accessed on:** 2017-06-05

**Title:** What is a sales invoice in financial accounting?  
**Author:** Gartenstein, D.  
**URL:** <http://smallbusiness.chron.com/sales-invoice-financial-accounting-24844.html>   
**Copyright:** n.d.  
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**IM:010 Explain the nature of marketing research**

**LAP**: LAP-IM-010 Seek and Find (Marketing Research)  
© **LAP:** 2017

**Curriculum Planning Level:** SP

**Objectives:**

a. Define the following terms: marketing research, secondary research, primary research, personal interview, mail interview, telephone interview, questionnaire, and focus group.  
b. Identify characteristics of effective marketing research.  
c. Describe the importance of marketing research.  
d. Explain how marketing research is carried out.  
e. Explain the uses of marketing research.  
f. Describe shortcomings of marketing research.  
g. Describe types of marketing research objectives.  
h. Describe the contents of a research plan or design.  
i. Classify types of marketing research data.  
j. Distinguish between internal and external sources of data.  
k. Describe types of data collection methods.  
l. Explain how data can be analyzed.  
m. Describe steps in the marketing research process.

**Activity:**

Assign a different local business to each student in the class. Each student should then determine the types of marketing-research activities that his/her assigned local business conducts and write a synopsis of her/his findings. Discuss the students' findings as a class, and contrast the marketing-research activities of large businesses with those of small businesses.

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**IM:282 Discuss the nature of marketing research problems/issues**

**LAP**: LAP-IM-282 What’s the Problem? (Marketing Research Problems)  
© **LAP:** 2017

**Curriculum Planning Level:** SP

**Objectives:**

a. Define the term marketing research problem, decision problem, variables, unit of analysis, research objectives.  
b. Explain the importance of determining the actual marketing research problem/issue.  
c. Discuss the need to determine the “real” issue/problem rather than its symptoms.  
d. Describe the steps involved in determining the marketing research problem/issue (e.g., clarifying and identifying the information needs, redefining the decision problem as a research problem, and setting research objectives.  
e. Discuss activities involved in identifying the information needs (e.g., determining the purpose of the research, understanding the complete problem, identifying measurable symptoms, determining the unit of analysis, and determining relevant variables).  
f. Explain why researchers need to adjust the decision problem into a research problem.  
g. Describe the purposes of setting marketing research objectives.  
h. Explain the relationship between the research problem/issue and the marketing research objectives.  
i. Discuss how determining the marketing research problem/issue aids in determining whether to conduct the study.  
j. Describe situations in which conducting a marketing research study would be inappropriate.

**Activity:**

Divide the class into groups of two, and instruct the groups to access the Social Science Research Network site for the Harvard Business School Marketing Unit at <http://papers.ssrn.com/sol3/JELJOUR_Results.cfm?form_name=journalbrowse&journal_id=334640>. Each pair of students should select a marketing-research paper of interest and download it from the Social Science Research Network. The pair should read the study to determine the nature of the research problem/issue, the unit of analysis, and variables; determine whether the research problem/issue aligns with the research objectives; share its findings with the class; and save the research study for future use.

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**URL:** <http://userwww.sfsu.edu/hussain/mktg632/Chapter02.pdf>   
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**Author:** KnowThis.com.  
**URL:** <http://www.knowthis.com/planning-for-marketing-research/step-2-identify-what-is-to-be-learned>   
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**Author:**  Mind Tools Editorial Team  
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**Author:** Smith, S.  
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**IM:281 Describe options businesses use to obtain marketing research data (i.e., primary and secondary research)**

**LAP**: LAP-IM-015 What's the Source? (Obtaining Marketing-Research Data)  
© **LAP:** 2013

**Curriculum Planning Level:** SP

**Objectives:**

a. Distinguish between primary and secondary marketing research.  
b. Describe occasions for using primary sources of marketing research data.  
c. Discuss primary sources of marketing research data.  
d. Describe advantages/disadvantages of primary marketing research.  
e. Explain types of primary research (i.e., quantitative and qualitative).  
f. Explain occasions for using secondary sources of marketing research data.  
g. Describe secondary sources of marketing research data (i.e., internal and external).  
h. Describe advantages/disadvantages with using internal sources of secondary data.  
i. Explain reasons that businesses need to analyze external data.  
j. Explain advantages/disadvantages of secondary marketing research.  
k. Discuss reasons for outsourcing marketing research activities.

**Activity:**

Instruct each student to obtain a marketing research paper from the Social Science Research Network at <http://papers.ssrn.com/sol3/JELJOUR_Results.cfm?form_name=journalbrowse&journal_id=334640>. S/He should analyze the paper to determine whether the author conducted primary or secondary research and from what resources the author obtained data—internal or external and primary or secondary. Finally, s/he should discuss her/his findings with a group of two or three other classmates.

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**Author:** Churchill, G.A., Brown, T.J., & Suter, T.A.  
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**Author:** Hair, J.F., Wolfinbarger, M., Ortinau, D.J., & Bush, R.P.  
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**Publisher:** New York: McGraw-Hill/Irwin  
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**Author:** BizFilings  
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**Author:** Entrepreneur.com.  
**URL:** [http://www.entrepreneur.com/encyclopedia/primary-market-research#](http://www.entrepreneur.com/encyclopedia/primary-market-research)   
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**Author:** KnowThis.com  
**URL:** <http://www.knowthis.com/principles-of-marketing-tutorials/data-collection-primary-research-methods/primary-research-advantages>   
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**IM:284 Describe methods used to design marketing research studies (i.e., descriptive, exploratory, and causal)**

**LAP**: LAP-IM-284 Better by Design (Marketing Research Designs)  
© **LAP:** 2017

**Curriculum Planning Level:** SP

**Objectives:**

a. Define the following terms: research design, descriptive design, exploratory design, causal design.  
b. Describe general purposes of marketing research (e.g., explain, predict, monitor, discover, test hypotheses).  
c. Explain the relationship between the research design and the purpose of the research.  
d. Discuss the purposes of using descriptive research.  
e. Explain the purposes of using exploratory research.  
f. Distinguish between descriptive and exploratory research.  
g. Describe the purposes of using causal research.

**Activity:**

Instruct students to access the Social Science Research Network site for the Harvard Business School Marketing Unit at <http://papers.ssrn.com/sol3/JELJOUR_Results.cfm?form_name=journalbrowse&journal_id=334640>. Each student should select a marketing research paper of interest and download it from the Social Science Research Network. S/He should read the paper to determine the general purpose of the study (i.e., explain, predict, monitor, discover or test hypotheses); determine whether the research design is descriptive, exploratory, or causal; determine whether the research design is appropriate for the purpose of the research; record her/his findings; write a summary of the research paper; submit his/her paper for feedback; and save the research study for future use.

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**Author:** Fluid Surveys University  
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**Author:** Ty, R.  
**URL:** <https://www.youtube.com/watch?v=49_u-pXwx7g>   
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**IM:285 Discuss the nature of sampling plans (i.e., who, how many, how chosen)**

**LAP**: LAP-IM-016 Take Your Pick (Nature of Sampling Plans)  
© **LAP:** 2013

**Curriculum Planning Level:** SP

**Objectives:**

a. Define the terms population, sample, probability sampling, non-probability sampling, and sampling plan.  
b. Discuss the advantages of using a sample to represent the population.  
c. Explain when it is appropriate to use a sample of the population.  
d. Distinguish between probability and non-probability sample designs.  
e. Explain types of non-probability sample designs.  
f. Describe types of probability sample designs.  
g. Explain types of sampling bias/errors.  
h. Discuss the purpose of sampling plans.  
i. Explain the components of a sampling plan.

**Activity:**

Instruct each student to use the marketing-research study previously downloaded from the Social Science Research Network at <http://papers.ssrn.com/sol3/JELJOUR_Results.cfm?form_name=journalbrowse&journal_id=334640> to explore the study’s sampling plan. S/He should determine whether a probability or non-probability sample was used, the type of sample design used, and the steps the research took to overcome sampling bias/error. Students should record their findings, submit them for review, and save their research studies for future use.

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**Author:** Churchill, G.A., Brown, T.J., & Suter, T.A.  
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**Title:** Essentials of marketing research  
**Author:** Hair, J.F., Wolfinbarger, M., Ortinau, D.J., & Bush, R.P.  
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**URL:** <https://explorable.com/sampling-error>   
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**Author:** Mays, S.  
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**Author:** MindCoral Inc.  
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**IM:289 Describe data-collection methods (e.g., observations, mail, diaries, telephone, Internet, discussion groups, interviews, scanners, tracking tools)**

**LAP**: LAP-IM-017 Hunting and Gathering (Data-Collection Methods)  
© **LAP:** 2015

**Curriculum Planning Level:** SP

**Objectives:**

a. Explain reasons for having a variety of data-collection methods.  
b. Describe forms of quantitative data collection (e.g., surveys, tracking, experiments).  
c. Describe forms of qualitative data collection (e.g., personal interviews, focus groups, observational research).  
d. Explain limitations associated with qualitative research.  
e. Explain advantages/disadvantages with using observational techniques to collect marketing data.  
f. Describe advantages/disadvantages associated with using mail techniques to collect marketing data.  
g. Discuss advantages/disadvantages associated with using telephone data-collection methods.  
h. Describe ways to use the Internet to collect data.  
i. Explain advantages/disadvantages associated with using the Internet as a data-collection method.  
j. Describe advantages/disadvantages of using discussion groups to collect data.  
k. Discuss advantages/disadvantages associated with using interviews to collect data.  
l. Explain advantages/disadvantages associated with using scanners to collect data.

**Activity:**

Each student should use the marketing research paper obtained from the Social Science Research Network at <http://papers.ssrn.com/sol3/JELJOUR_Results.cfm?form_name=journalbrowse&journal_id=334640> to determine what method(s) the author used to collect the data. S/He should identify the advantages/disadvantages associated with that data-collection method, determine additional ways the author could have collected the data, and discuss his/her ideas with a classmate.

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**Author:** Fleming, G.  
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**URL:** <http://www.knowthis.com/principles-of-marketing-tutorials/data-collection-primary-research-methods/qualitative-data-collection>   
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**Author:** SurveyBounty  
**URL:** <http://www.surveybounty.com/articles/surveyadvantages.html>   
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**PR:002 Explain the types of promotion (i.e., institutional, product)**

**LAP**: LAP-PR-004 Know Your Options (Types of Promotion)  
© **LAP:** 2016

**Curriculum Planning Level:** CS

**Objectives:**

a. Define the following terms: product promotion, primary product promotion, secondary product promotion, institutional promotion, public service, public relations, and patronage.  
b. Identify types of product promotion.  
c. Describe the uses of product promotion.  
d. Identify types of institutional promotion.  
e. Describe uses of institutional promotion.  
f. Discuss the advantages of promotional activities.  
g. Discuss the disadvantages of promotional activities.

**Activity:**

Students should locate examples of institutional and product promotions in magazines, in newspapers, or on the Internet. Each student should affix her/his promotions to paper, label each by its type of promotion, and obtain feedback from a classmate.

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**Author:** Grewal, D., & Levy, M.  
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**Publisher:** New York: National Council on Economic Education  
**Copyright:**2008

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**Author:** Perreault, W.D., Cannon, J.P., & McCarthy, E.J.  
**References:** [pp. 369-371, 429]  
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**Title:** Principles of marketing (12th ed.)  
**Author:** Kotler, P., & Armstrong, G.  
**References:** [pp. 506-509]  
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**Title:** Marketing (3rd ed.)  
**Author:** Burrow, J.L.  
**References:** [pp. 426-427]  
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**Title:** Entrepreneurship: A small business approach  
**Author:** Bamford, C.E., & Bruton, G.D.  
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**Author:** Clark, B., Basteri, C.G., Gassen, C., & Walker, M.  
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**Author:** Crystal, G., Joseph, A., & Foster, N.  
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**PR:003 Identify the elements of the promotional mix**

**LAP**: LAP-PR-001 Spread the Word (Nature of the Promotional Mix)  
© **LAP:** 2017

**Curriculum Planning Level:** SP

**Objectives:**

a. Define the following terms: promotional mix, advertising, personal selling, publicity and sales promotion.  
b. Identify the elements of the promotional mix.  
c. Categorize examples of promotions according to the elements of the promotional mix.  
d. Describe the importance of the promotional mix.  
e. Identify factors affecting the promotional mix.  
f. Describe how the product being sold affects the promotional mix.  
g. Explain how the product's market affects the promotional mix.  
h. Discuss how the distribution system affects the promotional mix.  
i. Explain how the product's company affects the promotional mix.

**Activity:**

Each student should identify two businesses similar to one that s/he might be interested in starting; determine their promotional mix; and examine their similarities and differences. Based on his/her assessment, each student should identify the promotional mix that would be effective for her/his business and write a rationale for his/her selection, identifying the promotional mix and explaining how it is similar to and/or different than that of the two businesses. Students should submit the rationale for review.

**Reference Books**

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**Author:** Perreault, W.D., Cannon, J.P., & McCarthy, E.J.  
**References:** [pp. 37-38, 368-371, 374-375]  
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**Title:** Marketing: Real people, real choices (5th ed.)  
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**Author:** Alanis Business Academy  
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**Author:** Pujari, S.  
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**Title:** (Updated) London's Bins Are Tracking Your Smartphone.  
**Author:** Vincent, J.  
**URL:** <http://www.independent.co.uk/life-style/gadgets-and-tech/news/updated-londons-bins-are-tracking-your-smartphone-8754924.html>   
**Copyright:** 2013, August 9  
**Accessed on:** 2017-06-05

**Title:** What is Integrated Marketing Communications?  
**Author:** WVU Reed College of Media  
**URL:** <http://imc.wvu.edu/about/what_is_imc>   
**Copyright:** 2017  
**Accessed on:** 2017-06-05

**PR:007 Explain types of advertising media**

**LAP**: LAP-PR-003 Ad-quipping Your Business (Types of Advertising Media)  
© **LAP:** 2016

**Curriculum Planning Level:** SP

**Objectives:**

a. Define the term advertising media.  
b. Categorize advertising media.  
c. Identify types of publications.  
d. Describe factors on which newspapers vary.  
e. Categorize types of magazines.  
f. Describe the two categories of broadcast media.  
g. Categorize purchase options for television advertising.  
h. Discuss the difference between local and network advertising.  
i. Describe types of direct-mail advertising.  
j. Explain types of Web advertising.  
k. Identify types of out-of-home media.  
l. Describe specialty advertising.  
m. Discuss the use of directory advertising.  
n. Explain the use of movie theater advertising.  
o. Describe the use of product placement for advertising.  
p. Discuss the use of telemarketing for advertising.  
q. Explain the use of videotapes, DVDs, and CD-ROM advertising.  
r. Explain trends that are affecting advertising media.

**Activity:**

Each student should create a list of print and broadcast media available in the local area; determine how often they are published/broadcast, who their target audiences are, and what type(s) of businesses could benefit from using each medium; and collect examples of their advertisements.

**Reference Books**

**Title:** Marketing (3rd ed.)  
**Author:** Burrow, J.L.  
**References:** [pp. 438, 440-441. 433-434]  
**Publisher:** Mason, OH: Thomson/South-Western  
**Copyright:**2012

**Title:** Principles of marketing (12th ed.)  
**Author:** Kotler, P., & Armstrong, G.  
**References:** [pp. 399, 408, 484-493]  
**Publisher:** Upper Saddle River, NJ: Prentice Hall  
**Copyright:**2008

**Title:** Marketing: Real people, real choices (5th ed.)  
**Author:** Soloman, M.R., Marshall, G.W., & Stuart, E.W.  
**References:** [pp. 415-420]  
**Publisher:** Upper Saddle River, NJ: Pearson Prentice Hall  
**Copyright:**2008

**Title:** Entrepreneurial small business (3rd ed.)  
**Author:** Katz, J. & Green, R.  
**References:** [pp. 314-318]  
**Publisher:** New York: McGraw-Hill/Irwin  
**Copyright:**2011

**Title:** Entrepreneurship: A small business approach  
**Author:** Bamford, C.E., & Bruton, G.D.  
**References:** (pp. 227-229)  
**Publisher:** New York: McGraw-Hill  
**Copyright:**2011

**Title:** Marketing dynamics (3rd ed.)  
**Author:** Clark, B., Basteri, C.G., Gassen, C., & Walker, M.  
**References:** [pp. 474-478, 492-494]  
**Publisher:** Tinley Park, IL: Goodheart-Willcox.  
**Copyright:**2014

**Title:** Contemporary marketing: 2013 edition  
**Author:** Kurtz, D.  
**References:** (pp. 505-509, 537-546)  
**Publisher:** Mason, OH: South-Western Cengage Learning  
**Copyright:**2013

**Title:** Marketing essentials 2012  
**Author:** Farese, L.S., Kimbrell, G., & Woloszyk, C.A.  
**References:** (pp. 441-449)  
**Publisher:** Columbus, OH: Glencoe/McGraw-Hill  
**Copyright:**2012

**Reference Websites**

**Title:** Effective advertising makes people remember your name.  
**Author:** BizFilings  
**URL:** <http://www.bizfilings.com/toolkit/sbg/marketing/advertising-pr/advertising-benefits.aspx>   
**Copyright:** 2012, May 25  
**Accessed on:** 2017-06-05

**Title:** Advertising media—Print.  
**Author:** Encyclopedia of Small Business: Reference for Business  
**URL:** <http://www.referenceforbusiness.com/small/A-Bo/Advertising-Media-Print.html>   
**Copyright:** 2017  
**Accessed on:** 2017-06-05

**Title:** Advertising media—Video.  
**Author:** Encyclopedia of Small Business: Reference for Business  
**URL:** <http://www.referenceforbusiness.com/small/A-Bo/Advertising-Media-Video.html>   
**Copyright:** 2017  
**Accessed on:** 2017-06-05

**Title:** Advertising media—Internet.  
**Author:** Encyclopedia of Small Business: Reference for Business  
**URL:** <http://www.referenceforbusiness.com/small/A-Bo/Advertising-Media-Internet.html>   
**Copyright:** 2017  
**Accessed on:** 2017-06-05

**Title:** Advertising media—Audio.  
**Author:** Enclycopedia for Business: Reference for Business  
**URL:** <http://www.referenceforbusiness.com/small/A-Bo/Advertising-Media-Audio.html>   
**Copyright:** 2017  
**Accessed on:** 2017-06-05

**Title:** Advertising trends: Changing media choices.  
**Author:** KnowThis.com  
**URL:** <http://www.knowthis.com/advertising/advertising-trends-changing-media-choices>   
**Copyright:** 2017  
**Accessed on:** 2017-06-05

**Title:** Advantages & disadvantages of print media.  
**Author:** Kokemuller, N.  
**URL:** <http://smallbusiness.chron.com/advantages-disadvantages-print-media-55556.html>   
**Copyright:** n.d.  
**Accessed on:** 2017-06-05

**Title:** What are the benefits of media advertising?  
**Author:** Kokemuller, N.  
**URL:** <http://www.ehow.com/info_7745779_benefits-media-advertising.html>   
**Copyright:** n.d.  
**Accessed on:** 2017-06-05

**Title:** Advantages and disadvantages of various advertising mediums.  
**Author:** Pleshette, L.A.  
**URL:** <http://www.powerhomebiz.com/marketing-tips/advertising/advantages-and-disadvantages-advertising-mediums.htm>   
**Copyright:** 2013, April 08  
**Accessed on:** 2017-06-05

**Title:** Promotion—Advertising media types. [Video file].  
**Author:** Richea, J.  
**URL:** <https://www.youtube.com/watch?v=W5HAX8dB1JM>   
**Copyright:** 2013, December 13  
**Accessed on:** 2017-06-05

**Performance Indicators:**

* Acquire product information for use in selling (SE:062, LAP-SE-131) (CS) (pp. 4-216—4-217)
* Explain the selling process (SE:048, LAP-SE-048) (CS) (pp. 4-218—4-220)
* Explain the role of customer service as a component of selling relationships (SE:076, LAP-SE-130) (CS) (pp. 4-221—4-222)
* Explain company selling policies (SE:932, LAP-SE-121) (CS) (pp. 4-223—4-224)
* Explain key factors in building a clientele (SE:828, LAP-SE-115) (SP) (pp. 4-225—4-226)

**Project Description:**

This project teaches students about selling while at the same time helping them to improve their class business’s chances for success during the *Business Strategies* course. Students will work in teams to become knowledgeable about the goods or services that their class business is planning to sell next year, as well as research specific sales concepts and skills. Following this research, each team will develop a script and storyboards for a sales training video. Each team’s video will be about a different assigned topic (e.g., selling policies, the selling process, etc.), and the audience for the videos will be the current *Principles of Marketing* students—who will view the videos again during *Business Strategies* class next year when preparing to sell their business’s products. After receiving instructor approval of its script and storyboards, each team will record its training video and submit it to the instructor and sales professionals for review.

**Driving Question:**

What will we need to know about selling to make our future class business a success?

**Timeframe:** 2½ weeks

**Entry Event:**

Talk with students about New Balance’s “Letters to My Future Self” campaign, which features inspirational videos and letters written by several famous athletes to themselves. If possible, watch several of the videos with the class and/or have students read some of the letters, all of which are available on New Balance’s website at <http://www.newbalance.com/letter-to-future-self/>. Ask students to identify common themes among the videos and/or letters, and encourage students to talk about the benefits of creating such letters or videos.

Next, give students time to write letters or videos to their future selves. Instruct students to include words of encouragement and advice to themselves as they finish high school and move on to college or the world of work. Upon completion of these letters or videos, collect them from students and save them to give back to students to read/watch just prior to their high school graduation.

After collecting the students’ work to save, explain that this project will give them another opportunity to give advice to their future selves—and to make their class business that they will run during *Business Strategies* a success. Then ask the driving question.

