Marketing Principles
Course Guide

Marketing-information management

Promotion

Selling

Market planning

Product/Service management

Channel management

Pricing

Marketing Principles

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Introduction to *Marketing Principles*

Section 1

Description of *Marketing Principles*

"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 redefined marketing in 2004 to mean "an organizational function and a set of processes for creating, communicating, and delivering value to customers and for managing customer relationships in ways that benefit the organization and its stakeholders." At the end of 2007, the American Marketing Association updated its marketing definition to "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."

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 *Marketing Principles* course has been developed to introduce students to marketing functions and their application and impact on business operations.

Premises of the Curriculum

The *Marketing Principles* curriculum should:

- Encourage students to think critically about the business world
- Stress the integration of and articulation with academics such as language arts, mathematics, and social studies
- Provide a foundation to support advanced study in business
- Enable students to acquire broad understandings of and skills in marketing
- Enable students to understand and use technology to perform classroom activities
- Stress the importance of interpersonal skills in diverse societies
- Foster a realistic understanding of the business environment in which marketing activities are performed
- Foster an understanding and appreciation of business ethics
- Utilize a variety of types of interactions with the business community

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 the *Marketing Principles* course.

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, Communications, 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. For example, the Finance Cluster Core is composed of seven instructional areas: Compliance, Customer Relations, Financial Analysis, Financial-Information Management, Product/Service 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 Finance Cluster, for example, the skills and knowledge that are common across jobs in banking services appear in the Banking Services 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 administration. The graph depicting the relationship among the four tiers is shown in Figure 1.
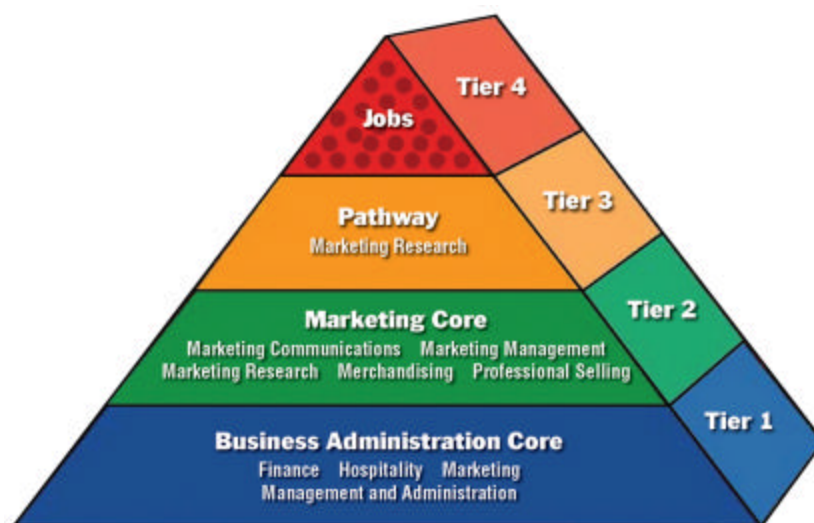

Figure 1. Relationship of Tiers

Curricular Organization

Within each tier, the curricular content has been organized into Knowledge and Skill Statements, Performance Elements, and Performance Indicators. The Knowledge and Skill Statements are broad-based content standards. They 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 Knowledge and Skill Statements identified for the Business Administration Core are:

Knowledge and Skill Statements

Business Law: Understands business's responsibility to know, abide by, and enforce laws and regulations that affect business operations and transactions

Communication Skills: Understands the concepts, strategies, and systems used to obtain and convey ideas and information

Customer Relations: Understands the techniques and strategies used to foster positive, ongoing relationships with customers

Economics: Understands the economic principles and concepts fundamental to business operations

Emotional Intelligence: Understands techniques, strategies, and systems used to foster self-understanding and enhance relationships with others

Entrepreneurship: 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: Understands tools, strategies, and systems used to maintain, monitor, control, and plan the use of financial resources

Human Resource Management: Understands the tools, techniques, and systems that businesses use to plan, staff, lead, and organize human resources

Information Management: Understands tools, strategies, and systems needed to access, process, maintain, evaluate, and disseminate information to assist business decision-making

Marketing: Understands the tools, techniques, and systems that businesses use to create exchanges and satisfy organizational objectives

Operations: Understands the processes and systems implemented to monitor, plan, and control the day-to-day activities required for continued business functioning

Professional Development: Understands concepts, tools, and strategies used to explore, obtain, and develop in a business career

Strategic Management: Understands tools, techniques, and systems that affect a business's ability to plan, control, and organize an organization/department

Marketing Core

The second tier of specificity represented those skills and knowledge that were identified as common across the five marketing pathways. The instructional areas addressed in this tier include Channel Management, Marketing-Information Management, Market Planning, Pricing, Product/Service Management, Promotion, and Selling. The Knowledge and Skill Statements identified for the Marketing Core are:

Channel Management: Understands the concepts and processes needed to identify, select, monitor, and evaluate sales channels

Marketing-Information Management: Understands the concepts, systems, and tools needed to gather, access, synthesize, evaluate, and disseminate information for use in making business decisions

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Market Planning: Understands the concepts and strategies utilized to determine and target marketing strategies to a select audience

Pricing: Understands concepts and strategies utilized in determining and adjusting prices to maximize return and meet customers' perceptions of value

Product/Service Management: Understands the concepts and processes needed to obtain, develop, maintain, and improve a product or service mix in response to market opportunities

Promotion: Understands the concepts and strategies needed to communicate information about products, services, images, and/or ideas to achieve a desired outcome

Selling: Understands the concepts and actions needed to determine client needs and wants and respond through planned, personalized communication that influences purchase decisions and enhances future business opportunities

Performance Elements

Each Knowledge and Skill Statement is composed of multiple Performance Elements. These statements are broad-based work or cognitive performances that aid in defining the Knowledge and Skill Statements. The Performance Elements addressed in this course are:

Communication Skills
Read to acquire meaning from written material and to apply the information to a task.
Write internal and external business correspondence to convey and obtain information effectively.
Customer Relations
Foster positive relationships with customers to enhance company image.
Resolve conflicts with/for customers to encourage repeat business.
Reinforce company's image to exhibit the company's brand promise.
Marketing
Understand marketing's role and function in business to facilitate economic exchanges with customers.
Professional Development
Understand career opportunities in marketing to make career decisions.
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.
Interpret marketing information to test hypotheses and/or to resolve issues.
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).
Pricing
Develop a foundational knowledge of pricing to understand its role in marketing.

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 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.
Employ sales processes and techniques to enhance customer relationships and to increase the likelihood of making sales.
Process the sale to complete the exchange.

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. For example, the Performance Indicators for Market Planning's Performance Element—**Employ marketing-information to develop a marketing plan—**are:

Explain the concept of marketing strategies (MP:001, IM LAP 7) (CS)
Identify considerations in implementing global marketing strategies (MP:002) (MN)
Explain the concept of market and market identification (MP:003, IM LAP 9) (CS)
Identify market segments (MP:004) (MN)
Select target market (MP:005) (MN)
Explain the nature of marketing planning (MP:006) (SP)
Explain the nature of marketing plans (MP:007) (SP)
Explain the role of situational analysis in the marketing planning process (MP:008) (SP)
Conduct market analysis (market size, area, potential, etc.) (MP:009) (MN)
Conduct SWOT analysis for use in the marketing planning process (MP:010) (MN)
Assess global trends and opportunities (MP:011) (MN)
Conduct competitive analysis (MP:012) (MN)
Explain the nature of sales forecasts (MP:013, IM LAP 3) (SP)
Forecast sales for marketing plan (MP:014) (MN)
Set marketing goals and objectives (MP:015) (MN)
Select marketing metrics (MP:016) (MN)
Set marketing budget (MP:017) (MN)
Develop marketing plan (MP:018) (MN)

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 curriculum-planning level for each performance indicator is referenced on the planning guide sheets found in Section 5. 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 the *Marketing Principles* course, four of the 13 Business Administration Core's Knowledge and Skills Statements and all six of the Marketing Core's Knowledge and Skill Statements are addressed. The title of each Knowledge and Skill Statement in the entire Business Administration Core and the Marketing Core are depicted in the schematic 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.
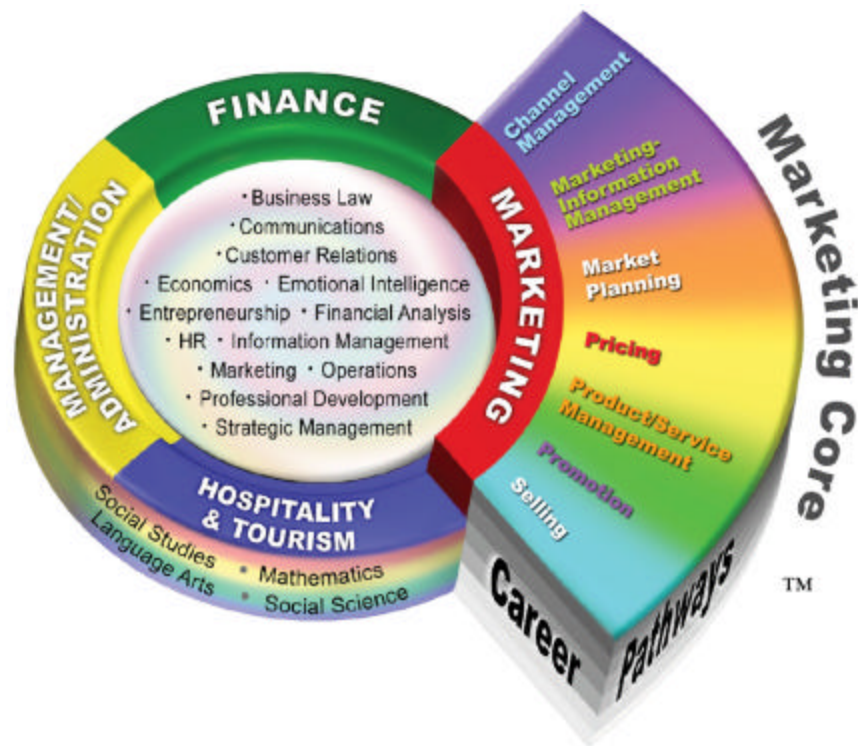

Figure 2: Schematic of Curriculum Framework for the Business Administration Core and Marketing Core

Course Philosophy, Purpose, and Goals

Section 2

Philosophy

Marketing Principles should introduce students to the dynamic processes and activities involved in marketing. The course should provide core content applicable to all aspects of marketing so that students acquire a deep understanding of all marketing activities.

A primary contributor to course success should be the use of and involvement with the local business community. Putting the activities and projects in the context of the local community should make them real to students, thereby creating student interest in the course.

To complete the activities and projects, students should use technological business tools. Tools will be recommended; however, the instructor should modify the activity or project so that the most current, available technology can be used. In addition, this course should integrate academic skills such as writing, reading, communication, and research.

Student Organization

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

Purpose

The purpose of the *Marketing Principles* course is to enable students to acquire a realistic understanding of marketing processes and activities. The course is designed to introduce students to all marketing activities so that they can begin to identify and focus on those activities of interest. Students will investigate marketing functions, analyze ethical and legal issues associated with each marketing function, recognize how technology is used in marketing, acquire in-depth knowledge of marketing-information, product/service management, and selling.

Goals

The broad goals of the *Marketing Principles* 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

Course Description
and Learning Outcomes

Section 3

Course	*Marketing Principles*
Credit	One unit
Suggested Grade Level	11
Prerequisites	There are no prerequisites for enrollment in the *Marketing Principles* course.
Admission Requirements	Admission to the course should be open to all students who are interested in pursuing a career in marketing. Students with special needs should be admitted to the course after an individual educational plan (IEP) has been prepared. The course instructor should have input into the prescription process.
Student Characteristics	Students in *Marketing Principles* should 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 pursuing a career in marketing.
Description	This 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 three 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 Strategies	To encourage immediate excitement about a future in marketing, *Marketing Principles* utilizes project-based learning for optional content delivery for some aspects of the course. During these projects, students work individually and in teams to conduct primary and secondary research to obtain the necessary knowledge required to complete the projects. Information about using project-based learning as an instructional method is found in Section 6.
	A variety of additional strategies should be utilized to deliver instruction effectively. Examples of these instructional strategies include, but are not limited to, small- and large-group activities, discussions, brainstorming, oral and written reports, online research, and community/school interactions.
	Use of instructional aids such as presentation software programs/transparencies, handouts, videotapes/DVDs, Internet access, CD-ROMs, and guest speakers is recommended.
Standards of Completion	Instructors should use formative and summative tests to evaluate student progress. Rubrics are provided to evaluate specified aspects of projects and appear in Section 6. Objective tests should be used for quizzes and end-of-year testing.
	Remedial activities should be planned and provided for students who do not meet the mastery level designated by the instructor. Successful completion of *Marketing Principles* requires mastery of all learning outcomes identified in the course outline.

Unit	**COMMUNICATION SKILLS**
Performance Element	**Read to acquire meaning from written material and to apply the information to a task.**
Performance Indicators	Analyze company resources to ascertain policies and procedures (CO:057) (CS)
Performance Element	**Write internal and external business correspondence to convey and obtain information effectively.**
Performance Indicators	Write business letters (CO:133) (CS) Write information messages (CO:039) (CS) Write inquiries (CO:040) (CS)
Unit	**CUSTOMER RELATIONS**
Performance Element	**Foster positive relationships with customers to enhance company image.**
Performance Indicators	Demonstrate a customer-service mindset (CR:004, HR LAP 32) (CS) Reinforce service orientation through communication (CR:005) (CS) Respond to customer inquiries (CO:006)(CS) Adapt communication to the cultural and social differences among clients (CR:019) (CS) Interpret business policies to customers/clients (CR:007) (CS)
Performance Element	**Resolve conflicts with/for customers to encourage repeat business.**
Performance Indicators	Handle difficult customers (CR:009, EI LAP 1) Handle customer/client complaints (CR:010)
Performance Element	**Reinforce company's image to exhibit the company's brand promise.**
Performance Indicators	Identify company's brand promise (CR:001) (CS) Determine ways of reinforcing the company's image through employee performance (CR:002) (CS)
Unit	**MARKETING**
Performance Element	**Understand marketing's role and function in business to facilitate economic exchanges with customers.**
Performance Indicators	Explain marketing and its importance in a global economy (MK:001, BA LAP 11) (CS)—Review Describe marketing functions and related activities (MK:002, MK LAP 1) (CS)

Unit | **PROFESSIONAL DEVELOPMENT**

Performance Element | **Understand career opportunities in marketing to make career decisions.**

Performance Indicators | Explain employment opportunities in marketing (PD:024, CD LAP 2) (CS)

Unit | **CHANNEL MANAGEMENT**

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

Performance Indicators | Explain the nature and scope of channel management (CM:001) (CS)
Explain the relationship between customer service and channel management (CM:002) (CS)
Explain the nature of channels of distribution (CM:003) (CS)
Describe the use of technology in the channel management function (CM:004) (CS)
Explain legal considerations in channel management (CM:005) (SP)
Describe ethical considerations in channel management (CM:006) (SP)

Unit | **MARKETING-INFORMATION MANAGEMENT**

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

Performance Indicators | Describe the need for marketing information (IM:012) (CS)
Identify information monitored for marketing decision making (IM:184) (SP)
Explain the nature and scope of the marketing information management function (IM:001) (SP)
Explain the role of ethics in marketing-information management (IM:025) (SP)
Describe the use of technology in the marketing-information management function (IM:183) (SP)
Describe the regulation of marketing-information management (IM:419) (SP)

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

Performance Indicators | Explain the nature of marketing research (IM:010) (SP)
Discuss the nature of marketing research problems/issues (IM:282) (SP)

Unit	**MARKETING-INFORMATION MANAGEMENT (cont'd)**
Performance Element	**Understand marketing-research design considerations to evaluate their appropriateness for the research problem/issue.**
Performance Indicators	Describe methods used to design marketing research studies (i.e., descriptive, exploratory, and causal) (IM:284) (SP) Describe options businesses use to obtain marketing-research data (i.e., primary and secondary research) (IM:281) (SP) Discuss the nature of sampling plans (i.e., who, how many, how chosen) (IM:285) (SP)
Performance Element	**Understand data-collection methods to evaluate their appropriateness for the research problem/issue.**
Performance Indicators	Describe data-collection methods (e.g., observations, mail, telephone, Internet, discussion groups, interviews, scanners) (IM:289) (SP) Explain characteristics of effective data-collection instruments (IM:418) (SP)
Performance Element	**Interpret marketing information to test hypotheses and/or to resolve issues.**
Performance Indicators	Explain techniques for processing marketing information (IM:062) (SP) Explain the use of descriptive statistics in marketing decision-making (IM:191) (SP)
Unit	**MARKET PLANNING**
Performance Element	**Employ marketing-information to develop a marketing plan.**
Performance Indicators	Explain the concept of marketing strategies (MP:001, IM LAP 7) (CS) Explain the concept of market and market identification (MP:003, IM LAP 9) (CS)
Unit	**PRICING**
Performance Element	**Develop a foundational knowledge of pricing to understand its role in marketing.**
Performance Indicators	Explain the nature and scope of the pricing function (PI:001, PI LAP 2) (SP) Describe the role of business ethics in pricing (PI:015) (SP) Explain the use of technology in the pricing function (PI:016) (SP) Explain legal considerations for pricing (PI:017) (SP) Explain factors affecting pricing decisions (PI:002) (SP)

Unit	**PRODUCT/SERVICE MANAGEMENT**
Performance Element	**Acquire a foundational knowledge of product/se rvice management to understand its nature and scope.**
Performance Indicators	Explain the nature and scope of the product/service management function (PM:001) (SP) Identify the impact of product life cycles on marketing decisions (PM:024) (SP) Describe the use of technology in the product/service management function (PM:039) (SP) Explain business ethics in product/service management (PM:040) (SP)
Performance Element	**Apply quality assurances to enhance product/service offerings.**
Performance Indicators	Describe the uses of grades and standards in marketing (PM:019, PM LAP 8) (CS) Explain warranties and guarantees (PM:020) (CS) Identify consumer protection provisions of appropriate agencies (PM:017) (SP)
Performance Element	**Employ product-mix strategies to meet customer expectations.**
Performance Indicators	Explain the concept of product mix (PM:003) (SP)
Performance Element	**Position products/services to acquire desired business image.**
Performance Indicators	Describe factors used by marketers to position products/services (PM:042) (SP) Explain the nature of product/service branding (PM:021, PM LAP 6) (SP)
Performance Element	**Position company to acquire desired business image.**
Performance Indicators	Explain the nature of corporate branding (PM:206) (SP)
Unit	**PROMOTION**
Performance Element	**Acquire a foundational knowledge of promotion to understand its nature and scope.**
Performance Indicators	Explain the role of promotion as a marketing function (PR:001, PR LAP 2) (CS) Explain the types of promotion (PR:002, PR LAP 4) (CS) Identify the elements of the promotional mix (PR:003, PR LAP 1) (SP) Describe the use of business ethics in promotion (PR:099) (SP) Describe the use of technology in the promotion function (PR:100) (SP) Describe the regulation of promotion (PR:101) (SP)

Unit	**PROMOTION (cont'd)**
Performance Element	**Understand promotional channels used to communicate with targeted audiences.**
Performance Indicator	Explain types of advertising media (PR:007, PR LAP 3) (SP)
	Describe word of mouth channels used to communicate with targeted audiences (PR:247) (SP)
	Explain the nature of direct marketing channels (PR:089) (SP)
	Identify communications channels used in sales promotion (PR:249) (SP)
	Explain communications channels used in public-relations activities (PR:250) (SP)
Unit	**SELLING**
Performance Element	**Acquire a foundational knowledge of selling to understand its nature and scope.**
Performance Indicators	Explain the nature and scope of the selling function (SE:017, SE LAP 117) (CS)
	Explain the role of customer service as a component of selling relationships (SE:076, SE LAP 130) (CS)
	Explain key factors in building a clientele (SE:828, SE LAP 115) (SP)
	Explain company selling policies (SE:932) (CS)
	Explain business ethics in selling (SE:106, SE LAP 129) (SP)
	Describe the use of technology in the selling function (SE:107) (SP)
	Describe the nature of selling regulations (SE:108) (SP)
Performance Element	**Acquire product knowledge to communicate product benefits and to ensure appropriateness of product for the customer.**
Performance Indicators	Acquire product information for use in selling (SE:062) (CS)
	Analyze product information to identify product features and benefits (SE:109, SE LAP 113)
Performance Element	**Understand sales processes and techniques to enhance customer relationships and to increase the likelihood of making sales.**
Performance Indicators	Explain the selling process (SE:048) (CS)
	Establish relationship with client/customer (SE:110) (CS)
	Determine customer/client needs (SE:111) (CS)
	Recommend specific product (SE:114, SE LAP 111) (CS)
Performance Element	**Process the sale to complete the exchange.**
Performance Indicators	Calculate miscellaneous charges (SE:116) (CS)
	Process special orders (SE:009) (CS)
	Process telephone orders (SE:835) (CS)

Course Outline

Section 4

Introduction

An outline is provided to identify a recommended instructional sequence/schedule for *Marketing Principles*. The outline identifies the week in which a learning outcome should be taught and an abbreviated version of the performance indicators, or learning outcomes. Immediately following the performance indicator, page numbers are referenced for the planning guide sheets in Section 5 that provide detailed information about each performance indicator.