**Briefings:**

To augment the project, briefings should be provided during the week specified.

|  |  |
| --- | --- |
| **Week** | **Topic** |
| 15 | Selling Process (pp. 4-197—4-201) |

**Step-by-Step Guide:**

|  |  |  |  |
| --- | --- | --- | --- |
| **Checkpoint** | **Week** | **Details** | **Assessment** |
| **Group Contract** | 14 | Each team develops a contract for how the team will operate, including how to handle conflict and consequences for team members that don’t participate. A sample group contract is provided on pages 4-203—4-204. | Complete/ Incomplete |
| **Project Plan** | 14 | Team develops a written project plan to be used as a guide for completing tasks within the project. A sample project plan is provided on pages 4-205—4-208, and a blank project plan form is provided on pages 4-209— 4-210 | Developing a Project Plan Rubric (pp. 4-211— 4-213) |
| **Video Script & Storyboards** | 14 & 15 | Assign one of the following topics to each group. If necessary, assign the same topic to more than group:   * Methods to acquire product information for use in selling * The selling process * Company selling policies * Key factors in building a clientele   Each team conducts research on the product(s) that the class’s business will sell during *Business Strategies* next year, as well as the sales-related topic assigned to that team by the instructor. After completing its research, each team develops a sales training video script and storyboards to submit to the teacher. Questions that each team should address in the script and storyboards (based on the assigned topic) are provided on page  4-202. | Complete/ Incomplete |

|  |  |  |  |
| --- | --- | --- | --- |
| **Checkpoint** | **Week** | **Details** | **Assessment** |
| **Quiz 4A** | 15 | At the end of week 15, students take a brief quiz covering the following performance indicators:   * Acquire product information for use in selling (SE:062, LAP-SE-131) (CS) * Explain the selling process (SE:048, LAP-SE-048) (CS) * Explain the role of customer service as a component of selling relationships (SE:076,  LAP-SE-130) (CS) | To create this quiz, use multiple-choice items provided on this course guide direct download link. |
| **Team Sales Training Video** | 15 & 16 | Each team uses its script and storyboards to create and edit a sales training video (4-6 minutes in length) targeted at their future selves. Every team member should speak during the training. Upon completion, students should share their videos with the class and then submit their videos to the instructor. If possible, also make arrangements for sales professionals to view the training videos and then give feedback to students (either in person or via Skype) about the videos. | Sales Training Video Rubric  (pp. 4-214—4-215) |
| **Quiz 4B** | 16 | At the end of week 16, students take a brief quiz covering the following performance indicators:   * Explain company selling policies (SE:932,  LAP-SE-121) (CS) * Explain key factors in building a clientele (SE:828, LAP-SE-115) (SP) | To create this quiz, use multiple-choice items provided on this course guide direct download link. |

**Teacher Tips:**

* If you would prefer not to collect or keep the students’ letters and videos to their future selves (completed as part of the entry event), search the Internet for an online service to do so for you. Websites such as FutureMe.org ([www.futureme.org](http://www.futureme.org)), Letters to My Future Self (<http://lettertomyfutureself.net/>), and Dear Future Me (<https://dearfutureme.org/>) offer to save students’ letters and then return them via email or snail mail to the students on a particular date in the future as requested by the students.
* Make arrangements for one or more sales professionals to view students’ training videos and then visit the classroom or call via Skype to provide feedback and further advice to each group.
* If the class’s business model does not involve selling any products, select an organization or business that could benefit from this project instead.

|  |  |
| --- | --- |
| Weekly Planner | |
| **Monday** |  |
| **Tuesday** |  |
| **Wednesday** |  |
| **Thursday** |  |
| **Friday** |  |

|  |  |
| --- | --- |
| Weekly Planner | |
| **Monday** |  |
| **Tuesday** |  |
| **Wednesday** |  |
| **Thursday** |  |
| **Friday** |  |

|  |  |
| --- | --- |
| Weekly Planner | |
| **Monday** |  |
| **Tuesday** |  |
| **Wednesday** |  |
| **Thursday** |  |
| **Friday** |  |

**Characteristics of the selling process**

* + Complex process
  + Varies across industries, products, and customers
  + No one, single, correct selling process for all situations
  + General phases can be applied to all sales situations

**Components/Phases of a general selling process**

* + Establishing relationships with customers
  + Discovering customer needs
  + Prescribing solutions to needs
  + Reaching closure
  + Reaffirming the buyer-seller relationship

**Establishing relationships with customers**

* Occurs during the first few minutes spent with a customer
* Often determines the outcome of the sales contact
* Can be used to:
  + Put the customer at ease
  + Encourage the customer to want to hear about your product
  + Gain customer confidence
  + Create a favorable impression
* Gives the salesperson a chance to size up the customer so that the approach can be adjusted to fit that customer
  + Provides a chance to determine whether customer is aware of their buying needs
  + Gives salesperson an opportunity to determine what buying decisions have been made
  + Lets salesperson determine the customer’s personality type
* Can get a head start on establishing relationships with customers by researching the prospect
  + Try to learn about the customer’s business
    - Company size
    - Purchasing practices
    - Company locations
    - Decision makers
  + Attempt to learn about the customer’s personality
    - Customer’s name
    - Customer’s position in the company
    - Customer’s educational background
    - Customer’s hobbies
    - Customer’s work history

**Discovering customer needs**

* A process that could be used involves:
  + Questioning the customer about her/his needs
  + Listening to the customer’s answers
  + Observing customer reactions
  + Analyzing customer reactions and comments
    - The process needs to be tailored to the sales presentation based on information gathered from the customer.
    - Importance of assessing customer needs:
    - Reduces the amount of selling time required
    - Reduces customer dissatisfaction and returns
    - Allows salesperson to call on/serve more customers, leading to greater profit and commissions
    - This phase of the selling process is thought of as a “diagnosis” since the salesperson is diagnosing customer needs based on information the customer provides.
    - This phase readies the salesperson to recommend a solution to the customer’s needs.

**Prescribing solutions to customer needs**

* This is the prescription phase: the salesperson offers solutions to meet customer needs.
* The prescription should be based on the diagnosis of a specific customer—one prescription does not fit all.
* This phase consists of two parts:
* The sales talk
  + - Should convince the customer of the benefits derived from purchasing the product
    - Requires salesperson to translate product features into product benefits that meet the customer’s specific needs
* The product demonstration
* Should create interest in the product
* Should allow the customer to interact and become involved in the selling process (e.g., customer asks questions; customer discusses important points in-depth to clarify what has been said)
* Rule-of-thumb guidelines for prescribing solutions to customer needs include:
  + - Sell the benefits of the product rather than its features.
    - Show a limited number of products to avoid confusion.
    - Select items that can help to define customers’ specific needs.
    - Concentrate on the main item of interest to close the sale.

**Reaching closure**

* Purposes of the closure phase:
  + - To identify any remaining resistance, or objections, the customer may have
    - To get the order
* Objections defined as questions or concerns customers raise after they have been prescribed a solution to their needs.
* Salespeople should anticipate objections and use them to their advantage during the sales presentation.
* Tips for handling objections include:
  + - Welcome customer objections.
    - Listen from the customer’s point of view to identify the real objection.
    - Restate the objection to be sure it’s understood.
    - Answer and overcome each objection completely, without arguing with the customer or losing your poise.
    - Review buyer benefits.
    - Try to develop customer conviction in the product.
* While overcoming objections, salespeople should look for customer clues that the time has come to close the sale.
  + - Customers express clues verbally: “This is just what we need.”
    - Customers give nonverbal clues: Closing and stacking product literature.
* The close is the logical completion to an effective sales presentation.
  + - Customers are moved too the point where they are convinced the product meets their needs.
    - They want to purchase the product.
* Salesperson asks the customer to buy.
* Salesperson then completes paperwork—a simple sales slip or a contract.

**Reaffirming the buyer-seller relationship**

* Purposes of the closure phase:
  + - To identify any remaining resistance, or objections, the customer may have
    - To get the order
* During this phase, the salesperson helps customers feel confident with their purchase decisions.
* The approach used depends on the nature of the sales situation and could involve any of the following:
* Simply saying, “This was the best product for your needs”
* Use of suggestion selling: recommending complementary products to go with the original purchase
* Answering any lingering questions the customer may have
* Explaining the sales contract fully
* Checking on or being present when the product is delivered
* Supervising installation or adjust of the product
* Training the customer’s staff in the use or the sale of the product
* Calling the customer later to ensure satisfaction

**Reasons for using the selling process**

* + Salespeople appear organized, which gains customer confidence.
  + The process ensures that customer needs and wants are met.
  + Increased company profits may result from the use of an efficient, effective sales process.

**Similarities and differences in the selling process**

Use of the selling process can vary from product to product and from customer to customer. All salespeople need to establish relationships with customers. They all need to discover customer needs/wants, but the time spent on doing it varies. They need to recommend specific products. They need to close the sale. They need to reaffirm the buyer-seller relationship; however, the approach taken will vary.

**Impact of the product and type of customer on the selling process**

A product’s cost, size, and physical existence influence the selling process.

* + - Example: Customers raise more objections when buying expensive products. This will make the close more difficult and will require additional follow-up to satisfy the customer.
    - Example: Real-estate salespeople take their customers to the product, thereby increasing the time required for the sales presentation and close.
    - Example: When selling services, salespeople often spend more time establishing relationships, determining needs, and prescribing solutions than they would if they were selling tangible products.

The nature of the customer impacts use of the selling process.

* + - Little sales assistance is needed when customers buy frequently purchased items such as socks.
    - Retail selling requires more time for prospecting and research when selling such intangibles as insurance or investments.

Each phase of the selling process requires more time in business-to-business sales situations than in retail situations.

**Acquiring Product Information**

1. What product(s) does the class business intend to sell?
2. Where can students acquire information about these product(s)?
3. What product information will be useful to the class in its sales efforts?
4. What features and benefits are associated with the class business’s product(s)?
5. When could information about the product(s) be used in a sales presentation?
6. How can students use visual aids to convey product information to customers?

**The Selling Process**

1. What should students say and do during each phase of the selling process?
2. How should the class business use the sales process to its advantage?

**Selling Policies**

1. What selling policies should the business follow?
2. Why are selling policies important?
3. What is the difference among selling-activity policies, terms-of-sale policies, and service policies?
4. What selling policies should the business adopt?

**Building a Clientele**

1. Who are the class business’s potential customers?
2. What are benefits of building a clientele?
3. What problems can occur if the business fails to build a clientele?
4. What attitudes can help to build the business’s clientele?
5. How can the students exhibit a service attitude during sales situations?
6. What activities could the business use to build a clientele?

**Group Constitution**

**Members:** Carlie, Otis, Neff, Rennie, Joe, Vince

**Forward:** This contract is a binding legal document and governs the group until the assigned project deadline. If the group separates, or a member is fired, the basic contract laws remain intact for both parties. However, being fired may cause work responsibilities to shift.

**Article I: Absence Policy**

1. If a group member will be absent on a day in which work is due, they must tell another group member a day in advance and have all work that they are responsible for turned in. All group members must stick to the provided agenda to have the assignments completed on time. If there will be an unexpected absence, the group member is to complete the work from home and email another group member to let them know they are gone for the day.
2. Group members will contact one another if they are absent for any amount of period during the time allotted for working on the projects.

**Article II: Work Policy**

1. Any member that is mentally or physically disabled and can prove that they cannot complete the work assigned to them alone may acquire assistance from other group members to help complete it. This will only apply for work that is group work and not individual work, and work will only be finished by that group member, and the assisting group member will not write it.
2. Each group member will work to the best of their ability, making sure the completed work is up to standards, and that they complete it with punctuality.
3. If a group member commits plagiarism, they are solely responsible and incur the punishment on their own.

**Article III: Leadership**

1. At the beginning of the project, a leader will be voted upon democratically. If a group member is absent at the time of voting, they waive their right to participate in voting. The person who wins the most votes becomes the leader. If there is an unclear outcome (same number of votes for different people), the group will have no leader until one can be chosen by a revote.
2. By being elected leader, the person must perform the following duties:
3. Organize group meetings.
4. Create and enforce a group agenda to govern group progress.
5. Organize any out-of-school project efforts.
6. Provide communication between group members in order to help individuals work towards the project goal.
7. If they fail to perform these duties, or another person is also carrying them out, a revote may be taken to determine whether to obtain a new leader.

**Article IV: Work Ethics**

1. If a group member does not complete work they were assigned, the punishment for the infringement will be of detriment solely to the group member at fault. No negative grading shall be given to any other group members.

**Article V: Member Dismissal**

1. The following conducts will result in a group member being able to be dismissed:
2. Incomplete or missing group work
3. Plagiarism or any form of cheating
4. If group member decides to leave under his or her own will
5. Any group member leaving under their own will may submit all their own work, while the other group members may not. Any group member fired for breaking any of the conducts under Article V-a (i-iii) will have their work taken from their possession to be used at the discretion of the original group, but not for the individual being fired. In addition, any fired member may not use any work completed by other group members, subject to punishment under Article 2-c.
6. If a group member leaves under the stipulation of Article V-a (iv), they retain all the work they have already provided for the group. The original group cannot use this work or it is subject to punishment under Article 2-c.

**Article VI: Signature**

By signing this contract, the following group members abide to the articles above. If any member fails to abide by the articles of this contract, they may be fired from the group given at least a 50% vote in favor of firing the individual.

**Signatures:**

Source: Novel Approach Consulting Group

**This document serves two purposes in every project:**

* Project planning guide
* Project status report

**Instructions:**

* Each team works together to determine:
  + Project objective
  + Tasks to be completed for a successful fulfillment of the project objective
  + Resources needed to complete each task (if any)
  + Person(s) responsible for completing each task
  + Due date for each task
* The first four columns of the table below (task, responsible, resources, and due date) serve as the guiding document through the end of the project. Make one copy of the table per week the project lasts (for a five-week project, make five copies)
* At the end of each week, use one copy to fill in the last three columns of the table. This serves as a weekly status report for your teacher.

|  |  |
| --- | --- |
| **Members of my group:** | Hannah, Cole, Zoe, Bryce |
| **Project Name:** | Spanish Club Recruitment Brochure |
| **Project Objective:** | Design an informative brochure for 9-11 graders that will raise their interest in joining the Spanish Club and direct them to get more information from Mrs. Gonzalez. Design must be ready-to-print in four weeks. |

| **Task** | **Who Is Responsible** | **Resources Needed** | **Due** | **Status** | **Date turned in** | **Check-off box** |
| --- | --- | --- | --- | --- | --- | --- |
| Initial meeting with Mrs. Gonzalez: gather information on club projects, requirements, etc., as well as brochure details (color? photos? etc.) | Team | n/a | Wk 1 |  |  |  |
| Attend Spanish Club meeting. Interview current club members & take digital pictures | Cole & Zoe | Digital camera | Wk 1 |  |  |  |
| Check printing costs at 3 print shops | Hannah | n/a | Wk 1 |  |  |  |
| Team meeting: update on week’s tasks | Team | n/a | Wk 1 |  |  |  |
| Questionnaire developed, distributed, and results compiled to determine why students would join Spanish Club | Team | n/a | Wk 2 |  |  |  |
| Create pencil sketch of brochure | Bryce | n/a | Wk 2 |  |  |  |
| Team comments on pencil sketch and changes made as needed | Team | n/a | Wk 2 |  |  |  |
| Team meeting: update on week’s tasks | Team | n/a | Wk 2 |  |  |  |
| Pencil sketch to Mrs. Gonzalez for comments | Bryce | n/a | Wk 3 |  |  |  |
| Pencil sketch changes made and resubmitted to Mrs. Gonzalez | Bryce | n/a | Wk 3 |  |  |  |
| Quotes obtained from Spanish Club members as needed | Zoe | n/a | Wk 3 |  |  |  |
| First draft of brochure completed in Microsoft Publisher | Hannah & Cole | Microsoft Publisher | Wk 3 |  |  |  |
| Team meeting: update on week’s tasks | Team | n/a | Wk 3 |  |  |  |
| Comments from team and changes made as needed | Team | n/a | Wk 4 |  |  |  |
| Submitted to Mrs. Gonzalez mid-week to allow time for changes if needed | Team | n/a | Wk 4 |  |  |  |
| Final to Mrs. Gonzalez | Team | n/a | Wk 4 |  |  |  |

**Team Signatures:**

Hannah **Cole**

Bryce ZOË

**This document serves two purposes in every project:**

* Project planning guide
* Project status report

**Instructions:**

* Each team works together to determine:
  + Project objective
  + Tasks to be completed for a successful fulfillment of the project objective
  + Resources needed to complete each task (if any)
  + Person(s) responsible for completing each task
  + Due date for each task
* The first four columns of the table below (task, responsible, resources, and due date) serve as the guiding document through the end of the project. Make one copy of the table per week the project lasts (for a five-week project, make five copies)
* At the end of each week, use one copy to fill in the last three columns of the table. This serves as a weekly status report for your teacher.

|  |  |
| --- | --- |
| **Members of my group:** |  |
| **Project Name:** |  |
| **Project Objective:** |  |

| **Task** | **Who Is Responsible** | **Resources Needed** | **Due** | **Status** | **Date turned in** | **Check-off box** |
| --- | --- | --- | --- | --- | --- | --- |
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**Team Signatures:**

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| **Criteria** | **Professional** | **Experienced** | **Developing** | **Novice** |
| **Content**  The information communicated by the project plan  40 points | ❑ All components of the project plan were complete and in writing. | ❑ All components of the project plan were addressed in writing, but some aspects needed further description. | ❑ Most of the project plan’s components were in writing; the missing elements diminished the plan’s effectiveness. | ❑ Many of the project plan’s components lacked sufficient detail to take action or were missing altogether. |
| ❑ The project plan’s objective gave a clear, comprehensive description of the project’s scope and schedule. | ❑ The project plan’s objective gave a clear description for the most part, but one of the items needed some clarification. | ❑ The project plan’s objective descriptions were difficult to follow/understand. | ❑ The project plan’s objectives were neither attainable nor measurable. |
| ❑ Needed resources were clearly identified. | ❑ Most resources were clearly identified. | ❑ Some critically needed resources were not identified. | ❑ Needed resources were too incomplete or were missing altogether. |
| ❑ The project plan contained specific activities/tasks. | ❑ For the most part, the project plan contained specific activities/tasks. | ❑ The project plan did not specifically contain all activities/tasks. | ❑ The project plan contained very few activities/tasks. |
| ❑ The project plan clearly specified persons responsible for each task. | ❑ For the most part, the project plan specified persons responsible for each task. | ❑ The project plan did not clearly specify persons responsible for each task. | ❑ The project plan did not specify persons responsible for each task. |
| ❑ The project plan contained specific deadlines. | ❑ For the most part, the project plan contained specific deadlines. | ❑ The project plan did not contain specific deadlines. | ❑ The project plan did not contain deadlines. |

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| **Criteria** | **Professional** | **Experienced** | **Developing** | **Novice** |
| **Content** (cont’d) | ❑ The project plan included easy-to-follow table or sequence-of-events flow chart. | ❑ The project plan included table or sequence-of-events flow chart, but some sections were not easy to follow. | ❑ The project plan included table or sequence-of-events flow chart, but it was too broad; important, smaller steps were omitted. | ❑ The project plan omitted table or flow chart; did not list sequence-of-events. |
| **Appropriateness**  Suitability; compatibility of one part of the plan with all other parts  35 points | ❑ The project plan’s objective was clear, attainable, and measurable. | ❑ The project plan’s objective was clear and measurable, but difficult to attain. | ❑ The project plan’s objective was stated in measurable terms. | ❑ The project plan’s objective was unclear and not stated in measurable terms. |
| ❑ All activities were logically sequenced and supported the project plan’s objective. | ❑ Most activities were logically sequenced and supported the project plan’s objective. | ❑ Several activities had gaps in sequence, were not in logical order, and/or did not support the project plan’s objective. | ❑ The sequence of activities made no sense and did not support the project plan’s objective. |
| ❑ Individual activity deadlines were realistic for achieving goals. | ❑ Most individual activity deadlines were realistic for achieving goals. | ❑ Several individual activity deadlines were not realistic for achieving goals. | ❑ Most individual activity deadlines were totally unreasonable. |

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| **Criteria** | **Professional** | **Experienced** | **Developing** | **Novice** |
| **Organization**  How the information is put together; the flow of the project plan  10 points | ❑ Main points were easy to follow and logical with points building on each other. | ❑ Main points were generally easy to follow and logical. | ❑ Main points were generally logical but difficult to follow. | ❑ Main points were so difficult to follow that their logic could not be determined, or they were illogical. |
| **Communication Skills**  Ability to express oneself so as to be understood by others  15 points | ❑ Ideas were expressed clearly in language that was easy to understand. | ❑ Ideas were expressed clearly with only a few words being difficult to understand. | ❑ Both ideas and words required much effort to understand. | ❑ Ideas were vague and elusive, and language was difficult to understand. |
| ❑ The project plan was neat, grammatically correct, and error-free. | ❑ The project plan was neat but contained minor errors that did not detract from the total plan. | ❑ The project plan contained some spelling and gram-matical errors that were distracting. | ❑ The project plan was messy, with many errors in spelling and grammar. |

| **Criteria** | **Professional** | **Experienced** | **Developing** | **Novice** |
| --- | --- | --- | --- | --- |
| **Content**  The information contained in and communicated by sales training video  60 points | ❑ Sales training video was informative, accomplishing its purpose. | ❑ Sales training video was informative, although audience was left with a few gaps in knowledge. | ❑ Sales training video attempted to be informative, but audience was not provided with enough information to become knowledgeable about the topic. | ❑ Sales training video did not attempt to inform the audience. Purpose of video assignment was ignored. |
| ❑ Video included relevant, accurate, up-to-date information. | ❑ Video included information that was relevant and accurate, but outdated. | ❑ Video included relevant information that was obviously incorrect and outdated. | ❑ Video wandered from topic to topic and/or included irrelevant information. |
| ❑ Supporting information was provided for each point made. | ❑ Unsupported points did not create a sense of incompleteness. | ❑ At least half of the points were vague or unsupported by evidence. | ❑ Points were vague and lacked any supporting evidence. |
| ❑ Sources were reliable and appropriate for topic. | ❑ All but 1-2 sources were reliable and appropriate for topic. | ❑ Half or more of the sources were not reliable or appropriate for the topic. | ❑ None of the sources were appropriate or reliable for the topic. |
| **Communication Skills**  The ability to express oneself so as to be understood by others  20 points | ❑ Information was clear and easy to understand. | ❑ Information was clear with only a few items being difficult to understand. | ❑ Information was not clear and took much effort to understand. | ❑ Information was too vague to understand. |
| ❑ Video was polished, complete, and grammatically correct. | ❑ Video contained minor errors or hesitations that did not distract from the message. | ❑ Video contained distracting hesitations or grammatical errors. | ❑ Video contained many grammatical errors and long, awkward pauses. |
| ❑ Visual aids supported, focused, clarified, and reinforced information given. | ❑ Visual aids added some support to the information given. | ❑ Visual aids were related to the information given but did not clarify or reinforce it. | ❑ Visual aids detracted from the information given, raising many questions. |
| **Organization**  The way in which the information is put together  20 points | ❑ Main points were logically sequenced and easy to follow with points building on each other. | ❑ Main points were logically sequenced and generally easy to follow. | ❑ Main points were logically sequenced but difficult to follow. | ❑ Main points were so difficult to follow that their logic could not be determined. |
| ❑ Introduction engaged viewers in topic and outlined what the video is about. | ❑ Introduction was interesting and provided a partial description of what the video is about. | ❑ Introduction was standard for the topic and hinted at what the video is about. | ❑ Introduction was uninteresting and did not outline what the video is about. |
| ❑ Video came to suitable conclusion with main points clearly summarized. | ❑ Conclusion was satisfying, but the summary of main points was unclear. | ❑ Conclusion was unsatisfying, and/or the summary of main points was vague. | ❑ Video ended abruptly without a conclusion or summary of main points. |

**SE:062 Acquire product information for use in selling**

**LAP**: LAP-SE-131 Get Informed (Acquiring Product Information for Use in Selling)  
© **LAP:** 2015

**Curriculum Planning Level:** CS

**Objectives:**

a. Identify sources of product information that provide information for use in selling.  
b. Identify types of product information that can be useful in selling.  
c. Cite occasions when product information can be used in sales presentations.  
d. Describe guidelines to follow when acquiring product information.  
e. Demonstrate procedures for acquiring product information for use in selling.

**Activity:**

Each student should examine product information accompanying five products sold by local businesses, record the sources and the types of product information accompanying the products, and explain how the information can be used in sales situations.

**Reference Books**

**Title:** Basic marketing: A marketing strategy planning approach (16th ed.)  
**Author:** Perreault, W.D., Cannon, J.P., & McCarthy, E.J.  
**References:** [p. 411]  
**Publisher:** Boston: Irwin/McGraw-Hill  
**Copyright:**2008

**Title:** Professional selling: A trust-based approach (4th ed.)  
**Author:** Ingram, T.N., LaForge, R.W., Avila, R.A., Schwepker, C.H., & Williams, M.R.  
**References:** [pp. 42, 44, 72, 195-196]  
**Publisher:** Mason, OH: South-Western Cengage Learning  
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**Title:** Selling today: Creating customer value (11th ed.)  
**Author:** Manning, G.L., Reece, B.L., & Ahearne, M.  
**References:** [pp. 28-131]  
**Publisher:** Upper Saddle River, NJ: Prentice Hall  
**Copyright:**2010

**Title:** Marketing (3rd ed.)  
**Author:** Burrow, J.L.  
**References:** [p. 489]  
**Publisher:** Mason, OH: South-Western Cengage Learning  
**Copyright:**2012

**Title:** Marketing dynamics (3rd ed.)  
**Author:** Clark, B., Basteri, C.G., Gassen, C., & Walker, M.  
**References:** [pp. 69, 422, 534-535]  
**Publisher:** Tinley Park, IL: Goodheart-Willcox.  
**Copyright:**2014

**Title:** Contemporary marketing: 2013 edition  
**Author:** Kurtz, D.  
**References:** (pp. 567, 579, 583-584)  
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**Copyright:**2013

**Title:** Marketing essentials 2012  
**Author:** Farese, L.S., Kimbrell, G., & Woloszyk, C.A.  
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**Publisher:** Columbus, OH: Glencoe/McGraw-Hill  
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**Title:** The importance of product knowledge. [Video].  
**Author:** FIG ESSA  
**URL:** <https://www.youtube.com/watch?v=iiOvLJshcxQ>  
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**Title:** Benefits of product knowledge.  
**Author:** Hudson, M.  
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**Copyright:** 2017, February 1  
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**Title:** How to acquire product knowledge?  
**Author:** Khanna, V.  
**URL:** <http://www.preservearticles.com/201103154532/how-to-acquire-product-knowledge.html>  
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**Title:** Importance of product knowledge in selling.  
**Author:** Prasad, R.K.  
**URL:** <http://blog.commlabindia.com/elearning-design/product-knowledge-in-selling>  
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**Author:** Selling Power  
**URL:** <http://www.sellingpower.com/content/article/?a=9830>  
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**Title:** Sales training video: Develop your product knowledge. [Video].  
**Author:** Sticky Bites - The Free Sales Training Channel  
**URL:** <https://www.youtube.com/watch?v=hzOftYVw2YQ>  
**Copyright:** 2016, August 12  
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**SE:048 Explain the selling process**

**LAP**: LAP-SE-048 Set Your Sales (The Selling Process)  
© **LAP:** 2017

**Curriculum Planning Level:** CS

**Objectives:**

a. Identify the components of the selling process.  
b. Describe the importance of establishing relationships with customers.  
c. Describe ways to discover customer needs.  
d. Describe the components of prescribing solutions to customer needs.  
e. Explain the importance of reaching closure in sales situations.  
f. Describe aspects of reaching closure in sales situations.  
g. Describe the importance of reaffirming the buyer-seller relationship.  
h. Describe ways to reaffirm the buyer-seller relationship.  
i. Explain similarities/differences in the ways businesses implement the selling process.  
j. Explain the importance of using a selling process.

**Activity:**

Review and present the Selling Process Briefing (starting on page 4-197) to students in a lecture or discussion format. Then each student should observe a sales presentation in which the salesperson used a selling process. Given a list of the components of the selling process, students should identify what was said or took place during the presentation that constituted each phase of the selling process and discuss the responses with the class.

**Ethics Case for Students:**Trevor, a car salesman, is currently working with an elderly customer who has great difficulty hearing. Trevor believes that the customer shouldn’t be driving without special accommodations, so he shows the customer a car with many automatic safety features such as visual cues and autonomous lane correction. However, the customer says he doesn’t like technology and wants something simpler. Trevor knows that the car’s autonomous features would provide tremendous safety benefits to the driver as well as other people on the road. Should Trevor try to convince the customer to buy the car that would help him with an apparent disability or show him the car he wants? *(Ethical Principles Involved: Trust, Accountability, Respect, Viability)*

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**Title:** Marketing  
**Author:** Grewal, D., & Levy, M.  
**References:** (p. 518)  
**Publisher:** New York: National Council on Economic Education  
**Copyright:**2008

**Title:** Basic marketing: A marketing strategy planning approach (16th ed.)  
**Author:** Perreault, W.D., Cannon, J.P., & McCarthy, E.J.  
**References:** [p. 415]  
**Publisher:** Boston: Irwin/McGraw-Hill  
**Copyright:**2008

**Title:** Professional selling: A trust-based approach (4th ed.)  
**Author:** Ingram, T.N., LaForge, R.W., Avila, R.A., Schwepker, C.H., & Williams, M.R.  
**References:** [pp. 12-15, 66]  
**Publisher:** Mason, OH: South-Western Cengage Learning  
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**Title:** Marketing (3rd ed.)  
**Author:** Burrow, J.L.  
**References:** [pp. 492-499]  
**Publisher:** Mason, OH: South-Western Cengage Learning  
**Copyright:**2012

**Title:** Marketing dynamics (3rd ed.)  
**Author:** Clark, B., Basteri, C.G., Gassen, C., & Walker, M.  
**References:** [pp. 534-545]  
**Publisher:** Tinley Park, IL: Goodheart-Willcox.  
**Copyright:**2014

**Title:** Contemporary marketing: 2013 edition  
**Author:** Kurtz, D.  
**References:** (pp. 578-582)  
**Publisher:** Mason, OH: South-Western Cengage Learning  
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**Title:** Marketing essentials 2012  
**Author:** Farese, L.S., Kimbrell, G., & Woloszyk, C.A.  
**References:** (pp. 297-313)  
**Publisher:** Columbus, OH: Glencoe/McGraw-Hill  
**Copyright:**2012

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**Title:** Differences in selling B2B vs. B2C.  
**Author:** Cohn, C.  
**URL:** <http://www.forbes.com/sites/chuckcohn/2015/06/16/differences-in-selling-b2b-vs-b2c/#28922e4c1314>  
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**Title:** The 7 stages of the sales cycle.  
**Author:** Connick, W.  
**URL:** <https://www.thebalance.com/the-7-stages-of-the-sales-cycle-2917515>  
**Copyright:** 2016, June 17  
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**Author:** Duff, V.  
**URL:** <http://smallbusiness.chron.com/customer-needs-wants-10558.html>  
**Copyright:** 2011, June 10  
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**Title:** Sales process: why you need a playbook.  
**Author:** Hunt, J.  
**URL:** <http://www.mansfieldsp.com/mansfield-sales-blog/bid/48213/The-Importance-of-the-Sales-Process>  
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**Title:** 02. Sales process. [Video].  
**Author:** Infoteam Consulting  
**URL:** <https://www.youtube.com/watch?v=PT0bkGv8DDU>  
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**Title:** The most important sales skill of all.  
**Author:** James, G.  
**URL:** <http://www.inc.com/geoffrey-james/the-most-important-sales-skill-of-all.html>  
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**URL:** <https://hbr.org/2015/01/companies-with-a-formal-sales-process-generate-more-revenue>  
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**Title:** Activities in the selling process.  
**Author:** KnowThis.com  
**URL:** <http://www.knowthis.com/the-selling-process/activities-in-the-selling-process>  
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**Copyright:** 2012, December 18  
**Accessed on:** 2017-06-01

**Title:** Free sales video: The seven steps of the sales process. [Video].  
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**URL:** <https://www.youtube.com/watch?v=tp-PbDYuckI>  
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**Accessed on:** 2017-06-01

**Title:** What is the sales process?—Steps, example, & quiz.  
**Author:** Study.com  
**URL:** <http://study.com/academy/lesson/what-is-the-sales-process-steps-example-quiz.html>  
**Copyright:** 2003-2015  
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**Title:** 10 differences between B2C and B2B marketing.   
**Author:** Zenn, J.  
**URL:** <http://blog.hubspot.com/agency/differences-b2c-b2b-marketing#sm.00000d7z86i270cx9sdv9bgvcm1bv>  
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**SE:076 Explain the role of customer service as a component of selling relationships**

**LAP**: LAP-SE-130 Go Beyond the Sale (Customer Service in Selling)  
© **LAP:** 2014

**Curriculum Planning Level:** CS

**Objectives:**

a. Distinguish between customer service as a process and customer service as a function.  
b. Describe how businesses can use customer service to beat their competition.  
c. Discuss factors that influence customer expectations of customer service.  
d. Explain how customer service facilitates sales relationships.  
e. Identify pre-sales opportunities for providing customer service that can facilitate sales relationships.  
f. Identify post-sales opportunities when customer service can be provided to facilitate sales relationships.  
g. Discuss actions a salesperson can take to make the most of her/his customer service activities.

**Activity:**

Students should analyze the role of customer service in a business's sales training program to determine how the business emphasizes customer service as a component of selling and write a synopsis of the findings.

**Reference Books**

**Title:** Basic marketing: A marketing strategy planning approach (16th ed.)  
**Author:** Perreault, W.D., Cannon, J.P., & McCarthy, E.J.  
**References:** [pp. 403-404]  
**Publisher:** Boston: Irwin/McGraw-Hill  
**Copyright:**2008

**Title:** Professional selling: A trust-based approach (4th ed.)  
**Author:** Ingram, T.N., LaForge, R.W., Avila, R.A., Schwepker, C.H., & Williams, M.R.  
**References:** [pp. 42, 240-252]  
**Publisher:** Mason, OH: South-Western Cengage Learning  
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**Title:** Marketing (3rd ed.)  
**Author:** Burrow, J.L.  
**References:** [pp. 486-488, 497-498]  
**Publisher:** Mason, OH: South-Western Cengage Learning  
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**Author:** Alessandra, T.  
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**Author:** Brownlee, D.  
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**Author:** Gaston, C.  
**URL:** <http://www.ehow.com/how_7491504_use-customer-service-competitive-tool.html>  
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**Author:** Hoagland-Smith, L.  
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**Author:** Ward, S.  
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**Accessed on:** 2017-06-01

**SE:932 Explain company selling policies**

**LAP**: LAP-SE-121 Sell Right (Selling Policies)  
© **LAP:** 2013

**Curriculum Planning Level:** CS

**Objectives:**

a. Define the following terms: selling policies, selling-activity policies, terms-of-sale policies and service policies.  
b. Identify types of selling-activity policies.  
c. Identify types of terms-of-sale policies.  
d. Identify types of service policies.  
e. Explain the importance of selling policies.  
f. Describe the characteristics of selling policies.  
g. Explain why selling policies are needed.  
h. Describe external factors that affect selling policies.  
i. Describe internal factors that affect selling policies.  
j. Describe regulatory factors that affect selling policies.  
k. Explain problems encountered with the use of selling policies.

**Activity:**

Students should determine the selling policies followed by two direct competitors and discuss the similarities and differences between the two businesses' policies.

**Ethics Case for Students:**Gary’s Gadgets is an electronics store that sells computers, phones, tablets, and other technology. Gary recently sold a set of computers to a local company. However, the installation process did not go as smoothly as expected. Because of the problems, the company’s employees were unable to work for two days while the computers were being set up. The president of the company blamed Gary’s Gadgets for this. She demanded that Gary compensate her for the loss of productivity caused by the computer installation.

Gary’s Gadgets has a terms-of-sale policy, though, that protects the store from being liable in situations such as these. Gary does not want to damage his relationship with this client, but he also knows that according to the terms-of-sale policy, he does not owe the company anything. What is the right thing to do? Should Gary abide by his selling policy, or should he make an exception to appease the client? *(Ethical Principles Involved: Integrity, Accountability, Fairness, Respect, Viability)*

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**Title:** Marketing  
**Author:** Grewal, D., & Levy, M.  
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**References:** [pp. 41-42]  
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**Author:** Manning, G.L., Reece, B.L., & Ahearne, M.  
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**URL:** <http://pages.ebay.ie/help/policies/selling-practices.html>  
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**Author:** Ness, D.  
**URL:** <https://docs.google.com/viewer?a=v&pid=sites&srcid=ZGVmYXVsdGRvbWFpbnxtYXJrZXRpbmdzaHNuZXNzfGd4OjU5YWRmYzc5NThkNzc5MTU>  
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**Author:** Schreiner, E.  
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**SE:828 Explain key factors in building a clientele**

**LAP**: LAP-SE-115 Keep Them Loyal (Key Factors in Building Clientele)  
© **LAP:** 2014

**Curriculum Planning Level:** SP

**Objectives:**

a. Identify company benefits of building a clientele.  
b. Identify salesperson benefits from building a clientele.  
c. Cite examples of costs that can be incurred by businesses for failing to build a clientele.  
d. Identify attitudes of salespeople that help to build a clientele.  
e. Describe ways that salespeople exhibit a service attitude.  
f. Describe the activities of salespeople that can help to build a clientele.

**Activity:**

Each student should observe the activities of a local business to determine what activities the business uses to build its clientele, record his/her observations, and discuss the responses with the class.

**Reference Books**

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**Author:** Perreault, W.D., Cannon, J.P., & McCarthy, E.J.  
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**Author:** Ingram, T.N., LaForge, R.W., Avila, R.A., Schwepker, C.H., & Williams, M.R.  
**References:** [pp. 1, 9, 36-47]  
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**Author:** Farese, L.S., Kimbrell, G., & Woloszyk, C.A.  
**References:** (pp. 323-326)  
**Publisher:** Woodland Hills, CA: Glencoe/McGraw-Hill  
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**Author:** Kurtz, D.  
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**Author:** Boundless.com  
**URL:** <https://www.boundless.com/marketing/textbooks/boundless-marketing-textbook/services-marketing-6/services-versus-products-49/client-based-relationships-250-610>   
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**URL:** <http://www.ehow.com/how_2060715_build-clientele.html>   
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**Author:** Richards-Gustafson, F.  
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**Author:** Ward, S.  
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**Title:** How to build customer loyalty from trust relationships.  
**Author:** Wlodarz, D.  
**URL:** <https://www.technibble.com/how-to-build-customer-loyalty-from-trust-relationships>   
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**Performance Indicators:**

* Explain the concept of marketing strategies (MP:001, LAP-MP-002) (CS) (pp. 4-244—4-245)
* Explain the concept of market and market identification (MP:003, LAP-MP-003) (CS)   
  (pp. 4-246—4-248)
* Explain the nature of marketing plans (MP:007, LAP-MP-007) (SP) (pp. 4-249—4-251)

**Project Description:**

This project acquaints students with marketing plans, their purposes, and their components. Drawing upon knowledge learned throughout this course, students analyze designated components of a sample marketing plan. Following this analysis, students will work in teams and then as a class to develop an informal, simple marketing plan for the class’s business that it will actualize during the *Business Strategies* course.

**Driving Question:**

What and how do marketers plan?

**Timeframe:** 2 weeks

**Entry Event:**

Project a blank outline of the United States. Ask students to determine how far it is to Madison. When students start asking questions about which Madison, where the starting point is, etc., point out that it’s important for everyone to know where it is they’re going; otherwise, they won’t know when they’ve arrived.

Explain that marketers need to know what their starting point is and where they’re headed, too. Determining these factors is part of the planning that needs to precede every action that marketers take.

**Briefings:**

To augment the project, briefings should be provided during the week specified.

|  |  |
| --- | --- |
| **Week** | **Topic** |
| 17 | Marketing Strategies Briefing (pp. 4-232—4-235)  Markets and Market Identification Briefing (pp. 4-236—4-238)  Marketing Plans Briefing (p. 4-239) |

**Step-by-Step Guide:**

|  |  |  |  |
| --- | --- | --- | --- |
| **Checkpoint** | **Week** | **Details** | **Assessment** |
| **Learning  About  Marketing Strategies** | 17 | To help students to begin to understand what marketers plan, deliver the briefing on marketing strategies found on pages 4-232—4-235. After the briefing, use the sample activity that appears in the planning guide sheet for MP:001 on 4-244. | Complete/ Incomplete |
| **Learning  About  Market Identification** | 17 | Discuss the idea that money is limited, so it’s crucial that marketers get the most bang for their buck when they develop their strategies. Explain that one way that marketers can do that is by targeting their strategies at the people most likely to buy their products. Deliver the briefing on market identification that appears on pages 4-236—4-238. | |
| **Learning  About and Selecting a Marketing Plan** | 17 | Explain that marketers formalize their planning in a document known as a marketing plan. Overview the components of a marketing plan that are identified in the briefing on page 4-239.  Divide the class into groups of four students each, and ask each group to scroll through the listing of sample marketing plans provided on the website <http://www.mplans.com> and select one that interests it.  Ask a representative from each group to tell the class which marketing plan was selected by the group. Write the names of the plans on the board. Then ask students to vote on the marketing plan that they think that the class should analyze during this project. Ask each student to print or bookmark the class’s chosen marketing plan for future reference. | |
| **Marketing Plan Analysis** | 17 | In teams, students analyze the class’s chosen marketing plan, examining such vital details as marketing strategies, target markets, product/service management, etc. To aid students in this process, provide them with the Marketing Plan Analysis Handout on pages 4-240—4-241. If desired, lead the class in daily discussions of students’ findings. | Complete/ Incomplete |
| **Quiz 5A** | 17 | At the end of week 17, students take a brief quiz covering the following performance indicators:   * Explain the concept of marketing strategies (MP:001, LAP-MP-002) (CS) * Explain the concept of market and market identification (MP:003, LAP-MP-003) (CS) * Explain the nature of marketing plans (MP:007, LAP-MP-007) (SP) | To create this quiz, use multiple-choice items provided on this course guide direct download link. |
| **Checkpoint** | **Week** | **Details** | **Assessment** |
| **Class Business Marketing Plan** | 18 | Upon completion of the sample marketing plan analysis, each team should use the Basic Marketing Plan Template provided on pages 4-242—4-243 to develop an informal, extremely simple marketing plan for the class’s future business. Upon completion, lead the class in a discussion of the teams’ recommendations. Assist the class in coming to consensus regarding a master marketing plan (albeit very basic) for the class business. Keep the class’s agreed-upon marketing plan for future reference, along with each team’s original recommendations. | Complete/ Incomplete |

**Teacher Tips:**

* If preferred, instruct students to complete each section of the Basic Marketing Plan Template for their class business immediately after responding to the corresponding questions on the Marketing Plan Analysis Handout.

|  |  |
| --- | --- |
| Weekly Planner | |
| **Monday** |  |
| **Tuesday** |  |
| **Wednesday** |  |
| **Thursday** |  |
| **Friday** |  |

|  |  |
| --- | --- |
| Weekly Planner | |
| **Monday** |  |
| **Tuesday** |  |
| **Wednesday** |  |
| **Thursday** |  |
| **Friday** |  |

**How do marketers achieve results?**

For marketers to achieve their desired results, they plan where they need to go and how to get there efficiently and then do what it takes to achieve those results. In other words, they set goals—objectives they plan to fulfill. Then, they establish a plan of action, or strategy, to meet their goals/objectives. These strategies are carried out with tactics—the specific actions used to carry out the strategy.

**How do marketers plan their strategies?**

1. They find out their company’s overall plan.
2. They figure out specifically where their firm needs to be by a particular date.
3. They write down agreed-upon goals—what it is they want to achieve.
   * Example: A restaurant wants to increase this year’s sales by 10% over last year’s sales.
4. They lay out their plan of action—their strategy—to show how they will reach their goal.
   * Example: The restaurant evaluates its many options and decides to add a kids’ menu to increase sales.
5. To be efficient, marketers choose their short-term actions—tactics—to carry out their strategy. The tactics must be in line with their goal/objectives and strategy.
   * Example: Tactics that the restaurant might use include introducing meals that kids like and/or offering a free ice-cream cone to each child selecting a kids’ meal.

**How do marketers choose the best option to reach their goals/objectives?**

Since they have many options to choose from to reach their goals/objectives, they try to select the best option available to them by considering:

* How the marketing concept applies to their situation
* When they want to reach their goal
* Which resources are on hand

Marketers customize their strategies based on their goals/objectives and environment, adjusting and/or combining strategies to achieve their desired results.

**What types of changes impact marketers’ plans?**

Because business situations can change rapidly, marketers always have to be on the lookout for challenges/opportunities that could impact their plans. When changes occur, marketers must react quickly and accurately to be able to achieve their goals/objectives.

Examples of changes that could impact marketers’ plans include:

* Finding out that the company can’t handle distribution on its own
* Hearing about a new product with better features than the one currently offered
* Figuring out that the price is too high for customers
* Seeing the company’s ad in the back of the newspaper instead of in the section in which it was expected
* Learning of new government regulations that impact the business
* Watching the economy improve/worsen

**What is the marketing mix?**

The marketing mix is the combination of the four elements of marketing—product, price, place, and promotion. Marketers adapt their marketing mix to suit each situation.

**Elements of the marketing mix**

**Product:** The goods, services, or ideas a business will offer its customers

* Marketers conduct research and use their creativity to determine what customers need and how they will meet that need.
* Questions marketers ask to answer the question:
  + Should we offer one product—or more than one?
  + Is the product a good, service, or idea?
  + Does the product have special features?
  + Does the product have multiple uses?
  + What resources are necessary to research and develop the product?
  + What level of quality should be produced or provided?
  + Which brands should be used?
  + How should the product be packaged?
  + How might the product affect the company’s image?
  + How might customers view this product in relation to others?
  + Should the company offer a warranty, maintenance contract, or other support services?
  + Marketers have succeeded with the product element when customers view the product as the best solution to their needs.

**Price:** The amount of money a business asks in exchange for its products

* + Marketers must find a good balance between customer value and satisfaction and between company cost and profit.
  + Marketers start by determining their pricing objectives:
  + Getting their products into more customers’ hands—might be accomplished by lowering the price
  + Helping customers view the business as distinct from its competitors—might offer something unique
  + Bringing in the amount of income they need/want—involves pricing the product high enough to cover expenses and provide a profit
  + Raising the product’s value in the customer’s eyes—involves getting customers to view the product as higher quality
  + Matching the product’s value with what customers expect to receive—setting prices at the level customers expect
  + Marketers also determine how they will accept payment—cash, credit, debit, or check?
  + They decide whether they will offer discounts.
  + Marketers know they’ve been successful with the price element when customers feel that the benefits they receive outweigh the costs, and the business is bringing in enough revenue to make a profit, while keeping prices low enough to encourage sales.

**Place:** Getting a selected product in the right place at the right time

* Considerations marketers address:
* Which businesses to buy from
* When to buy the product
* How much of the product to order
* How to protect the product from damage
* How to store the product until it’s needed
* Where to make the product available
* How to get the product where it’s needed
* How to process customer orders
* Which businesses to involve in the process
* How to answer customer questions
* How to coordinate all the steps involved
* Marketers are successful with the place element when customers can buy a desired product when and where they want.

**Promotion:** Letting customers know the product’s value and its benefits that meet customers’ current needs and refers to the various types of communication that marketers use to inform, persuade, or remind customers about their products

* Seeks a positive response from customers—they buy.
* Types of communication included:
* Advertising
* Personal selling
* Publicity/Public relations
* Sales promotion
* Factors marketers need to consider to use communication channels effectively:
* Which messages to send
* Which media to use
* When they want messages delivered
* How often they want messages delivered
* How to coordinate communication efforts
* How to evaluate results

**How are the marketing mix elements interrelated?**

A change to one element of the marketing mix affects the other elements. For example, improving product features will probably result in price increases, and simplifying the place element will probably result in price decreases. When marketers assemble the mix, they carefully determine which elements to include and to what degree—keeping in mind that the mix works as a unit.

**What is a market?**

A customer or potential customer who:

• has an unfulfilled desire (needs a good or service)

• Is financially able to satisfy that desire (has the resources to purchase the good or service)

• Is willing to satisfy that desire (is willing to purchase the good or service to meet a need)

**What is a target market?**

A particular group of customers that a business seeks to attract; the customers who fall into a particular target market share similar needs and characteristics

**Why are target markets important to businesses?**

Businesses identify target markets in order to make products that will effectively meet the needs of the targeted customers.

**What is mass marketing?**

Designing products and directing marketing activities to appeal to the whole market, which is everyone

**Advantages of mass marketing**

• Mass marketing can be used to communicate a broad message to as many customers as possible.

• Mass marketing allows a business to produce one product for everyone, which is more cost-effective than producing and marketing several products to several target markets.

• Mass marketing provides the most possibilities for success at the least cost.

**Disadvantages of mass marketing**

• Mass marketing’s audience is very diverse.

• Only small percentage of that mass market is likely to purchase the product.

**What is market segmentation?**

Market segmentation uses the division of a total market into smaller, more specific groups. The needs and concerns of each market segment can be met more directly and carefully.

**Advantages of segment marketing**

• Segment marketing is more precise than mass marketing.

• Segment marketing allows for a finely tuned product, an appropriate price, and ease of distribution for the targeted market segment.

• Segment marketing encourages effective communication because its message is targeted to a specific market segment.

**Disadvantages of segment marketing**

• Segment marketing requires more money.

• Because segment marketing is targeted at a more specific group of people with more specific needs and expectations, the product is often more complex to produce.

**Why is the use of market segments increasing?**

Today’s customers are more discerning with product purchases. Those customers are more educated and less swayed by mass marketing. They want to know how the good or service will benefit them directly. To address their concerns more directly, many marketers are turning to segment marketing.