Since the best curriculum is one that has been designed for a specific situation, instructors should examine local considerations when making final curricular decisions. These considerations involve such factors as:

Student Ability Level

Marketing Principles was developed with the assumption that students enrolled in the course are average in ability and motivation. If an individual or a class does not meet that assumption, the instructor should modify the curriculum by addressing fewer learning outcomes at a slower pace than that recommended or by adding more general business outcomes to increase the pace.

Instructional Time

The amount of instructional time devoted to each performance indicator will vary. The amount of time should be increased or decreased based on the overall ability level of students and the complexity of the performance indicator, or learning outcome. For example, less time might be spent on prerequisite performance indicators and more time on specialist-level indicators.

Career-Technical Student Organization

Use of a co-curricular student organization may affect the sequence of instruction presented in the course outline. The instructor should carefully examine the make-up of competitive events to ensure proper alignment with course content. In DECA, for example, written tests are used at each level of competition, with the tests progressing from general, core content to more industry-specific knowledge as students progress from district/regional, to state, to national events.

Week	Performance Indicators
1	Describe classroom expectations/procedures Overview of the major course outcomes Overview of student organization Review of marketing and its importance (p. 5-23) Marketing Functions (p. 5-25)
2	Employment Opportunities in Marketing (p. 5-27) Analysis of Company Resources (p. 5-3) Marketing Strategies (p. 5-70)
3	Marketing Strategies (p. 5-70) [cont'd] Market Identification (p. 5-72)
4	Need for Marketing Information (p. 5-40) Information Monitored for Marketing Decision-making (p. 5-42) Writing Business Letters (p. 5-5)
5	Writing Business Letters (p. 5-5) [cont'd] Nature and Scope of Selling (p. 5-126) Role of Customer Service in Selling (p. 5-128)
6	Customer-service Mindset (p. 5-9) Service Orientation Through Communication (p. 5-11) Adapting Communication to Social/Cultural Differences of Clients (p. 5-14)
7	Customer Inquiries (p. 5-13) Company Selling Policies (p. 5-132) Interpreting Business Policies (p. 5-16)
8	Handling Difficult Customers (p. 5-17) Handling Customer Complaints (p. 5-19) Grades and Standards (p. 5-91)
9	Warranties and Guarantees (p. 5-93) Brand Promise (p. 5-21) Reinforcing Company Image (5-22)
10	Acquiring Product Information (p. 5-140) Analyzing Product Information for Features and Benefits (p. 5-142) Selling Process (p. 5-144)
11	Establishing Customer Relationship (p. 5-146) Determining Customer Needs (p. 5-148) Recommending Specific Product (p. 5-150)
12	Calculating Miscellaneous Charges (p. 5-152) Processing Special Orders (p. 5-154) Processing Telephone Orders (p. 5-155)

Week	Performance Indicators
13	Nature and Scope of Product/Service Management (p. 5-83) Product Life Cycles (p. 5-85)
14	Product Life Cycles (cont'd) (p. 5-85) Technology in Product/Service Management (p. 5-87) Ethics in Product/Service Management (p. 5-89)
15	Consumer Protection (p. 5-95) Product Mix (p. 5-97)
16	Factors Used to Position Products (p. 5-99) Product Branding (p. 5-101) Corporate Branding (p. 5-103)
17	Corporate Branding (p. 5-103) [cont'd] Nature and Scope of Pricing (p. 5-74) Ethics in Pricing (p. 5-76)
18	Technology in Pricing (p. 5-78) Legal Considerations in Pricing (p. 5-79) Factors Affecting Pricing Decisions (p. 5-81)
19	Nature and Scope of Channel Management (p. 5-29) Customer Service and Channel Management (p. 5-31)
20	Channels of Distribution (p. 5-32) Technology in Channel Management (p. 5-34)
21	Legal Considerations in Channel Management (p. 5-36) Ethical Considerations in Channel Management (p. 5-38) Writing Informational Messages (p. 5-7)
22	Writing Informational Messages (p.5-7) [cont'd] Role of Promotion (p. 5-105) Types of Promotion (p. 5-107)
23	Promotional Mix (p. 5-109) Ethics in Promotion (p. 5-111)
24	Technology in Promotion (p. 5-113) Regulation of Promotion (p. 5-115)
25	Types of Advertising Media (p. 5-117) Word of Mouth Channels (p. 5-119)
26	Direct Marketing Channels (p. 5-121) Sales Promotion Channels (p. 5-122)
27	Public-relations Channels (p. 5-124) Writing Inquiries (p. 5-8)

Week	Performance Indicators
28	Nature and Scope of Marketing-information Management (p. 5-44) Ethics in Marketing-Information Management (p. 5-46)
29	Technology in Marketing-Information Management (p. 5-48) Regulation of Marketing-Information Management (p. 5-50)
30	Nature of Marketing Research (p. 5-52) Nature of Marketing Research Problems/Issues (p. 5-54)
31	Marketing Research Design Methods (p. 5-56) Options for Obtaining Marketing-research Data (p. 5-58)
32	Nature of Sampling Plans (p. 5-60) Data-collection Methods (p. 5-62)
33	Data-collection Instruments (p. 5-64) Techniques for Processing Marketing Information (p. 5-66)
34	Descriptive Statistics (p. 5-68) Factors in Building a Clientele (p. 5-130)
35	Ethics in Selling (p. 5-134) Technology in Selling (p. 5-136)
36	Selling Regulations (p. 5-138) Course Evaluation

Planning Guide Sheets

Section 5

Overview

The following planning guide sheets were developed for each of the performance indicators in the *Marketing Principles* course guide. Each guide sheet identifies a Knowledge and Skill Statement (standard), a Performance Element (topic), a Performance Indicator, a Curriculum Planning Level, SCANS crosswalk, 21st Century Skills crosswalk, Objectives, a Sample Activity, and a listing of resources. The LAPs and presentation software packages identified in the resource listing can be purchased separately from MarkED to support instruction.

Sample Activities

A sample activity is provided for each performance indicator. These activities can be used to reinforce concepts, practice skills, extend knowledge, and/or assess student performance. Considerations made in developing the activities are as follows:

- The activities should promote critical thinking, decision-making, and teamwork.

- A variety of activities should be developed to appeal to different learning and teaching styles and to maintain student interest.

- The activities should reflect the intent of the performance indicators; e.g., concept-oriented activities should be developed for concept-oriented performance indicators.

- The activities should enable students to integrate and apply academic content.

- The activities should encourage the use of technology.

- The activities should be viewed as examples that can be used for instructional assistance. They should not be considered mandatory or all inclusive.

- The activities should be developed from the student's point of view; i.e., the activities are for a student to complete, rather than instructional directions for a teacher to implement.

Knowledge/ Skill Statement	Understands the concepts, strategies, and systems used to obtain and convey ideas and information
Performance Element	Read to acquire meaning from written material and to apply the information to a task.
Performance Indicator	Analyze company resources to ascertain policies and procedures (CO:057)
Level	Career-sustaining
SCANS	Information 5; Systems 15; Basic Skills 1
21st Century Skills	Critical Thinking and Problem Solving 1; Communication and Collaboration 1

Objectives

a. Distinguish between policies and procedures.
b. Discuss the need for company policies and procedures.
c. Describe the impact of ineffective policies and procedures.
d. Explain the importance of understanding company policies and procedures.
e. Identify company resources that can be accessed for policies and procedures.
f. Demonstrate how to analyze company resources to ascertain policies and procedures.

Sample Activity

Obtain samples of a business's materials (e.g., handbook, employee policies, departmental policies/procedures) from your teacher or place of employment. Participate in a small-group activity to compare company policies/procedures with those of your team members. As a group, record the policies and procedures the group would want employees to follow in its own business.

Resources

Textbooks

DuBrin, A.J. (2003). *Essentials of management* (6th ed.) [pp. 128-130]. Mason, OH: Thomson/South-Western.

Evenson, R. (2007). *Award-winning customer service* (pp. 106-107). New York: AMACOM.

Lesikar, R.V. & Flatley, M.E. (2005). *Basic business communication: Skills for empowering the Internet generation* (10th ed.) [pp. 98-99]. New York: McGraw-Hill/Irwin.

Lussier, R.N. (2003). *Management fundamentals: Concepts, applications, skill development* (2nd ed.) [p. 129]. Mason, OH: Thomson/South-Western.

Software/ Online

Bartridge, T. (2005, March 9). *Why are policies and procedures so important?* Retrieved April 28, 2008, from http://www.ameinfo.com/55422.html

Fox, T. (2008, April 9). *Policies and procedures with customer focus.* Retrieved April 28, 2008, from http://ezinearticles.com/?Policies-And-Procedures-With-Customer-Focus&id=1099245

Gallinger, G. (2008). *The critical fine print of policies, procedures.* Retrieved April 28, 2008, from http://www.westchestercountybusiness.com/archive/guestcolumns/gallinger041408.php4

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Polivec, Inc. (2007, February 25). *Keys to an effective employee awareness program—Part one—Introduction.* Retrieved April 28, 2008, from http://www.polivec.com/index.php/articles/story/keys_to_an_effective_employee_awareness_program_part_one_introduction/

Safety 1st. (n.d.). *Policies and procedures.* Retrieved April 28, 2008, from http://www.angelfire.com/on3/safety1st/pol.html

Knowledge/ Skill Statement	Understands the concepts, strategies, and systems used to obtain and convey ideas and information
Performance Element	Write internal and external business correspondence to convey and obtain information effectively.
Performance Indicator	Write business letters (CO:133)
Level	Career-sustaining
SCANS	Information 5-8; Systems 15; Basic Skills 1-2; Thinking Skills 12
21st Century Skills	Communication and Collaboration 1
Objectives	a. Identify types of business letters. b. Describe the components of an effective business letter. c. Explain the guidelines for business-letter writing. d. Write a business letter.
Sample Activity	Write a business letter, and transmit it as an e-mail attachment to your teacher. The letter should describe a target market you have identified for a good, service, or idea that you intend to market to or should explain the nature of a business that you are interested in owning.

Resources

Textbooks

Carey, J.A. (Ed.). (2002). *Business letters for busy people* (4th ed.) [pp. 1-22]. Franklin Lakes, NJ: Career Press.

Clark, B.; Sobel, J.; & Basteria, C.G. (2006). *Marketing dynamics* (pp. 677-679). Tinley Park, IL: Goodheart-Willcox.

Gorman, T. (2005). *The complete idiot's guide to business letters and memos* (2nd ed.) [pp. 15-26]. Indianapolis: Alpha Books/Penguin Group.

Kimball, C. & Van Gelder, J. (2007). *Ultimate book of business letters* (pp. 1-17). Madison, WI: Entrepreneur Press.

Lesikar, R.V. & Flatley, M.E. (2005). *Basic business communication: Skills for empowering the Internet generation* (10th ed.) [pp. 94-95, 554-572]. New York: McGraw-Hill/Irwin.

Locker, K.O. (2000). *Business and administrative communication* (5th ed.) [pp. 154-209, 586-606]. Boston: Irwin/McGraw-Hill.

Souter, N. (2007). *Persuasive writing: How to make words work for you* (pp. 111-127). New York: Sterling.

Software/ Online

Business-letters.com. (n.d.). *How to write an effective business letter.* Retrieved April 25, 2008, from http://www.business-letters.com/business-letters.htm

Connor, P. (1993-2008). *Guides to writing business letters.* Retrieved April 25, 2008, from http://writing.colostate.edu/guides/documents/business_writing/business_letter/

EnglishClub.com. (1997-2008). *Business Letters in English.* Retrieved April 25, 2008, from http://www.englishclub.com/business-english/business-letters.htm

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Fawcett, S. (2008). *Business letters: Do you really know what they are?* Retrieved April 25, 2008, from http://www.marketingsource.com/articles/view/3939

Trawick, L. (1995-2008). *Writing the basic business letter.* Retrieved April 25, 2008, from http://owl.english.purdue.edu/owl/resource/653/01/

The Writing Center, University of North Carolina at Chapel Hill. (1998-2007). *Business Letters.* Retrieved April 25, 2008, from http://www.unc.edu/depts/wcweb/handouts/business.html

Knowledge/ Skill Statement	Understands the concepts, strategies, and systems used to obtain and convey ideas and information
Performance Element	Write internal and external business correspondence to convey and obtain information effectively.
Performance Indicator	Write informational messages (CO:039)
Level	Career-sustaining
SCANS	Information 5-8; Systems 15; Basic Skills 1-2; Thinking Skills 12
21st Century Skills	Communication and Collaboration 1
Objectives	a. Define the term informational messages. b. Identify examples of informational messages used by businesses. c. Explain the purposes of informational messages. d. Demonstrate procedures for writing informational messages.
Sample Activity	Write a letter to the school or local newspaper to inform the paper of the student organization's latest activities.

Resources

Textbooks

Carey, J.A. (Ed.). (2002). *Business letters for busy people* (4th ed.) [pp. 35-61]. Franklin Lakes, NJ: Career Press.

Clark, B.; Sobel, J.; & Basteria, C.G. (2006). *Marketing dynamics* (pp. 679-680). Tinley Park, IL: Goodheart-Willcox.

Gorman, T. (2005). *The complete idiot's guide to business letters and memos* (2nd ed.) [pp. 145-170]. Indianapolis: Alpha Books/Penguin Group.

Kimball, C. & Van Gelder, J. (2007). *Ultimate book of business letters* (pp. 71-114, 119, 122, 127-133, 137-141, 143-165). Madison, WI: Entrepreneur Press.

Lesikar, R.V. & Flatley, M.E. (2005). *Basic business communication: Skills for empowering the Internet generation* (10th ed.) [pp. 84-104]. New York: McGraw-Hill/Irwin.

Locker, K.O. (2000). *Business and administrative communication* (5th ed.) [pp. 154-175]. Boston: Irwin/McGraw-Hill.

Souter, N. (2007). *Persuasive writing: How to make words work for you* (pp. 89-99). New York: Sterling.

Software/ Online

Guffey, M.E. (2006). *Chapter 5: Preparing to write business messages.* Retrieved April 25, 2008, from http://ccba.jsu.edu/mhearn/BC/PP/ch05.ppt

Howe, M. (2007, January 26). *Preparing to write a business message.* Retrieved April 25, 2008, from http://website.consultapc.org/en/art/?135

Prentice Hall. (2005). *Writing business messages.* Retrieved April 25, 2008, from http://learn.dccc.edu/~severly/bct8_ppt05in.ppt

Knowledge/ Skill Statement	Understands the concepts, strategies, and systems used to obtain and convey ideas and information
Performance Element	Write internal and external business correspondence to convey and obtain information effectively.
Performance Indicator	Write inquiries (CO:040)
Level	Career-sustaining
SCANS	Information 5-8; Systems 15; Basic Skills 1-2; Thinking Skills 12
21st Century Skills	Communication and Collaboration 1
Objectives	a. Define the term inquiries. b. Identify occasions when inquiries are written by businesses. c. Describe the importance of writing inquiries. d. Demonstrate procedures for writing inquiries.
Sample Activity	Write an inquiry to obtain membership information in a professional organization of interest to you.
Resources **Textbooks**	Carey, J.A. (Ed.). (2002). *Business letters for busy people* (4th ed.) [pp. 27, 118]. Franklin Lakes, NJ: Career Press. Gorman, T. (2005). *The complete idiot's guide to business letters and memos* (2nd ed.) [pp. 158-164]. Indianapolis: Alpha Books/Penguin Group. Kimball, C. & Van Gelder, J. (2007). *Ultimate book of business letters* (pp. 33-68, 115-117, 120-121, 142). Madison, WI: Entrepreneur Press. Lesikar, R.V. & Flatley, M.E. (2005). *Basic business communication: Skills for empowering the Internet generation* (10th ed.) [pp. 112-119]. New York: McGraw-Hill/Irwin. Lesikar, R.V.; Pettit, J.D., Jr.; & Flatley, M.E. (1999). *Lesikar's basic business communication* (8th ed.) [pp. 78-89]. Boston: Irwin/McGraw-Hill.
Software/ Online	About.com. (2008). *Business letter writing: Enquiries—Asking for information.* Retrieved April 25, 2008, from http://esl.about.com/library/writing/blwrite_make_enquire.htm McMurrey, D.A. (n.d.). *Chapter 1: Business correspondence—Inquiry letters.* Retrieved April 25, 2008, from http://www.gel.ulaval.ca/~poussart/gel64324/McMurrey/texte/inquire.htm WriteExpress. (1996-2008). *Inquiry letters.* Retrieved April 25, 2008, from http://www.writeexpress.com/inquiry.htm

Knowledge/ Skill Statement	Understands the techniques and strategies used to foster positive, ongoing relationships with customers
Performance Element	Foster positive relationships with customers to enhance company image.
Performance Indicator	Demonstrate a customer-service mindset (CR:004, HR LAP 32)
Level	Career-sustaining
SCANS	Interpersonal 11,14; Systems 15; Basic Skills 5-6; Thinking Skills 12; Personal Qualities 14-15,17
21st Century Skills	Critical Thinking and Problem Solving 1
Objectives	a. Identify beliefs held by employees who have a customer-service mindset. b. Describe the importance of exhibiting a customer-service mindset. c. Identify occasions when marketing employees can exhibit a customer-service mindset. d. Describe guidelines for exhibiting a customer-service mindset. e. Demonstrate a customer-service mindset.
Sample Activity	Select an employee whom you can observe to identify that person's efforts in exhibiting a customer-service mindset. Record your observations, and share them with a small group of classmates. As a group, create a list of the five most unique ways that employees exhibited a customer-service mindset.
Resources **LAP**	Marketing Education Resource Center. (1999). *Customer-service mindset* [LAP: HR-032]. Columbus, OH: Author. Marketing Education Resource Center. (1999). *Customer-service mindset: Instructor copy* [LAP: HR-032]. Columbus, OH: Author.
Textbooks	Anderson, R.E. & Dubinsky, A.J. (2004). *Personal selling: Achieving customer satisfaction and loyalty* (pp. 238-246). Boston: Houghton Mifflin Company. Evenson, R. (2007). *Award-winning customer service* (pp. 108-111, 208-209, 221). New York: AMACOM. Farese, L.S.; Kimbrell, G.; & Woloszyk, C.A. (2006). *Marketing essentials* (pp. 324-327). Woodland Hills, CA: Glencoe/McGraw-Hill. Ingram, T.N.; LaForge, R.W.; Avila, R.A.; Schwepker, C.H., Jr.; & Williams, M.R. (2004). *Professional selling: A trust-based approach* (2nd ed.) [pp. 252-255]. Mason, OH: Thomson/South-Western.
Workbooks/ Manuals	Rokes, B. (2002). *Customer service: Business 2000* (pp. 2-20). Cincinnati, OH: South-Western/Thomson Learning.
Software/ Online	Clancy, T. (n.d.). *Customer service above and beyond: What are you willing to do to amaze your customers?* Retrieved April 25, 2008, from http://www.thecustomerservicerepairman.com/customerserviceabovebeyon.html

Galati, C.S. (2008, February 11). *Client service mindset: "The 22nd thing".* Retrieved April 25, 2008, from http://blogs.inbusinesslasvegas.com/TheHeartOfBusiness/index.php/client-service-mindset-%E2%80%9Cthe-22nd-thing%E2%80%9D

Hannabarger, C., Buchman, F., & Economy, P. (2007, September). *Mastering the art of customer service.* Retrieved April 25, 2008, from http://www.dummies.com/WileyCDA/DummiesArticle/Mastering-the-Art-of-Customer-Service.id-5548.html

Interbrand. (n.d.). *Managing the customer experience.* Retrieved May 9, 2008, from http://www.marketingpower.com/content-printer-friendly.php?&Item_ID=1083

KnowThis.com. (1998-2008). *Customer service and marketing—Managing customers.* Retrieved April 25, 2008, from http://www.knowthis.com/tutorials/principles-of-marketing/managing-customers/customer-service-and-marketing.htm

Marketing Education Resource Center. (1999). *Customer-service mindset* [LAP: HR-032: Presentation Software]. Columbus, OH: Author.

Miller, A. (1999-2008). *Customer service tips and techniques.* Retrieved April 25, 2008, from http://www.businessknowhow.com/marketing/cstips.htm

Mitreanu, C. (n.d.). *Next-generation customer-centricity.* Retrieved May 9, 2008, from http://www.marketingpower.com/content-printer-friendly.php?&Item_ID=25900

Smikle, J.L. (2002, September). *Creating the service mindset: Where does it start?* Retrieved April 25, 2008, from http://www.thinkhdi.com/hdi2003/downloads/CreatetheServiceMindset.pdf

Knowledge/ Skill Statement	Understands the techniques and strategies used to foster positive, ongoing relationships with customers
Performance Element	Foster positive relationships with customers to enhance company image.
Performance Indicator	Reinforce service orientation through communication (CR:005)
Level	Career-sustaining
SCANS	Information 5; Interpersonal 11; Systems 15; Basic Skills 1-2,5-6; Thinking Skills 12; Personal Qualities 15
21st Century Skills	Communication and Collaboration 1
Objectives	a. Define the term service orientation. b. Explain the relationship between communication and service. c. Identify ways in which employees in business and marketing can demonstrate a service orientation. d. Demonstrate procedures for reinforcing a service orientation through communication.
Sample Activity	Select a job in marketing, and write five ways or statements that an employee in that role could reinforce a service orientation through communication.

Resources

Textbooks

Carey, J.A. (Ed.). (2002). *Business letters for busy people* (4th ed.) [pp. 191-212]. Franklin Lakes, NJ: Career Press.

Gorman, T. (2005). *The complete idiot's guide to business letters and memos* (2nd ed.) [pp. 195-208]. Indianapolis: Alpha Books/Penguin Group.

Ingram, T.N.; LaForge, R.W.; Avila, R.A.; Schwepker, C.H., Jr.; & Williams, M.R. (2004). *Professional selling: A trust-based approach* (2nd ed.) [pp. 36-37]. Mason, OH: Thomson/South-Western.

Workbooks/ Manuals

Rokes, B. (2002). *Customer service: Business 2000* (pp. 52-72). Cincinnati, OH: South-Western/Thomson Learning.

Software/ Online

American Institute of Certified Public Accountants. (2006-2008). *Customer service tips—Client communication and service.* Retrieved April 25, 2008, from http://www.aicpa.org/Professional+Resources/Public+Accounting+Firm+ Resources/CPA+Marketing+Toolkit/ClientService1.htm

American Institute of Certified Public Accountants. (2006-2008). *Customer service tips—Cultivating a service orientation.* Retrieved April 25, 2008, from http://www.aicpa.org/Professional+Resources/Public+Accounting+Firm+ Resources/CPA+Marketing+Toolkit/ClientService4.htm

Pedersen, J. (2000-2006). *Communication and customer service.* Retrieved April 25, 2008, from http://www.enotalone.com/article/2540.html

Ross, G. (2008, February 17). *Three communication tips to help maintain customer loyalty.* Retrieved April 25, 2008, from http://www.allbusiness.com/technology/software-services-applications-internet-social/6789119-1.html

Service orientation. (n.d.). Retrieved April 25, 2008, from http://www.uncg.edu/hrs/serorien.htm

Knowledge/ Skill Statement	Understands the techniques and strategies used to foster positive, ongoing relationships with customers
Performance Element	Foster positive relationships with customers to enhance company image.
Performance Indicator	Respond to customer inquiries (CR:006)
Level	Career-sustaining
SCANS	Interpersonal 11, 14; Systems 15; Basic Skills 5-6; Thinking Skills 12; Personal Qualities 15, 17
21st Century Skills	Critical Thinking and Problem Solving 1
Objectives	a. Explain the nature of customer inquiries. b. Identify the types of customer inquiries. c. Discuss the importance of possessing knowledge of the company (e.g., policies, history, capabilities, etc.). d. Discuss the importance of possessing adequate product knowledge. e. Describe guidelines for handling customer inquiries. f. Demonstrate use of proper procedure for solving a customer inquiry in a marketing situation.
Sample Activity	Observe your teacher's demonstration of the guidelines for handling customer inquiries. Using a performance checklist, evaluate the teacher's demonstration. Discuss your ratings with the class.
Resources **Textbooks**	Beebe, S.A.; Beebe, S.J.; & Redmond, M.V. (2008). *Interpersonal communication: Relating to others* (5th ed.) [pp. 154-155]. Boston: Pearson/A and B. Dunne, P.M.; Lusch, R.F.; & Griffith, D.A. (2002). *Retailing* (4th ed.) [pp. 454-459]. Mason, OH: South-Western. Evenson, R. (2007). *Award-winning customer service* (pp. 8-9). New York: AMACOM. Farese, L.S.; Kimbrell, G.; & Woloszyk, C.A. (2006). *Marketing essentials* (pp. 266-268, 324-327). Woodland Hills, CA: Glencoe/McGraw-Hill.
Workbooks/ Manuals	Rokes, B. (2002). *Customer service: Business 2000* (pp. 87-91, 94). Cincinnati, OH: South-Western/Thomson Learning.
Software/ Online	BNET Editorial. (2008). *Dealing with customer inquiries.* Retrieved April 28, 2008, from http://www.bnet.com/2410-13240_23-64264.html Environmental and Social Report. (2007). *The customer assistance center—Working for greater customer satisfaction and improved product quality.* Retrieved April 28, 2008, from http://sharp-world.com/corporate/eco/csr_report/2007pdf/sharp17_23e.pdf Online Business Advisor. (2006). *Respond to customer inquiries and complaints promptly.* Retrieved April 25, 2008, from http://www.onlinebusadv.com/index.php?PAGE=161

Knowledge/ Skill Statement	Understands the techniques and strategies used to foster positive, ongoing relationships with customers
Performance Element	Foster positive relationships with customers to enhance company image.
Performance Indicator	Adapt communication to the cultural and social differences among clients (CR:019)
Level	Career-sustaining
SCANS	Interpersonal 11, 14; Systems 15; Basic Skills 5-6; Thinking Skills 12; Personal Qualities 15, 17
21st Century Skills	Global Awareness 2; Communication and Collaboration 1, 3

Objectives

a. Discuss the purpose of adapting communication to a client's cultural or social community.
b. Explain the importance of context in communication.
c. Discuss reasons for adapting communication to the cultural or social differences among clients.
d. Explain skills associated with adapting communication (e.g., empathy, risk taking, problem solving, etc.).
e. Describe ways to adapt communication to the cultural or social environment of clients.
f. Demonstrate how to adapt communication to the cultural or social differences among clients.

Sample Activity

Participate with a team member to develop a skit showing how you would adapt your communication to the cultural/social differences among clients. Explain the situation to the class. Present the skit to classmates, while they identify and record how you adapted communication to the situation. At the end of the skit, ask classmates to explain what they observed and how they could improve communication.

Resources

Textbooks

Beebe, S.A.; Beebe, S.J.; & Redmond, M.V. (2008). *Interpersonal communication: Relating to others* (5th ed.) [pp. 88-120]. Boston: Pearson/A and B.

Lesikar, R.V. & Flatley, M.E. (2005). *Basic business communication: Skills for empowering the Internet generation* (10th ed.) [pp. 452-467]. New York: McGraw-Hill/Irwin.

Locker, K.O. (2000). *Business and administrative communication* (5th ed.) [pp. 312-328]. Boston: Irwin/McGraw-Hill.

Morrison, T. & Conaway, W.A. (2006). *Kiss, bow, or shake hands: The bestselling guide to doing business in more than 60 countries.* Avon, MA: Adams Media.

Workbooks/ Manuals

Rokes, B. (2002). *Customer service: Business 2000* (p. 15). Cincinnati, OH: South-Western/Thomson Learning.

**Software/
Online**

Advanced cross cultural communication. (2008, Winter). Retrieved April 29, 2008, from
http://www.sba.pdx.edu/faculty/amlei/alaccess/576/Class8.pdf

Cultural differences and international business communication. (n.d.). Retrieved April 28, 2008, from
http://www.content4reprint.com/business/communication/cultural-differences-and-international-business-communication.htm

Ngomsi, E. (2003-2007). *Bridging cultures in the business workplace.* Retrieved April 28, 2008, from http://www.yan-koloba.com/articles.html

Wilson, B. (n.d.). *Chapter 1 lecture: High-context and low-context culture styles.* Retrieved April 28, 2008, from
http://www.marin.edu/buscom/index_files/page0009.htm

Wilson, B. (n.d.). *Cross-cultural communications in business.* Retrieved April 28, 2008, from http://faculty.business.utsa.edu/bjwilson/Cross-Cultural%20Comm%20in%20Business.ppt

Knowledge/ Skill Statement	Understands the techniques and strategies used to foster positive, ongoing relationships with customers
Performance Element	Foster positive relationships with customers to enhance company image.
Performance Indicator	Interpret business policies to customers/clients (CR:007)
Level	Career-sustaining
SCANS	Information 7; Interpersonal 11,14; Systems 15; Basic Skills 1-2,5-6; Thinking Skills 8,12; Personal Qualities 14-15,17
21st Century Skills	Critical Thinking and Problem Solving 1; Communication and Collaboration 1
Objectives	a. Define the term business policy.
	b. Identify characteristics of effective business policies.
	c. Describe reasons for having business policies.
	d. Explain types of business policies that affect customers.
	e. Discuss the role of employees in interpreting business policies.
	f. Explain when business policies should be interpreted.
	g. Explain guidelines for interpreting business policies to customers.
	h. Demonstrate procedures for interpreting business policies to customers.
Sample Activity	Keep a record of the policies that have to be interpreted for customers at a school-based or work-based enterprise. Discuss the findings with the class.

Resources

Textbooks

Evenson, R. (2007). *Award-winning customer service* (pp. 106-107). New York: AMACOM.

Gorman, T. (2005). *The complete idiot's guide to business letters and memos* (2nd ed.) [pp. 201-203]. Indianapolis: Alpha Books/Penguin Group.

Ingram, T.N.; LaForge, R.W.; Avila, R.A.; Schwepker, C.H., Jr.; & Williams, M.R. (2004). *Professional selling: A trust-based approach* (2nd ed.) [pp. 243-255]. Mason, OH: Thomson/South-Western.

Workbooks/ Manuals

Rokes, B. (2002). *Customer service: Business 2000* (pp. 87-89). Cincinnati, OH: South-Western/Thomson Learning.

Townsley, M. (2002). *Retail: Business 2000* (pp.123-126). Cincinnati, OH: South-Western/Thomson Learning.

Software/ Online

Bartridge, T. (2005, March 9). *Why are policies and procedures so important?* Retrieved April 28, 2008, from http://www.ameinfo.com/55422.html

Council of Better Business Bureau, Inc. (2003). *Sample privacy notice.* Retrieved April 28, 2008, from http://www.bbbonline.org/privacy/sample_privacy.asp

Fox, T. (2008, April 9). *Policies and procedures with customer focus.* Retrieved April 28, 2008, from http://ezinearticles.com/?Policies-And-Procedures-With-Customer-Focus&id=1099245

Moses, J. (2005, October 10). *Implementing return/exchange policies.* Retrieved April 28, 2008, from http://www.nfib.com/object/IO_24973.html

Knowledge/ Skill Statement	Understands the techniques and strategies used to foster positive, ongoing relationships with customers
Performance Element	Resolve conflicts with/for customers to encourage repeat business.
Performance Indicator	Handle difficult customers (CR:009, EI LAP 1)
Level	Career-sustaining
SCANS	Information 7; Interpersonal 11,14; Systems 15; Basic Skills 5-6; Thinking Skills 9,12; Personal Qualities 14-15,17
21st Century Skills	Communication and Collaboration 1,3

Objectives

a. Define the following terms: disagreeable customer, domineering/ superior customers, dishonest customers.
b. Identify types of difficult customers.
c. Describe categories of disagreeable customers.
d. Discuss categories of domineering/superior customers.
e. Describe ways in which customers are dishonest.
f. Identify situations in which customers become difficult.
g. Explain reasons for handling difficult customers.
h. Describe general guidelines for handling difficult customers.
i. Explain specific guidelines for handling types of difficult customers.
j. Demonstrate procedures for handling difficult customers.

Sample Activity

Write a description of a situation you have encountered involving a difficult customer in marketing. Give the description to the instructor who will select three of the most representative examples written by the class.

Resources

LAP

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Lipow, V. (2007). *How to deal with difficult customers.* Retrieved April 28, 2008, from http://career-advice.monster.com/conflict-management/retail/How-to-Deal-with-Difficult-Customer/home.aspx

Marketing Education Resource Center. (2006). *Making mad glad (Handling difficult customers)* [LAP: EI-001: Presentation Software]. Columbus, OH: Author.

Knowledge/ Skill Statement	Understands the techniques and strategies used to foster positive, ongoing relationships with customers
Performance Element	Resolve conflicts with/for customers to encourage repeat business.
Performance Indicator	Handle customer/client complaints (CR:010)
Level	Career-sustaining
SCANS	Information 7; Interpersonal 11, 14; Systems 15; Basic Skills 5-6; Thinking Skills 9, 12; Personal Qualities 14-15, 17
21st Century Skills	Critical Thinking and Problem Solving 1, Communication and Collaboration 1
Objectives	a. Define the term complaint. b. Identify the costs associated with customer complaints. c. Identify reasons for customer complaints. d. Describe the benefits of customer complaints. e. Explain the importance of appropriately handling customer complaints. f. Explain procedures for handling customer complaints. g. Demonstrate procedures for handling customer complaints.
Sample Activity	Talk to a supervisor or manager of a local business to find out the nature of frequently voiced complaints. Determine how the business responds to the complaints. Report the findings to the class.

Resources

Textbooks

Anderson, R.E. & Dubinsky, A.J. (2004). *Personal selling: Achieving customer satisfaction and loyalty* (pp. 249-250). Boston: Houghton Mifflin Company.

Dunne, P.M.; Lusch, R.F.; & Griffith, D.A. (2002). *Retailing* (4th ed.) [pp. 460-463]. Mason, OH: South-Western.

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Knowledge/ Skill Statement	Understands the techniques and strategies used to foster positive, ongoing relationships with customers
Performance Element	Reinforce company's image to exhibit the company's brand promise
Performance Indicator	Identify company's brand promise (CR:001)
Level	Career-sustaining
SCANS	Information 5-7; Systems 15; Basic Skills 1-2, 5-6; Thinking Skills 7, 10, 12
21st Century Skills	Critical Thinking and Problem Solving 1
Objectives	a. Define the terms touch points, brand, and brand promise. b. Explain the importance of a company's brand promise. c. Describe factors impacting a company's brand promise. d. Demonstrate how to identify a company's brand promise.
Sample Activity	Select a local business to identify its brand promise. Record the brand promise, and write a rationale for your findings. Participate in a small-group activity to share your findings and rationale.

Resources

Textbooks

Chiaravalle, B. & Schenck, B.F. (2007). *Branding for dummies* (pp. 96-98). Indianapolis: Wiley Publishing, Inc.

Grewal, D. & Levy, M. (2008). *Marketing* (pp. 271-272, 274-285). New York: McGraw-Hill/Irwin.

Kotler, P. & Keller, K.L. (2006). *Marketing management* (12th ed.) [pp. 274-278]. Upper Saddle River, NJ: Prentice-Hall.

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Asacker, T., VanAuken, B. & Daye, D. (2008, February 6). *The language of branding: "Brand promise".* Retrieved April 28, 2008, from http://www.brandingstrategyinsider.com/2008/02/the-language-of.html

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Heaton, C. & Guzzo, R. (2007, August 28). *Delivering on the brand promise: Making every employee a brand manager.* Retrieved April 28, 2008, from http://www.lippincott-margulies.com/pdfs/a_heaton01.pdf

Krueger, J.R. (2007, March 1). *Brand promise: Providing the "second wow".* Retrieved April 28, 2008, from http://www.jckonline.com/article/CA6429130.html

Smith, G. (2004, September 28). *A brand is the sum of all touchpoints.* Retrieved April 28, 2008, from http://www.marketingprofs.com/4/smith1.asp

Knowledge/ Skill Statement	Understands the techniques and strategies used to foster positive, ongoing relationships with customers
Performance Element	Reinforce company's image to exhibit the company's brand promise.
Performance Indicator	Determine ways of reinforcing the company's image through employee performance (CR:002)
Level	Career-sustaining
SCANS	Information 5, 7; Systems 15; Basic Skills 2, 5-6; Thinking Skills 8-9, 12, 13, 15, 17
21st Century Skills	Critical Thinking and Problem Solving 1, 3
Objectives	a. Discuss types of company images. b. Describe factors that affect a company's image. c. Explain the importance of reinforcing the company's image. d. Describe ways that employees can reinforce the company's image through their performance. e. Demonstrate how to determine ways to reinforce the company's image through employee performance.
Sample Activity	Use the local business and its brand promise previously identified to determine ways that the company's employees reinforce the business's image through their performance. Record your findings and suggest additional ways for employees to reinforce the company's image.

Resources

Textbooks

Evenson, R. (2007). *Award-winning customer service* (pp. 14-15, 70-71, 114-115). New York: AMACOM.

Kotler, P. & Keller, K.L. (2006). *Marketing management* (12th ed.) [pp. 320-322]. Upper Saddle River, NJ: Prentice-Hall.

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Rokes, B. (2002). *Customer service: Business 2000* (pp. 8, 12). Cincinnati, OH: South-Western/Thomson Learning.

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Devarajan, R. (2003). *Image is everything.* Retrieved April 28, 2008, from http://www.blonnet.com/2003/05/28/stories/2003052800180900.htm

Encyclopedia of Business (2nd ed.). (2006). *Corporate identity.* Retrieved April 28, 2008, from http://www.referenceforbusiness.com/encyclopedia/Con-Cos/Corporate-Identity.html#IMPORTANCE_OF_CORPORATE_IMAGE

Marken Communications. (2003, March 13). *Corporate image, we all have one, but few work to protect, project it.* Retrieved April 28, 2008, from http://www.markencom.com/docs/03mar13.htm

Roberts, P. (2008). *Improving your company image.* Retrieved April 28, 2008, from http://www.thedifference.co.uk/improve_image.htm

Knowledge/ Skill Statement	Understands the tools, techniques, and systems that businesses use to create exchanges and satisfy organizational objectives
Performance Element	Understand marketing's role and function in business to facilitate economic exchanges with customers.
Performance Indicator	Explain marketing and its importance in a global economy (MK:001, BA LAP 11)
Level	Career-sustaining
SCANS	Information 5; Interpersonal 11; Systems 15; Thinking Skills 12; Personal Qualities 15
21st Century Skills	Global Awareness 1; Critical Thinking and Problem Solving Skills 1, 3
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.
Sample Activity	Identify ways in which local businesses apply the marketing concept domestically and abroad, and determine how this affects the businesses' customers. Write an article depicting your findings, and compete with classmates to have the best paper selected for publication in the school/local paper. Keep a journal for one day to identify how marketing affects your life. Start the journal the moment that you wake up. When finished, underline areas that are impacted by global marketing. Discuss your journal entries with the class. Locate an article about global marketing in the newspaper or on the Internet. Summarize the article, and present it to the class. Develop a list of ways that a school-based enterprise or a local business could apply the marketing concept. Write a one-page report of your recommendations and provide a rationale for those recommendations. Submit the paper to your teacher for feedback.
Resources **LAP**	Marketing Education Resource Center. (2005). *Have it your way (Marketing)* [LAP: BA-011]. Columbus, OH: Author. Marketing Education Resource Center. (2005). *Have it your way (Marketing): Instructor copy* [LAP: BA-011]. Columbus, OH: Author.

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Boone, L.E. & Kurtz, D.L. (2004). *Contemporary marketing* (11th ed.) [pp. 5-9, 11]. Mason, OH: Thomson/South-Western.

Brown, B.J. & Clow, J.E. (2006). *Introduction to business* (pp. 196-205). Woodland Hills, CA: Glencoe/McGraw-Hill.

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Everard, K. E. & Burrow, J. L. (2001). *Business principles and management* (11th ed.) [pp. 545-560]. Cincinnati, OH: South-Western/Thomson Learning.

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Grewal, D. & Levy, M. (2008). *Marketing* (pp. 4-7, 12-14, 20-26). New York:McGraw-Hill Irwin.

Lamb, C.W., Jr.; Hair, J.F., Jr.; & McDaniel C. (2003) *Essentials of marketing* (3rd ed.) [pp. 6, 9-14, 18-20]. Mason, OH: South-Western.

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Workbooks/ Manuals

Burrow, J.L. (2003). *Marketing: Business 2000* (pp. 4-18). Mason, OH: South-Western/Thomson Learning.

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Bell, A. (n.d.). *Are you a marketing octopus or a marketing worm?* Retrieved April 28, 2008, from http://www.andrebell.com/blog/are-you-a-marketing-octopus-or-a-marketing-worm

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Lake, L. (2008). *Marketing basics for the small business.* Retrieved April 28, 2008, from http://marketing.about.com/cs/sbmarketing/l/aa060103a.htm

Lotti, M. & Lehmann, D. (2007, December 17). *Definition of marketing.* Retrieved May 9, 2008, from http://ama-academics.communityzero.com/elmar?go=1712138

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Magos, A. (1995-2008). *Ask Alice about marketing 101.* Retrieved April 28, 2008, from http://www.toolkit.cch.com/advice/mark101.asp

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Tutor2u.net. (n.d.). *Free marketing study resources.* Retrieved April 28, 2008, from http://www.tutor2u.net/marketing/default.html

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Knowledge/ Skill Statement	Understands the tools, techniques, and systems that businesses use to create exchanges and satisfy organizational objectives
Performance Element	Understand marketing's role and function in business to facilitate economic exchanges with customers.
Performance Indicator	Describe marketing functions and related activities (MK:002, MK LAP 1)
Level	Career-sustaining
SCANS	Information 5; Systems 15; Thinking Skills 12
21st Century Skills	Critical Thinking and Problem Solving Skills 1, 3
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.
Sample Activity	Make a list of all of the goods and services that you have used in the past 24 hours, and respond to the following questions: a. How did you come to use these goods/services? b. How did you find out about these goods/services? c. Where did you obtain these goods/services? d. How much did these goods/services cost?
Resources **LAP**	Marketing Education Resource Center. (2006). *Work the big six (Marketing functions)* [LAP: MK-001]. Columbus, OH: Author. Marketing Education Resource Center. (2006). *Work the big six (Marketing functions): Instructor copy* [LAP: MK-001]. Columbus, OH: Author.
Textbooks	Boone, L.E. & Kurtz, D.L. (2004). *Contemporary marketing* (11th ed.) [pp. 47-50]. Mason, OH: Thomson/South-Western. Burrow, J.L. (2006). *Marketing* (2nd ed.) [pp. 6-8, 473]. Mason, OH: Thomson/South-Western. Clark, B.; Sobel, J.; & Basteria, C.G. (2006). *Marketing dynamics* (pp. 46-48). Tinley Park, IL: Goodheart-Willcox. Eggland, S.S.; Dlabay, L.R.; & Burrow, J.L. (2004). *Intro to Business* (5th ed.) [pp. 102-104]. Mason, OH: Thomson/South-Western. Farese, L.S.; Kimbrell, G.; & Woloszyk, C.A. (2006). *Marketing essentials* (pp. 6-7). Woodland Hills, CA: Glencoe/McGraw-Hill.
Workbooks/ Manuals	Burrow, J.L. (2003). *Marketing: Business 2000* (pp. 5-6, 35-36, 88-89, 110, 117, 132-133, 140-144). Mason, OH: South-Western/Thomson Learning.