**Common ways to divide a market into segments**

**Demographic segmentation**

* Demographic segmentation involves dividing a market on the basis of its physical and social characteristics.
* Demographic characteristics include:
  + Gender
  + Origin or heritage
  + Religion
  + Social or economic status
  + Life stage

**Geographic segmentation**

* Is the division of a market on the basis of where consumers are located—grouping customers based on where they live
* Allows marketers to determine customers’ purchase preferences according to things like their climate, their political boundaries, or the population density of their area
* Helps marketers to discover where their markets are located, who their competitors are, and which media will reach their customers

**Behavioral segmentation**

* Marketers use behavioral segmentation to divide a market on the basis of consumers’ response to a product.
* With this method, marketers look into the cause-and-effect nature of customers’ purchase decisions. What do customers respond to when they buy a particular product?
* Behavioral segmentation is useful because it lines up with the marketing concept, which uses the customer’s point of view to make marketing decisions.
* Customers typically ask themselves one or more of the following questions when buying a particular product:
  + How will the product benefit me?
  + Am I ready to buy it?
  + When will I use the product?
  + Am I in a comfortable buying pattern?
  + Do I feel loyal to a particular brand?

**Psychographic segmentation**

* Psychographic segmentation is the division of a market on the basis of consumers’ lifestyles and personalities.
* Psychographic segmentation helps marketers to find out what’s driving their customers to make the choices they do.
* Customers’ buying decisions are influenced by their:
  + Values
  + Motives
  + Attitudes
  + Opinions
  + Interests
  + Activities
  + Personalities
  + Lifestyles

**Definition of marketing plan**

A marketing plan is a written document that specifies how, where, and to whom a business plans to market its product(s) and/or brand(s). A small business typically creates a one-year marketing plan, while a larger business may develop five-year marketing plans. A marketing plan may be part of a more comprehensive business plan.

**Benefits of having a marketing plan**

• Can help to define a business and its goals

• Can serve as a roadmap to guide business actions and decision-making

• Can help a business to focus on its target market

• Can act as a measuring stick against which to measure business performance

• Can unite business employees toward common goals and make employees feel like part of a cohesive team

• Captures people’s thoughts and ideas in writing

**Components of a marketing plan**

* **Executive Summary:** The executive summary contains a brief overview of the marketing plan. It focuses only on the most important points of the plan.
* **Situation Analysis:** The situation analysis is an assessment of where the organization currently stands both internally and externally. To develop this assessment, much analysis must be done: an external analysis, a customer analysis, an internal analysis, and a SWOT analysis. The organization’s product(s), target markets, distribution channels, competitors, finances, strengths, weaknesses, opportunities, and threats must all be considered.
* **Marketing Goals and Objectives:** The marketing goals define what the business hopes to accomplish. The marketing objectives, which should be measurable and specific, spell out how to meet those goals.
* **Marketing Strategies:** The marketing strategies component of the marketing plan provides detailed information about the organization’s target markets and planned marketing mix (product, price, place, and promotion).
* **Implementation Plan:** The implementation plan explains what the company must do to accomplish its goals and objectives. More specifically, the implementation plan should note the time, personnel, actions, and financial resources needed to reach these company goals and objectives.
* **Evaluation and Control:** The evaluation and control section contains performance standards against which to measure the marketing plan and company performance. This section also provides information on what actions should be taken if the marketing goals and objectives are not met.

**Directions:** Read the class’s chosen sample marketing plan, and as a group, answer the following questions about it. Record your team’s responses on a separate sheet of paper.

**Marketing Strategies**

1. What are the strategies the company plans to use that address the 4 Ps?
2. How would you change those strategies?

**Target Market(s)**

1. Who is the business’s target market?
2. Is the market a business/industrial or consumer market?
3. How was the target market determined?
4. What other target markets can you identify for the company?

**Product/Service Management**

1. What goods and services does the business plan to offer?
2. How would you categorize these goods/services?
3. How is the company positioning itself against its competitors?
4. Determine what branding strategies the company plans to use.
5. Identify examples of customer touch points employees at the company will have.
6. Where is the business’s product in its life cycle, and what impact should this have on the four Ps?

**Pricing**

1. What factors are currently having the most impact on the product’s price?

**Channel Management**

1. What channels of distribution will the company’s goods/service use?
2. What additional distribution channels do you recommend the company consider? Why?

**Promotion**

1. How does the company plan to promote its products?
2. Why would these promotional activities be appropriate for the product in its current life-cycle phase?
3. How would you modify the company’s promotional activities as the products move through its their life cycle?
4. What additional promotional activities could the company use to effectively reach its target market?

**Competition**

1. Who are the company’s primary competitors?
2. Who are other direct or indirect competitors for the company?
3. How did the business access information about its competitors?

**Selling**

1. Does the business plan to have its own sales force, or will it use an intermediary to sell its products?
2. What benefits should the business stress to its customers?
3. How could the business handle objections to its pricing and products?

|  |  |
| --- | --- |
| **Target Market(s)** | |
| What group(s) of people would be good target markets for our class business? |  |
| **Product/Service Management** | |
| What goods/services will we offer? |  |
| How should we position our products? |  |
| What branding strategies should we use? |  |
| **Channel Management** | |
| What distribution channel(s) should we use? |  |

|  |  |
| --- | --- |
| **Promotion** | |
| What promotional activities would be appropriate for our business |  |
| **Selling** | |
| How will the class business sell its products to customers? |  |
| What level of customer service should we provide? |  |

**MP:001 Explain the concept of marketing strategies**

**LAP**: LAP-MP-002 Pick the Mix (Nature of Marketing Strategies)  
© **LAP:** 2016

**Curriculum Planning Level:** CS

**Objectives:**

a. Define the following terms: marketing mix, product, place, promotion, price, goals, strategies, and tactics.  
b. Identify the components of the marketing mix.  
c. Describe the importance of each of the components of the marketing mix.  
d. Explain the relationship of goals, strategies, and tactics.  
e. Describe the importance of marketing strategies.  
f. Explain the factors that may cause marketing strategies to change.  
g. Explain the importance of strategies in the marketing mix.

**Activity:**

Review and present the Marketing Strategies Briefing (starting on page 4-232) to students in a lecture or discussion format. Then, ask students to imagine that each of them is the marketing manager for your school’s play or other school activity. Each student should identify strategies that s/he would use to market the play/activity, explain why s/he would use them, and summarize his/her plan in a brief presentation for the play/activity directors.

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**References:** (pp. 7-12, 38-41)  
**Publisher:** New York: National Council on Economic Education  
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**Title:** Basic marketing: A marketing strategy planning approach (16th ed.)  
**Author:** Perreault, W.D., Cannon, J.P., & McCarthy, E.J.  
**References:** [pp. 32-40]  
**Publisher:** Boston: Irwin/McGraw-Hill  
**Copyright:**2008**Title:** Marketing (3rd ed.)  
**Author:** Burrow, J.L.  
**References:** [pp. 22-23, 100, 238, 253, 260-261, 267-269, 427, 441, 558]  
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**MP:003 Explain the concept of market and market identification**

**LAP**: LAP-MP-003 Have We Met? (Market Identification)  
© **LAP:** 2012

**Curriculum Planning Level:** CS

**Objectives:**

a. Define the following terms: market, target market, mass marketing, marketing segments, market segmentation, demographic segmentation, geographic segmentation, psychographic segmentation, and behavioral segmentation.  
b. Explain the importance of target markets to businesses.  
c. Describe advantages and disadvantages of mass marketing.  
d. Describe advantages and disadvantages of using market segments.  
e. Explain why the use of market segments is increasing.  
f. Describe demographic characteristics that are analyzed by marketers.  
g. Explain the value of geographic segmentation.  
h. Discuss the value of psychographic segmentation.  
i. Describe types of behavioral segmentation.

**Activity:**

Review and present the Markets and Marketing Identification Briefing (starting on page 4-236) to students in a lecture or discussion format. Then, each student should create a phrase or description that s/he would use to promote a new skin cream to the following markets:

* Female athletes
* Physicians
* Men over 40
* Teenage girls
* Women in other global regions (e.g., Asia, Europe, Latin America, etc.)

Or, instruct each student to select a national company and search online to determine its target market. Each student should identify five things the business does to appeal to that market, identify additional things that the business could do to attract the market, record his/her findings, and discuss them with a classmate.

**Ethics Case for Students:**A beverage company has completed a demographic market segmentation and determined that a certain ethnic group is growing at a fast rate. The company wants to target this market segment using advertisements and other campaigns that speak to the interests of this ethnic group. However, some people are concerned that these targeted marketing campaigns will play on offensive stereotypes. Is it ethical to target ethnic groups using generalizations about that group? Or should the company use a different tactic? *(Ethical Principles Involved: Integrity, Respect, Viability)*

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**Publisher:** Mason, OH: South-Western Cengage Learning  
**Copyright:**2013

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**Author:** Farese, L.S., Kimbrell, G., & Woloszyk, C.A.  
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**MP:007 Explain the nature of marketing plans**

**LAP**: LAP-MP-007 A Winning Plan (Nature of Marketing Plans)  
© **LAP:** 2016

**Curriculum Planning Level:** SP

**Objectives:**

a. Define the terms marketing plan, situation analysis.  
b. Explain the benefits associated with having a marketing plan.  
c. Identify the components of marketing plans.  
d. Describe the purpose of each component of the marketing plan.

**Activity:**

Search the Internet to locate an example of a marketing plan that you would like for students to evaluate. Make a copy of the marketing plan for each student. Organize the class into small groups of three or four students each. Ask them to analyze the components of the marketing plan that you provide and to determine its strengths and weaknesses. Ask each group to record their recommendations of ways to improve the plan. Have the groups submit their recommendations to you.

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**Title:** Basic marketing: A marketing strategy planning approach (16th ed.)  
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**Author:** Clark, B., Basteri, C.G., Gassen, C., & Walker, M.  
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**Title:** Marketing essentials 2012  
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***Principles of Marketing*  
LAPs**

Section 5

|  |  |  |  |
| --- | --- | --- | --- |
| **Performance  Indicator #** | **LAP #\*** | **Level** | **LAP Title** |
| **MK:001** | LAP-MK-004 | CS | Have It Your Way (Nature of Marketing) |
| **MK:002** | LAP-MK-001 | CS | Work the Big Seven (Marketing Functions) |
| **IM:001** | LAP-IM-002 | SP | Get the Facts Straight (Marketing-Information Management) |
| **PM:001** | LAP-PM-017 | SP | Rapping Up Products (Nature of Product/Service Management) |
| **CM:001** | LAP-CM-002 | CS | Chart Your Channels (Channel Management) |
| **PI:001** | LAP-PI-002 | SP | The Price Is Right (Nature of Pricing) |
| **PR:001** | LAP-PR-002 | CS | Razzle Dazzle (Nature of Promotion) |
| **SE:017** | LAP-SE-117 | CS | Sell Away (Nature of Selling) |
| **PM:019** | LAP-PM-008 | SP | Raise the Bar (Grades and Standards) |
| **PM:020** | LAP-PM-004 | SP | Promises, Promises (Warranties and Guarantees) |
| **PM:024** | LAP-PM-018 | SP | Get a Life (Cycle) (Product Life Cycles) |
| **PI:002** | LAP-PI-003 | SP | Make Cents (Factors Affecting Selling Price) |
| **CM:003** | LAP-CM-003 | CS | Channel It (Channels of Distribution) |
| **PM:003** | LAP-PM-003 | SP | Mix and Match (The Nature of the Product Mix) |
| **PM:042** | LAP-PM-019 | SP | Getting Piece of Mind (Factors Used to Position Products/Services) |
| **PM:021** | LAP-PM-006 | SP | It’s a Brand, Brand, Brand World! (Nature of Product Branding) |
| **PM:206** | LAP-PM-020 | SP | Corporate Identity (Nature of Corporate Branding) |
| **IM:012** | LAP-IM-012 | CS | Data Do It (Need for Marketing Data) |
| **IM:184** | LAP-IM-184 | SP | Data Diving (Identifying Marketing Data) |

\* LAP #s subject to change

|  |  |  |  |
| --- | --- | --- | --- |
| **Performance  Indicator #** | **LAP #\*** | **Level** | **LAP Title** |
| **IM:010** | LAP-IM-010 | SP | Seek and Find (Marketing Research) |
| **IM:282** | LAP-IM-282 | SP | What’s the Problem? (Marketing Research Problems) |
| **IM:281** | LAP-IM-015 | SP | What’s the Source? (Obtaining Marketing-Research Data) |
| **IM:284** | LAP-IM-284 | SP | Better by Design (Marketing Research Designs) |
| **IM:285** | LAP-IM-016 | SP | Take Your Pick (Nature of Sampling Plans) |
| **IM:289** | LAP-IM-017 | SP | Hunting and Gathering (Data-Collection Methods) |
| **PR:002** | LAP-PR-004 | CS | Know Your Options (Product and Institutional Promotion) |
| **PR:003** | LAP-PR-001 | SP | Spread the Word (Nature of Promotional Mix) |
| **PR:007** | LAP-PR-003 | SP | Ad-quipping Your Business (Types of Advertising Media) |
| **SE:062** | LAP-SE-131 | CS | Get Informed (Acquiring Product Information for Use in Selling) |
| **SE:048** | LAP-SE-048 | CS | Set Your Sales (The Selling Process) |
| **SE:076** | LAP-SE-130 | CS | Go Beyond the Sale (Customer Service in Selling) |
| **SE:932** | LAP-SE-121 | CS | Sell Right (Selling Policies) |
| **SE:828** | LAP-SE-115 | SP | Keep Them Loyal (Key Factors in Building Clientele) |
| **MP:001** | LAP-MP-002 | CS | Pick the Mix (Nature of Marketing Strategies) |
| **MP:003** | LAP-MP-003 | CS | Have We Met? (Market Identification) |
| **MP:007** | LAP-MP-007 | SP | A Winning Plan (Nature of Marketing Plans) |

\* LAP #s subject to change

**High School of Business™**

**Course Sequence**

Appendix A

**Leadership   
Optional Course**  
*Leadership,* a project-based leadership course, develops student understanding and skills in such areas as communication skills, emotional intelligence, operations, and professional development. Students acquire an understanding and appreciation of the need for leadership skills. To encourage immediate implementation of leadership skills, *Leadership* utilizes an on-going service-learning project for course delivery and reinforcement. The course content is sequenced for students to identify, plan, implement, and evaluate a service-learning project based on the needs of their community/school. Throughout the course, students are presented problem-solving situations for which they must apply academic and critical-thinking skills. Formal reflection is an on-going component of the course.  
Recommended**:** 9th grade  
  
  
**Wealth Management  
Optional Course**  
*Wealth Management* is an accelerated financial literacy course in which High School of Business™ students actively learn to manage and build personal wealth. Students develop an understanding of the relationship between economics and wealth management, set personal and financial goals, establish a personal budget, manage personal finances, explore methods of generating income, determine insurance needs, and acquire investing skills and knowledge. To demonstrate their mastery of such financial literacy skills and knowledge, students engage in an intensive project to educate those around them (e.g., fellow high school students, adult members of the community, etc.) about wealth management, its importance, and its impact upon a person’s overall success in life.  
Recommended: 9th grade **Principles of Business  
Course #1**  
*Principles of Business*, a project-based business course, develops student understanding and skills in such areas as business law, economics, financial analysis, human resources management, information management, marketing, operations, and strategic management. Through the use of three projects, students acquire an understanding and appreciation of the business world. They develop a business analysis report, conduct an environmental scan of the local business community, and investigate business activities. Current technology will be used to acquire information and to complete the projects. Throughout the course, students are presented problem-solving situations for which they must apply academic and critical-thinking skills. Formal reflection is an on-going component of the course.  
Required: 10th grade

**Business Economics   
Course #2**  
In *Business Economics*, a project-based business course, students expand their understanding that businesses are influenced by external factors that are often beyond their control. Consumer spending, government policies, economic conditions, legal issues, and global competition are addressed through practical, current applications to everyday societal and business life. Students develop their knowledge and skills in such areas as economics, entrepreneurship, and professional development.  
Required: 10th grade  
  
  
**Principles of Marketing  
Course #3**  
*Principles of Marketing* is a project-based business course that develops student understanding and skills in the functional areas of channel management, marketing-information management, market planning, pricing, product/service management, promotion, and selling. Students acquire an understanding and appreciation of each of the marketing activities.  
Required: 11th grade  
  
  
**Principles of Finance  
Course #4**  
*Principles of Finance* furthers student understanding of two specific business activities—accounting and finance—that were introduced in an earlier High School of Business™ course, *Principles of Business*. Through team activities and a semester-long corporate investment project, students make connections between accounting and finance. Students acquire an understanding of financial statements, calculate financial ratios, and make corporate financial management decisions based on their analysis of that financial data. In addition, students apply the concepts of operating and overhead costs, internal accounting controls, and budgets to their class business. Lastly, cost/benefit analysis is introduced as an element of financial planning and decision-making.  
Required: 11th or 12th grade

**Principles of Management   
Course #5**  
*Principles of Management* furthers student understanding of management that was introduced in an earlier High School of Business™ course, *Principles of Business*. Through individual and team activities and a semester-long project, students make connections between management and business success. Students acquire an understanding of legal and ethical issues associated with management; initiate, plan, implement and control, and close a project; motivate team members; delegate work; develop a chain of command; coordinate work efforts; and interpret statistical findings.  
Required: 11th or 12th grade  
 **Business Strategies  
Course #6**  
*Business Strategies,* which is the capstone course for the High School of Business™ program, develops student understanding and skills in such areas as business law, entrepreneurship, financial analysis, human resources management, and strategic management. By planning, organizing, staffing, directing, leading, and controlling business activities, students acquire a realistic understanding of what is required to open and successfully run a business. They conduct situational, market, and competitive analyses; select a target market; develop a business plan; recruit, interview, select, and hire staff; supervise staff; control use of resources; and evaluate the results of the business effort. Throughout the course, students make decisions and use problem-solving skills. Formal reflection is an on-going component of the course.   
Required: 12th grade

***Principles of Marketing***

***Performance Indicators***

Appendix B

**Instructional Area: Channel Management (CM)**

**Performance Element:** **Acquire foundational knowledge of channel management to understand its role in marketing.**

**Performance Indicators:**

CM:001 Explain the nature and scope of channel management (CS) LAP-CM-002

CM:003 Explain the nature of channels of distribution (CS) LAP-CM-003

**Instructional Area: Marketing-Information Management (IM)**

**Performance Element:** **Acquire foundational knowledge of marketing-information management to understand its nature and scope.**

**Performance Indicators:**

IM:012 Describe the need for marketing data (CS) LAP-IM-012

IM:184 Identify data monitored for marketing decision making  (SP) LAP-IM-184

IM:001 Explain the nature and scope of the marketing-information management function  (SP)   
LAP-IM-002

**Performance Element:** **Understand marketing-research activities to show command of their nature and scope.**

**Performance Indicators:**

IM:010 Explain the nature of marketing research  (SP) LAP-IM-010

IM:282 Discuss the nature of marketing research problems/issues  (SP) LAP-IM-282

**Performance Element:** **Understand marketing-research design considerations to evaluate their appropriateness for the research problem/issue.**

**Performance Indicators:**

IM:284 Describe methods used to design marketing research studies (i.e., descriptive, exploratory, and causal)  (SP) LAP-IM-284

IM:281 Describe options businesses use to obtain marketing research data (i.e., primary and secondary research)  (SP) LAP-IM-015

IM:285 Discuss the nature of sampling plans (i.e., who, how many, how chosen)  (SP) LAP-IM-016

**Performance Element: Understand data-collection methods to evaluate their appropriateness for the research problem/issue.**

**Performance Indicators:**

IM:289 Describe data-collection methods (e.g., observations, mail, diaries, telephone, Internet, discussion groups, interviews, scanners, tracking tools)  (SP) LAP-IM-017

**Instructional Area: Marketing (MK)**

**Performance Element:** **Understand marketing's role and function in business to facilitate economic exchanges with customers.**

**Performance Indicators:**

MK:001 Explain marketing and its importance in a global economy (CS) LAP-MK-004

MK:002 Describe marketing functions and related activities (CS) LAP-MK-001

MK:023 Describe the use of technology in the marketing functions (SP)

MK:022 Explain legal and ethical considerations in marketing (SP)

**Instructional Area: Market Planning (MP)**

**Performance Element:** **Develop marketing strategies to guide marketing tactics.**

**Performance Indicators:**

MP:001 Explain the concept of marketing strategies (CS) LAP-MP-002

**Performance Element:** **Select target market appropriate for product/business to obtain the best return on marketing investment (ROMI).**

**Performance Indicators:**

MP:003 Explain the concept of market and market identification (CS) LAP-MP-003

**Performance Element:** **Employ marketing-information to plan marketing activities.**

**Performance Indicators:**

MP:007 Explain the nature of marketing plans  (SP) LAP-MP-007

**Instructional Area: Pricing (PI)**

**Performance Element:** **Develop a foundational knowledge of pricing to understand its role.**

**Performance Indicators:**

PI:001 Explain the nature and scope of the pricing function  (SP) LAP-PI-002

PI:002 Explain factors affecting pricing decisions  (SP) LAP-PI-003

**Instructional Area: Product/Service Management (PM)**

**Performance Element:** **Acquire a foundational knowledge of product/service management to understand its nature and scope.**

**Performance Indicators:**

PM:001 Explain the nature and scope of the product/service management function  (SP) LAP-PM-017

PM:024 Identify the impact of product life cycles on marketing decisions  (SP) LAP-PM-018

**Performance Element:** **Apply quality assurances to enhance product/service offerings.**

**Performance Indicators:**

PM:019 Describe the uses of grades and standards in marketing  (CS) LAP-PM-008

PM:020 Explain warranties and guarantees  (CS) LAP-PM-004

**Performance Element:** **Employ product-mix strategies to meet customer expectations.**

**Performance Indicators:**

PM:003 Explain the concept of product mix  (SP) LAP-PM-003

**Performance Element:** **Position company to acquire desired business image.**

**Performance Indicators:**

PM:206 Explain the nature of corporate branding  (SP) LAP-PM-020

**Performance Element:** **Position products/services to acquire desired business image.**

**Performance Indicators:**

PM:042 Describe factors used by marketers to position products/services  (SP) LAP-PM-019

PM:021 Explain the nature of product/service branding  (SP) LAP-PM-006

**Instructional Area: Promotion (PR)**

**Performance Element:** **Acquire a foundational knowledge of promotion to understand its nature and scope.**

**Performance Indicators:**

PR:001 Explain the role of promotion as a marketing function (CS) LAP-PR-002

PR:002 Explain the types of promotion (i.e., institutional, product) (CS) LAP-PR-004

PR:003 Identify the elements of the promotional mix  (SP) LAP-PR-001

**Performance Element:** **Understand promotional channels used to communicate with targeted audiences.**

**Performance Indicators:**

PR:007 Explain types of advertising media  (SP) LAP-PR-003

**Instructional Area: Selling (SE)**

**Performance Element:** **Acquire a foundational knowledge of selling to understand its nature and scope.**

**Performance Indicators:**

SE:017 Explain the nature and scope of the selling function (CS) LAP-SE-117

SE:076 Explain the role of customer service as a component of selling relationships (CS) LAP-SE-130

SE:828 Explain key factors in building a clientele  (SP) LAP-SE-115

SE:932 Explain company selling policies (CS) LAP-SE-121

**Performance Element:** **Acquire product knowledge to communicate product benefits and to ensure appropriateness of product for the customer.**

**Performance Indicators:**

SE:062 Acquire product information for use in selling (CS) LAP-SE-131

**Performance Element:** **Understand sales processes and techniques to enhance customer relationships and to increase the likelihood of making sales.**

**Performance Indicators:**

SE:048 Explain the selling process (CS) LAP-SE-048

**Integrated Performance Indicators**The following performance indicators will be used to carry out projects throughout *Principles of Marketing*. However, they are not addressed directly in course content. These performance indicators should be addressed formally using rubrics and/or informally through observation.