**Software/
Online**

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    MarketingBasics1.ppt

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    functions)* [LAP: MK-001: Presentation Software]. Columbus, OH: Author.

Panasyuk, I. (n.d.). *Marketing concepts.* Retrieved April 28, 2008, from
    http://mysite.verizon.net/vze7ta92/id1.html

Smart Business Learning. (2007, October 25). *Marketing functions, mix, and
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    http://learningbiz.net/marketing-functions-mix-and-performers

Knowledge/ Skill Statement	Understands concepts, tools, and strategies used to explore, obtain, and develop in a business career
Performance Element	Understand career opportunities in marketing to make career decisions.
Performance Indicator	Explain employment opportunities in marketing (PD:024, CD LAP 2)
Level	Career-sustaining
SCANS	Information 5; Systems 15; Basic Skills 1-2, 5-6; Thinking Skills 12; Personal Qualities 13, 16
21st Century Skills	Financial, Economic, Business and Entrepreneurial Literacy 1, Critical Thinking and Problem Solving 1, Communication and Collaboration 1, Information Literacy 1

Objectives

a. Identify types of businesses that offer careers in marketing.
b. Contrast marketing careers with careers in medicine.
c. Explain why jobs in marketing provide career potential.
d. Describe the following marketing careers:
    (1) Marketing research
    (2) Advertising
    (3) Product management
    (4) Distribution/Warehousing
    (5) Sales
    (6) Retailing
    (7) Service marketing
    (8) Customer service
    (9) Public relations
e. Describe well-recognized traits and skills needed for success in marketing careers.

Sample Activity

Select a marketing occupation of interest, and collect information about it from as many resources as possible. Obtain the following pieces of information:
a. Marketing occupation
b. Duties and responsibilities
c. Educational requirements
d. Recommended courses
e. Employment outlook
f. Salary range
g. Schools offering training
h. Perquisites (Perks)
i. Lifestyle associated with the occupation
j. Geographic availability of jobs
k. Personal traits needed
l. Work environment
m. Example of a positive/negative work experience
n. Pictures of people in the occupation
o. List of sources of career information
Create a notebook from the collected information. Present the information to the class.

Resources
LAP

Marketing Education Resource Center. (1999). *Marketing careers* [LAP: CD-002]. Columbus, OH: Author.

Marketing Education Resource Center. (1999). *Marketing careers: Instructor copy* [LAP: CD-002]. Columbus, OH: Author.

Textbooks

Boone, L.E. & Kurtz, D.L. (2004). *Contemporary marketing* (11th ed.) [pp. xlvii-li]. Mason, OH: Thomson/South-Western.

Burrow, J.L. (2006). *Marketing* (2nd ed.) [pp. 4-8]. Mason, OH: Thomson/South-Western.

Farese, L.S.; Kimbrell, G.; & Woloszyk, C.A. (2006). *Marketing essentials* (pp. 5-7). Woodland Hills, CA: Glencoe/McGraw-Hill.

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Software/ Online

CareerOverview.com. (2004). *Marketing careers, jobs, and training information.* Retrieved April 29, 2008, from http://www.careeroverview.com/marketing-careers.html

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Lake, L. (2008). *Exploring careers and jobs in marketing.* Retrieved April 29, 2008, from http://marketing.about.com/od/exploremarketingcareers/l/aa052103a.htm

Marketing Education Resource Center. (1999). *Marketing careers* [LAP: CD-002: Presentation Software]. Columbus, OH: Author.

Northern Illinois University. (2008). *Marketing careers.* Retrieved April 29, 2008, from http://www.cob.niu.edu/mktg/careers.asp

University of Southern California Marshall School of Business. (2001-2008). *Marketing career paths and descriptions.* Retrieved April 29, 2008, from http://www.marshall.usc.edu/marketing/resources/resources-overview.htm

Knowledge/ Skill Statement	Understands the concepts and processes needed to identify, select, monitor, and evaluate sales channels
Performance Element	Acquire foundational knowledge of channel management to understand its role in marketing.
Performance Indicator	Explain the nature and scope of channel management (CM:001)
Level	Career-Sustaining
SCANS	Information 5; Systems 15; Basic Skills 1-2, 5-6; Thinking Skills 12
21st Century Skills	Critical Thinking and Problem Solving Skills 1, 3; Communication 1

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, physical distribution, 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.

Sample Activity

Identify examples of channel-management activities that take place at local businesses. Discuss similarities and differences across types of businesses and industries.

Resources
  Textbooks

Boone, L.E. & Kurtz, D.L. (2004). *Contemporary marketing* (11th ed.) [pp. 434-437, 444-446]. Mason, OH: Thomson/South-Western.
Burrow, J.L. (2006). *Marketing* (2nd ed.) [pp. 103-104, 342-353]. Mason, OH: Thomson/South-Western.
Eggland, S.S.; Dlabay, L.R.; & Burrow, J.L. (2004). *Intro to Business* (5th ed.) [pp. 107-110]. Mason, OH: Thomson/South-Western.
Etzel, M.J.; Walker, B.J.; & Stanton, W.J. (2007). *Marketing* (14th ed.) [pp. 43-44, 377-401]. New York: McGraw-Hill/Irwin.
Farese, L.S.; Kimbrell, G.; & Woloszyk, C.A. (2006). *Marketing essentials* (pp. 444-446, 454-456). Woodland Hills, CA: Glencoe/McGraw-Hill.
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Lamb, C.W., Jr.; Hair, J.F., Jr.; & McDaniel C. (2003) *Essentials of marketing* (3rd ed.) [pp. 322-325]. Mason, OH: South-Western.

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Direct and channel marketing and distribution. (n.d.). Retrieved April 29, 2008, from http://www.jpec.org/handouts/jpec122.pdf

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Tutor2u. (n.d.). *Distribution—Channel strategy.* Retrieved April 29, 2008, from http://www.tutor2u.net/business/marketing/distribution_channel_strategy.asp

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Knowledge/ Skill Statement

Understands the concepts and processes needed to identify, select, monitor, and evaluate sales channels

Performance Element

Acquire foundational knowledge of channel management to understand its role in marketing.

Performance Indicator

Explain the relationship between customer service and channel management (CM:002)

Level

Career-Sustaining

SCANS

Information 5-8; Systems 15; Basic Skills 1-2, 5-6; Thinking Skills 9, 12; Personal Qualities 13, 17

21st Century Skills

Critical Thinking and Problem Solving 3; Communication and Collaboration 1

Objectives

a. Explain how customer service facilitates order processing.
b. Identify actions that customer service can take to facilitate order processing.
c. Describe the role of customer service in following up on orders.

Sample Activity

Interview two people who have had experiences getting late delivery of products or have received the wrong products. Compare how the companies that shipped the products handled the situations. Find out the roles that customer service played in the situations. Share the information with a small group of students in your class.

Resources

Textbooks

Coyle, J.J.; Bardi, E.J.; & Langley, C.J., Jr. (2003). *The management of business logistics: A supply chain perspective* (7th ed.) [pp. 92-103]. Mason, OH: Thomson/South-Western.

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Software/ Online

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Fath, E. (2006-2008). *Understanding the value of follow up.* Retrieved April 29, 2008, from http://www.customersloveit.com/value.htm

Lowery, S. (1997-2008). *Customer service—Following up with your customers.* Retrieved April 29, 2008, from http://www.web-source.net/followup.htm

Knowledge/ Skill Statement	Understands the concepts and processes needed to identify, select, monitor, and evaluate sales channels
Performance Element	Acquire foundational knowledge of channel management to understand its role in marketing.
Performance Indicator	Explain the nature of channels of distribution (CM:003)
Level	Career-Sustaining
SCANS	Information 5-8; Systems 15; Basic Skills 1-2, 5-6; Thinking Skills 12
21st Century Skills	Critical Thinking and Problem Solving 3; Communication and Collaboration 1
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.
Sample Activity	Select a product of interest, and chart its distribution from the point of production to the final consumer/user. Explain your chart to the class.

Resources

Textbooks

Boone, L.E. & Kurtz, D.L. (2004). *Contemporary marketing* (11th ed.) [pp. 436-440]. Mason, OH: Thomson/South-Western.

Burrow, J.L. (2006). *Marketing* (2nd ed.) [pp. 347-363]. Mason, OH: Thomson/South-Western.

Clark, B.; Sobel, J.; & Basteria, C.G. (2006). *Marketing dynamics* (pp. 322-320). Tinley Park, IL: Goodheart-Willcox.

Eggland, S.S.; Dlabay, L.R.; & Burrow, J.L. (2004). *Intro to Business* (5th ed.) [pp. 107-110]. Mason, OH: Thomson/South-Western.

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Workbooks/ Manuals

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Online**

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Olson, J. (2007, August 26). *Types of wholesale distribution and sales channels.* Retrieved April 29, 2008, from http://ezinearticles.com/?Types-Of-Wholesale-Distribution-And-Sales-Channels&id=704341

Knowledge/ Skill Statement	Understands the concepts and processes needed to identify, select, monitor, and evaluate sales channels
Performance Element	Acquire foundational knowledge of channel management to understand its role in marketing.
Performance Indicator	Describe the use of technology in the channel management function (CM:004)
Level	Career-Sustaining
SCANS	Information 5-8; Systems 15; Technology 18; Basic Skills 1-2, 5-6; Thinking Skills 12
21st Century Skills	Global Awareness 1; Financial, Economic, Business and Entrepreneurial Literacy 2; Critical Thinking and Problem Solving Skills 1, 3; Communication 1

Objectives

a. Identify ways that the use of technology impacts the channel management function.
b. Explain specific applications of technology in channel management.
c. Discuss ways that the use of technology in channel management impacts relationships with channel members.
d. Explain ways that the use of technology in channel management facilitates global trade.
e. Describe benefits associated with the use of technology in channel management.
f. Explain barriers to the use of technology in channel management.

Sample Activity

Visit a local business or email a business partner to discuss how the use of technology has impacted channel management at that business. Determine the types of technology the business uses and how their use has benefited the business. Report the findings to the class.

Resources

Textbooks

Coyle, J.J.; Bardi, E.J.; & Langley, C.J., Jr. (2003). *The management of business logistics: A supply chain perspective* (7th ed.) [pp. 463-474]. Mason, OH: Thomson/South-Western.

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Knowledge/ Skill Statement	Understands the concepts and processes needed to identify, select, monitor, and evaluate sales channels
Performance Element	Acquire foundational knowledge of channel management to understand its role in marketing.
Performance Indicator	Explain legal considerations in channel management (CM:005)
Level	Specialist
SCANS	Information 5-8; Systems 15; Basic Skills 1-2, 5-6; Thinking Skills 12
21st Century Skills	Critical Thinking and Problem Solving Skills 1, 3
Objectives	a. Define the following terms: exclusive dealing, tying agreements, full-line forcing, and closed territories. b. Describe illegal channel management activities. c. Identify laws that govern channel management activities. d. Explain the impact of regulation on channel management activities.
Sample Activity	Participate in a group activity to identify the federal and state laws that govern channel management of a product of interest to the group. Search the Internet to locate examples of violations to each of those regulations. Present the group's findings to the class.

Resources

Textbooks

Boone, L.E. & Kurtz, D.L. (2004). *Contemporary marketing* (11th ed.) [pp. 442-443]. Mason, OH: Thomson/South-Western.

Farese, L.S.; Kimbrell, G.; & Woloszyk, C.A. (2006). *Marketing essentials* (pp. 456-457). Woodland Hills, CA: Glencoe/McGraw-Hill.

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| # **Planning Guide Sheets** |

Knowledge/ Skill Statement	Understands the concepts and processes needed to identify, select, monitor, and evaluate sales channels
Performance Element	Acquire foundational knowledge of channel management to understand its role in marketing.
Performance Indicator	Describe ethical considerations in channel management (CM:006)
Level	Specialist
SCANS	Information 5-8; Systems 15; Basic Skills 1-2, 5-6; Thinking Skills 9,12; Personal Qualities 17
21st Century Skills	Financial, Economic, Business and Entrepreneurial Literacy 2; Critical Thinking and Problem Solving Skills 1, 3; Communication 1; Ethics 3, 4
Objectives	a. Define the following terms: exploitation, coercion, gray market, and slotting allowance.
	b. Discuss reasons that marketers should not manipulate the availability of a product for the purpose of exploitation.
	c. Describe ethical issues associated with serving markets with low profit potential.
	d. Explain when ethical issues can arise in a distribution channel.
	e. Explain the ethical implications of the gray market on U.S. businesses.
	f. Describe how communication relates to channel management ethics.
Sample Activity	Talk with a business partner about questionable practices that s/he has encountered in channel management. Examples might relate to manipulation of the availability of products, use of coercion, and exertion of undue influence over a channel member's decision about carrying a product. Write a summary of your findings, and present them to the class. As a group, draw conclusions about the nature of ethics in channel management and the frequency with which unethical practices occur.
Resources	
Textbooks	Boone, L.E. & Kurtz, D.L. (2004). *Contemporary marketing* (11th ed.) [p. 86]. Mason, OH: Thomson/South-Western.
	Burrow, J.L. (2006). *Marketing* (2nd ed.) [p. 47]. Mason, OH: Thomson/South-Western.
	Etzel, M.J.; Walker, B.J.; & Stanton, W.J. (2007). *Marketing* (14th ed.) [pp. 70-71, 383]. New York: McGraw-Hill/Irwin.
	Farese, L.S.; Kimbrell, G.; & Woloszyk, C.A. (2006). *Marketing essentials* (pp. 456-457). Woodland Hills, CA: Glencoe/McGraw-Hill.
	Perreault, W.D., Jr.; Cannon, J.P.; & McCarthy, E.J. (2008). *Basic marketing: Marketing strategy planning approach* (16th ed.) [pp. 308-309, 471-472]. New York: McGraw-Hill/Irwin.
Software/ Online	Anderson, S. (2006, February 10). *Coercion.* Retrieved April 29, 2008, from http://plato.stanford.edu/entries/coercion/#WroCoe
	Bergen, M. (2006, May 19-20). *Branding between the lines: Protecting your brand and managing gray markets.* Retrieved April 29, 2008, from http://www.csom.umn.edu/Assets/75892.pdf

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Knowledge/ Skill Statement	Understands the concepts, systems, and tools needed to gather, access, synthesize, evaluate, and disseminate information for use in making business decisions
Performance Element	Acquire foundational knowledge of marketing-information management to understand its nature and scope.
Performance Indicator	Describe the need for marketing information (IM:012)
Level	Career-sustaining
SCANS	Information 5-8; Systems 15; Basic Skills 1-2, 5-6; Thinking Skills 9, 12
21st Century Skills	Critical Thinking and Problem Solving Skills 1, 3; Communication
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.
Sample Activity	Identify a current problem in marketing. Ask another student to describe types of marketing information that could be obtained to resolve the problem. Ask the class to react to the recommendations.

Resources

Textbooks

Burrow, J.L. (2006). *Marketing* (2nd ed.) [pp. 116-123]. Mason, OH: Thomson/South-Western.

Etzel, M.J.; Walker, B.J.; & Stanton, W.J. (2007). *Marketing* (14th ed.) [pp. 170-171]. New York: McGraw-Hill/Irwin.

Everard, K.E. & Burrow, J.L. (2001). *Business principles and management* (11th ed.) [pp. 284-285, 519-521, 550-551]. Cincinnati, OH: South-Western/Thomson Learning.

Farese, L.S.; Kimbrell, G.; & Woloszyk, C.A. (2006). *Marketing essentials* (pp. 6, 592-603). Woodland Hills, CA: Glencoe/McGraw-Hill.

Hair, J.F., Jr.; Bush, R.P.; & Ortinau, D.J. (2000). *Marketing research: A practical approach for the new millennium* (pp. 56-63). Boston: Irwin/McGraw-Hill.

Lamb, C.W., Jr.; Hair, J.F., Jr.; & McDaniel C. (2003) *Essentials of marketing* (3rd ed.) [pp. 215-217]. Mason, OH: South-Western.

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Workbooks/ Manuals

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Knowledge/ Skill Statement	Understands the concepts, systems, and tools needed to gather, access, synthesize, evaluate, and disseminate information for use in making business decisions
Performance Element	Acquire foundational knowledge of marketing-information management to understand its nature and scope.
Performance Indicator	Identify information monitored for marketing decision making (IM:184)
Level	Specialist
SCANS	Information 5-8; Systems 15; Basic Skills 1-2, 5-6; Thinking Skills 8-9, 12
21st Century Skills	Critical Thinking and Problem Solving Skills 1; Communication 1; Information Literacy 1
Objectives	a. Define the following terms: request and complaint reports, lost sales reports, call reports, and activity reports.
	b. Explain information contained in sales and expense reports that is monitored for marketing decision-making.
	c. Describe information in reports provided by salespeople that is monitored for use in marketing decision-making.
	d. Discuss information about customers that is monitored for marketing decision-making.
	e. Explain information about competitors that is monitored for marketing decision-making.
	f. Demonstrate procedures for identifying information to monitor for marketing decision-making.
Sample Activity	Talk with a businessperson about how her/his company monitors competitors' activities. Find out what activities are monitored and what techniques are used to monitor them. Discuss how web sites are being used to monitor competitors. Write a one-page report of your findings.
Resources	
Textbooks	Burns, A.C. & Bush, R.F. (2000). *Marketing research* (3rd ed.) [pp. 16-21]. Upper Saddle River, NJ: Prentice Hall.
	Churchill, G.A., Jr. (2001). *Basic marketing research* (4th ed.) [pp. 184-194]. Mason, OH: South-Western/Thomson Learning.
	Grewal, D. & Levy, M. (2008). *Marketing* (pp. 242-250). New York: McGraw-Hill/Irwin.
	Hair, J.F., Jr.; Bush, R.P.; & Ortinau, D.J. (2000). *Marketing research: A practical approach for the new millennium* (pp. 95-111, 182-193). Boston: Irwin/McGraw-Hill.
Software/ Online	Aware. (2007, June 26). *Competitor analysis—A brief guide.* Retrieved April 30, 2008, from http://www.marketing-intelligence.co.uk/resources/competitor-analysis.htm
	Business Owner's Toolkit. (1995-2008). *Internal secondary market research.* Retrieved April 30, 2008, from http://www.toolkit.com/small_business_guide/sbg.aspx?nid=P03_3020

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Knowledge/ Skill Statement	Understands the concepts, systems, and tools needed to gather, access, synthesize, evaluate, and disseminate information for use in making business decisions
Performance Element	Acquire foundational knowledge of marketing-information management to understand its nature and scope.
Performance Indicator	Explain the nature and scope of the marketing information management function (IM:001)
Level	Specialist
SCANS	Information 5-8; Systems 15; Basic Skills 1-2, 5-6; Thinking Skills 12
21st Century Skills	Critical Thinking and Problem Solving Skills 1, 3; Communication 1; Information Literacy 1, 2; Media Literacy 1

Objectives

a. Define the following terms: marketing information, marketing-information management system, and marketing research.
b. Describe the need of 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.

Sample Activity

Listen to a guest speaker discuss her/his company's marketing-information management system, its components, and how the components work together. Write a synopsis of the presentation.

Resources
Textbooks

Burrow, J.L. (2006). *Marketing* (2nd ed.) [pp. 7-8, 119-127]. Mason, OH: Thomson/South-Western.

Etzel, M.J.; Walker, B.J.; & Stanton, W.J. (2007). *Marketing* (14th ed.) [pp. 170-181]. New York: McGraw-Hill/Irwin.

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Farese, L.S.; Kimbrell, G.; & Woloszyk, C.A. (2006). *Marketing essentials* (pp. 594-595, 612-616). Woodland Hills, CA: Glencoe/McGraw-Hill.

Perreault, W.D., Jr.; Cannon, J.P.; & McCarthy, E.J. (2008). *Basic marketing: Marketing strategy planning approach* (16th ed.) [pp.208-230]. New York: McGraw-Hill/Irwin.

Workbooks/ Manuals	Burrow, J.L. (2003). *Marketing: Business 2000* (pp. 6, 22-23, 101-102). Mason, OH: South-Western/Thomson Learning. Greene, C.L. (2001). *Entrepreneurship: Business 2000* (pp. 77-78). Cincinnati, OH: South-Western/Thomson Learning.
Software/ Online	Abraham, M. (2001-2004). *You do have a sales and marketing database?* Retrieved April 29, 2008, from http://www.sticky-marketing.net/articles/sm-dbases.htm Anderson, D. & Bailey, B. (1998, May 26). *MBA 604 orange juice: The marketing information system.* Retrieved April 29, 2008, from http://tolearn.net/marketing/isystem.htm Anderson, D. & Bailey, B. (1998, May 26). *MBA 604 orange juice: Primary information.* Retrieved April 29, 2008, from http://tolearn.net/marketing/iprimary.htm Anderson, D. & Bailey, B. (1998, April 27). *MBA 604 orange juice: Secondary information.* Retrieved April 29, 2008, from http://tolearn.net/marketing/isecond.htm Crawford, I.M. (n.d.). *Chapter 2: Secondary sources of information.* Retrieved April 29, 2008, from http://www.fao.org/docrep/W3241E/w3241e03.htm#internal%20sources%20of%20secondary%20information Crawford, I.M. (n.d.). *Chapter 9: Marketing information systems.* Retrieved April 29, 2008, from http://www.fao.org/docrep/W3241E/w3241e0a.htm#chapter%209:%20marketing%20information%20systems Lancaster, G. (n.d.). *Marketing information systems and forecasting.* Retrieved April 29, 2008, from http://www.da-group.co.uk/main/s6/st72790.htm Lancaster, G. (n.d.). *Marketing research.* Retrieved April 29, 2008, from http://www.da-group.co.uk/main/s6/st72789.htm Management-Hub.com. (2005-2008). *Concept and components of a marketing information system.* Retrieved April 29, 2008, from http://www.management-hub.com/marketing-information-management-system.html

Knowledge/ Skill Statement	Understands the concepts, systems, and tools needed to gather, access, synthesize, evaluate, and disseminate information for use in making business decisions
Performance Element	Acquire foundational knowledge of marketing-information management to understand its nature and scope.
Performance Indicator	Explain the role of ethics in marketing-information management (IM:025)
Level	Specialist
SCANS	Information 5-8; Systems 15; Basic Skills 1-2, 5-6; Thinking Skills 9, 12; Personal Qualities 17
21st Century Skills	Critical Thinking and Problem Solving Skills 1; Communication 1; Information Literacy 2; Media Literacy 3
Objectives	a. Describe the importance of credibility and objectivity in marketing-information management.
	b. Explain why the integrity of the marketing information must be protected.
	c. Explain types of ethical conflicts in marketing-information management.
	d. Discuss ethical issues associated with obtaining information about competitors.
	e. Describe ethical issues created by the use of technology in data collection.
Sample Activity	Given a series of marketing-information management case studies, determine the ethical violations involved in collecting, analyzing, and using data. Discuss your responses with the class.

Resources
  Textbooks

Boone, L.E. & Kurtz, D.L. (2004). *Contemporary marketing* (11th ed.) [pp. 85-86]. Mason, OH: Thomson/South-Western.

Burrow, J.L. (2006). *Marketing* (2nd ed.) [p. 123]. Mason, OH: Thomson/South-Western.

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Knowledge/ Skill Statement	Understands the concepts, systems, and tools needed to gather, access, synthesize, evaluate, and disseminate information for use in making business decisions
Performance Element	Acquire foundational knowledge of marketing-information management to understand its nature and scope.
Performance Indicator	Describe the use of technology in the marketing-information management function (IM:183)
Level	Specialist
SCANS	Information 5-8; Systems 15; Technology 18; Basic Skills 1-2, 5-6; Thinking Skills 12
21st Century Skills	Critical Thinking and Problem Solving Skills 1; Communication 1; ICT Literacy 1, 2
Objectives	a. Identify ways that the use of technology impacts the marketing-information management function. b. Describe how the use of the Internet for marketing-information management tracks and monitors customer website activities. c. Discuss how customer-to-business communications on the Internet can be used in marketing-information management (e.g., email reminders, popup notices, online focus groups, etc.) d. Explain how the Internet provides services for conducting research (e.g., search engines, tools for online surveys, database access, blogs, etc.) e. Discuss marketers' use of virtual realties and simulations in marketing-information management. f. Describe how the use of Global Positioning Systems (GPS) can facilitate marketing-information management. g. Explain the use of data analysis software in marketing-information management.
Sample Activity	Prepare a list of ways that your company can use the Internet to assist with the marketing-information management function. Share the list with a classmate.
Resources **Textbooks**	Boone, L.E. & Kurtz, D.L. (2004). *Contemporary marketing* (11th ed.) [pp. 212-213]. Mason, OH: Thomson/South-Western. Etzel, M.J.; Walker, B.J.; & Stanton, W.J. (2007). *Marketing* (14th ed.) [pp. 174-177]. Burr Ridge, IL: McGraw-Hill/Irwin. Grewal, D. & Levy, M. (2008). *Marketing* (pp. 243-244). New York: McGraw-Hill/Irwin. Lamb, C.W., Jr.; Hair, J.F., Jr.; & McDaniel C. (2003). *Essentials of marketing* (3rd ed.) [pp. 214, 240-243]. Mason, OH: South-Western. Perreault, W.D., Jr.; Cannon, J.P.; & McCarthy, E.J. (2008). *Basic Marketing: A marketing strategy planning approach* (16th ed.) [pp. 80-81, 209-213]. Burr Ridge, IL: McGraw-Hill/Irwin.

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Knowledge/ Skill Statement	Understands the concepts, systems, and tools needed to gather, access, synthesize, evaluate, and disseminate information for use in making business decisions
Performance Element	Acquire foundational knowledge of marketing-information management to understand its nature and scope.
Performance Indicator	Describe the regulation of marketing-information management (IM:419)
Level	Specialist
SCANS	Information 5-7; Systems 15; Basic Skills 1-2, 5-6; Thinking Skills 11, 12; Personal Qualities 17
21st Century Skills	Civic Literacy 1; Information Literacy 2; Media Literacy 3
Objectives	a. Define the following terms: self-regulation, SUGGING, FRUGGING, privacy
	b. Explain the role of self-regulation for marketing researchers.
	c. Discuss privacy concerns associated with the collection, storage, mining, and use of data.
	d. Describe the legalities associated with the collection of marketing data from children.
	e. Discuss legal issues associated with the collection and sharing of health-care data.
	f. Explain legal issues associated with the protection of information held by financial institutions.
	g. Discuss why marketing researchers are excluded from governance under the CAN-SPAM Act.
	h. Explain how marketing researchers are protected from SUGGING and FRUGGING.
	i. Describe legal issues associated with callbacks.
	j. Discuss legal issues associated with the use of automatic dialers when collecting data.
	k. Ascertain the current status of privacy/data security legislation.
	l. Discuss reasons that marketing researchers must consider state, federal, and international laws when collecting data.
Sample Activity	Search the Internet to locate information about current regulations impacting marketing-information management or marketing research. (Good sources to search include the Marketing Research Association and the Council of American Survey Research Organizations [CASRO].) Divide a page into two columns—the one on the left labeled "Findings"; the other column labeled "Implications." For each piece of regulation (both self-regulation and government regulation), determine how the regulation will impact your data collection, storage, and use. Submit the completed document to your teacher.
	Conduct an Internet search to determine your state's laws governing the collection, storage, and use of marketing data. Record your findings, and discuss them with a classmate.

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Knowledge/ Skill Statement	Understands the concepts, systems, and tools needed to gather, access, synthesize, evaluate, and disseminate information for use in making business decisions
Performance Element	Understand marketing-research activities to show command of their nature and scope.
Performance Indicator	Explain the nature of marketing research (IM:010)
Level	Specialist
SCANS	Information 5-8; Systems 15; Basic Skills 1-2, 5-6; Thinking Skills 8-9, 12
21st Century Skills	Critical Thinking and Problem Solving Skills 1; Communication 1; Information Literacy 1
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.
Sample Activity	Determine the types of marketing-research activities that an assigned local business conducts. Discuss your findings with the class. Contrast the marketing-research activities of large businesses with those of small businesses. Write a synopsis of your findings.

Resources
Textbooks

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Knowledge/ Skill Statement	Understands the concepts, systems, and tools needed to gather, access, synthesize, evaluate, and disseminate information for use in making business decisions
Performance Element	Understand marketing-research activities to show command of their nature and scope.
Performance Indicator	Discuss the nature of marketing research problems/issues (IM:282)
Level	Specialist
SCANS	Information 5-7; Systems 15; Basic Skills 1-2, 5-6; Thinking Skills 9
21st Century Skills	Critical Thinking and Problem Solving 1,2; Communication and Collaboration 1
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.
Sample Activity	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. Select a marketing-research paper of interest and download it from the Social Science Research Network. Read the study to determine the nature of the research problem/issue. Work with a classmate to determine the problem/issue, unit of analysis, and variables. Determine whether the research problem/issue aligns with the research objectives. Share your findings with the class. Save the research study for future use.

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Knowledge/ Skill Statement	Understands the concepts, systems, and tools needed to gather, access, synthesize, evaluate, and disseminate information for use in making business decisions
Performance Element	Understand marketing-research design considerations to evaluate their appropriateness for the research problem/issue.
Performance Indicator	Describe methods used to design marketing research studies (i.e., descriptive, exploratory, and causal) (IM:284)
Level	Specialist
SCANS	Information 5-8; Systems 15; Basic Skills 1-2, 5-6; Thinking Skills 8, 12
21st Century Skills	Critical Thinking and Problem Solving Skills 1; Communication 1; Information Literacy 1
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.
Sample Activity	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. Select a marketing research paper of interest, and download it from the Social Science Research Network. 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 your findings, and write a summary of the research paper. Submit your paper to your teacher for feedback. Save the research study for future use.
Resources **Textbooks**	Burns, A.C. & Bush, R.F. (2000). *Marketing research* (3rd ed.) [pp. 75-77,129-139]. Upper Saddle River, NJ: Prentice Hall. Churchhill, G.A., Jr. (2001). *Basic marketing research*) (4th ed.) [pp. 104-108, 109-116, 121-146]. Cincinnati: South-Western. Churchhill, G.A., Jr.; & Iacobucci, D. (2002). *Marketing research: Methodological foundations* (8th ed.) [pp. 55-56, 90-123, 130-140, 165-168]. Fort Worth: Harcourt College Publishers. Hair, J.F., Jr.; Bush, R.P.; & Ortinau, D.J. (2000). *Marketing research: A practical approach for the new millennium* (pp. 36-38, 252-253). Burr Ridge, IL: Irwin McGraw-Hill. Malhotra N.K. (1999). *Marketing research: An applied orientation* (3rd ed.) [pp. 83-97, 214-218]. Upper Saddle River, NJ: Prentice Hall.

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Knowledge/ Skill Statement	Understands the concepts, systems, and tools needed to gather, access, synthesize, evaluate, and disseminate information for use in making business decisions
Performance Element	Understand marketing-research design considerations to evaluate their appropriateness for the research problem/issue.
Performance Indicator	Describe options businesses use to obtain marketing-research data (i.e., primary and secondary research, quantitative and qualitative research) (IM:281)
Level	Specialist
SCANS	Information 5-8; Systems 15; Basic Skills 1-2, 5-6; Thinking Skills 8, 12
21st Century Skills	Critical Thinking and Problem Solving Skills 1; Communication 1; Information Literacy 1
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.
Sample Activity	Using 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, 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. Discuss your findings with a group of two or three other classmates.
Resources **Textbooks**	Boone, L.E. & Kurtz, D.L. (2004). *Contemporary marketing* (11th ed.) [pp. 200-203]. Mason, OH: Thomson/South-Western.
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Knowledge/ Skill Statement	Understands the concepts, systems, and tools needed to gather, access, synthesize, evaluate, and disseminate information for use in making business decisions
Performance Element	Understand marketing-research design considerations to evaluate their appropriateness for the research problem/issue.
Performance Indicator	Discuss the nature of sampling plans (i.e., who, how many, how chosen) (IM:285)
Level	Specialist
SCANS	Information 5-7; Systems 15; Basic Skills 1-2, 5-6; Thinking Skills 12
21st Century Skills	Critical Thinking and Problem Solving 1, 2; Communication and Collaboration 1
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.
Sample Activity	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. 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. Record your findings, and submit them to your teacher. Save the research study for future use.
Resources Textbooks	Burns, A.C. & Bush, R.F. (2000). *Marketing research.* (3rd ed.) [pp. 382-413]. Upper Saddle River, NJ: Prentice Hall.
	Churchill, G.A., Jr.; & Nielsen, A.C., Jr. (2001). *Basic marketing research* (4th ed.) [pp. 448-458]. Mason, OH: South-Western/Thomson Learning.
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Planning Guide Sheets

Knowledge/ Skill Statement	Understands the concepts, systems, and tools needed to gather, access, synthesize, evaluate, and disseminate information for use in making business decisions
Performance Element	Understand data-collection methods to evaluate their appropriateness for the research problem/issue.
Performance Indicator	Describe data-collection methods (e.g., observations, mail, telephone, Internet, discussion groups, interviews, scanners) (IM:289)
Level	Specialist
SCANS	Information 5-8; Systems 15; Basic Skills 1-2, 5-6; Thinking Skills 8, 12
21st Century Skills	Critical Thinking and Problem Solving Skills 1; Information Literacy 1
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.
Sample Activity	Using 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, determine what method(s) the author used to collect the data. Identify the advantages/disadvantages associated with that data-collection method. Determine additional ways the author could have collected the data. Discuss your ideas with a classmate.
Textbooks	Boone, L.E. & Kurtz, D.L. (2004). *Contemporary marketing* (11th ed.) [pp. 199, 204-210]. Mason, OH: Thomson/South-Western.
	Burns, A.C. & Bush, R.F. (2000). *Marketing research* (3rd ed.) [pp. 232-257, 264-269]. Upper Saddle River, NJ: Prentice Hall.
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Hair, J.F., Jr.; Bush, R.P.; & Ortinau, D.J. (2000). *Marketing research: A practical approach for the new millennium* (pp. 41, 218-224, 253-266, 286-287, 302-308, 310-314). Burr Ridge, IL: Irwin McGraw-Hill.

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National Service Research. (2001). *Market research overview.* Retrieved April 30, 2008, from http://www.nsr.cc/scripts/mro.htm

Knowledge/ Skill Statement	Understands the concepts, systems, and tools needed to gather, access, synthesize, evaluate, and disseminate information for use in making business decisions
Performance Element	Understand data-collection methods to evaluate their appropriateness for the research problem/issue.
Performance Indicator	Explain characteristics of effective data-collection instruments (IM:418)
Level	Specialist
SCANS	Information 5-7; Systems 15; Basic Skills 1-2, 5-6; Thinking Skills 12
21st Century Skills	Critical Thinking and Problem Solving 1, Communication and Collaboration 1
Objectives	a. Explain why data-collection instruments must be carefully designed and administered.
	b. Discuss challenges in developing effective data-collection instruments (e.g., cultural differences between researcher and source, resources required for the study, intangible nature of some types of information, difficulty accessing some sources of information).
	c. Explain elements of surveys (i.e., a statement to respondents about how information will be used and why it is valuable; clear instructions, including for any skip patterns; appealing format; logical sequence of questions; consideration of how answers to previous items might affect later items).
	d. Describe qualities of a good survey item (e.g., clear questions, single focus for each question, neutral questions, balanced questions, appropriate language for the intended respondent, appropriately broad or narrow in scope).
	e. Explain how to ensure the quality of observations.
	f. Discuss considerations for collecting data online.
	g. Describe considerations in using a pre-existing data collection instrument.
Sample Activity	Use the 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 examine the effectiveness of the study's data-collection instrument. Determine what data-collection instrument was used and whether the researcher developed a quality data-collection instrument. Record your findings, and provide a rationale for your assessment. Discuss your findings with a classmate.
Textbooks	Burns, A.C. & Bush, R.F. (2000). *Marketing research.* (3rd ed.) [pp. 81-82, 262-286, 342-373]. Upper Saddle River, NJ: Prentice Hall.
	Churchill, G.A., Jr.; & Nielsen, A.C., Jr. (2001). *Basic marketing research* (4th ed.) [pp. 256-276, 286-295, 314-347]. Mason, OH: South-Western/Thomson Learning.
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TC Evaluation Center (2006, June). *Developing data collection instruments for evaluation.* Retrieved April 28, 2008, from http://ucce.ucdavis.edu/files/filelibrary/5715/27620.pdf

Knowledge/ Skill Statement	Understands the concepts, systems, and tools needed to gather, access, synthesize, evaluate, and disseminate information for use in making business decisions
Performance Element	Interpret marketing information to test hypotheses and/or to resolve issues.
Performance Indicator	Explain techniques for processing marketing information (IM:062)
Level	Specialist
SCANS	Information 5-8; Systems 15; Basic Skills 1-2, 5-6; Thinking Skills 8-9, 12
21st Century Skills	Critical Thinking and Problem Solving Skills 1; Communication & Collaboration 1; Information Literacy 1
Objectives	a. Explain the need for physical inspection of paper-based marketing data.
	b. Identify questions to ask when screening initial data.
	c. Discuss actions that can be taken with incomplete records.
	d. Explain reasons for data entry errors that limit the use of marketing research data.
	e. Discuss reasons that questionable entries are found in raw marketing research data.
	f. Describe the role of coding in processing marketing information.
	g. Explain generally accepted coding principles.
	h. Discuss the importance of editing coded information.
	i. Describe data-entry options.
	j. Compare the processing of paper-based marketing information with that of computer-based marketing information.
	k. Explain the importance of using a codebook to describe data and to indicate where and how they can be accessed.
Sample Activity	Observe how spreadsheet software packages can be used to process marketing information. Identify the strengths and weaknesses associated with the use of spreadsheets for processing marketing information.

Resources
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Knowledge/ Skill Statement	Understands the concepts, systems, and tools needed to gather, access, synthesize, evaluate, and disseminate information for use in making business decisions
Performance Element	Interpret marketing information to test hypotheses and/or to resolve issues.
Performance Indicator	Explain the use of descriptive statistics in marketing decision-making (IM:191)
Level	Specialist
SCANS	Information 5-8; Systems 15; Basic Skills 1-2, 4, 5-6; Thinking Skills 8-9, 12
21st Century Skills	Critical Thinking and Problem Solving Skills 1, 2; Communication & Collaboration 1
Objectives	a. Define the following terms: descriptive statistics, mean, medium, mode, range, standard deviation, and skewed. b. Explain the objectives of using descriptive statistics to interpret data. c. Describe the advantages and disadvantages of using the mean, median, and mode as measures of central tendency. d. Explain when to use the mean, median, and mode. e. Discuss the importance of using the median when working with skewed distributions. f. Describe the use of the standard deviation in data analysis.
Sample Activity	Given data from a fundraising activity, interpret the descriptive statistics, and identify marketing decisions that could be made from the results of the data.

Resources

Textbooks

Burns, A.C. & Bush, R.F. (2000). *Marketing research.* (3rd ed.) [pp. 493-494, 496-507]. Upper Saddle River, NJ: Prentice Hall.

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Knowledge/ Skill Statement	Understands the concepts and strategies utilized to determine and target marketing strategies to a select audience
Performance Element	Employ marketing-information to develop a marketing plan.
Performance Indicator	Explain the concept of marketing strategies (MP:001, IM LAP 7)
Level	Career-sustaining
SCANS	Information 5-8; Systems 15; Basic Skills 1-2, 5-6; Thinking Skills 8-9, 12
21st Century Skills	Critical Thinking and Problem Solving Skills 1, 3; Communication & Collaboration 1
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.
Sample Activity	Imagine that you are the marketing manager for your school's play or other school activity. Identify strategies that you would use to market the play/activity. Explain why you would use them, and summarize your plan in a brief presentation for the play/activity directors.
Resources **LAP**	Marketing Education Resource Center. (2005). *Pick the mix (Marketing strategies)* [LAP: IM-007]. Columbus, OH: Author. Marketing Education Resource Center. (2005). *Pick the mix (Marketing strategies): Instructor copy* [LAP: IM-007]. Columbus, OH: Author.
Textbooks	Allen, K.R. & Meyer, E.C. (2006). *Entrepreneurship and small business management* (pp. 207-215). Woodland Hills, CA: McGraw-Hill/Glencoe. Boone, L.E. & Kurtz, D.L. (2004). *Contemporary marketing* (11th ed.) [pp. 45-50]. Mason, OH: Thomson/South-Western. Burrow, J.L. (2006). *Marketing* (2nd ed.) [pp. 19-20, 94-97, 220-231]. Mason, OH: Thomson/South-Western. Clark, B.; Sobel, J.; & Basteria, C.G. (2006). *Marketing dynamics* (pp. 20-26, 61, 183-185). Tinley Park, IL: Goodheart-Willcox. Eggland, S.S.; Dlabay, L.R.; & Burrow, J.L. (2004). *Intro to Business* (5th ed.) [p. 105]. Mason, OH: Thomson/South-Western. Etzel, M.J.; Walker, B.J.; & Stanton, W.J. (2007). *Marketing* (14th ed.) [pp. 16-17]. New York: McGraw-Hill/Irwin. Everard, K.E. & Burrow, J.L. (2001). *Business principles and management* (11th ed.) [p. 560]. Cincinnati, OH: South-Western/Thomson Learning. Farese, L.S.; Kimbrell, G.;, & Woloszyk, C.A. (2006). *Marketing essentials* (pp. 16-19). Woodland Hills, CA: Glencoe/McGraw-Hill. Grewal, D. & Levy, M. (2008). *Marketing* (pp. 7-12, 38-41). New York: McGraw-Hill/Irwin.