**Instructional Area: Communication Skills (CO)**

**Performance Element: Read to acquire meaning from written material and to apply the information to a task.**

**Performance Indicators:**

Identify sources that provide relevant, valid written material (CO:054) (PQ)

Extract relevant information from written materials (CO:055) (PQ)

Apply written directions to achieve tasks (CO:056) (PQ)

Analyze company resources to ascertain policies and procedures (CO:057) (CS)

**Performance Element: Apply active listening skills to demonstrate understanding of what is being said.**

**Performance Indicators:**

Explain communication techniques that support and encourage a speaker (CO:082) (PQ)

**Performance Element: Apply verbal skills to obtain and convey information.**

**Performance Indicators:**

Explain the nature of effective verbal communications (CO:147) (PQ)

Ask relevant questions (CO:058) (PQ)

Interpret others’ nonverbal cues (CO:059) (PQ)

Provide legitimate responses to inquiries (CO:060) (PQ)

Employ communication styles appropriate to target audience (CO:084) (CS)

Handle telephone calls in a businesslike manner (CO:114) (CS)

**Performance Element: Record information to maintain and present a report of business activity.**

**Performance Indicators:**

Utilize note-taking strategies (CO:085) (CS)

Organize information (CO:086) (CS)

Select and use appropriate graphic aids (CO:087) (CS)

**Instructional Area: Communication Skills (CO)** (cont’d)

**Performance Element: Write internal and external business correspondence to convey and obtain information effectively.**

**Performance Indicators:**

Explain the nature of effective written communications (CO:016) (CS)

Select and utilize appropriate formats for professional writing (CO:088) (CS)

Edit and revise written work consistent with professional standards (CO:089) (CS)

Write professional e-mails (CO:090) (CS)

Write business letters (CO:133) (CS)

Write informational messages (CO:039) (CS)

Write inquiries (CO:040) (CS)

Write persuasive messages (CO:031) (SP)

Prepare simple written reports (CO:094) (SP)

**Instructional Area: Emotional Intelligence (EI)**

**Performance Element: Foster self-understanding to recognize the impact of personal feelings on others.**

**Performance Indicators:**

Explain the concept of self-esteem (EI:016) (PQ)

Recognize personal biases and stereotypes (EI:017) (PQ)

**Performance Element: Develop personal traits to foster career advancement.**

**Performance Indicators:**

Identify desirable personality traits important to business (EI:018, LAP-EI-009) (PQ)

Exhibit self-confidence (EI:023) (PQ)

Demonstrate interest and enthusiasm (EI:020) (PQ)

Demonstrate initiative (EI:024, LAP-EI-002) (PQ)

**Performance Element: Apply ethics to demonstrate trustworthiness.**

**Performance Indicators:**

Demonstrate honesty and integrity (EI:022, LAP-EI-138) (PQ)

Demonstrate responsible behavior (EI:021, LAP-PD-021) (PQ)

**Performance Element: Exhibit techniques to manage emotional reactions to people and situations.**

**Performance Indicators:**

Exhibit a positive attitude (EI:019, LAP-EI-003) (PQ)

Demonstrate self-control (EI:025, LAP-EI-014) (PQ)

Explain the use of feedback for personal growth (EI:003, LAP-EI-015) (PQ)

Adjust to change (EI:026) (PQ)

**Instructional Area: Emotional Intelligence (EI)** (cont’d)

**Performance Element: Identify with others’ feelings, needs, and concerns to enhance interpersonal relations.**

**Performance Indicators:**

Respect the privacy of others (EI:029) (PQ)

**Performance Element: Use communication skills to foster open, honest communications.**

**Performance Indicators:**

Explain ethical considerations in providing information (EI:038) (SP)

**Performance Element: Implement teamwork techniques to accomplish goals.**

**Performance Indicators:**

Motivate team members (EI:059) (SP)

Encourage team building (EI:044) (SU)

**Performance Element: Manage internal and external business relationships to foster positive interactions.**

**Performance Indicators:**

Treat others with dignity and respect (EI:036, LAP-EI-036) (PQ)

Foster positive working relationships (EI:037, LAP-EI-037) (CS)

Maintain collaborative partnerships with colleagues (EI:061) (SP)

Explain the impact of political relationships within an organization (EI:034) (SP)

**Instructional Area: Information Management (NF)**

**Performance Element: Use information literacy skills to increase workplace efficiency and effectiveness.**

**Performance Indicators:**

Assess information needs (NF:077) (CS)

Obtain needed information efficiently (NF:078) (CS)

Evaluate quality and source of information (NF:079) (CS)

Apply information to accomplish a task (NF:080) (CS)

Store information for future use (NF:081) (CS)

**Instructional Area: Information Management (NF)** (cont’d)

**Performance Element: Utilize information-technology tools to manage and perform work responsibilities.**

**Performance Indicators:**

Use basic operating systems (NF:085) (PQ)

Describe the scope of the Internet (NF:086) (PQ)

Demonstrate basic e-mail functions (NF:004) (PQ)

Demonstrate personal information management/productivity applications (NF:005) (PQ)

Demonstrate basic web-search skills (NF:006) (PQ)

Demonstrate basic word processing skills (NF:007) (PQ)

Demonstrate basic presentation applications (NF:008) (PQ)

Demonstrate basic database applications (NF:009) (PQ)

Demonstrate basic spreadsheet applications (NF:010) (PQ)

Use an integrated business software application package (NF:088) (CS)

Demonstrate collaborative/groupware applications (NF:011) (CS)

Create and post basic web page (NF:042) (SP)

**Performance Element: Acquire information to guide business decision-making.**

**Performance Indicators:**

Interpret statistical findings (NF:093) (SP)

**High School of Business™**

**Online National Exam Information**

Appendix C

**Overview: High School of Business™ Exams**

High School of Business™ (HSB™) end-of-course exam and pre-course exams are comprised of test questions that require students to think and move beyond the simple regurgitation of information. Hence, HSB™ exams contain higher-level questions and generally do not focus on definitions. Each test question relates to a specific performance indicator from the course and tests significant content, such as how to perform a process, the advantages or disadvantages of something, the identification of an appropriate example of a concept, etc. Test items use simple sentences and easy-to-understand words so that students do not have to guess at what they have been asked.

Each test item consists of a stem and four alternatives. The stem presents a self-contained question or problem to give students a complete frame of reference. In fact, the bulk of an item’s content is usually contained in the stem in an effort to keep alternatives brief. Each test item is stated in a question or completion format (with the blank coming at or near the end of the statement for completion items), and some questions are phrased so that they call for a yes or no answer plus an explanation. As a general rule, negatively-stated stems are avoided. Distractors (wrong answers) are typically plausible but not defensible. All of the above and none of the above alternatives do not appear on HSB™ exams.

Final exams consist of 100 multiple-choice items. Pre-tests include 50 multiple-choice items. 

***Principles of Marketing* Exam Specifications**

Weight of exam by instructional area:

|  |  |  |
| --- | --- | --- |
| MK | Marketing | 11% |
| CM | Channel Management | 5% |
| IM | Marketing-Information Management | 24% |
| MP | Market Planning | 8% |
| PI | Pricing | 5% |
| PM | Product/Service Management | 21% |
| PR | Promotion | 10% |
| SE | Selling | 16% |

**WebXam Policies and Procedures Manual**

For the WebXam Manual, go to [www.mbaresearch.org/hsb](http://www.mbaresearch.org/hsb):

1. Click on “For Participating Schools”
2. Click on “Administering the Program”
3. Select *WebXam Manual* and *Policies and Procedures for Proctoring HSB™ Exams*

Prior to your scheduled exam, select the *Proctor Registration form* on this same page and submit it electronically to MBA Research.

Immediately following the exam, the proctor selects the *Exam Certification form* on this same page and submits it electronically to MBA Research.

**High School of Business™**

**Program-Long Project**

Appendix D

**Overview: High School of Business™ Program-Long Project**

In addition to completing course-specific projects, students in the High School of Business™ program are required to take part in a program-long entrepreneurial project incorporated in the six required HSB™ courses. During the first five required courses, the students conceptualize a class business venture and make critical decisions regarding its nature and scope. They document their decision-making in writing, and the HSB™ teaching staff maintains these records for use in the capstone course in the program.

To conceptualize, develop, and actualize their class business venture, students complete the following specific steps:

* ***Principles of Business*:** Students identify potential businesses that the class might start.
* ***Business Economics*:** Students prepare decision matrices to select the business to start from the ideas generated in *Principles of Business*. Teams conduct a venture feasibility test for the selected option.
* ***Principles of Marketing*:** Students identify potential target markets for the class’s business, determine what goods/services the business will offer and branding strategies to use, discuss appropriate distribution channels for the business, determine appropriate promotional activities for the business, identify potential sources of information that they can use to investigate their competitors, determine how the business will provide its products to customers, and recommend the level of customer service the business will provide. The class determines the business’s product mix and how to position the product mix. The class discusses the marketing research needed, and it finalizes its marketing research plans.
* ***Principles of Finance:***The class develops a list of potential business operating expenses and estimates how much money will be required for fixed, variable, and semi-variable expenses. They select possible vendors and create a list of internal accounting controls that will be used by the business. Students develop a list of potential sources of venture capital and identify ways to control business expense. The class conducts a cost/benefit analysis to determine the course of action for the business to take on a variety of factors.
* ***Principles of Management:*** Students identify the different positions needed within the business and develop an organizational chart depicting lines of authority. Students also recommend potential company names.
* ***Business Strategies*:** Students use the information they previously generated to plan, actualize, and exit a business of their own. They apply their knowledge and skill from economics, finance, marketing, and management to create a non-profit organization whose profit needs to be reinvested in their business’s mission, rather than being shared by students.

**Guidance for Choosing a Business Venture**

As students determine the nature of their business, teachers should guide them to choose a venture that meets the following guidelines:

* Must be large enough to allow active participation by all members of the class
* Must function (be open for business) for at least half the duration of the capstone course
* Is operated using sub-teams of students that include, at a minimum, the functional areas of a business (finance, marketing, management, etc.)
* Must provide multiple opportunities for students to serve as supervisors
* Does not need to actually file paperwork related to starting a business
* Must close one week prior to the end the capstone course to allow time for analysis and reflection. If a class creates a business that remains open beyond the end of the capstone course (and program), an operating plan must be created and approved by the teacher prior to the end of *Business Strategies*.
* Is non-profit in nature. Non-profit simply means that the business must end with a zero profit. The class can choose to put all money earned toward the business mission, budget for a zero balance, or give the profit away.
* Should be more business-oriented than the service-learning project completed during the *Leadership* course.

**High School of Business™**

**Observational Internship Guidelines**

Appendix E



**High School of Business™ Observational Internship Guidelines**

**Revised March 2011**

**Section 1: Teacher’s Guidelines**

**Observational Internship Summary**

The High School of Business™ Internship requirement allows students the opportunity to see first-hand how business executives function, interact, and put into use the concepts taught in the High School of Business™ program. Students are required to observe a high-level business executive (vice-president, sr.-level marketing manager, certified financial planner, sales manager, etc.) for a minimum of 20 hours. The observation should take place during the student’s senior year or the summer preceding. Students keep a daily journal describing their experiences. Each student summarizes his/her experiences in a short oral presentation to the class. The journal and oral report are graded by the teacher and those grades are included in the *Business Strategies* course grade.

**Internship Objectives**

Provides students the opportunity to:

* See academic knowledge translated to workplace situations
* Further recognize the relevance of what is learned in the classroom
* Be exposed to business careers
* Gain an appreciation for the world of work
* Build excitement about the many career opportunities that a business education can provide

Internships also allow for community involvement in the education of young people and promote a partnership between the schools, businesses and the community.

The internship should take place during the senior year or the summer preceding. The senior year was chosen because of the breadth of business knowledge the student will have at that point, which will encourage students to make connections between what they have learned in the classroom and what they are observing in the workplace. For example, if the student observes a professional analyzing market research about a target market, the student will have the opportunity to make a connection with work completed in the High School of Business™ *Principles of Marketing* course.

When a student completes the required 20 hours, s/he submits his/her journal for your review. (Detailed instructions for their journaling are outlined in the student section of this document.) Students then deliver a 5-10 minute oral presentation discussing what they learned and how it influenced them. Those details are also listed in the student section.

**Securing internships**

The High School of Business™ Steering Team is responsible for finding the internship opportunities. The business executives who serve on the Steering Team will lead this effort. Teachers should provide the Steering Team with information regarding the number of internship opportunities needed as well as any special requests for placement. This data should be given to the Steering Team no later than six months prior to the starting date in which the internships are needed. In most cases, this will be the beginning of the second semester of the students’ junior year.

Once the internships have been lined up by the Steering Team, the teacher can use the letter provided to share additional information with the internship sponsor.

**Post-internship survey**

After students have completed their observational internships, High School of Business™ instructors are encouraged to gather feedback from internship sponsors/hosts using a customizable Survey Monkey template designed by High School of Business™ staff. Teachers should go to [www.surveymonkey.com](http://www.surveymonkey.com), log in (Username: HSBInternship; password: hsbinternship), and copy the template for use at their school. Instructors simply change the title “TEMPLATE” to the high school’s name, copy the survey link, and send the link in an email to sponsors/hosts.



**Observational Internship Request Form**

Teacher completes and shares with Steering Team

Number of students in class:

Date range for the internships:

(typically the summer prior to the senior year or first semester of senior year)

Specials Requests made by students and/or teacher: ****

**Letter to Sponsor (example):**

(use school letterhead)

Dear Sponsoring Businessperson,

Thank you for your willingness to participate in ABC High School's internship program within the High School of Business™ program. Your assistance with this important phase of the education of our young people is greatly needed and much appreciated. High School of Business™ is a rigorous series of business courses that prepare students to excel in college-level business programs. This observational internship is a key part of the program. For some students, it may be the first time they have observed a professional business environment and/or high-level business professionals at work. The student is required to spend at least twenty hours with you and keep a journal of your daily activities. At the end of the internship, the student submits the journal to his/her instructor and gives a short classroom presentation about his/her experiences.

The observational internship experience is intended to help the student in his/her understanding of the role of a business professional. Ideally, the student sees business processes in action and makes a connection between those and the concepts learned in the classroom. Therefore, I hope you will provide numerous opportunities for this prospective business professional to observe you and your colleagues at work in as many business activities as is feasible.

I have enclosed an evaluation form for you to fill out at the end of the observational internship. It simply reports to me any issues that occurred during the internship (e.g., tardiness, lack of interest, etc.). Please fill it out and return it to me at the address below. If the student’s behavior needs to be addressed prior to the end of the internship, please contact me immediately.

As partners in educating this student, I thank you. Please don't hesitate to contact me if you have any questions.

Sincerely,

Your Name  
Teacher  
ABC High School  
Phone Number

Email

****

**High School of Business™ Observational Internship**

**Sponsor Report**

**Student’s Name:**

**Sponsor’s Name & Title:**

**Sponsor’s Employer:**

1. Did the student conduct himself/herself in a professional manner while observing your workplace?

Yes  No

Comments:

1. Did the student arrive to the internship on time each day?

Yes  No

Comments:

1. Did the student dress in a manner appropriate to your workplace environment?

Yes  No

Comments:

1. Did the student exhibit interest in learning about your occupation, workplace, and career path?

Yes  No

Comments:

1. Would you be interested in hosting a student in an observational internship again?

Yes  No

Comments:

Thank you very much for participating.

|  |
| --- |
| ***NOTE:*** *For ease of distribution and collection of this post-internship survey, schools are encouraged to consider copying these questions into an electronic survey (e.g., Survey Monkey).* |



**Section 2: Student Guidelines for Internships**

**Summary:**

The High School of Business™ Observational Internship provides you with the opportunity to see first-hand how business executives function, interact, and put into use the concepts taught in the High School of Business™ program. You will observe a high-level business executive (e.g., vice-president, senior-level marketing manager, certified financial planner, sales manager, etc.) for a minimum of 20 hours. The observation should take place during your senior year or the summer preceding. You will keep a journal that describes your experiences.

1. Your teacher will tell you about the available internship options. Since these are limited, you may not get your first choice. If you would prefer to set up your own internship, be sure that it is with a high-level business professional (such as a vice-president, sr.-level marketing manager, certified financial planner, sales manager, etc.) and that you clear it with your teacher.
2. Your internship must include 20 hours of observation during which you keep a daily journal in a bound notebook of the happenings of each day. At the top of the notes for the day must be the date and hours for each particular time period.
3. This experience is an observational internship. In other words, your main goal is to observe the professional’s daily work life. You may or may not be given any tasks to complete. Remember that you were specifically paired with a high-level executive to become familiar with his/her career. You are not there to spend your time making copies, stapling, etc. (Although you may find that even high-level executives routinely complete these tasks as the U.S. workforce continues to flatten and lower-level positions, such as administrative assistant or entry-level assistant, are deleted from organizations.)
4. As you observe, be sure to take notes. After each day spent at your internship, you will expand upon these notes in your journal. There are certain topics you should be sure to cover, which are outlined in point # 2 below.

**Journal Outline**

1. **Summary Page**. The first page of your journal is a one-page summary. It includes the following:
   1. Your name, date and class period
   2. The name, address, and phone number of your sponsor and the place of internship
   3. Two paragraphs summarizing the internship. The first should explain your sponsor’s job responsibilities. In the second paragraph, provide a brief synopsis of the company for which the sponsor works, including an overview of the industry in which the company does business, products/services provided or sold, and number of employees.
2. **Daily Journal Entries.** Each journal entry should be set up as follows, with the underlined words used as section titles.
   * Date
   * Name and title of person you are observing
   * Work objectives. List at least one objective on which your sponsor spent time. These could include preparing next year’s budget, writing performance reviews, purchasing air time for a radio ad, etc.
   * Workplace-to-classroom connection: High School of Business™. Choose one of the work objectives listed and make a connection to a topic you learned in the classroom. For example, if the sponsor spent much of his/her time carefully monitoring another employee’s work, you could identify the type of managerial style that was being used and explain why it was or was not effective in the workplace.
   * Workplace to classroom connection: Academics. Each day your sponsor will use a wide variety of skills and knowledge to accomplish his/her objectives. In this exercise, you will identify how s/he uses subjects taught in school at work.
     1. How were math skills used today by your sponsor?
     2. How were language arts skills (speaking, writing, reading) used today by your sponsor?
   * Time management. How did your sponsor manage his/her time? Was a planner, PDA, or other method used? Do you think this method is effective for him/her? Why or why not?
   * Workplace environment. Describe at least two details about the workplace environment and its impact on the work being done. These may include a description of how the co-workers work together, evidence of good managerial skills in use, conflict observed, etc.
   * My thoughts. Here’s the section for you to record your feelings about your internship experience. This does not have to be business-related material. You may write about the people with whom you worked, if the job you are observing is interesting to you, etc.
3. **The interaction of business functions**. As you observe your sponsor, be aware of how his/her daily decisions (a) have an impact on other areas of the company, and (b) how decisions made elsewhere impact your sponsor’s ability to complete his/her objectives. Make notes as you observe these interactions. Then, at the end of your internship, use those notes to complete the following:
   1. Every function in a business impacts every other function. How does each of the following business functions impact your sponsor’s decisions? Be sure to list specific examples.
      1. Marketing
      2. Finance
      3. Accounting
      4. Strategic management
      5. Operations (e.g., purchasing, production)
      6. Human resources management
      7. Information management (e.g., maintaining customer records; use of technology to organize, use, and learn from the business’ data)
   2. Now think about the impact from the other side: how do your sponsor’s decisions impact each of the functional areas listed above?
4. **Safety Considerations.** Is this workplace environment safe? In thinking about your future career, you may not have considered safety. But an unsafe working environment is not only hazardous to the health of employees, it can lead to a company’s economic distress. Lawsuits, government fines, equipment repair, and other expenses can put a company out of business. Therefore, it’s important to be aware of safety issues for your personal health as well as your professional health. Answer the following questions about the workplace you are observing. Be sure to explain your answers.
   1. Is the work environment safe? Provide three examples to support your answer.
   2. What safety training do employees receive?
   3. What actions does the business take to prevent accidents?
   4. What would be your biggest concern about safety in this workplace?
   5. Are security measures in place to prevent theft?
   6. Are security measures in place to protect employees from crimes?
5. **Career Reflection.** On the last page of your journal, reflect on the job you observed as a possible piece of your career path. Answer the following questions:
   1. Are you interested in pursuing a job similar to that of your sponsor? Why or why not?
   2. Were there any other jobs you observed during your internship that interested you? If so, what were they? Why do you think that these appealed to you?
6. What is the career you are most interested in pursuing? (This can be something that does not relate to your internship.) Assume that you have decided to pursue that career. Write a timeline for the next 20 years of your life that lists the milestones you will need to achieve to meet your career goal.  
   **Wrap-Up**
   1. Would this site be beneficial for another student to visit? Why or why not?
   2. Would observing this sponsor be beneficial for another student? Why or why not?

**Oral Presentation**

After you have received your graded journal, you will give a 5-10 minute oral presentation to the class detailing your internship experience. Be sure to cover these points in your presentation.

1. Brief synopsis of the company for which the sponsor works, including an overview of the industry in which the company does business, products/services sold, and number of employees.
2. Your sponsor’s job responsibilities.
3. Describe one workplace objective on which you observed your sponsor working. Be sure to include some of the tasks done to meet the objective. Then, share the connection you made in your journal between this objective and your classroom learning.
4. End your presentation by explaining to the class how they might determine if this type of job is right for them.

**Observational Internship: Integrated Performance Indicators**

**Instructional Area: Communication Skills (CO)**

**Performance Element: Apply active listening skills to demonstrate understanding of what is being said.**

**Performance Indicators:**

Explain communication techniques that support and encourage a speaker (CO:082) (PQ)

Demonstrate active listening skills (CO:017) (PQ)

**Performance Element: Apply verbal skills to obtain and convey information.**

**Performance Indicators:**

Explain the nature of effective verbal communications (CO:147) (PQ)

Ask relevant questions (CO:058) (PQ)

Interpret others’ nonverbal cues (CO:059) (PQ)

Provide legitimate responses to inquiries (CO:060) (PQ)

**Performance Element: Record information to maintain and present a report of business activity.**

**Performance Indicators:**

Utilize note-taking strategies (CO:085) (CS)

Organize information (CO:086) (CS)

**Instructional Area: Emotional Intelligence (EI)**

**Performance Element: Develop personal traits to foster career advancement.**

**Performance Indicators:**

Identify desirable personality traits important to business (EI:018, LAP-EI-009) (PQ)

Exhibit self-confidence (EI:023) (PQ)

Demonstrate interest and enthusiasm (EI:020) (PQ)

Demonstrate initiative (EI:024, LAP-EI-002) (PQ)

**Performance Element: Apply ethics to demonstrate trustworthiness.**

**Performance Indicators:**

Demonstrate honesty and integrity (EI:022, LAP-EI-138) (PQ)

Demonstrate responsible behavior (EI:021, LAP-PD-021) (PQ)

Demonstrate ethical work habits (EI:004, LAP-EI-004) (PQ)

**Performance Element: Exhibit techniques to manage emotional reactions to people and situations.**

**Performance Indicators:**

Exhibit a positive attitude (EI:019, LAP-EI-003) (PQ)

Demonstrate self-control (EI:025, LAP-EI-014) (PQ)

**Instructional Area: Emotional Intelligence (EI)** (cont’d)

**Performance Element: Identify with others’ feelings, needs, and concerns to enhance interpersonal relations.**

**Performance Indicators:**

Exhibit cultural sensitivity (EI:033, LAP-EI-011) (CS)

**Performance Element: Manage internal and external business relationships to foster positive interactions.**

**Performance Indicators:**

Treat others with dignity and respect (EI:036, LAP-EI-036) (PQ)

Foster positive working relationships (EI:037, LAP-EI-037) (CS)

**Instructional Area: Operations (OP)**

**Performance Element: Implement safety procedures to minimize loss.**

**Performance Indicators:**

Follow safety precautions (OP:007) (PQ)

Maintain a safe work environment (OP:008) (CS)

**Performance Element: Implement security policies/procedures to minimize chance for loss.**

**Performance Indicators:**

Explain routine security precautions (OP:013) (CS)

Follow established security procedures/policies (OP:152) (CS)

**Instructional Area: Professional Development (PD)**

**Performance Element: Acquire self-development skills to enhance relationships and improve efficiency in the work environment.**

**Performance Indicators:**

Maintain appropriate personal appearance (PD:002, LAP-PD-005) (PQ)

Demonstrate systematic behavior (PD:009) (PQ)

Set personal goals (PD:018, LAP-PD-016) (CS)

**Performance Element: Utilize critical-thinking skills to determine best options/outcomes.**

**Performance Indicators:**

Explain the need for innovation skills (PD:126, LAP-PD-018) (CS)

Make decisions (PD:017, LAP-PD-010) (CS)

Demonstrate problem-solving skills (PD:077, LAP-PD-077) (CS)

Demonstrate appropriate creativity (PD:012, LAP-PD-012) (SP)

Use time-management skills (PD:019, LAP-PD-001) (SP)

**Instructional Area: Professional Development (PD)** (cont’d)

**Performance Element: Participate in career-planning to enhance job-success potential.**

**Performance Indicators:**

Assess personal interests and skills needed for success in business (PD:013) (PQ)

Analyze employer expectations in the business environment (PD:020) (PQ)

**High School of Business™**

**National College Credit Agreements**

Appendix F

The following material appears in the *Principles of Business* course guide (introduction to Project 4: Business to the Rescue!). It is recommended that students be reminded of the opportunity for credit through Bowling Green State University, Bellevue University, University of Northern Colorado, Metropolitan State University of Denver, and Valley City State University throughout their experience in High School of Business™*.*

Students in the High School of Business™ program are eligible for up to nine credits through Bowling Green State University (BGSU) in Bowling Green, Ohio; Bellevue University in Bellevue, Nebraska; University of Northern Colorado in Greeley, Colorado; Metropolitan State University of Denver in Denver, Colorado; and Valley City State University of Valley City, North Dakota.