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Knowledge/ Skill Statement	Understands the concepts and strategies utilized to determine and target marketing strategies to a select audience
Performance Element	Employ marketing-information to develop a marketing plan.
Performance Indicator	Explain the concept of market and market identification (MP:003, IM LAP 9)
Level	Career-sustaining
SCANS	Information 5-8; Interpersonal 14; Systems 15; Basic Skills 1-2, 5-6; Thinking Skills 8-9, 12
21st Century Skills	Critical Thinking and Problem Solving Skills 1, 3; Communication & Collaboration 1
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.
Sample Activity	Create a phrase or description that you would use to promote a new skin cream to the following markets: a. Female athletes b. Physicians c. Men over 40 d. Teenage girls e. Women in other global regions (e.g., Asia, Europe, Latin America, etc.) Select a national company, and search online to determine its target market. Identify five things the business does to appeal to that market. Record your findings, and discuss them with a classmate, identifying additional things the business could do to attract its target market.
Resources **LAP**	Marketing Education Resource Center. (2006). *Have we met? (Market identification)* [LAP: IM-009]. Columbus, OH: Author. Marketing Education Resource Center. (2006). *Have we met? (Market identification): Instructor copy* [LAP: IM-009]. Columbus, OH: Author.
Textbooks	Allen, K.R. & Meyer, E.C. (2006). *Entrepreneurship and small business management* (pp. 118, 125). Woodland Hills, CA: McGraw-Hill/Glencoe. Boone, L.E. & Kurtz, D.L. (2004). *Contemporary marketing* (11th ed.) [pp. 224-241]. Mason, OH: Thomson/South-Western.

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Knowledge/ Skill Statement	Understands concepts and strategies utilized in determining and adjusting prices to maximize return and meet customers' perceptions of value
Performance Element	Develop a foundational knowledge of pricing to understand its role in marketing.
Performance Indicator	Explain the nature and scope of the pricing function (PI:001, PI LAP 2)
Level	Specialist
SCANS	Information 5-8; Systems 15; Basic Skills 1-3, 5-6; Thinking Skills 12
21st Century Skills	Critical Thinking and Problem Solving Skills 1, 3; Communication 1
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.
Sample Activity	Prepare a brief presentation about the goals of pricing. Target the presentation to a group of elementary or middle-school students who are involved in a service-learning project. Deliver the presentation.
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Knowledge/ Skill Statement	Understands concepts and strategies utilized in determining and adjusting prices to maximize return and meet customers' perceptions of value
Performance Element	Develop a foundational knowledge of pricing to understand its role in marketing.
Performance Indicator	Describe the role of business ethics in pricing (PI:015)
Level	Specialist
SCANS	Information 5-8; Systems 15; Basic Skills 1-3, 5-6; Thinking Skills 8-9, 12; Personal Qualities 17
21st Century Skills	Critical Thinking and Problem Solving Skills 1, 3; Communication 1
Objectives	a. Define the following terms: price fixing, predatory pricing. b. Identify ethical considerations in setting prices. c. Explain ethical concerns associated with the use of complex prices that are confusing to consumers. d. Explain how pricing tactics can relate to social responsibility.
Sample Activity	Participate in a class debate about the ethics of pricing a product as high as possible due to high demand. Examples to consider are oil prices and popular cars.

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Knowledge/ Skill Statement	Understands concepts and strategies utilized in determining and adjusting prices to maximize return and meet customers' perceptions of value
Performance Element	Develop a foundational knowledge of pricing to understand its role in marketing.
Performance Indicator	Explain the use of technology in the pricing function (PI:016)
Level	Specialist
SCANS	Information 5-8; Systems 15; Technology 18; Basic Skills 1-2,5-6; Thinking Skills 8-9,12
21st Century Skills	Critical Thinking and Problem Solving Skills 1, 3; Communication 1
Objectives	a. Identify ways that the use of technology impacts the pricing function. b. Explain specific applications of technology in pricing. c. Describe benefits of automating the pricing process. d. Discuss risks associated with automating the pricing process. e. Explain how automating pricing facilitates targeted pricing.
Sample Activity	Listen to a businessperson discuss the use of technology in pricing. Record responses to the following questions: a. What technology is used in setting prices? b. What technology is used in marking prices on products? c. How has the use of technology in pricing changed in the past 10 years? d. How has the use of technology affected the pricing process?
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Knowledge/ Skill Statement	Understands concepts and strategies utilized in determining and adjusting prices to maximize return and meet customers' perceptions of value
Performance Element	Develop a foundational knowledge of pricing to understand its role in marketing.
Performance Indicator	Explain legal considerations for pricing (PI:017)
Level	Specialist
SCANS	Information 7; Systems 15; Basic Skills 1-2, 5-6; Thinking Skills 8, 12
21st Century Skills	Critical Thinking and Problem Solving Skills 1, 3; Communication 1
Objectives	a. Define the following terms: bait-and-switch advertising, deceptive pricing, dumping, loss-leader pricing, predatory pricing, price discrimination, and price fixing. b. Describe laws affecting pricing. c. Explain positive effects of pricing laws. d. Discuss negative effects of pricing laws. e. Explain the impact of anti-dumping laws on consumers.
Sample Activity	Search the Internet to find an article about a company recently accused of pricing violations. Write a summary of the article, identifying the company, what it was accused of doing, and what the outcome of the case has been. Present the summary to the class, asking students to identify the law that had been violated.
Resources **Textbooks**	Allen, K.R. & Meyer, E.C. (2006). *Entrepreneurship and small business management* (pp. 232-233). Woodland Hills, CA: McGraw-Hill/Glencoe. Boone, L.E. & Kurtz, D.L. (2004). *Contemporary marketing* (11th ed.) [pp. 377-379]. Mason, OH: Thomson/South-Western. Burrow, J.L. (2006). *Marketing* (2nd ed.) [pp. 45, 382-383]. Mason, OH: Thomson/South-Western. Etzel, M.J.; Walker, B.J.; & Stanton, W.J. (2007). *Marketing* (14th ed.) [pp. 355-356, 360-361]. New York: McGraw-Hill/Irwin. Farese, L.S.; Kimbrell, G.; & Woloszyk, C.A. (2006). *Marketing essentials* (pp. 536-537). Woodland Hills, CA: Glencoe/McGraw-Hill. Grewal, D. & Levy, M. (2008). *Marketing* (pp. 401-404). New York: McGraw-Hill/Irwin. Lamb, C.W., Jr.; Hair, J.F., Jr.; & McDaniel C. (2003). *Essentials of marketing* (3rd ed.) [pp. 519-521]. Mason, OH: South-Western. Perreault, W.D., Jr.; Cannon, J.P.; & McCarthy, E.J. (2008). *Basic marketing: Marketing strategy planning approach* (16th ed.) [pp. 478-481]. New York: McGraw-Hill/Irwin.

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Knowledge/ Skill Statement	Understands concepts and strategies utilized in determining and adjusting prices to maximize return and meet customers' perceptions of value
Performance Element	Develop a foundational knowledge of pricing to understand its role in marketing.
Performance Indicator	Explain factors affecting pricing decisions (PI:002)
Level	Specialist
SCANS	Information 5-8; Systems 15; Basic Skills 1-2, 5-6; Thinking Skills 9, 12
21st Century Skills	Critical Thinking and Problem Solving Skills 1, 3; Communication 1
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.
Sample Activity	Given a list of 10 grocery items that can be found in grocery stores, convenience stores, warehouse clubs, etc., determine the price of each product at the locations specified by your teacher. Discuss reasons for the differences in prices at the various locations.
	Imagine that you are starting a business. Identify factors that would affect your business's pricing decisions. Record these factors, and discuss them with a classmate.

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Knowledge/ Skill Statement	Understands the concepts and processes needed to obtain, develop, maintain, and improve a product or service mix in response to market opportunities
Performance Element	Acquire a foundational knowledge of product/service management to understand its nature and scope.
Performance Indicator	Explain the nature and scope of the product/service management function (PM:001)
Level	Specialist
SCANS	Resources 3; Information 5-8; Systems 15; Basic Skills 1-2, 5-6; Thinking Skills 12
21st Century Skills	Critical Thinking and Problem Solving Skills 1, 3; Communication 1
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.
Sample Activity	Participate on a product team to identify a consumer product that your team's company 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. Appoint a group representative to present the team's recommendations to the class.
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Knowledge/ Skill Statement	Understands the concepts and processes needed to obtain, develop, maintain, and improve a product or service mix in response to market opportunities
Performance Element	Acquire a foundational knowledge of product/service management to understand its nature and scope.
Performance Indicator	Identify the impact of product life cycles on marketing decisions (PM:024)
Level	Specialist
SCANS	Resources 3; Information 5-8; Systems 15; Basic Skills 1-2, 5-6; Thinking Skills 12
21st Century Skills	Critical Thinking and Problem Solving Skills 1, 3; Communication 1; Flexibility and Adaptability 2
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.
Sample Activity	Participate in a class discussion to select a product to sell at school, sell the product, and observe its product life cycle. Write a summary of your observations depicting each phase.

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Knowledge/ Skill Statement	Understands the concepts and processes needed to obtain, develop, maintain, and improve a product or service mix in response to market opportunities
Performance Element	Acquire a foundational knowledge of product/service management to understand its nature and scope.
Performance Indicator	Describe the use of technology in the product/service management function (PM:039)
Level	Specialist
SCANS	Information 5-8; Systems 15; Technology 18; Basic Skills 1-2, 5-6; Thinking Skills 12
21st Century Skills	Critical Thinking and Problem Solving Skills 1, 3; Communication and Collaboration 1; ICT Literacy 1
Objectives	a. Identify ways that the use of technology impacts the product/service management function. b. Explain specific applications of technology in product/service management. c. Describe how technology is used to manage the product life cycle. d. Discuss how technology is used in market testing. e. Explain how technology is used in product labeling and packaging.
Sample Activity	Read two articles in *Brandweek* to identify examples of technology used in bringing and keeping products on the market. Report your findings to the class.
Resources **Textbooks**	Burrow, J.L. (2006). *Marketing* (2nd ed.) [p. 281]. Mason, OH: Thomson/South-Western. Farese, L.S.; Kimbrell, G.; & Woloszyk, C.A. (2006). *Marketing essentials* (pp. 205-211). Woodland Hills, CA: Glencoe/McGraw-Hill. Grewal, D. & Levy, M. (2008). *Marketing* (pp. 313, 345-346). New York: McGraw-Hill/Irwin. Lamb, C.W., Jr.; Hair, J.F., Jr.; & McDaniel C. (2003). *Essentials of marketing* (3rd ed.) [pp. 281, 295]. Mason, OH: South-Western.
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Knowledge/ Skill Statement	Understands the concepts and processes needed to obtain, develop, maintain, and improve a product or service mix in response to market opportunities
Performance Element	Acquire a foundational knowledge of product/service management to understand its nature and scope.
Performance Indicator	Explain business ethics in product/service management (PM:040)
Level	Specialist
SCANS	Information 5-8; Systems 15; Basic Skills 1-2, 5-6; Thinking Skills 12; Personal Qualities 17
21st Century Skills	Critical Thinking and Problem Solving Skills 1, 3; Communication and Collaboration 1; Information Literacy 2
Objectives	a. Describe ethical considerations in product packaging. b. Explain how planned obsolescence is an ethical issue for businesses. c. Explain ethical issues associated with product labeling. d. Discuss ethical issues associated with changing a product's quality. e. Describe ethical issues associated with failing to inform customers about product risks.
Sample Activity	Tell students to imagine that the development of a new product will result in a huge profit for a business; however, its production will result in hazardous wastes. Arrange for students to conduct a class debate about whether a company should move forward with product development. Implement the debate, and debrief following the activity.
Resources **Textbooks**	Boone, L.E. & Kurtz, D.L. (2004). *Contemporary marketing* (11th ed.) [p. 86]. Mason, OH: Thomson/South-Western. Burrow, J.L. (2006). *Marketing* (2nd ed.) [pp. 96, 258, 270]. Mason, OH: Thomson/South-Western. Etzel, M.J.; Walker, B.J.; & Stanton, W.J. (2007). *Marketing* (14th ed.) [pp. 248-252, 273, 275-276]. New York: McGraw-Hill/Irwin. Farese, L.S.; Kimbrell, G.; & Woloszyk, C.A. (2006). *Marketing essentials* (pp. 660-667). Woodland Hills, CA: Glencoe/McGraw-Hill. Kuratko, D.F. & Hodgetts, R.M. (2001). *Entrepreneurship: A contemporary approach* (5th ed.) [pp. 159-161]. Mason, OH: South-Western/Thomson Learning. Perreault, W.D., Jr.; Cannon, J.P.; & McCarthy, E.J. (2008). *Basic marketing: Marketing strategy planning approach* (16th ed.) [pp. 256, 276]. New York: McGraw-Hill/Irwin.
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Knowledge/ Skill Statement	Understands the concepts and processes needed to obtain, develop, maintain, and improve a product or service mix in response to market opportunities
Performance Element	Apply quality assurances to enhance product/service offerings.
Performance Indicator	Describe the uses of grades and standards in marketing (PM:019, PM LAP 8)
Level	Career-Sustaining
SCANS	Information 5-8; Systems 15; Basic Skills 1-2, 5-6; Thinking Skills 12
21st Century Skills	Critical Thinking and Problem Solving Skills 1
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.
Sample Activity	Participate in a scavenger hunt to find and collect as many grades and standards for goods and services as possible. For each, identify its purpose and the agency responsible (if applicable). Display and discuss your collection.
Resources	
LAP	Marketing Education Resource Center. (2000). *Grades and standards* [LAP: PM-008]. Columbus, OH: Author. Marketing Education Resource Center. (2000). *Grades and standards: Instructor copy* [LAP: PM-008]. Columbus, OH: Author.
Textbooks	Farese, L.S.; Kimbrell, G.; & Woloszyk, C.A. (2006). *Marketing essentials* (3rd ed.) [p. 666]. Woodland Hills, CA: Glencoe. Hoffman, K.D. & Bateson, J.E.G. (2002). *Essentials of services marketing: Concepts, strategies, & cases* (2nd ed.) [pp. 328-331]. Orlando, FL: Harcourt College Publishers. Kotler, P. & Keller, K.L. (2006). *Marketing management* (12th ed.) [pp. 376-380]. Upper Saddle River, NJ: Prentice-Hall.
Software/ Online	ASTM International. (n.d.). *Handbook of standardization.* Retrieved May 1, 2008, from http://www.astm.org/cgi-bin/SoftCart.exe/NEWS/handbook02/index.html?E+mystore Marketing Education Resource Center. (2000). *Grades and standards* [LAP: PM-008: Presentation Software]. Columbus, OH: Author.

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| **Planning Guide Sheets** |

Knowledge/ Skill Statement	Understands the concepts and processes needed to obtain, develop, maintain, and improve a product or service mix in response to market opportunities
Performance Element	Apply quality assurances to enhance product/service offerings.
Performance Indicator	Explain warranties and guarantees (PM:020)
Level	Career-sustaining
SCANS	Information 5-8; Systems 15; Basic Skills 1-2, 5-6; Thinking Skills 12
21st Century Skills	Critical Thinking and Problem Solving Skills 1
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.
Sample Activity	Find and read a product warranty, and 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?
Resources **Textbooks**	Burrow, J.L. (2006). *Marketing* (2nd ed.) [pp. 95, 226, 266]. Mason, OH: Thomson/South-Western. Farese, L.S.; Kimbrell, G.; & Woloszyk, C.A. (2006). *Marketing essentials* (3rd ed.) [pp. 674-678]. Woodland Hills, CA: Glencoe. Lamb, C.W., Jr.; Hair, J.F., Jr.; & McDaniel C. (2003). *Essentials of marketing* (3rd ed.) [pp. 281-282]. Mason, OH: South-Western. Perreault, W.D., Jr.; Cannon, J.P.; & McCarthy, E.J. (2008). *Basic Marketing: A marketing strategy planning approach* (16th ed.) [pp.257-258]. Burr Ridge, IL: McGraw-Hill/Irwin.
Software/ Online	BBC. (2007, May 1). *What's the difference between a guarantee and a warranty?* Retrieved May 1, 2008, from http://www.bbc.co.uk/wales/x-ray/x_guides/warranties/8-3.shtml Federal Trade Commission. (2007, June 8). *A businessperson's guide to federal warranty law.* Retrieved May 1, 2008, from http://www.ftc.gov/bcp/conline/pubs/buspubs/warranty.shtm#titling Federal Trade Commission. (2008). *Consumer law: Warranty FAQ.* Retrieved May 1, 2008, from http://consumer-law.lawyers.com/warranty-law/Consumer-Law-Warranty-FAQ.html

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Knowledge/ Skill Statement	Understands the concepts and processes needed to obtain, develop, maintain, and improve a product or service mix in response to market opportunities
Performance Element	Apply quality assurances to enhance product/service offerings.
Performance Indicator	Identify consumer protection provisions of appropriate agencies (PM:017)
Level	Specialist
SCANS	Information 5-8; Systems 15; Basic Skills 1-2, 5-6; Thinking Skills 12
21st Century Skills	Information Literacy 2
Objectives	a. Describe forms of consumer protection associated with product/service management. b. Describe the need for consumer protection in product/service management. c. Discuss the role of governmental agencies in protecting consumers. d. Explain laws that protect consumers. e. Explain how consumer protection affects businesses. f. Describe expenses that can be incurred by businesses as a result of consumer protection.
Sample Activity	Use the Internet to locate information about a recent case involving the Consumer Product Safety Commission (CPSC). Record the following information: a. Name of company b. Nature of product safety issue c. Outcome of case Present your findings to the class.

Resources

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Knowledge/ Skill Statement	Understands the concepts and processes needed to obtain, develop, maintain, and improve a product or service mix in response to market opportunities
Performance Element	Employ product-mix strategies to meet customer expectations.
Performance Indicator	Explain the concept of product mix (PM:003)
Level	Specialist
SCANS	Information 5-8; Systems 15; Basic Skills 1-2, 5-6; Thinking Skills 12
21st Century Skills	Critical Thinking and Problem Solving Skills 1, 3; Communication and Collaboration 1
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.
Sample Activity	Access a company's web site to identify its product lines; for each product line, identify product items. Company web sites can be accessed through *Hoover's Online* at http://www.hoovers.com/ and *Infospace* at http://www.infospace.com/bizweb.htm. Print the information obtained, and write a one-page report about the company's product mix and its advantages and disadvantages for the company.
Resources **Textbooks**	Boone, L.E. & Kurtz, D.L. (2004). *Contemporary marketing* (11th ed.) [pp. 245-246, 251, 332-333, 360-361]. Mason, OH: Thomson/South-Western.
	Burrow, J.L. (2006). *Marketing* (2nd ed.) [pp. 265-271]. Mason, OH: Thomson/South-Western.
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Knowledge/ Skill Statement	Understands the concepts and processes needed to obtain, develop, maintain, and improve a product or service mix in response to market opportunities
Performance Element	Position products/services to acquire desired business image.
Performance Indicator	Describe factors used by marketers to position products/services (PM:042)
Level	Specialist
SCANS	Information 5-8; Systems 15; Basic Skills 1-2, 5-6; Thinking Skills 7-8, 12
21st Century Skills	Critical Thinking and Problem Solving Skills 1, 3; Communication and Collaboration 1
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.
Sample Activity	Select two automobile manufacturers: one offers luxury cars, the other offers economy cars. Identify factors that the two companies use to position the cars. Participate in a small-group activity to discuss your responses.
Resources **Textbooks**	Allen, K.R. & Meyer, E.C. (2006). *Entrepreneurship and small business management* (pp. 126, 209). Woodland Hills, CA: McGraw-Hill/Glencoe. Boone, L.E. & Kurtz, D.L. (2004). *Contemporary marketing* (11th ed.) [pp. 245-246]. Mason, OH: Thomson/South-Western. Burrow, J.L. (2006). *Marketing* (2nd ed.) [pp. 171-174]. Mason, OH: Thomson/South-Western. Clark, B.; Sobel, J.; & Basteria, C.G. (2006). *Marketing dynamics* (pp. 268-270). Tinley Park, IL: Goodheart-Willcox. Etzel, M.J.; Walker, B.J.; & Stanton, W.J. (2007). *Marketing* (14th ed.) [pp. 157-159, 235-236]. New York: McGraw-Hill/Irwin. Everard, K.E. & Burrow, J.L. (2001). *Business principles and management* (11th ed.) [pp. 550-552]. Cincinnati, OH: South-Western/Thomson Learning. Farese, L.S.; Kimbrell, G.; & Woloszyk, C.A. (2006). *Marketing essentials* (pp. 645-646). Woodland Hills, CA: Glencoe/McGraw-Hill. Kazanjian, K. (2007). *Exceeding customer expectations* (pp. 27-56). New York: Doubleday. Lamb, C.W., Jr.; Hair, J.F., Jr.; & McDaniel C. (2003). *Essentials of marketing* (3rd ed.) [pp. 201-205]. Mason, OH: South-Western. Longenecker, J.G.; Moore, C.W.; & Petty, J.W. (2003). *Small business management: An entrepreneurial emphasis* (12th ed.) [pp. 30-31]. Mason, OH: Thomson/South-Western.

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Knowledge/ Skill Statement	Understands the concepts and processes needed to obtain, develop, maintain, and improve a product or service mix in response to market opportunities
Performance Element	Position product/service to acquire desired business image.
Performance Indicator	Explain the nature of product/service branding (PM:021, PM LAP 6)
Level	Specialist
SCANS	Information 5-8; Systems 15; Basic Skills 1-2, 5-6; Thinking Skills 7-8, 12
21st Century Skills	Critical Thinking and Problem Solving Skills 1, 3; Communication and Collaboration 1
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.
Sample Activity	Select a brand name and identify the characteristics that make it an effective brand name. Then, determine the brand's stage of brand loyalty: recognition, preference, or insistence. Obtain materials from your instructor to prepare visuals featuring symbols, names, and characters associated with the product/service's brand identity. Discuss the visual with a classmate.
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Knowledge/ Skill Statement	Understands the concepts and processes needed to obtain, develop, maintain, and improve a product or service mix in response to market opportunities
Performance Element	Position company to acquire desired business image.
Performance Indicator	Explain the nature of corporate branding (PM:206)
Level	Specialist
SCANS	Information 5-8; Systems 15; Basic Skills 1-2, 5-6; Thinking Skills 7-8, 12
21st Century Skills	Critical Thinking and Problem Solving Skills 1; Communication and Collaboration 1
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 brand's identity. c. Explain the use of values in brand development. d. Discuss the significance of a brand's personality. e. Describe the use of brand touch points. f. Distinguish between corporate and distributor brands.
Sample Activity	Using the visual developed for the previous activity, add to the visual by featuring its brand values, brand personality, and touch points. Discuss the visual with a classmate.

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Knowledge/ Skill Statement	Understands the concepts and strategies needed to communicate information about products, services, images, and/or ideas to achieve a desired outcome
Performance Element	Acquire a foundational knowledge of promotion to understand its nature and scope.
Performance Indicator	Explain the role of promotion as a marketing function (PR:001, PR LAP 2)
Level	Career-sustaining
SCANS	Information 5-8; Systems 15; Basic Skills 1-2, 5-6; Thinking Skills 12
21st Century Skills	Critical Thinking and Problem Solving Skills 1, 3; Communication and Collaboration 1
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.
Sample Activity	Participate in an activity in which the class has been divided into three groups and assigned to one of the following promotional objectives: to inform, to persuade, to remind. Focus on the group's promotional objective, locating and/or identifying promotional messages targeted at accomplishing the group's objective. Identify at least four promotional messages for the objective. Present the findings to the class.
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Knowledge/ Skill Statement	Understands the concepts and strategies needed to communicate information about products, services, images, and/or ideas to achieve a desired outcome
Performance Element	Acquire a foundational knowledge of promotion to understand its nature and scope.
Performance Indicator	Explain the types of promotion (PR:002, PR LAP 4)
Level	Career-sustaining
SCANS	Information 5-8; Systems 15; Basic Skills 1-2, 5-6; Thinking Skills 12
21st Century Skills	Critical Thinking and Problem Solving Skills 1

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.

Sample Activity

Locate examples of institutional and product promotions in magazines, in newspapers, or on the Internet. Affix the promotions to paper, and label each by its type of promotion. Obtain feedback from a classmate.

Create a list of different examples of institutional and product promotions that you could use to promote a business you would be interested in opening. Participate in a small-group discussion to examine your ideas, and add to/ subtract from the list based on input from your group members. Create a multi-column table using a spreadsheet software program in which you create the following headings:
a. Institutional/Product
b. Promotion Idea
c. Purpose
d. Advantages/Disadvantages (of Promotion Idea)
Complete the table, and submit it to your instructor.

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Knowledge/ Skill Statement	Understands the concepts and strategies needed to communicate information about products, services, images, and/or ideas to achieve a desired outcome
Performance Element	Acquire a foundational knowledge of promotion to understand its nature and scope.
Performance Indicator	Identify the elements of the promotional mix (PR:003, PR LAP 1)
Level	Specialist
SCANS	Information 5-8; Systems 15; Basic Skills 1-2, 5-6; Thinking Skills 12
21st Century Skills	Critical Thinking and Problem Solving Skills 1, 3; Communication and Collaboration 1
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.
Sample Activity	Identify two businesses similar to one that you might be interested in starting. Determine their promotional mix; examine their similarities and differences. Based on your assessment, identify the promotional mix that would be effective for your business. Write a rationale for your selection, identifying the promotional mix and explaining how it is similar to and/or different than that of the two businesses. Submit the rationale to your teacher.
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Knowledge/ Skill Statement	Understands the concepts and strategies needed to communicate information about products, services, images, and/or ideas to achieve a desired outcome
Performance Element	Acquire a foundational knowledge of promotion to understand its nature and scope.
Performance Indicator	Describe the use of business ethics in promotion (PR:099)
Level	Specialist
SCANS	Information 5-8; Systems 15; Basic Skills 1-2, 5-6; Thinking Skills 12; Personal Qualities 17
21st Century Skills	Critical Thinking and Problem Solving Skills 1, 3; Communication and Collaboration 1; ICT Literacy 2
Objectives	a. Explain ethical issues associated with fear-based advertising. b. Discuss sexism/stereotyping in advertising. c. Explain ethical issues associated with promotion to children. d. Discuss ethical issues associated with sales promotion sweepstakes, samples, rebates, and premiums. e. Explain the use of stealth marketing. f. Discuss ethical issues associated with use of customer information obtained on the Internet. g. Describe ways that businesses use socially responsible promotions.
Sample Activity	Watch television advertisements, and identify five deceptive techniques you see. Discuss your observations with the class, identifying the product being advertised and what you consider deceptive.
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Planning Guide Sheets

Knowledge/ Skill Statement	Understands the concepts and strategies needed to communicate information about products, services, images, and/or ideas to achieve a desired outcome
Performance Element	Acquire a foundational knowledge of promotion to understand its nature and scope.
Performance Indicator	Describe the use of technology in the promotion function (PR:100)
Level	Specialist
SCANS	Information 5-8; Systems 15; Technology 18-19; Basic Skills 1-2, 5-6; Thinking Skills 12
21st Century Skills	Critical Thinking and Problem Solving Skills 1; Communication and Collaboration 1; ICT Literacy 1

Objectives

a. Explain how the use of technology in promotion has changed the way marketers communicate with customers.
b. Identify ways that the use of technology positively impacts the promotion function.
c. Discuss ways that the use of technology negatively impacts the promotion function.
d. Describe ways that businesses use the Internet as a promotional tool.
e. Describe how technology has enhanced opportunities to contact customers with promotional messages.
f. Discuss ways that technology has facilitated the use of sales promotions.
g. Explain specific applications of technology in promotion.

Sample Activity

Conduct research on how the Internet is changing the way businesses promote their products. Write a one-page paper on the topic, and submit it to your teacher.

Resources

Textbooks

Clark, B.; Sobel, J.; & Basteria, C.G. (2006). *Marketing dynamics* (p. 557). Tinley Park, IL: Goodheart-Willcox.

O'Guinn, T.C., Allen, C.T. & Semenik, R.J. (2003). *Advertising and integrated brand promotion* (3rd ed.) [pp. 47, 99-108]. Mason, OH: Thomson/South-Western.

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Knowledge/ Skill Statement	Understands the concepts and strategies needed to communicate information about products, services, images, and/or ideas to achieve a desired outcome
Performance Element	Acquire a foundational knowledge of promotion to understand its nature and scope.
Performance Indicator	Describe the regulation of promotion (PR:101)
Level	Specialist
SCANS	Information 5-8; Systems 15; Basic Skills 1-2,5-6; Thinking Skills 12; Personal Qualities 17
21st Century Skills	Critical Thinking and Problem Solving Skills 1, 3; Communication and Collaboration 1; ICT Literacy 2
Objectives	a. Explain the need for truthfulness in promotional messages and claims. b. Discuss how the use of misleading or inaccurate statements in promotion is regulated. c. Explain laws that protect customers from unwanted promotions. d. Discuss laws that protect children from promotional messages. e. Explain the regulation of telemarketing. f. Discuss the regulation of data privacy. g. Describe actions that can be taken by the Federal Trade Commission to correct misleading advertising. h. Discuss reasons for the regulation of products used in advertising. i. Explain how the legality of products used in advertising can vary from country to country.
Sample Activity	Access the United States' Federal Trade Commission web site at http://www.ftc.gov, and use its search engine to link to articles/transcripts related to advertising. Select an article that discusses the actions the Federal Trade Commission has taken to ensure fair advertising practices by a business/industry, and write a one-page summary of your findings. Submit your summary to the teacher.
Resources **Textbooks**	Boone, L.E. & Kurtz, D.L. (2004). *Contemporary marketing* (11th ed.) [pp. 560-561]. Mason, OH: Thomson/South-Western. Burrow, J.L. (2006). *Marketing* (2nd ed.) [pp. 433-434]. Mason, OH: Thomson/South-Western. Clark, B.; Sobel, J.; & Basteria, C.G. (2006). *Marketing dynamics* (pp. 524-525). Tinley Park, IL: Goodheart-Willcox. Etzel, M.J.; Walker, B.J.; & Stanton, W.J. (2007). *Marketing* (14th ed.) [pp. 490-493]. New York: McGraw-Hill/Irwin. Farese, L.S.; Kimbrell, G.; & Woloszyk, C.A. (2006). *Marketing essentials* (pp.129-130, 666-667). Woodland Hills, CA: Glencoe/McGraw-Hill. Grewal, D. & Levy, M. (2008). *Marketing* (pp. 479-480). New York: McGraw-Hill/Irwin. O'Guinn, T.C., Allen, C.T. & Semenik, R.J. (2003). *Advertising and integrated brand promotion* (3rd ed.) [pp. 129-144]. Mason, OH: Thomson/South-Western.

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Knowledge/ Skill Statement	Understands the concepts and strategies needed to communicate information about products, services, images, and/or ideas to achieve a desired outcome
Performance Element	Understand promotional channels used to communicate with targeted audiences.
Performance Indicator	Explain types of advertising media (PR:007, PR LAP 3)
Level	Specialist
SCANS	Information 5-8; Systems 15; Basic Skills 1-2,5-6; Thinking Skills 12
21st Century Skills	Critical Thinking and Problem Solving Skills 1; Communication and Collaboration 1; Media Literacy 1
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.
Sample Activity	Create a list of print and broadcast media available in your 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. Collect examples of their advertisements.
Resources	
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	Marketing Education Resource Center (2003). *Ad-quipping your business (Types of promotional media): Instructor copy* [LAP: PR-003]. Columbus, OH: Author.
Textbooks	Boone, L.E. & Kurtz, D.L. (2004). *Contemporary marketing* (11th ed.) [pp. 542-548]. Mason, OH: Thomson/South-Western.
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Knowledge/ Skill Statement	Understands the concepts and strategies needed to communicate information about products, services, images, and/or ideas to achieve a desired outcome
Performance Element	Understand promotional channels used to communicate with targeted audiences.
Performance Indicator	Describe word of mouth channels used to communicate with targeted audiences (PR:247)
Level	Specialist
SCANS	Information 5-8; Systems 15; Basic Skills 1-2, 5-6; Thinking Skills 12
21st Century Skills	Critical Thinking and Problem Solving Skills 1
Objectives	a. Define the term word of mouth marketing, buzz marketing, viral marketing, community marketing, grassroots marketing, evangelist marketing, product seeding, influencer marketing, cause marketing, conversation creation, brand blogging, referral programs, social networks.
	b. Discuss the need for honesty and transparency in word of mouth marketing.
	c. Explain the philosophy of word of mouth marketing.
	d. Describe types of word of mouth marketing.
	e. Distinguish between organic and amplified word of mouth marketing.
	f. Discuss techniques businesses can use to foster organic word of mouth marketing.
	g. Explain techniques businesses can use to foster amplified word of mouth marketing.
Sample Activity	Select a business or product, and develop a plan for how you could creatively create buzz about the business or product. Share your plan with a classmate, and discuss similarities/differences between your plan and that of your classmate. Identify the top three buzz techniques the two of you created. Share your ideas with the class.
Resources **Textbooks**	Clark, B.; Sobel, J.; & Basteria, C.G. (2006). *Marketing dynamics* (pp. 492-493). Tinley Park, IL: Goodheart-Willcox. Lane, W.R., King, K.W., & Russell, J.T. (2005). *Kleppner's advertising procedure* (16th ed.) [pp. 714-716]. Upper Saddle River, NJ: Pearson/Prentice Hall. O'Guinn, T.C.; Allen, C.T.; & Semenik, R.J. (2003). *Advertising and integrated brand promotion* (3rd ed.) [pp. 577-578]. Mason, OH: Thomson/South-Western. Semenik, R.J. *Promotion and integrated marketing communications* (pp. 320, 441-443, 460-461).
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Knowledge/ Skill Statement	Understands the concepts and strategies needed to communicate information about products, services, images, and/or ideas to achieve a desired outcome
Performance Element	Understand promotional channels used to communicate with targeted audiences.
Performance Indicator	Explain the nature of direct marketing channels (PR:089)
Level	Specialist
SCANS	Information 5-8; Systems 15; Basic Skills 1-2, 5-6; Thinking Skills 12
21st Century Skills	Critical Thinking and Problem Solving Skills 1; Communication and Collaboration 1; ICT Literacy
Objectives	a. Define the term direct marketing. b. Identify communication channels used for direct marketing. c. Describe advantages/disadvantages associated with direct marketing. d. Explain how the Internet has changed businesses' ability to communicate directly with customers. e. Describe the importance of databases to direct marketing.
Sample Activity	Collect samples of direct marketing delivered to your home or e-mail address. Share your samples with a team composed of two or three other classmates. Determine what conclusions the team can make about the use of direct marketing channels—e.g., types of products promoted, forms of direct marketing used, effectiveness of direct marketing techniques, etc.

Resources

Textbooks

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Farese, L.S.; Kimbrell, G.; & Woloszyk, C.A. (2006) *Marketing essentials* (3rd ed.) [pp. 363, 364]. Woodland Hills, CA: Glencoe.

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Knowledge/ Skill Statement	Understands the concepts and strategies needed to communicate information about products, services, images, and/or ideas to achieve a desired outcome
Performance Element	Understand promotional channels used to communicate with targeted audiences.
Performance Indicator	Identify communications channels used in sales promotion (PR:249)
Level	Specialist
SCANS	Information 5-8; Systems 15; Basic Skills 1-2, 5-6; Thinking Skills 12
21st Century Skills	Critical Thinking and Problem Solving Skills 1
Objectives	a. Define the following terms: free-standing insert (FSI), coupons, rebates, push money, point-of-sale displays, trade allowances, dealer loaders, contests, sweepstakes, games, loyalty programs, demonstrations, personal appearances, advertising-support programs, co-op advertising, trade-in promotions, samples, premiums, free products, promotional products, trade shows, push strategies, pull strategies.
	b. Discuss differences between advertising and sales promotion.
	c. Explain reasons that businesses use sales promotions.
	d. Describe types of consumer sales promotions.
	e. Discuss types of trade sales promotions.
	f. Explain types of business-to-business sales promotions.
	g. Describe types of point-of-purchase (POP) displays that are used for sales promotion.
	h. Compare the similarities and differences between coupons and rebates.
	i. Distinguish between push and pull sales promotion strategies.
	j. Explain how contests, sweepstakes, and games differ.
	k. Describe trends in sales promotions.
Sample Activity	Visit a brick or a click consumer business to determine the types of sales promotions being used. Record your findings. Do the same for a trade business, and record your findings. Share your findings with a group of two or three classmates. Create a poster of the team's sales promotion findings. Show the poster to the class, and discuss the team's findings.
Resources **Textbooks**	Boone, L.E. & Kurtz, D.L. (2004). *Contemporary marketing* (11th ed.) [pp. 549-554]. Mason, OH: Thomson/South-Western.
	Clark, B.; Sobel, J.; & Basteria, C.G. (2006). *Marketing dynamics* (pp. 475-479). Tinley Park, IL: Goodheart-Willcox.
	Etzel, M.J.; Walker, B.J.; & Stanton, W.J. (2007). *Marketing* (14th ed.) [pp. 538-543]. Burr Ridge, IL: McGraw-Hill/Irwin.
	Farese, L.S.; Kimbrell, G.; & Woloszyk, C.A. (2006) *Marketing essentials* (3rd ed.) [pp. 365, 369-375]. Woodland Hills, CA: Glencoe.
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Knowledge/ Skill Statement	Understands the concepts and strategies needed to communicate information about products, services, images, and/or ideas to achieve a desired outcome
Performance Element	Understand promotional channels used to communicate with targeted audiences.
Performance Indicator	Explain communications channels used in public-relations activities (PR:250)
Level	Specialist
SCANS	Information 5-8; Systems 15; Basic Skills 1-2, 5-6; Thinking Skills 12
21st Century Skills	Critical Thinking and Problem Solving Skills 1, 3; Communication and Collaboration 1; ICT Literacy 1
Objectives	a. Define the following terms: press kits, audio/video releases, matte release, website press room, special events, sponsorships, community relations, philanthropy, crisis management.
	b. Explain the role of public relations in business.
	c. Discuss advantages/disadvantages associated with public relations.
	d. Describe the main tools used in public relations to communicate with targeted audiences (i.e., media relations, media tours, newsletters, special events, speaking engagements, sponsorships, employee relations, and community relations and philanthropy).
	e. Explain tools used to communicate public relations messages to the media (i.e., press kits, audio/video releases, matte releases, website press room).
	f. Discuss reasons that public relations specialists monitor markets.
	g. Describe the purpose of crisis management in public relations.
	h. Explain trends in public relations.
	i. Describe the use of blogs for public relations activities.
	j. Discuss the use of web forums in public relations activities.
	k. Explain how RSS feeds can be used for public relations activities.
	l. Describe the use of podcasting for public relations activities.
	m. Explain how search engine optimization (SEO) can be used for public relations activities.
Sample Activity	Develop a listing of the public-relations activities your school could use to develop a positive relationship with the local business community. Write a rationale for your choice of public-relations activities. Share your ideas with a team of two or three students, have the team select the best ideas, and present those ideas to the class and to a panel of experts. Ask the experts to select the best ideas to be implemented during the school year.
	Select a company of interest, and access its website. Download press releases and/or press kits. Write a brief summary of what you learned about the company's public-relations activities. Present your summary to the class.
Resources **Textbooks**	Boone, L.E. & Kurtz, D.L. (2004). *Contemporary marketing* (11th ed.) [pp. 554-556]. Mason, OH: Thomson/South-Western.

Clark, B.; Sobel, J.; & Basteria, C.G. (2006). *Marketing dynamics* (pp. 479-480). Tinley Park, IL: Goodheart-Willcox.

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Marketing Teacher. (2000-2008). *Public relations.* Retrieved May 2, 2008, from http://marketingteacher.com/Lessons/lesson_public_relations.htm

Knowledge/ Skill Statement	Understands the concepts and actions needed to determine client needs and wants and respond through planned, personalized communication that influences purchase decisions and enhances future business opportunities
Performance Element	Acquire a foundational knowledge of selling to understand its nature and scope.
Performance Indicator	Explain the nature and scope of the selling function (SE:017, SE LAP 117)
Level	Career-sustaining
SCANS	Information 5-8; Systems 15; Basic Skills 1-2, 5-6; Thinking Skills 12
21st Century Skills	Financial, Economic, Business and Entrepreneurial Literacy 2; Critical Thinking and Problem Solving Skills 1; Communication and Collaboration 1
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.
Sample Activity	Write a brief paper about how selling affects economic decision making in society. Submit the paper to your teacher for review.
Resources **LAP**	Marketing Education Resource Center. (2007). *Sell away (The nature and scope of selling)* [LAP: SE-117]. Columbus, OH: Author. Marketing Education Resource Center. (2007). *Sell away (The nature and scope of selling): Instructor copy* [LAP: SE-117]. Columbus, OH: Author.
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Knowledge/ Skill Statement	Understands the concepts and actions needed to determine client needs and wants and respond through planned, personalized communication that influences purchase decisions and enhances future business opportunities
Performance Element	Acquire a foundational knowledge of selling to understand its nature and scope.
Performance Indicator	Explain the role of customer service as a component of selling relationships (SE:076, SE LAP 130)
Level	Career-sustaining
SCANS	Information 5-8; Interpersonal 11; Systems 15; Basic Skills 1-2, 5-6; Thinking Skills 12
21st Century Skills	Critical Thinking and Problem Solving Skills 1
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.
Sample Activity	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. Write a synopsis of the findings.
Resources **LAP**	Marketing Education Resource Center. (2007). *Go beyond the sale (Customer service in selling)* [LAP: SE-130]. Columbus, OH: Author.
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Knowledge/ Skill Statement	Understands the concepts and actions needed to determine client needs and wants and respond through planned, personalized communication that influences purchase decisions and enhances future business opportunities
Performance Element	Acquire a foundational knowledge of selling to understand its nature and scope.
Performance Indicator	Explain key factors in building a clientele (SE:828, SE LAP 115)
Level	Specialist
SCANS	Information 5-8; Interpersonal 11; Systems 15; Basic Skills 1-2, 5-6; Thinking Skills 12
21st Century Skills	Critical Thinking & Problem Solving 1, 5; Communication & Collaboration 1, 3; Social & Cross-Cultural Skills 1; Leadership & Responsibility 3
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.
Sample Activity	Observe the activities of a local business to determine what activities the business uses to build its clientele. Record your observations. Discuss the responses with the class.

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Knowledge/ Skill Statement	Understands the concepts and actions needed to determine client needs and wants and respond through planned, personalized communication that influences purchase decisions and enhances future business opportunities
Performance Element	Acquire a foundational knowledge of selling to understand its nature and scope.
Performance Indicator	Explain company selling policies (SE:932)
Level	Career-sustaining
SCANS	Information 5-8; Systems 15; Basic Skills 1-2, 5-6; Thinking Skills 12
21st Century Skills	Critical Thinking and Problem Solving Skills 1
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.
Sample Activity	Determine the selling policies followed by two direct competitors. Discuss the similarities and differences between their policies.