To familiarize students with these opportunities, please do the following:

1. Download, print, and send home copies of flyers about the different national college credit agreements and the process for receiving credit from each university. The flyers are located on the [College Credit Opportunities page](https://www.mbaresearch.org/index.php/component/k2/item/504) of our website: [www.MBAResearch.org/HSB](http://www.MBAResearch.org/HSB).

(If clicking directly on the link in this Word document doesn’t work, type [www.MBAResearch/HSB](http://www.MBAResearch/HSB) into your web browser and click on ‘College Credit Opportunities’ in the menu.)

1. Show the following videos in class:

Bowling Green State University (BGSU):

* + High School of Business™ alumni and current BGSU students share their experiences: <http://www.youtube.com/watch?v=lBBlQ1Ex1s4>
  + BGSU’s College of Business Administration focuses on interactive learning (similar to the project-based learning used in HSB™) <http://www.youtube.com/watch?v=NpiwtKjadY8>
  + Overview of the College of Business at BGSU <https://www.youtube.com/watch?v=DrnWrmf4hmY>

Bellevue University:

* + Benefits of studying business administration at Bellevue University  
    <https://www.youtube.com/watch?v=qMaqvRoPV_U>

University of Northern Colorado (UNC):

* + How to Get a Great Business Education at University of Northern Colorado <https://www.youtube.com/watch?v=rPmaNEWqnGY>
  + Overview of the College of Business at UNC <https://www.youtube.com/watch?v=Vw_fnzwNv0c>

Metropolitan State University of Denver (MSU Denver):

* Overview of MSU Denver  
  <https://www.youtube.com/watch?v=VbVyZw-HmNY>

Valley City State University (VCSU):

* Overview of VCSU’s Division of Business and Information Technology  
  <https://www.youtube.com/watch?v=HIcayJpS4-4&index=4&list=PL0827E9205AE434B9>

You may also consider sharing this information with parents during an open house or similar event.

**Using Rubrics**

Appendix G

**Step 1:**

The first step in implementing a rubric is to be very clear about its goals. Study the rubric yourself to learn the factors being assessed and what will be expected of the students. Determine also what preparation you’ll need to do to encourage learning.

**Step 2:**

Identify the task/scenario that you will use. Determine the best setting for evaluation of   
each performance indicator.

**Step 3:**

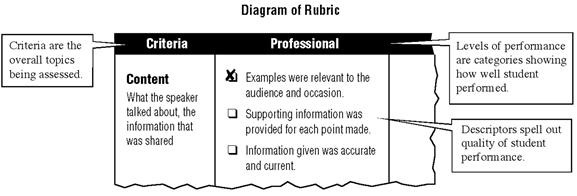
Give students a copy of the rubric, and review it with them. Be sure they understand all the terminology used across the different levels of performance and to describe the rubric’s components.

Explain to the students that the rubric will be used to assess their performance on the activity, or scenario. The assessment will provide a picture of which skills they have mastered and where they may need to improve. They’ll be able to see exactly how their work stacks up against a professional level of performance.

**Criteria:** The particular factors being assessed

**Level of Performance:** How well or poorly the student performs. These rubrics include four levels of performance: Professional, Experienced, Developing, and Novice. A student’s performance may fall across the range of levels, even for a single criterion.

**Descriptors:** Items under each level of performance for each criterion that describe the quality of student performance; together, they provide a comprehensive profile of student performance.



**Step 4:**

Plan your instruction based on the criteria and descriptors in the rubric.

**Step 5:**

Deliver your instruction, teaching the skills needed for the performance. Implement teaching methods appropriate for the performance indicator. Rein-force your instruction, giving students opportunities to practice the skill.

**Step 6:**

Have the students perform the task/scenario,   
and use the rubric to evaluate their performance, developing a profile of the quality of the student’s performance for each criterion.

**Step 7:**

Give the completed assessment to the students, so that they can compare the assessment results to see how their performance compares with a professional standard. Ask students to discuss their reactions to the rubric and to the assessment process.

**Step 8:**

Review and evaluate rubric implementation. You may want to change some of the vocabulary or spend more time teaching a particular skill. Once you’ve actually used the rubric, it will be much easier to identify any problems that may still exist.

**High School of Business™**

**LinkedIn Activities**

Appendix H

**Teaching Effective Use of LinkedIn Throughout the HSB™ Program**

**Goals:**

* Teach students the value of LinkedIn for business professionals
* Start early the habit of building a strong profile of skills and knowledge

**Overview:**

Each High School of Business™ course guide[[1]](#footnote-1) includes a section in which students learn about LinkedIn. This begins with the student creating his/her own LinkedIn profile in the Principles of Business course. As they continue in the program, they learn how to build a professional online presence that can generate valuable business connections and future career opportunities.

For reference, each of the 1-2 day assignments included in the program are listed below.

**Principles of Business:**

**Topics:** Create profile; follow High School of Business™ on LinkedIn and other social media

**Text That Appears in Course Guide:**

**Create your LinkedIn profile.** It’s never too early to begin building a professional network. LinkedIn is the tool business uses to connect and to recruit. Throughout the High School of Business™ program, students will learn how to use this tool to create a professional online presence that can generate valuable business connections and future career opportunities.

1. Show this video to students to provide an overview of what LinkedIn is and why it is important. <https://www.youtube.com/watch?v=o2c0qKBwWOs>
2. Have each student log into LinkedIn and create a profile. No need to worry much about its content yet. Students will learn how to improve their profiles in other courses in the HSB™ program.
3. Ask students to follow High School of Business™ on LinkedIn. <https://www.linkedin.com/showcase/10914329/>

**Business Economics:**

**Topics:** Claim a unique LinkedIn URL; share work samples

**Text That Appears in Course Guide:**

LinkedIn is a professional business tool that students can use to connect with their local and national peers, business professionals in their local community, and other business leaders. It is a place to create and develop their profile, access business resources, and stay on top of what’s going on in the business world.

As students progress through High School of Business™, they will continually develop their profiles. Being an active part of LinkedIn is beneficial for connecting with future employers of any type. In addition, the student’s profile can be used as a repository of work samples, skills, and awards (think online portfolio). Work done throughout HSB™ can be linked to the page as proof that the student has excelled in accelerated work that will set him/her apart from peers.

Here are two additional steps students should complete right away to continue to build a strong profile:

1. **Claim your unique LinkedIn URL**. To increase the professional results that appear when people search for you online, set your LinkedIn profile to “public” and create a unique URL (e.g., [www.linkedin.com/in/JohnSmith](http://www.linkedin.com/in/JohnSmith)). Do this now to increase your chances of your name being available. No charge. Here’s how:
2. Move your cursor over Profile at the top of your homepage and select Edit Profile.
3. You'll see a URL link under your profile photo like www.linkedin.com/in/yourname. Move your cursor over the link and click the Settings icon next to it. Note: "Update your public profile settings" will show up if you don’t have a public profile. Learn how to [enable your public profile](https://www.linkedin.com/help/linkedin/answer/83).
4. Under the “Your public profile URL” section on the right, click the Edit icon next to your URL.
5. Type the last part of your new custom URL in the text box.
6. Click Save.
7. **Share your work.** Consider a short clip of a student delivering a business presentation. Or a particularly great slide show he/she developed. Or a link to a website created for a local nonprofit. It’s easy to add rich media or documents to your LinkedIn Profile. Here’s how:
8. On your LinkedIn home page, move the cursor over Profile and select Edit Profile.
9. Scroll down to the section where you’d like to insert the item, and select the type of media from the Add Media bar that appears within each section.

**Source:** <https://university.linkedin.com/content/dam/university/global/en_US/site/pdf/TipSheet_BuildingaGreatProfile.pdf>

**Principles of Marketing:**

**Topics:** Add a profile photo; add education/awards

**Text That Appears in Course Guide:**

**Add a photo to your LinkedIn profile.** LinkedIn is a professional business tool that students can use to connect with their local and national peers, business professionals in their local community, and other business leaders. It is a place to create and develop their profile, access business resources, and stay on top of what’s going on in the business world.

1. Select the photo you would like from your computer or device and click Open.
2. Click Upload Photo
3. You can upload JPG, GIF or PNG files.
4. File size - 8MB maximum.
5. Your photo should be square.
6. The ideal pixel size for your photo is 400 x 400. If either width or height exceeds 20,000 pixels, your photo will not upload.
7. Select who you want the photo to be visible to (likely you want it to be visible to “your network”).
8. Click Save.
9. An appropriate profile picture should include your entire face. There should be no one else in the photo with you. A school photo or one in which you are clean and dressed well is acceptable.  
   Do not use a photo that is: grainy, out of focus, badly cropped, shows inappropriate slogans on your clothing, is not something you want an employer to see.
10. Go [here](https://www.linkedin.com/help/linkedin/answer/1615/adding-or-changing-your-profile-photo?lang=en) for more direction on uploading a photo.
11. Go [here](https://business.linkedin.com/talent-solutions/blog/2014/12/5-tips-for-picking-the-right-linkedin-profile-picture) for more guidelines to selecting an appropriate photo.

**Add education/awards.**

1. In your profile, scroll down to Education, and click on the + sign on the right. (This will open a new window.)
2. Under “School,” add the name of your high school. Leave “Degree” and “Field of Study” blank. Under “Grade,” you can enter your cumulative GPA. Under “Activities and societies,” you can enter your various honors, clubs, leadership positions, etc. You can also enter your HSB™ courses to showcase that you’ve been taking part in this special program through your school. Please separate each activity by starting a new line and using bullet points.
3. You can also fill in the years you have been in high school as well as a description of your high school if you wish.
   1. Go [here](https://www.linkedin.com/help/linkedin/answer/381) for more direction on adding/editing education entries on your profile.

**Principles of Finance:**

**Topics:** Write a professional headline; choose keywords for job title and summary

**Text That Appears in Course Guide:**

Everyone wants a LinkedIn profile that engages people. The secret for increasing traffic to your LinkedIn Profile is to apply effective Search Engine Optimization (SEO) techniques.

Basically, LinkedIn is a very large database of profiles that uses key fields to order (or "index") the entire collection of data. So using keywords lets you optimize views of your job skills and achievements.

**Write a catchy professional headline.** The phrase that appears below your name is your professional headline. You’d do well to change it from the automatic “current-job” headline to one using keywords that will attract recruiters.

For example, consider switching “*Vice President of Sales at ABC Company*” to “*VP Sales. Revenue Growth in Cloud-Enabled Technology Solutions. Product Development & Sales Operations Leadership*.” This way, you more fully explain what you do and add keywords like “cloud-enabled,” “product development,” “operations,” and “leadership”—all desirable keywords for recruiters.

**Add keywords to your job title.** The Job Title field on LinkedIn is also a highly indexed field. However, if your current job title is too vague, you can miss out on a chance for more traffic. What works well in this case is to add content to your Job Title.

For example, “*Operations Associate*” can become “*Operations Associate – Operations Manager for Thermo-printing Division*.”

The second version more fully explains the true job function to someone outside of the organization, and uses a greater number of searchable keywords.

**Use keywords in your summary.** Although not considered a highly indexed part of LinkedIn, your Summary must nevertheless contain compelling text, along with a high percentage of keywords relevant to your goal:

*"As an IT Director, my goal is to satisfy stakeholders and speak the language of our trading industry users, while implementing technologies to boost processing speed and accelerate business transformation. I've led IT project teams of up to 110 in service delivery and brought hosting costs down 32%, even during rapid growth."*

*"In Senior Manager and Director of Sales roles, I’ve built trust among customers and captured market trends in the oil and gas industry… with new sales channels and alliances that grew revenue 123%. I enjoy the challenge of creating a competitive edge through increased brand recognition and high-performance sales team mentoring."*

Of course, this type of Summary language employs more robust keyword content than a resume summary--which is a key reason you shouldn’t duplicate your resume on your LinkedIn Profile.

**Source:**

These are three examples of ways to increase traffic to your LinkedIn profile. Much of this information was found in the more comprehensive article “How to Double (or Triple) Your LinkedIn Visitor Traffic with Keywords” by Laura Smith-Proulx. Please find the full article [here](https://www.job-hunt.org/social-networking/LinkedIn-job-search/linkedin-keywords.shtml).

A great article on how to fill your resume or LinkedIn profile with searchable keywords is found [here](http://www.huffingtonpost.com/susan-p-joyce/20-kinds-of-keywords-jobs_b_5092363.html).

Another helpful article about how to find current keywords for a specific job can be found [here](https://www.job-hunt.org/social-networking/LinkedIn-job-search/indeed-jobtrends-research.shtml).

**Principles of Management:**

**Topics:** Write a LinkedIn summary

**Text That Appears in Course Guide:**

Your LinkedIn Summary is an essential part of your profile, and it is highly searchable by recruiters. To find your Summary, click on the small pencil icon (edit button) to the right of your picture in your profile. In the new window, scroll down to the bottom to find the box marked “Summary.” Here is where you can tell people your talents and skills in a quick snapshot.

To write an impactful summary, you’ll need to consider these things:

**Who is your audience?** Think about what kind of company or industry you want to hire you, and focus your summary toward those people.

**What do you want this audience to know about you in 30 seconds or less?** What do you think would most appeal to them? What are you most proud of or think are your most compelling qualities? For example, “I am the most optimistic person I know,” and “Every event I have planned has come in on budget,” are interesting and important content to know about you. But be sure you are telling the truth about yourself! If you’re a grumpy person in the morning, people aren’t going to believe that you’re an incredibly optimistic person.

**What are your facts/stats?** Do you have quantifiable information? For example, “I speak 3 languages,” and “I have traveled to over 30 countries,” are both facts that would be compelling for someone trying to get a job in another country or in international relations.

**Write it up.** Start with an interesting/enticing detail or description of yourself. Then weave in your various facts and details. Close by telling your audience what you want them to do or where they can go to get more information from you.

Check out these [sample summaries](https://business.linkedin.com/talent-solutions/blog/linkedin-best-practices/2016/7-linkedin-profile-summaries-that-we-love-and-how-to-boost-your-own) from LinkedIn that really work.

Much of this information was found in the article “Three Steps to Writing the Perfect Summary” by William Arruda. Please find the full article [here](https://www.forbes.com/sites/williamarruda/2014/09/07/three-steps-to-writing-the-perfect-linkedin-summary/#5d8ddebc5fbf).

Another great way to grown your LinkedIn presence is to join professional organizations or “Groups” related to your career. The best way to begin is to:

1. Click on the “Work” tab on the far right in the task bar at the top of your LinkedIn homepage. (The “Work” icon is a grid with nine tiny squares.)
2. In the new drop-down window, click on the “Groups” icon second down on the left. (This will open a new tab on your browser.)
3. At the top of the page are two choices: “My Groups” and “Discover.” Click on “Discover” and LinkedIn will populate a list of groups that it has selected for you based on the keywords in your profile.
4. Review these groups and select the ones that interest you and will be beneficial to finding a job in your field. Most groups require that you click the blue “Ask to join” button in order to join. This step keeps spammers and bots from joining groups fraudulently.

For more detailed information on finding the best groups for you, try this [article](https://www.inc.com/jeff-haden/11-tips-to-find-the-best-linkedin-groups.html).

**Business Strategies:**

**Topics:** Collect recommendations; earn HSB™ badges and add them to LinkedIn

**Text That Appears in Course Guide:**

**Collect recommendations.** Ask your teachers, coaches, advisors, and others to write a recommendation for your profile. Consider those who have seen your work out of the classroom as well, such as employers and leaders of clubs in which you’ve held leadership roles.

**Earn an HSB™ badge.** There are two types of High School of Business™ badges:

* 1. The HSB™ program consists of 6 required courses and 2 optional courses. You can earn one of 8 badges based on an end-of-course assessment you complete. If you score at least a 70% on the end-of-course assessment via WebXam, your badge will be automatically emailed to you.
  2. You can also earn a program completion badge once you have completed all of the courses in the HSB™ program. To receive this badge, ask your teacher for the link to the Online Program Completion Form. Within the form, you will provide your email address, and your completer badge will be emailed to that address.

\***A note on email addresses:** Please be sure to use a long-term email address that you will be able to access after high school. If you use your high school email address, you are likely to lose access once you graduate, and you’ll no longer be able to access your earned badges.

**Add your badge to your LinkedIn profile.** HSB™’s digital badges are stored in Mozilla’s Open Badges Backpack, so be sure you have followed the directions on the email you received about your earned badge.

Once you have successfully created an account and located your earned badge(s), please follow these directions:

1. Go to LinkedIn and log in to your account
2. Go to Edit Profile by hovering over the Profile tab in the top left
3. Choose which section of your profile you want to display badges in (for example, the summary section at the top of your profile)
4. Hover over the + dropdown and click Add Link
5. Log in to your Open Badges Backpack and open the badge collection you want to display
6. Click the Share This Group icon in the collection box and choose a social media platform to access the URL for your badge collection
7. Copy the link for this page (you do not have to go through with sharing your badges if you don’t want to, just close the pop-up window after copying the link)
8. Paste the link into the Add Link field in LinkedIn, add descriptor info, and save
9. Your LinkedIn profile will display part of the image of your first badge in the collection. You can click on this and then on the Read Original button to access the full page displaying your badges.

(Directions taken from the Open Badges blog [here](http://openbadges.tumblr.com/post/55809369771/how-to-display-your-open-badges-on-your-linkedin).)

The above directions may be a little confusing on your first try. This YouTube [video](https://www.youtube.com/watch?v=uozLz10TwNc) by Josh Gwin shows the same step-by-step directions on how to add your badge(s) to your LinkedIn Profile. Once you’re done watching the video, there are lots of other LinkedIn video tutorials on YouTube by Josh Gwin and others to check out from there.

**High School of Business™**

**Online Portfolio Tutorial**

Appendix I

Your High School of Business™ program provides you with knowledge and experience that set you apart from your peers. You can easily share what you’ve learned with colleges and employers by creating an online portfolio. Your personalized portfolio is created using a High School of Business™ template available through Google Sites. The template includes a page for each course in the program as well as space for your résumé and other information you’d like to share with colleges and employers.

Use the following instructions to create your personalized online portfolio:

* First, you need to create a Google account if you do not already have one. This can be done simply by going to google.com/accounts and clicking on the **sign up** button.
* Once you’ve entered your information and your account has been created, you’ll be able to begin working on your portfolio.
* Go to this URL to access the High School of Business™ template: <https://sites.google.com/site/highschoolofbusiness/>
* After you have selected the template, click the **use template** button at the top right of the screen.
* You will now be prompted to enter a name for your site. **You are required to name the site your full name** (i.e., John Doe)**.** Under the **Site location option,** make the URL hsbfirstnamelastname (i.e., hsbjohndoe). If you are prompted with a notification that the URL is in use, add a number to the end of the URL (i.e., hsbjohndoe1)
* Type the code shown at the bottom of the page, and proceed by clicking the **create** button.
* You are now ready to start working on your portfolio!

To begin your portfolio, you must set your site to **private.** Click the **more** button, and then, on the drop down list, select the **Sharing and Permissions** link. Once there, find where it says **who has access**. If your page is not already set to **private,** click the **change** link to set your site to **private.**

Next, you must give your teacher access to your page. At the bottom of the page you will find an **Add people** box. Enter the email address provided by your teacher, and set their account to **can view.** This will ensure your teacher will have access to view your portfolio. In the future you will be able to add peers, friends, and family to this list so they can see your work as well.

Now it’s time to get started on the content of your portfolio. Return to the main editing page, and click on the tab labeled **About Me**. At the top of the page, click the **Edit page** button (the left button in the picture below).



Enter some information about yourself (i.e., school, grade/year in school, academic and career goals, hobbies, etc.). This can be edited at any time. Then, continue to the tab for each HSB™ class you have taken so far to begin uploading your work. Each page has an **Add files** button at the bottom of the page. This can be used to upload anything that does not need to be visually represented. These documents, however, can be downloaded from your site.

To add other objects such as pictures or videos on the page, click the **Edit Page** button again. A box will come up below the title of the class. Here, you can insert any objects you would like. You can enter and edit text or use the **Insert** button to add pictures, charts, videos, etc. Features like the **Format** button allow you to change font types and alignments, **table** allows you to insert a table, and **layout** allows you to change the number of columns that are in your text box.

After playing around with the features, go to the **Résumé** page. This is where you can upload your résumé directly into your portfolio. Having your résumé online will be useful when you begin to share your portfolio with potential employers! Continue editing your site as you complete more projects, and you will have an online compilation of everything you have accomplished.

Finally, if you did not take Leadership and Wealth Management, delete those pages of the template. Go to the page you wish to delete, and click the **more** button. Then, select **delete page**.

We hope you find your High School of Business™ Online Portfolio to be a valuable asset for college and career. Thank you for participating in the High School of Business™ program.

**Guide to the Business Administration Standards**

Appendix J

**Business Administration Curriculum**

The business administration curricular structure consists of four tiers of specificity: Business Administration Core, Cluster Core, Pathways, and Specialties. The content of the broad-based Business Administration Core is fundamental to an understanding of business and can be viewed as co-requisites and as prerequisites for all business administration courses.

**Business Administration Core**

The content of the Business Administration Core should be mastered in order for cluster-specific content to have relevance to student learning. There are 13 Business Administration instructional areas: Business Law, Communication Skills, Customer Relations, Economics, Emotional Intelligence, Entrepreneurship, Financial Analysis, Human-Resources Management, Information Management, Marketing, Operations, Professional Development, and Strategic Management.

**Cluster Core**

The Cluster Core tier represents the skills and knowledge that were identified as common across the Pathways in a cluster. The Finance Cluster Core, for example, is composed of six instructional areas: Compliance, Customer Relations, Financial Analysis, Financial-Information Management, Professional Development, and Risk Management.

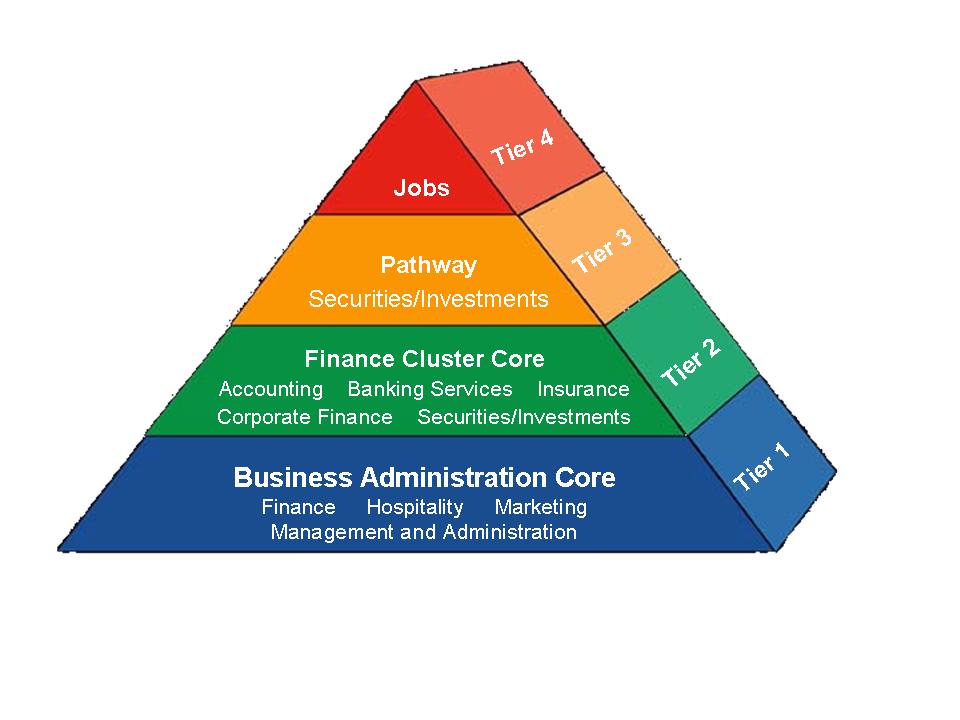
**Pathways**

The Pathways tier addresses the content of a variety of broad-based occupational opportunities within a cluster. In the Business and Administrative Services Cluster, for instance, the skills and knowledge that are common across jobs in operations management appear in the Operations Management Pathway.

**Specialties**

The fourth tier, Specialties, focuses on specific job opportunities that are tied to a pathway. The job opportunities identified in the Specialties require knowledge and skills unique to a product or service. In Marketing, for example, Specialties for the Professional Selling Pathway include pharmaceutical sales, advertising sales, heavy-equipment sales, and medical-equipment sales.

Thus, the business administration curriculum can be viewed as a continuum that begins in the primary grades with career awareness and exploration and continues through postsecondary education with the emphasis becoming more specialized to the learner’s individual interest in business. A graphic depicting the relationship among the four ties is shown in Figure 1.

Figure 1. Relationship of Tiers

**Curricular Organization**

Within each tier, the curricular content has been organized into Standards (Knowledge and Skill Statements), Performance Elements, and Performance Indicators.

**Standards**

The broadly-based Standards identify what students should know and be able to do as a result of instruction in any of the business-related clusters. These statements encapsulate the overarching intent/purpose of a work function. The Standards identified for the **Business Administration Core** are:

**Business Law (BL):** Understands business’s responsibility to know, abide by, and enforce laws and regulations that affect business operations and transactions

**Communication Skills (CO):**Understands the concepts, strategies, and systems used to obtain and convey ideas and information

**Customer Relations (CR):**Understands the techniques and strategies used to foster positive, ongoing relationships with customers

**Economics (EC):**Understands the economic principles and concepts fundamental to business operations

**Emotional Intelligence (EI):**Understands techniques, strategies, and systems used to foster self-understanding and enhance relationships with others

**Entrepreneurship (EN):**Understands the concepts, processes, and skills associated with identifying new ideas, opportunities, and methods and with creating or starting a new project or venture

**Financial Analysis (FI):**Understands tools, strategies, and systems used to maintain, monitor, control, and plan the use of financial resources

**Human Resource Management (HR):**Understands the tools, techniques, and systems that businesses use to plan, staff, lead, and organize human resources

**Information Management (NF):**Understands tools, strategies, and systems needed to access, process, maintain, evaluate, and disseminate information to assist business decision-making

**Marketing (MK):**Understands the tools, techniques, and systems that businesses use to create exchanges and satisfy organizational objectives

**Operations (OP):**Understands the processes and systems implemented to monitor, plan, and control the day-to-day activities required for continued business functioning

**Professional Development (PD):**Understands concepts, tools, and strategies used to explore, obtain, and develop in a business career

**Strategic Management (SM):** Understands tools, techniques, and systems that affect a business’s ability to plan, control, and organize an organization/department

**Performance Elements**

Each Standard is composed of multiple Performance Elements. These statements are broad-based work or cognitive performances that aid in defining the Standards. The Performance Elements addressed in this course are:

**Channel Management**

Acquire foundational knowledge of channel management to understand its role in marketing.

**Marketing-Information Management**

Acquire foundational knowledge of marketing-information management to understand its nature and scope.  
Understand marketing-research activities to show command of their nature and scope.  
Understand marketing-research design considerations to evaluate their appropriateness for the research problem/issue.  
Understand data-collection methods to evaluate their appropriateness for the research problem/issue.

**Marketing**

Understand marketing’s role and function in business to facilitate economic exchanges with customers.

**Market Planning**

Develop marketing strategies to guide marketing tactics.  
Select target market appropriate for product/business to obtain the best return on marketing investment (ROMI).  
Employ marketing information to plan marketing activities.

**Pricing**

Develop a foundational knowledge of pricing to understand its role.

**Product/Service Management**

Acquire a foundational knowledge of product/service management to understand its nature and scope.  
Apply quality assurances to enhance product/service offerings.  
Employ product-mix strategies to meet customer expectations.  
Position company to acquire desired business image.  
Position products/services to acquire desired business image.

**Promotion**

Acquire a foundational knowledge of promotion to understand its nature and scope.  
Understand promotional channels used to communicate with targeted audiences.

**Selling**

Acquire a foundational knowledge of selling to understand its nature and scope.

Acquire product knowledge to communicate product benefits and to ensure appropriateness of product for the customer.

Understand sales processes and techniques to enhance customer relationships and to increase the likelihood of making sales.

**Performance Indicators**

Performance Elements are defined through Performance Indicators that are specific work-based actions—either knowledge or skills. They specify what an individual worker must know or be able to do to achieve the Performance Elements. These learning outcomes are measureable (i.e., can be assessed). For example, the Performance Indicators for the Customer Relations Performance Element “Understand marketing-research activities to show command of their nature and scope” are:

IM:010 Explain the nature of marketing research  (SP) LAP-IM-010

IM:282 Discuss the nature of marketing research problems/issues  (SP) LAP-IM-282

**Objectives**

Each of the Performance Indicators is further defined through a series of Objectives. This organizational component specifies the scope of each Performance Indicator. Their use tells teachers what content to include or exclude from their instruction. For example, the Performance Indicator “Explain the nature of marketing research” is defined through Objectives as follows:

a. Define the following terms: marketing research, secondary research, primary research, personal interview, mail interview, telephone interview, questionnaire, and focus group.  
b. Identify characteristics of effective marketing research.  
c. Describe the importance of marketing research.  
d. Explain how marketing research is carried out.  
e. Explain the uses of marketing research.  
f. Describe shortcomings of marketing research.  
g. Describe types of marketing research objectives.  
h. Describe the contents of a research plan or design.  
i. Classify types of marketing research data.  
j. Distinguish between internal and external sources of data.  
k. Describe types of data collection methods.  
l. Explain how data can be analyzed.  
m. Describe steps in the marketing research process.

**Curriculum Planning Levels**

Each performance indicator is assigned to one of six curriculum-planning levels that represent a continuum of instruction ranging from simple to complex. The levels can serve as building blocks for curriculum development in that students should know and be able to perform the performance indicators at one level before tackling more complex skills and knowledge at the next level. The levels can also be used as the basis for developing an unduplicated sequence of instruction for articulation between high school and postsecondary business courses. In these cases, instructors can agree as to how far along the continuum students will advance in high school so that postsecondary instructors can initiate instruction at that point in the continuum. This will enable students to focus on new, more advanced subject matter rather than on content previously mastered. The six curriculum-planning levels are described as follows:

**Prerequisite (PQ):**Content develops employability and job-survival skills and concepts, including work ethics, personal appearance, and general business behavior.

**Career Sustaining (CS):** Content develops skills and knowledge needed for continued employment in or study of business based on the application of basic academics and business skills.

**Specialist (SP):**Content provides in-depth, solid understanding and skill development in all business functions.

**Supervisor (SU):** Content provides the same in-depth, solid understanding and skill development in all business functions as in the specialist curriculum, and in addition, incorporates content that addresses the supervision of people.

**Manager (MN):** Content develops strategic decision-making skills in all business functions needed to manage a business or department within an organization.

**Owner (ON):**Content develops strategic decision-making skills in all aspects of business that are needed to own and operate a business.

**Curriculum Frameworks**

In general, a framework is a skeleton structure that supports or encloses something. In education, frameworks are used to support and enclose the curriculum of a discipline by defining the discipline’s main elements, thereby providing a big picture overview of the discipline’s curriculum. They can act as gatekeepers by helping educators and curriculum developers make decisions about what should be addressed or eliminated from consideration in a curriculum. Once educators have determined what content should be addressed, they can use the scaffolding that frameworks provide as a basis around which curricular content is developed, organized, and implemented. Its visual presentation, or schematic, can serve as a communications tool to share with those interested in a discipline. It quickly communicates the main topics or areas of instruction that will be addressed.

In *Principles of Marketing,* one of the 13 Business Administration Core’s Standards and seven Marketing Core’s Standards are addressed. The title of each Standard in the entire Business Administration Core and the Marketing Core are depicted in Figure 2. The schematic also shows that the study of marketing integrates academic concepts from Language Arts, Mathematics, Social Sciences, and Social Studies. The successful application of these academic skills is imperative for obtaining a marketing career and advancing in business.

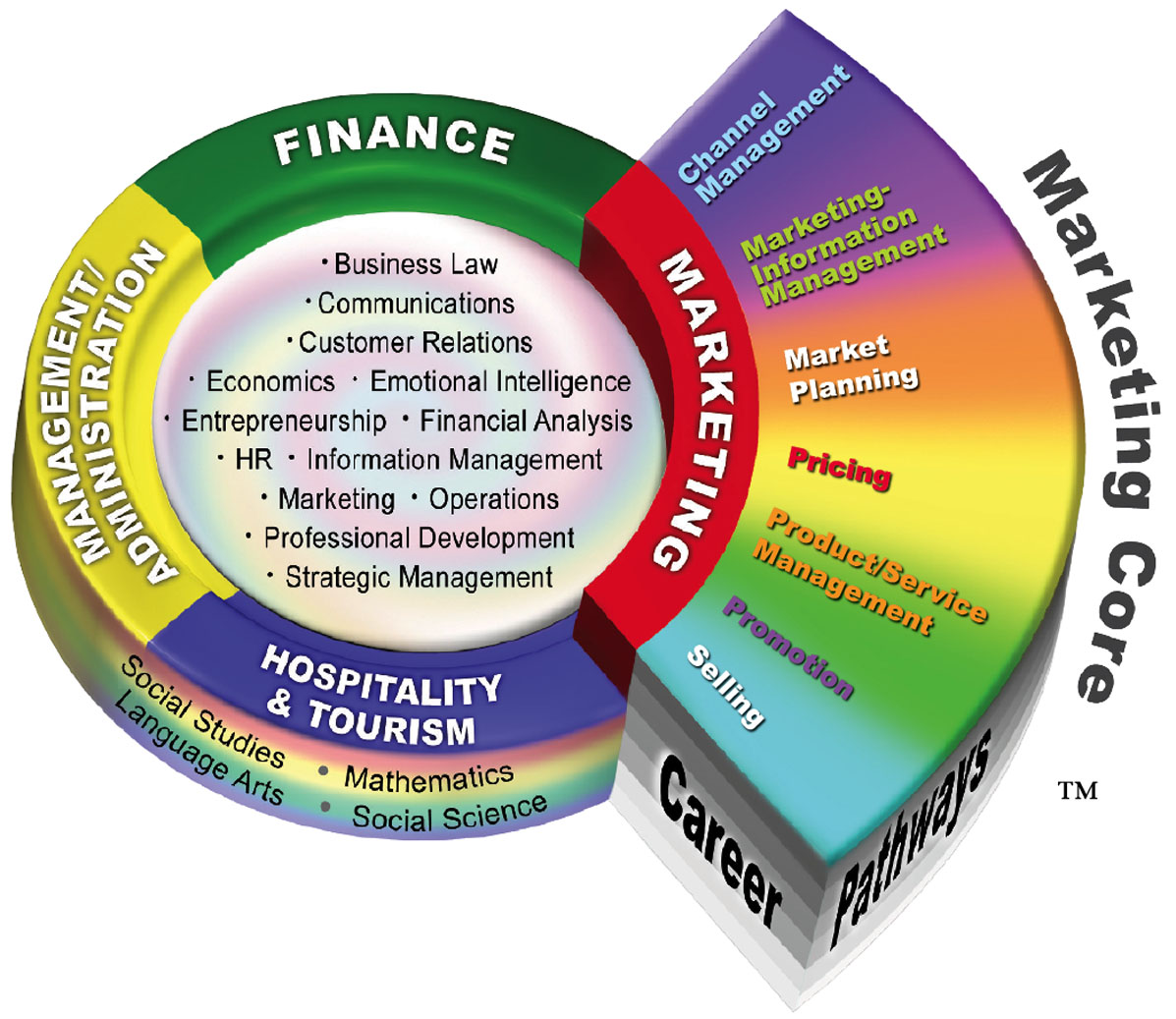


Figure 2. Schematic of Curriculum Framework for the Business Administration Core and Marketing Core

**SCANS Competencies & Skills**

Appendix K

**SCANS**

**Background**

The Secretary's Commission on Achieving Necessary Skills (SCANS) was established in February 1990 to examine the demands of the workplace and to determine whether the current and future work force is capable of meeting those demands. Commission members included 31 representatives from the nation's schools, businesses, unions and government. The Commission issued its first report, "What Work Requires of Schools," in June 1991. This report told educators and employers what students and workers need to know and be able to do in order to succeed in the workplace. This kind of information is especially vital today, when more than half of our young people leave school without the basic skills required to find and hold a good job.

Specifically, the Commission was directed to advise the Secretary of Labor on the type and level of skills required to enter employment.  In carrying out this charge, the Commission was asked to:

      1.     Define the skills needed for employment;

      2.     Propose acceptable levels in those skills;

      3.     Suggest effective ways to assess proficiency; and

      4.     Develop a strategy to disseminate the findings to the nation's schools, businesses and homes.

The Commission identified two types of skills: competencies and foundations. Competencies are the skills necessary for success in the workplace and are organized into five areas. Foundations are skills and qualities that underlie the competencies. The competencies and foundations are generic—most of them are required for most jobs.

**Competencies**

**Resources**

**1        Allocates Time—**Selects relevant, goal-related activities; ranks them in order of importance; allocates time to activities; and understands, prepares and follows schedules. Competent performance in allocating time includes properly identifying tasks to be completed; ranking tasks in order of importance; developing and following an effective, workable schedule based on accurate estimates of such things as importance of tasks, time to complete tasks, time available for completion and task deadlines; avoiding wasting time; and accurately evaluating and adjusting a schedule.

**2       Allocates Money—**Uses or prepares budgets, including making cost and revenue forecasts, keeps detailed records to track budget performance and makes appropriate adjustments. Competent performance in allocating money includes accurately preparing and using a budget according to a consistent and orderly accounting method; accurately calculating future budgetary needs based on projected costs and revenues; accurately tracking the extent to which actual costs and revenues differ from the estimated budget; and taking appropriate and effective actions.

**3       Allocates Material and Facility Resources—**Acquires, stores and distributes materials, supplies, parts, equipment, space or final products in order to make the best use of them. Competent performance in allocating material and facility resources includes carefully planning the steps involved in the acquisition, storage and distribution of resources; safely and efficiently acquiring, transporting or storing them; maintaining them in good condition; and distributing them to the end user.

**4       Allocates Human Resources—**Assesses knowledge and skills and distributes work accordingly, evaluates performance and provides feedback. Competent performance in allocating human resources includes accurately assessing peoples' knowledge, skills, abilities and potential; identifying present and future workload; making effective matches between individual talents and workload; and actively monitoring performance and providing feedback.

**Information**

**5        Acquires and Evaluates Information—**Identifies need for data, obtains them from existing sources or creates them and evaluates their relevance and accuracy. Competently performing the tasks of acquiring data and evaluating information includes analytic questions to determine specific information needs; selecting possible information and evaluating its appropriateness; and determining when new information must be created.

**6        Organizes and Maintains Information—**Organizes, processes and maintains written or computerized records and other forms of information in a systematic fashion. Competently performing the tasks of organizing and maintaining information includes understanding and organizing information from computer, visual, oral and physical sources in readily accessible formats, such as computerized data bases, spreadsheets, microfiche, video disks, paper files, etc.; when necessary, transforming data into different formats in order to organize them by the application of various methods such as sorting, classifying or more formal methods.

**7       Interprets and Communicates Information—**Selects and analyzes information and communicates the results to others using oral, written, graphic, pictorial or multi-media methods. Competently performing the tasks of communicating and interpreting information to others includes determining information to be communicated; identifying the best methods to present information (e.g., overheads, handouts); if necessary, converting to desired format and conveying information to others through a variety of means including oral presentation, written communication, etc.

**8       Uses Computers to Process Information—**Employs computers to acquire, organize, analyze and communicate information. Competently using computers to process information includes entering, modifying, retrieving, storing and verifying data and other information; choosing format for display (e.g., line graphs, bar graphs, tables, pie charts, narrative); and ensuring the accurate conversion of information into the chosen format.

**Interpersonal**

**9        Participates as a Member of a Team—**Works cooperatively with others and contributes to group with ideas, suggestions and effort. Demonstrating competence in participating as a member of a team includes doing own share of tasks necessary to complete a project; encouraging team members by listening and responding appropriately to their contributions; building on individual team members' strengths; resolving differences for the benefit of the team; taking personal responsibility for accomplishing goals; and responsibly challenging existing procedures, policies or authorities.

**10       Teaches Others—**Helps others learn. Demonstrating competence in teaching others includes helping others to apply related concepts and theories to tasks through coaching or other means; identifying training needs; conveying job information to allow others to see its applicability and relevance to tasks; and assessing performance and providing constructive feedback/reinforcement.

**11       Serves Clients/Customers—**Works and communicates with clients and customers to satisfy their expectations. Demonstrating competence in serving clients and customers includes actively listening to customers to avoid misunderstandings and identifying needs; communicating in a positive manner especially when handling complaints or conflict; and efficiently obtaining additional resources to satisfy client needs.

**12       Exercises Leadership—**Communicates thoughts, feelings and ideas to justify a position; encourages, persuades, convinces or otherwise motivates an individual or groups, including responsibly challenging existing procedures, policies or authority. Demonstrating competence in exercising leadership includes making positive use of the rules/values followed by others; justifying a position logically and appropriately; establishing credibility through competence and integrity; and taking minority viewpoints into consideration.

**13       Negotiates to Arrive at a Decision—**Works toward an agreement that may involve exchanging specific resources or resolving divergent interests. Demonstrating competence in negotiating to arrive at a decision involves researching opposition and the history of the conflict; setting realistic and attainable goals; presenting facts and arguments; listening to and reflecting on what has been said; clarifying problems and resolving conflicts; adjusting quickly to new facts/ideas; proposing and examining possible options; and making reasonable compromises.

**14       Works with Cultural Diversity—**Works well with men and women and with a variety of ethnic, social or educational backgrounds. Demonstrating competence in working with cultural diversity involves understanding one's own culture and those of others and how they differ; respecting the rights of others while helping them make cultural adjustments where necessary; basing impressions on individual performance, not on stereotypes; and understanding concerns of members of other ethnic and gender groups.

**Systems**

**15       Understands Systems—**Knows how social, organizational and technological systems work and operates effectively within them. Demonstrating competence in understanding systems involves knowing how a system's structures relate to goals; responding to the demands of the system/organization; knowing the right people to ask for information and where to get resources; and functioning within the formal and informal codes of the social/organizational system.

**16       Monitors and Corrects Performance—**Distinguishes trends, predicts impact of actions on system operations, diagnoses deviations in the function of a system/organization and takes necessary action to correct performance. Demonstrating competence in monitoring and correcting performance includes identifying trends and gathering needed information about how the system is intended to function; detecting deviations from system's intended purpose; troubleshooting the system; and making changes to the system to rectify system functioning and to ensure quality of product.

**17       Improves and Designs Systems—**Makes suggestions to modify existing systems to improve products or services and develops new or alternative systems. Demonstrating competence in improving or designing systems involves making suggestions for improving the functioning of the system/organization; recommending alternative system designs based on relevant feedback; and responsibly challenging the status quo to benefit the larger system.

**Technology**

**18       Selects Technology—**Judges which set of procedures, tools or machines, including computers and their programs, will produce the desired results. Demonstrating competence in selecting technology includes determining desired outcomes and applicable constraints; visualizing the necessary methods and applicable technology; evaluating specifications; and judging which machine or tool will produce the desired results.

**19       Applies Technology to Task—**Understands the overall intent and the proper procedures for setting up and operating machines, including computers and their programming systems. Demonstrating competence in how to apply technology to task includes understanding how different parts of machines interact and how machines interact with broader production systems; on occasion installing machines including computers; setting up machines or systems of machines efficiently to get desired results; accurately interpreting machine output; and detecting errors from program output.

**20       Maintains and Troubleshoots Technology—**Prevents, identifies or solves problems in machines, computers and other technologies. Demonstrating competence in maintaining and troubleshooting technology includes identifying, understanding and performing routine preventative maintenance and service on technology; detecting more serious problems; generating workable solutions to correct deviations; and recognizing when to get additional help.

**Foundation Skills**

**Basic Skills**

**1       Reading—**Locates, understands and interprets written information in prose and documents—including manuals, graphs and schedules—to perform tasks; learns from text by determining the main idea or essential message; identifies relevant details, facts and specifications; infers or locates the meaning of unknown or technical vocabulary; judges the accuracy, appropriateness, style and plausibility of reports, proposals or theories of other writers.

**2        Writing—**Communicates thoughts, ideas, information and messages in writing; records information completely and accurately; composes and creates documents such as letters, directions, manuals, reports, proposals, graphs, flow-charts; uses language, style, organization and format appropriate to the subject matter, purpose and audience; includes supporting documentation and attends to level of detail; and checks, edits and revises for correct information, appropriate emphasis, form, grammar, spelling and punctuation.

**3       Arithmetic—**Performs basic computations; uses basic numerical concepts such as whole numbers and percentages in practical situations; makes reasonable estimates of arithmetic results without a calculator; and uses tables, graphs, diagrams and charts to obtain or convey quantitative information.

**4       Mathematics—**Computational skills needed in maintaining records, estimating results, using spreadsheets or applying statistical process.

**5       Listening—**Receives, attends to, interprets and responds to verbal messages and other cues such as body language in ways that are appropriate to the purpose; for example, to comprehend, to learn, to critically evaluate, to appreciate or to support the speaker.

**6       Speaking—**Organizes ideas and communicates oral messages appropriate to listeners and situations; participates in conversation, discussion and group presentations; selects an appropriate medium for conveying a message; uses verbal language and other cues such as body language appropriate in style, tone and level of complexity to the audience and the occasion; speaks clearly and communicates a message; understands and responds to listener feedback; and asks questions when needed.

**Thinking Skills**

**7        Creative Thinking—**Uses imagination freely, combines ideas or information in new ways, makes connections between seemingly unrelated ideas and reshapes goals in ways that reveal new possibilities.

**8       Decision Making—**Specifies goals and constraints, generates alternatives, considers risks and evaluates and chooses best alternative.

**9        Problem Solving—**Recognizes that a problem exists (i.e., there is a discrepancy between what is and what should or could be); identifies possible reasons for the discrepancy; devises and implements a plan of action to resolve it; evaluates and monitors progress; and revises plan as indicated by findings.

**10       Seeing Things in the Mind's Eye—**Organizes and processes symbols, pictures, graphs, objects or other information; for example, sees a building from a blueprint; a system's operation from schematics; the flow of work activities from narrative descriptions; or the taste of food from reading a recipe.

**11       Knowing How to Learn—**Uses efficient learning techniques to acquire and apply new knowledge and skills.

**12       Reasoning—**Discovers a rule or principle underlying the relationship between two or more objects and applies it in solving a problem.

**Personal Qualities**

**13       Responsibility—**Exerts a high level of effort and perseverance toward goal attainment; works hard to become excellent at doing tasks by setting high standards, paying attention to details, working well and displaying a high level of concentration even when assigned an unpleasant task; and displays high standards of attendance, punctuality, enthusiasm, vitality and optimism in approaching and completing tasks.

**14       Self-Esteem—**Believes in own self-worth and maintains a positive view of self.

**15       Social—**Demonstrates understanding, friendliness, adaptability, empathy and politeness in new and on-going group settings; asserts self in familiar and unfamiliar social situations; relates well to others; responds appropriately as the situation requires; and takes an interest in what others say and do.

**16       Self-Management—**Assesses own knowledge, skills and abilities accurately; sets well-defined and realistic personal goals; monitors progress toward goal attainment and motivates self through goal achievement; exhibits self-control and responds to feedback unemotionally and non-defensively; and is a "self-starter."

**17       Integrity/Honesty—**Chooses ethical courses of action.

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|  | Resources | | | | Information | | | | Interpersonal | | | | | | Systems | | | Technology | | |
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| MK:001 |  |  |  |  | x |  |  |  |  |  | x |  |  |  | x |  |  |  |  |  |
| MK:002 |  |  |  |  | x |  |  |  |  |  |  |  |  |  | x |  |  |  |  |  |
| IM:001 |  |  |  |  | x | x | x | x |  |  |  |  |  |  | x |  |  |  |  |  |
| PM:001 |  |  | x |  | x | x | x | x |  |  |  |  |  |  | x |  |  |  |  |  |
| CM:001 |  |  |  |  | x |  |  |  |  |  |  |  |  |  | x |  |  |  |  |  |
| PI:001 |  |  |  |  | x | x | x | x |  |  |  |  |  |  | x |  |  |  |  |  |
| PR:001 |  |  |  |  | x | x | x | x |  |  |  |  |  |  | x |  |  |  |  |  |
| SE:017 |  |  |  |  | x | x | x | x |  |  |  |  |  |  | x |  |  |  |  |  |
| MK:022 |  |  |  |  | x | x | x | x |  |  |  |  |  |  | x |  |  |  |  |  |
| MK:023 |  |  |  |  | x | x | x | x |  |  |  |  |  |  | x |  |  | x | x |  |
| PM:019 |  |  |  |  | x | x | x | x |  |  |  |  |  |  | x |  |  |  |  |  |
| PM:020 |  |  |  |  | x | x | x | x |  |  |  |  |  |  | x |  |  |  |  |  |
| PM:024 |  |  | x |  | x | x | x | x |  |  |  |  |  |  | x |  |  |  |  |  |
| PI:002 |  |  |  |  | x | x | x | x |  |  |  |  |  |  | x |  |  |  |  |  |
| CM:003 |  |  |  |  | x | x | x | x |  |  |  |  |  |  | x |  |  |  |  |  |
| PM:003 |  |  |  |  | x | x | x | x |  |  |  |  |  |  | x |  |  |  |  |  |
| PM:042 |  |  |  |  | x | x | x | x |  |  |  |  |  |  | x |  |  |  |  |  |
| PM:021 |  |  |  |  | x | x | x | x |  |  |  |  |  |  | x |  |  |  |  |  |
| PM:206 |  |  |  |  | x | x | x | x |  |  |  |  |  |  | x |  |  |  |  |  |
| IM:012 |  |  |  |  | x | x | x | x |  |  |  |  |  |  | x |  |  |  |  |  |
| IM:184 |  |  |  |  | x | x | x | x |  |  |  |  |  |  | x |  |  |  |  |  |
| IM:010 |  |  |  |  | x | x | x | x |  |  |  |  |  |  | x |  |  |  |  |  |
| IM:282 |  |  |  |  | x | x | x |  |  |  |  |  |  |  | x |  |  |  |  |  |
| IM:281 |  |  |  |  | x | x | x | x |  |  |  |  |  |  | x |  |  |  |  |  |
| IM:284 |  |  |  |  | x | x | x | x |  |  |  |  |  |  | x |  |  |  |  |  |
| IM:285 |  |  |  |  | x | x | x |  |  |  |  |  |  |  | x |  |  |  |  |  |
|  | **Resources** | | | | **Information** | | | | **Interpersonal** | | | | | | **Systems** | | | **Technology** | | |
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| IM:289 |  |  |  |  | x | x | x | x |  |  |  |  |  |  | x |  |  |  |  |  |
| PR:002 |  |  |  |  | x | x | x | x |  |  |  |  |  |  | x |  |  |  |  |  |
| PR:003 |  |  |  |  | x | x | x | x |  |  |  |  |  |  | x |  |  |  |  |  |
| PR:007 |  |  |  |  | x | x | x | x |  |  |  |  |  |  | x |  |  |  |  |  |
| SE:062 |  |  |  |  | x | x | x | x |  |  |  |  |  |  | x |  |  |  |  |  |
| SE:048 |  |  |  |  | x | x | x | x |  |  |  |  |  |  | x |  |  |  |  |  |
| SE:076 |  |  |  |  | x | x | x | x |  |  | x |  |  |  | x |  |  |  |  |  |
| SE:932 |  |  |  |  | x | x | x | x |  |  |  |  |  |  | x |  |  |  |  |  |
| SE:828 |  |  |  |  | x | x | x | x |  |  | x |  |  |  | x |  |  |  |  |  |
| MP:001 |  |  |  |  | x | x | x | x |  |  |  |  |  |  | x |  |  |  |  |  |
| MP:003 |  |  |  |  | x |  | x | x |  |  |  |  |  | x | x |  |  |  |  |  |
| MP:007 |  |  |  |  | x | x | x | x |  |  |  |  |  |  | x |  |  |  |  |  |

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|  | Basic Skills | | | | | | Thinking Skills | | | | | | Personal Qualities | | | | |
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| MK:001 |  |  |  |  |  |  |  |  |  |  |  | x |  |  | x |  |  |
| MK:002 |  |  |  |  |  |  |  |  |  |  |  | x |  |  |  |  |  |
| IM:001 | x | x |  |  | x | x |  |  |  |  |  | x |  |  |  |  |  |
| PM:001 | x | x |  |  | x | x |  |  |  |  |  | x |  |  |  |  |  |
| CM:001 | x | x |  |  | x | x |  |  |  |  |  | x |  |  |  |  |  |
| PI:001 | x | x | x |  | x | x |  |  |  |  |  | x |  |  |  |  |  |
| PR:001 | x | x |  |  | x | x |  |  |  |  |  | x |  |  |  |  |  |
| SE:017 | x | x |  |  | x | x |  |  |  |  |  | x |  |  |  |  |  |
| MK:022 | x | x | x |  | x | x |  | x | x |  |  | x |  |  |  |  | x |
| MK:023 | x | x |  |  | x | x |  | x | x |  |  | x |  |  |  |  |  |
| PM:019 | x | x |  |  | x | x |  |  |  |  |  | x |  |  |  |  |  |
| PM:020 | x | x |  |  | x | x |  |  |  |  |  | x |  |  |  |  |  |
| PM:024 | x | x |  |  | x | x | x | x |  |  |  | x |  |  |  |  |  |
| PI:002 | x | x |  |  | x | x |  |  | x |  |  | x |  |  |  |  |  |
| CM:003 | x | x |  |  | x | x |  |  |  |  |  | x |  |  |  |  |  |
| PM:003 | x | x |  |  | x | x |  |  |  |  |  | x |  |  |  |  |  |
| PM:042 | x | x |  |  | x | x | x | x |  |  |  | x |  |  |  |  |  |
| PM:021 | x | x |  |  | x | x | x | x |  |  |  | x |  |  |  |  |  |
| PM:206 | x | x |  |  | x | x | x | x |  |  |  | x |  |  |  |  |  |
| IM:012 | x | x |  |  | x | x |  |  | x |  |  | x |  |  |  |  |  |
| IM:184 | x | x |  |  | x | x |  | x | x |  |  | x |  |  |  |  |  |
| IM:010 | x | x |  |  | x | x |  | x | x |  |  | x |  |  |  |  |  |
| IM:282 | x | x |  |  | x | x |  |  | x |  |  |  |  |  |  |  |  |
| IM:281 | x | x |  |  | x | x |  | x |  |  |  | x |  |  |  |  |  |
| IM:284 | x | x |  |  | x | x |  | x |  |  |  | x |  |  |  |  |  |
| IM:285 | x | x |  |  | x | x |  |  |  |  |  | x |  |  |  |  |  |
|  | **Basic Skills** | | | | | | **Thinking Skills** | | | | | | **Personal Qualities** | | | | |
|  | **1** | **2** | **3** | **4** | **5** | **6** | **7** | **8** | **9** | **10** | **11** | **12** | **13** | **14** | **15** | **16** | **17** |
| IM:289 | x | x |  |  | x | x |  | x |  |  |  | x |  |  |  |  |  |
| PR:002 | x | x |  |  | x | x |  |  |  |  |  | x |  |  |  |  |  |
| PR:003 | x | x |  |  | x | x |  |  |  |  |  | x |  |  |  |  |  |
| PR:007 | x | x |  |  | x | x |  |  |  |  |  | x |  |  |  |  |  |
| SE:062 | x | x |  |  | x | x |  |  |  |  |  | x |  |  |  |  |  |
| SE:048 | x | x |  |  | x | x |  |  |  |  |  | x |  |  |  |  |  |
| SE:076 | x | x |  |  | x | x |  |  |  |  |  | x |  |  |  |  |  |
| SE:932 | x | x |  |  | x | x |  |  |  |  |  | x |  |  |  |  |  |
| SE:828 | x | x |  |  | x | x |  |  |  |  |  | x |  |  |  |  |  |
| MP:001 | x | x |  |  | x | x |  | x | x |  |  | x |  |  |  |  |  |
| MP:003 | x | x |  |  | x | x |  | x | x |  |  | x |  |  |  |  |  |
| MP:007 | x | x |  |  | x | x |  | x | x |  |  | x |  |  |  |  |  |

**21st Century Skills**

Appendix L

**21st Century Skills**

**Overview**

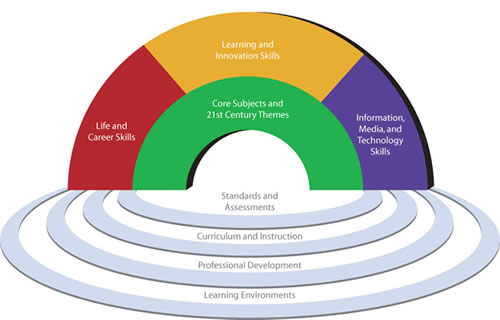
While the No Child Left Behind Act of 2001 identifies the core subjects as the traditional academic areas, business and education leaders along with policymakers have identified several other significant content areas that they consider critical to educational success in the 21st century. This group known as The Partnership for 21st Century Skills leads the way for including these skills in education. To encourage school districts to address these skills, the group provides the necessary tools and resources schools need to add the skills to the curriculum.

The Partnership for 21st Century Skills conducted extensive initial research with thousands of key stakeholders and citizens across the country. The Partnership has identified six elements of 21st century learning:

* Core subjects
* 21st century themes
* Learning and innovation skills
* Information, media, and technology skills
* Life and career skills
* 21st century assessments

**21st Century Content**

The Partnership for 21st Century Skills has created the graphic below to summarize their work.  The graphic represents both 21st century skills student outcomes (as represented by the arches of the rainbow) and 21st century skills support systems (as represented by the pools at the bottom).  The text following the graphic describes the Partnership’s perspective and then lists the student outcomes identified.  To facilitate the crosswalk of 21st Century Skills with MBA Research performance indicators, numbers have been given to each skill.



Mastery of core subjects and 21st century themes is essential for students in the 21st century. Core subjects include:

* English, reading or language arts
* World languages
* Arts
* Mathematics
* Economics
* Science
* Geography
* History
* Government and Civics

In addition to these subjects, we (The Partnership) believe schools must move beyond a focus on basic competency in core subjects to promoting understanding of academic content at much higher levels by weaving 21st century interdisciplinary themes into core subjects:

**Global Awareness**

1. Using 21st century skills to understand and address global issues
2. Learning from and working collaboratively with individuals representing diverse cultures, religions and lifestyles in a spirit of mutual respect and open dialogue in personal, work and community contexts
3. Understanding other nations and cultures, including the use of non-English languages

**Financial, Economic, Business and Entrepreneurial Literacy**

1. Knowing how to make appropriate personal economic choices
2. Understanding the role of the economy in society
3. Using entrepreneurial skills to enhance workplace productivity and career options

**Civic Literacy**

1. Participating effectively in civic life through knowing how to stay informed and understanding governmental processes
2. Exercising the rights and obligations of citizenship at local, state, national and global levels
3. Understanding the local and global implications of civic decisions

**Health Literacy**

1. Obtaining, interpreting and understanding basic health information and services and using such information and services in ways that are health enhancing
2. Understanding preventive physical and mental health measures, including proper diet, nutrition, exercise, risk avoidance and stress reduction
3. Using available information to make appropriate health-related decisions
4. Establishing and monitoring personal and family health goals
5. Understanding national and international public health and safety issues

**Learning and Innovation Skills**

Learning and innovation skills are increasingly being recognized as the skills that separate students who are prepared for increasingly complex life and work environments in the 21st century, and those who are not. A focus on creativity, critical thinking, communication and collaboration is essential to prepare students for the future.

**Creativity & Innovation**

1. Demonstrating originality and inventiveness in work
2. Developing, implementing and communicating new ideas to others
3. Being open and responsive to new and diverse perspectives
4. Acting on creative ideas to make a tangible and useful contribution to the domain in which the innovation occurs

**Critical Thinking & Problem Solving**

1. Exercising sound reasoning in understanding
2. Making complex choices and decisions
3. Understanding the interconnections among systems
4. Identifying and asking significant questions that clarify various points of view and lead to better solutions
5. Framing, analyzing and synthesizing information in order to solve problems and answer questions

**Communication & Collaboration**

1. Articulating thoughts and ideas clearly and effectively through speaking and writing
2. Demonstrating ability to work effectively with diverse teams
3. Exercising flexibility and willingness to be helpful in making necessary compromises to accomplish a common goal
4. Assuming shared responsibility for collaborative work

**Information, Media and Technology Skills**

People in the 21st century live in a technology and media-suffused environment, marked by access to an abundance of information, rapid changes in technology tools, and the ability to collaborate and make individual contributions on an unprecedented scale. To be effective in the 21st century, citizens and workers must be able to exhibit a range of functional and critical thinking skills related to information, media and technology.

**Information Literacy**

1. Accessing information efficiently and effectively, evaluating information critically and competently and using information accurately and creatively for the issue or problem at hand
2. Possessing a fundamental understanding of the ethical/legal issues surrounding the access and use of information

**Media Literacy**

1. Understanding how media messages are constructed, for what purposes and using which tools, characteristics and conventions.
2. Examining how individuals interpret messages differently, how values and points of view are included or excluded and how media can influence beliefs and behaviors.
3. Possessing a fundamental understanding of the ethical/legal issues surrounding the access and use of information

**ICT (Information, Communications & Technology) Literacy**

1. Using digital technology, communication tools and/or networks appropriately to access, manage, integrate, evaluate, and create information in order to function in a knowledge economy
2. Using technology as a tool to research, organize, evaluate and communicate information, and the possession of a fundamental understanding of the ethical/legal issues surrounding the access and use of information

**Life & Career Skills**

Today’s life and work environments require far more than thinking skills and content knowledge. The ability to navigate the complex life and work environments in the globally competitive information age requires students to pay rigorous attention to developing adequate life and career skills.

**Flexibility & Adaptability**

1. Adapting to varied roles and responsibilities
2. Working effectively in a climate of ambiguity and changing priorities

**Initiative & Self-Direction**

1. Monitoring one’s own understanding and learning needs
2. Going beyond basic mastery of skills and/or curriculum to explore and expand one’s own learning and opportunities to gain expertise
3. Demonstrating initiative to advance skill levels towards a professional level
4. Defining, prioritizing and completing tasks without direct oversight
5. Utilizing time efficiently and managing workload
6. Demonstrating commitment to learning as a lifelong process

**Social & Cross-Cultural Skills**

1. Working appropriately and productively with others
2. Leveraging the collective intelligence of groups when appropriate
3. Bridging cultural differences and using differing perspectives to increase innovation and the quality of work

**Productivity & Accountability**

1. Setting and meeting high standards and goals for delivering quality work on time
2. Demonstrating diligence and a positive work ethic (e.g., being punctual and reliable)

**Leadership & Responsibility**

1. Using interpersonal and problem-solving skills to influence and guide others toward a goal
2. Leveraging strengths of others to accomplish a common goal
3. Demonstrating integrity and ethical behavior
4. Acting responsibly with the interests of the larger community in mind

For more information about 21st Century Skills, check out the Partnership for 21st Century Skills website at <http://www.p21.org/>.

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|  | Global Awareness | | Financial, Economic, Business & Entrepren. Literacy | | | Civic Literacy | | Health Literacy | | | | Creativity & Innovation | Critical Thinking & Problem Solving | | | | | Communication & Collaboration | | | |
|  | **1** | **2** | **1** | **2** | **3** | **1** | **3** | **1** | **2** | **3** | **4** | **2** | **1** | **2** | **3** | **4** | **5** | **1** | **2** | **3** | **4** |
| MK:001 | x |  |  |  |  |  |  |  |  |  |  |  | x |  | x |  |  | x |  |  |  |
| MK:002 |  |  |  |  |  |  |  |  |  |  |  |  | x |  | x |  |  |  |  |  |  |
| IM:001 |  |  |  |  |  |  |  |  |  |  |  |  | x |  | x |  |  | x |  |  |  |
| PM:001 |  |  |  |  |  |  |  |  |  |  |  |  | x |  | x |  |  | x |  |  |  |
| CM:001 |  |  |  |  |  |  |  |  |  |  |  |  | x |  | x |  |  | x |  |  |  |
| PI:001 |  |  |  |  |  |  |  |  |  |  |  |  | x |  | x |  |  | x |  |  |  |
| PR:001 |  |  |  |  |  |  |  |  |  |  |  |  | x |  | x |  |  | x |  |  |  |
| SE:017 |  |  |  | x |  |  |  |  |  |  |  |  | x |  |  |  |  | x |  |  |  |
| MK:022 |  |  |  | x |  | x |  |  |  |  |  |  | x | x |  |  |  | x |  |  |  |
| MK:023 | x |  |  | x |  |  |  |  |  |  |  |  | x | x |  |  |  | x |  |  |  |
| PM:019 |  |  |  |  |  |  |  |  |  |  |  |  | x |  |  |  |  |  |  |  |  |
| PM:020 |  |  |  |  |  |  |  |  |  |  |  |  | x |  |  |  |  |  |  |  |  |
| PM:024 | x |  |  |  |  |  |  |  |  |  |  |  | x |  | x |  |  | x |  |  |  |
| PI:002 |  |  |  |  |  |  |  |  |  |  |  |  | x |  | x |  |  | x |  |  |  |
| CM:003 |  |  |  |  |  |  |  |  |  |  |  |  |  |  | x |  |  | x |  |  |  |
| PM:003 |  |  |  |  |  |  |  |  |  |  |  |  | x |  | x |  |  | x |  |  |  |
| PM:042 |  |  |  |  |  |  |  |  |  |  |  |  | x |  | x |  |  | x |  |  |  |
| PM:021 |  |  |  |  |  |  |  |  |  |  |  |  | x |  | x |  |  | x |  |  |  |
| PM:206 |  |  |  |  |  |  |  |  |  |  |  |  | x |  |  |  |  | x |  |  |  |
| IM:012 |  |  |  |  |  |  |  |  |  |  |  |  | x |  | x |  |  | x |  |  |  |
| IM:184 |  |  |  |  |  |  |  |  |  |  |  |  | x |  |  |  |  | x |  |  |  |
| IM:010 |  |  |  |  |  |  |  |  |  |  |  |  | x |  |  |  |  | x |  |  |  |
| IM:282 |  |  |  |  |  |  |  |  |  |  |  |  | x | x |  |  |  | x |  |  |  |
|  | **Global Awareness** | | **Financial, Economic, Business & Entrepren. Literacy** | | | **Civic Literacy** | | **Health Literacy** | | | | **Creativity & Innovation** | **Critical Thinking & Problem Solving** | | | | | **Communication & Collaboration** | | | |
|  | **1** | **2** | **1** | **2** | **3** | **1** | **3** | **1** | **2** | **3** | **4** | **2** | **1** | **2** | **3** | **4** | **5** | **1** | **2** | **3** | **4** |
| IM:281 |  |  |  |  |  |  |  |  |  |  |  |  | x |  |  |  |  | x |  |  |  |
| IM:284 |  |  |  |  |  |  |  |  |  |  |  |  | x |  |  |  |  | x |  |  |  |
| IM:285 |  |  |  |  |  |  |  |  |  |  |  |  | x | x |  |  |  | x |  |  |  |
| IM:289 |  |  |  |  |  |  |  |  |  |  |  |  | x |  |  |  |  |  |  |  |  |
| PR:002 |  |  |  |  |  |  |  |  |  |  |  |  | x |  |  |  |  |  |  |  |  |
| PR:003 |  |  |  |  |  |  |  |  |  |  |  |  | x |  | x |  |  | x |  |  |  |
| PR:007 |  |  |  |  |  |  |  |  |  |  |  |  | x |  |  |  |  | x |  |  |  |
| SE:062 |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| SE:048 |  |  |  |  |  |  |  |  |  |  |  |  | x |  |  |  |  |  |  |  |  |
| SE:076 |  |  |  |  |  |  |  |  |  |  |  |  | x |  |  |  |  |  |  |  |  |
| SE:932 |  |  |  |  |  |  |  |  |  |  |  |  | x |  |  |  |  |  |  |  |  |
| SE:828 |  |  |  |  |  |  |  |  |  |  |  |  | x |  |  |  | x | x |  | x |  |
| MP:001 |  |  |  |  |  |  |  |  |  |  |  |  | x |  | x |  |  | x |  |  |  |
| MP:003 |  |  |  |  |  |  |  |  |  |  |  |  | x |  | x |  |  | x |  |  |  |
| MP:007 |  |  |  |  |  |  |  |  |  |  |  |  | x |  | x |  |  | x |  |  |  |

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|  | Info. Literacy | | Media Literacy | | ICT (Information, Communications &Technology) Literacy | | Flexibility & Adaptability | | Social & Cross-Cultural Skills | | | Productivity & Accountability | | Leadership  & Responsibility | | | |
|  | **1** | **2** | **1** | **3** | **1** | **2** | **1** | **2** | **1** | **2** | **3** | **1** | **2** | **1** | **2** | **3** | **4** |
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| MK:002 |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| IM:001 | x | x |  | x |  |  |  |  |  |  |  |  |  |  |  |  |  |
| PM:001 |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| CM:001 |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| PI:001 |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| PR:001 |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| SE:017 |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| MK:022 | x |  | x |  |  |  |  |  |  |  |  |  |  | x |  |  |  |
| MK:023 |  |  |  |  | x |  |  |  |  |  |  |  |  |  |  |  |  |
| PM:019 |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| PM:020 |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| PM:024 |  |  |  |  |  |  |  | x |  |  |  |  |  |  |  |  |  |
| PI:002 |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| CM:003 |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| PM:003 |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| PM:042 |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| PM:021 |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| PM:206 |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| IM:012 |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| IM:184 | x |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| IM:010 |  |  | x |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| IM:282 |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
|  | **Info. Literacy** | | **Media Literacy** | | **ICT (Information, Communications &Technology) Literacy** | | **Flexibility & Adaptability** | | **Social & Cross-Cultural Skills** | | | **Productivity & Accountability** | | **Leadership**  **& Responsibility** | | | |
|  | **1** | **2** | **1** | **3** | **1** | **2** | **1** | **2** | **1** | **2** | **3** | **1** | **2** | **1** | **2** | **3** | **4** |
| IM:281 | x |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| IM:284 | x |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| IM:285 |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| IM:289 | x |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| PR:002 |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| PR:003 |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| PR:007 |  |  | x |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| SE:062 | x | x |  |  | x | x |  |  |  |  |  |  |  |  |  |  |  |
| SE:048 |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| SE:076 |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| SE:932 |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| SE:828 |  |  |  |  |  |  |  |  | x |  |  |  |  |  |  | x |  |
| MP:001 |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| MP:003 |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| MP:007 |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |

1. Required course sequence only. *Leadership* and *Wealth Management* do not include LinkedIn instructions. [↑](#footnote-ref-1)