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Knowledge/ Skill Statement	Understands the concepts and actions needed to determine client needs and wants and respond through planned, personalized communication that influences purchase decisions and enhances future business opportunities
Performance Element	Acquire a foundational knowledge of selling to understand its nature and scope.
Performance Indicator	Explain business ethics in selling (SE:106, SE LAP 129)
Level	Specialist
SCANS	Information 5-8; Systems 15; Basic Skills 1-2, 5-6; Thinking Skills 12; Personal Qualities 17
21st Century Skills	Leadership & Responsibility 3
Objectives	a. Explain the importance of business ethics in selling.
	b. Describe ethical concerns of salespeople that deal with the company.
	c. Explain ethical concerns of salespeople that deal with coworkers.
	d. Explain ethical concerns of salespeople that deal with customers/clients.
	e. Describe ethical concerns of salespeople that deal with the competition.
	f. Describe ethical concerns of employers in dealing with salespeople.
Sample Activity	Working in a group of three or four students, think of a salesperson you or a family member may have encountered who made you question his/her ethics in regard to selling. Prepare and present a report for the class on each instance and the principles violated.

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Knowledge/ Skill Statement	Understands the concepts and actions needed to determine client needs and wants and respond through planned, personalized communication that influences purchase decisions and enhances future business opportunities
Performance Element	Acquire a foundational knowledge of selling to understand its nature and scope.
Performance Indicator	Describe the use of technology in the selling function (SE:107)
Level	Specialist
SCANS	Information 5-8; Systems 15; Technology 18-19; Basic Skills 1-2, 5-6; Thinking Skills 12
21st Century Skills	ICT Literacy 1, 2
Objectives	a. Describe capabilities that the use of technology provides salespeople. b. Explain how technology impacts a salesperson's planning skills. c. Describe how technology can impact a salesperson's targeting skills. d. Discuss how technology can impact a salesperson's presentation skills. e. Explain how technology can impact a salesperson's ability to adapt or tailor a sales presentation to a particular customer. f. Explain the use of Customer Relationship Management (CRM) software in selling. g. Discuss the use of tablet PCs in selling. h. Explain the use of web-based visits between customers and sales staff. i. Describe the use of the Internet in sales administration activities.
Sample Activity	Listen to a professional salesperson or sales manager discuss the use of technology in selling. Record responses to the following questions: a. What technology is used in prospecting? b. How has the use of technology in selling changed in the past 10 years? c. What technology is used in demonstrating products to clients? d. What technology is used in processing clients' orders? e. What technology is used in determining whether requested models/brands are available? f. How has the use of technology affected the selling process?
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Knowledge/ Skill Statement	Understands the concepts and actions needed to determine client needs and wants and respond through planned, personalized communication that influences purchase decisions and enhances future business opportunities
Performance Element	Acquire a foundational knowledge of selling to understand its nature and scope.
Performance Indicator	Describe the nature of selling regulations (SE:108)
Level	Specialist
SCANS	Information 5-8; Systems 15; Basic Skills 1-2, 5-6; Thinking Skills 12; Personal Qualities 17
21st Century Skills	Critical Thinking and Problem Solving Skills 1
Objectives	a. Identify reasons that sales activities are regulated. b. Describe unfair or deceptive sales practices that are regulated. c. Explain state and federal regulations that affect sales activities.
Sample Activity	Access the Federal Trade Commission's web site at http://www.ftc.gov, and use its links to research five selling regulations currently affecting business sales activities. Write a short report that explains each of the regulations, and submit it to the teacher.

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Churchill, G.A., Jr., Ford, N.M., Walker, O.C., Jr., Johnston, M.W., & Tanner, J.F. Jr. (2000). *Sales force management* (6th ed.) [pp. 83-84]. Boston: Irwin/McGraw-Hill.

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Knowledge/ Skill Statement	Understands the concepts and actions needed to determine client needs and wants and respond through planned, personalized communication that influences purchase decisions and enhances future business opportunities
Performance Element	Acquire product knowledge to communicate product benefits and to ensure appropriateness of product for the customer.
Performance Indicator	Acquire product information for use in selling (SE:062)
Level	Career-sustaining
SCANS	Information 5-8; Systems 15; Basic Skills 1-2, 5-6; Thinking Skills 12
21st Century Skills	Information Literacy 1, 2; ICT Literacy 1, 2
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.
Sample Activity	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.

Resources

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Knowledge/ Skill Statement	Understands the concepts and actions needed to determine client needs and wants and respond through planned, personalized communication that influences purchase decisions and enhances future business opportunities
Performance Element	Acquire product knowledge to communicate product benefits and to ensure appropriateness of product for the customer.
Performance Indicator	Analyze product information to identify product features and benefits (SE:109, SE LAP 113)
Level	Specialist
SCANS	Information 5-8; Systems 15; Basic Skills 1-2, 5-6; Thinking Skills 7, 12
21st Century Skills	Critical Thinking and Problem Solving 1, 5; ICT Literacy 1
Objectives	a. Define the following terms: feature, benefit, obvious benefits, unique benefits, hidden benefits, feature-benefit selling, and feature-benefit chart.
	b. Identify sources of feature/benefit information.
	c. Identify an example of an obvious or apparent benefit.
	d. Identify an example of a unique or exclusive benefit.
	e. Identify an example of a hidden benefit.
	f. Describe how to prepare a feature-benefit chart for a product.
	g. Prepare a feature-benefit chart for a product.
Sample Activity	Create a feature-benefit chart for a product of interest to you. Review the chart with a classmate, and discuss how the information could be used in a sales situation.
Resources	
LAP	Marketing Education Resource Center. (2007). *Find features, boost benefits (Feature-benefit selling)* [LAP: SE-113]. Columbus, OH: Author.
	Marketing Education Resource Center. (2007). *Find features, boost benefits (Feature-benefit selling): Instructor copy* [LAP: SE-113]. Columbus, OH: Author.
Textbooks	Futrell, C.M. (2006). *Fundamentals of selling: Customers for life through service* (9th ed.) [pp. 317-318]. New York: McGraw-Hill/Irwin.
	Ingram, T.N.; LaForge, R.W.; Avila, R.A.; Schwepker, C.H., Jr.; & Williams, M.R. (2004). *Professional selling: A trust-based approach* (2nd ed.) [pp. 176-177, 187-189]. Mason, OH: Thomson/South-Western.
	Kotler, P. & Keller, K.L. (2006). *Marketing management* (12th ed.) [pp. 256. 376]. Upper Saddle River, NJ: Prentice-Hall.
Workbooks/ Manuals	Greene, C.L. (2003). *Selling: Business 2000* (pp. 48-49, 55-56). Mason, OH: South-Western/Thomson Learning.
Software/ Online	Chitwood, R.E. (2001, January). *A buying motive feature-benefit matrix helps determine a buyer's "hot buttons".* Retrieved May 5, 2008, from http://www.maxsacks.com/tstimes/tstimes34.html#feature

Douglas, L.C. (2008). *Marketing features vs. benefits.* Retrieved May 5, 2008, from
http://www.entrepreneur.com/magazine/homeofficemagcom/2000/december/34942.html

Feature-benefit chart project. (n.d.). Retrieved May 5, 2008, from
http://www.clover2.k12.sc.us/chs/Portal/academics/courses/vocational/sutton/Feature-Benefit%20Chart%20Project.htm

KnowThis.com. (1998-2008). *Consumable product features.* Retrieved May 5, 2008, from http://www.knowthis.com/tutorials/principles-of-marketing/product-decisions/consumable-product-features.htm

Marketing Education Resource Center. (2007). *Find features, boost benefits (Feature-benefit selling)* [LAP: SE-113: Presentation Software]. Columbus, OH: Author.

Spitfire. (2002). *Features and benefits chart.* Retrieved May 5, 2008, from
http://www.spitfire.us/training6.htm

Knowledge/ Skill Statement	Understands the concepts and actions needed to determine client needs and wants and respond through planned, personalized communication that influences purchase decisions and enhances future business opportunities
Performance Element	Understand sales processes and techniques to enhance customer relationships and to increase the likelihood of making sales.
Performance Indicator	Explain the selling process (SE:048)
Level	Career-sustaining
SCANS	Information 5-8; Systems 15; Basic Skills 1-2, 5-6; Thinking Skills 12
21st Century Skills	Critical Thinking & Problem Solving 1
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.
Sample Activity	Observe a sales presentation in which the salesperson used a selling process. Given a list of the components of the selling process, identify what was said or took place during the presentation that constituted each phase of the selling process. Discuss the responses with the class.
Resources	
Textbooks	Boone, L.E. & Kurtz, D.L. (2004). *Contemporary marketing* (11th ed.) [pp. 580-586]. Mason, OH: Thomson/South-Western.
	Clark, B., Sobel, J,. & Basteria, C.G. (2006). *Marketing dynamics* (pp. 568-569). Tinley Park, IL: Goodheart-Willcox.
	Etzel, M.J.; Walker, B.J.; & Stanton, W.J. (2007). *Marketing* (14th ed.) [pp. 508-510]. Burr Ridge, IL: McGraw-Hill/Irwin.
	Farese, L.S.; Kimbrell, G.; & Woloszyk, C.A. (2006) *Marketing essentials* (3rd ed.) [pp. 278-287, 294-307, 314-319]. Woodland Hills, CA: Glencoe.
	Grewal, D. & Levy, M. (2008). *Marketing* (p. 518). New York: McGraw-Hill/Irwin.
	Lamb, C.W., Jr.; Hair, J.F., Jr.; & McDaniel C. (2003). *Essentials of marketing* (3rd ed.) [pp. 481-490]. Mason, OH: South-Western.
Software/ Online	Franz, C. (2004, September 27). *Dr. Seuss's 3-step selling process.* Retrieved May 5, 2008, from http://ezinearticles.com/?Dr.-Seusss-3-Step-Selling-Process&id=4247
	KnowThis.com. (1998-2008). *Activities in the selling process.* Retrieved May 5, 2008, from http://www.knowthis.com/tutorials/principles-of-marketing/the-selling-process/1.htm

Lancaster, G. (n.d.). *Selling and sales management.* Retrieved May 5, 2008, from http://www.da-group.co.uk/main/s6/st72797.htm

Marketing Teacher. (2000-2008). *Lesson—Personal selling.* Retrieved May 5, 2008, from http://marketingteacher.com/Lessons/lesson_personal_selling.htm

Matthews, P. (n.d.). *The selling process: Steps to success.* Retrieved May 5, 2008, from http://www.sbdc.uga.edu/pdfs/matthews04.pdf

Knowledge/ Skill Statement	Understands the concepts and actions needed to determine client needs and wants and respond through planned, personalized communication that influences purchase decisions and enhances future business opportunities
Performance Element	Employ sales processes and techniques to enhance customer relationships and to increase the likelihood of making sales.
Performance Indicator	Establish relationship with client/customer (SE:110)
Level	Career-sustaining
SCANS	Information 5-8; Interpersonal 11; Systems 15; Basic Skills 1-2,5-6; Thinking Skills 7,12; Personal Qualities 15
21st Century Skills	Communication and Collaboration 1; Social and Cross-cultural Skills 1

Objectives

a. Describe the importance of establishing relationships with customers/clients during the initial contact with them.
b. Explain techniques for establishing relationships with customers/clients during the initial contact with them.
c. Identify factors affecting the choice of techniques to use in establishing relationships with customers/clients during initial contact.
d. Describe characteristics of effective sales openings.
e. Explain procedures for establishing relationships with customers/clients during initial contacts.
f. Demonstrate how to establish relationships with customers/clients during the initial contact with them.

Sample Activity

Given situations in which a salesperson is about to open the sales presentation, write two openings that could be used for each situation. Discuss the responses with the class.

Resources

Textbooks

Anderson, R.E. & Dubinsky, A.J. (2004). *Personal selling: Achieving customer satisfaction and loyalty* (pp. 115-125). Boston: Houghton Mifflin Company.
Clark, B.; Sobel, J.; & Basteria, C.G. (2006). *Marketing dynamics* (pp. 578-580). Tinley Park, IL: Goodheart-Willcox.
Futrell, C.M. (2006). *Fundamentals of selling: Customers for life through service* (9th ed.) [pp. 308-323]. New York: McGraw-Hill/Irwin.
Ingram, T.N.; LaForge, R.W.; Avila, R.A.; Schwepker, C.H., Jr.; & Williams, M.R. (2004). *Professional selling: A trust-based approach* (2nd ed.) [pp. 174-178]. Mason, OH: Thomson/South-Western.

Software/ Online

Galper, A. (2000-2008). *How to build great relationships through cold calling.* Retrieved May 5, 2008, from http://www.hooverwebdesign.com/articles/cold-calling-tips.html
Initial contact. (n.d.). Retrieved May 5, 2008, from http://media.techtarget.com/searchCRM/downloads/CyberSelling_Chapter_VII.pdf
Parinello, T. (2008). *Crafting an opening sales statement.* Retrieved May 5, 2008, from http://www.entrepreneur.com/sales/presentations/article78614.html

Silverstein, R. (2007, July 25). *How do I build customer rapport?* Retrieved
May 5, 2008, from
http://www.entrepreneur.com/sales/salescolumnistraysilverstein/article18
2144.html

Knowledge/ Skill Statement	Understands the concepts and actions needed to determine client needs and wants and respond through planned, personalized communication that influences purchase decisions and enhances future business opportunities
Performance Element	Employ sales processes and techniques to enhance customer relationships and to increase the likelihood of making sales.
Performance Indicator	Determine customer/client needs (SE:111)
Level	Career-sustaining
SCANS	Information 5-8; Interpersonal 11; Systems 15; Basic Skills 1-2, 5-6; Thinking Skills 7, 12; Personal Qualities 15
21st Century Skills	Critical Thinking and Problem Solving 4, Communication and Collaboration 1, Information Literacy 1, Social and Cross-cultural Skills 3

Objectives

a. Define the following terms: open-ended questions, assumptive questions, and interpretive questions.
b. Identify examples of the types of questions used in sales situations.
c. Explain the importance of questioning in selling.
d. Explain the timing of questions in selling.
e. Describe the relationship of customer type to questioning style.
f. Explain guidelines for questioning customers.
g. Question customers to obtain information that will help to satisfy their needs.

Sample Activity

Create a list of five products that you sell, and write three questions that could be asked customers to determine their needs. Discuss the responses with the class.

Resources

Textbooks

Anderson, R.E. & Dubinsky, A.J. (2004). *Personal selling: Achieving customer satisfaction and loyalty* (pp. 336-344). Boston: Houghton Mifflin Company.

Clark, B.; Sobel, J.; & Basteria, C.G. (2006). *Marketing dynamics* (pp. 580-584). Tinley Park, IL: Goodheart-Willcox.

Futrell, C.M. (2006). *Fundamentals of selling: Customers for life through service* (9th ed.) [pp. 112-119]. New York: McGraw-Hill/Irwin.

Ingram, T.N.; LaForge, R.W.; Avila, R.A.; Schwepker, C.H., Jr.; & Williams, M.R. (2004). *Professional selling: A trust-based approach* (2nd ed.) [pp. 105-118, 186]. Mason, OH: Thomson/South-Western.

Workbooks/ Manuals

Greene, C.L. (2003). *Selling: Business 2000* (pp. 78-80). Mason, OH: South-Western/Thomson Learning.

Software/ Online

Goldner, P.S. (2001, June). *The six best questions to ask your customers.* Retrieved May 5, 2008, from http://findarticles.com/p/articles/mi_qa5331/is_200106/ai_n21473358

Graham, J.R. (2008). *How to improve sales productivity: Asking questions makes the sale.* Retrieved May 5, 2008, from http://www.edwardlowe.org/index.elf?page=sserc&storyid=7520&function=story

James, G. (2007, August 9). *How to uncover customer needs.* Retrieved May 5, 2008, from http://blogs.bnet.com/salesmachine/?p=98

JustSell.com. (1998-2008). *Top 30 open-ended questions.* Retrieved May 5, 2008, from http://www.justsell.com/salestools/openendedquestions.aspx

Ross, D. (n.d.). *When it comes to sales, the question is…* Retrieved May 5, 2008, from http://www.efgp.org/articles/EF%20-%20The%20Question%20Is.pdf

Rudin, A. (2007, November 26). *The right sales questions will get the right answers.* Retrieved May 5, 2008, from http://www.customerthink.com/article/right_sales_question_get_right_answers

Knowledge/ Skill Statement	Understands the concepts and actions needed to determine client needs and wants and respond through planned, personalized communication that influences purchase decisions and enhances future business opportunities
Performance Element	Employ sales processes and techniques to enhance customer relationships and to increase the likelihood of making sales.
Performance Indicator	Recommend specific product (SE:114, SE LAP 111)
Level	Career-sustaining
SCANS	Information 5-7; Interpersonal 11; Systems 15; Basic Skills 1-2, 5-6; Thinking Skills 7, 12; Personal Qualities 15
21st Century Skills	Critical Thinking and Problem Solving 1, Communication and Collaboration 3
Objectives	a. Define the following terms: product substitution, trading-up, and trading down. b. Explain the importance of meeting customers' needs when recommending specific products. c. Explain guidelines for using buying motives when recommending specific products. d. Identify occasions when product substitution should be used. e. Explain guidelines for recommending a specific product to customers. f. Demonstrate procedures for recommending specific products to customers.
Sample Activity	Develop a role-play situation in which product substitutions are suggested for products with which you are familiar. Implement the role-play situation.
Resources	
LAP	Marketing Education Resource Center (2000). *Using substitute selling* [LAP: SE-111]. Columbus, OH: Author. Marketing Education Resource Center (2000). *Using substitute selling: Instructor copy* [LAP: SE-111]. Columbus, OH: Author.
Textbooks	Farese, L.S.; Kimbrell, G.; & Woloszyk, C.A. (2006). *Marketing essentials* (3rd ed.) [pp. 294-300]. Woodland Hills, CA: Glencoe. Futrell, C.M. (2006). *Fundamentals of selling: Customers for life through service* (9th ed.) [pp. 112-114]. New York: McGraw-Hill/Irwin. Grewal, D. & Levy, M. (2008). *Marketing* (pp. 520-522). New York: McGraw-Hill/Irwin. Ingram, T.N.; LaForge, R.W.; Avila, R.A.; Schwepker, C.H., Jr.; & Williams, M.R. (2004). *Professional selling: A trust-based approach* (2nd ed.) [pp. 187-192]. Mason, OH: Thomson/South-Western.
Workbooks/ Manuals	Greene, C.L. (2003). *Selling: Business 2000* (pp. 48-50, 80-81, 149). Mason, OH: South-Western/Thomson Learning.
Software/ Online	Chitwood, R.E. (2001, January). *A buying motive feature-benefit matrix helps determine a buyer's "hot buttons".* Retrieved May 5, 2008, from http://www.maxsacks.com/tstimes/tstimes34.html#feature

Kehrer, D. (2006). *Eight ideas for cross selling success.* Retrieved May 5, 2008, from http://www.business.com/directory/advice/sales-and-marketing/sales/8-ideas-for-cross-selling-success/

Marketing Education Resource Center (2000). *Using substitute selling* [LAP: SE-111: Presentation Software]. Columbus, OH: Author.

Thomas, G. (2004, August 11). *Match selling.* Retrieved May 5, 2008, from http://grant-one.com/Documents/c.%20Match%20Selling.pdf

West Cork Enterprise Board. (n.d.). *Growing your sales.* Retrieved May 5, 2008, from http://www.wceb.ie/download/1/growing%20your%20sales.doc

Knowledge/ Skill Statement	Understands the concepts and actions needed to determine client needs and wants and respond through planned, personalized communication that influences purchase decisions and enhances future business opportunities
Performance Element	Process the sale to complete the exchange.
Performance Indicator	Calculate miscellaneous charges (SE:116)
Level	Career-sustaining
SCANS	Information 5, 7-8; Systems 15; Basic Skills 1-3, 5-6; Thinking Skills 12
21st Century Skills	Critical Thinking and Problem Solving 1

Objectives

a. Identify types of charges/discounts associated with purchases.
b. Explain how charges and discounts affect the price of purchases.
c. Read a tax table to determine the amount of tax on purchases.
d. Calculate tax on purchases.
e. Read shipping/delivery tables to determine the amount of shipping/delivery charges.
f. Read an alterations chart to determine alterations fees.
g. Explain how the use of technology can speed up calculations of charges and discounts.
h. Explain the impact of incorrectly calculating charges/discounts.
i. Manually calculate miscellaneous charges on purchases.
j. Manually calculate discounts.
k. Calculate flat-rate charges and discounts.

Sample Activity

Determine the types of special charges and discounts that are frequently calculated at your place of employment. Discuss your findings with the class.

Resources

Textbooks

Dunne, P.M.; Lusch, R.F.; & Griffith, D.A. (2002). *Retailing* (4th ed.) [pp. 338-343]. Mason, OH: South-Western.

Farese, L.S.; Kimbrell, G.; & Woloszyk, C.A. (2006). *Marketing essentials* (3rd ed.) [pp. 339-340, 340-341]. Woodland Hills, CA: Glencoe.

Newman, A.J. & Cullen, P. (2002). *Retailing: Environment & operations* (pp. 310-312). London: Thomson Learning.

Workbooks/ Manuals

Townsley, M. (2002). *Retail: Business 2000* (pp. 74-76). Cincinnati, OH: South-Western/Thomson Learning.

Software/ Online

Calloway-West, M.A. (n.d.). *Sales and purchase discounts.* Retrieved May 6, 2008, from http://www.glc.k12.ga.us/BuilderV03/lptools/lpshared/lpdisplay.asp?Session_Stamp=&LPID=15912

ForYouForHome. (n.d.). *Shipping rates/delivery.* Retrieved May 6, 2008, from http://www.foryouforhome.com/GiftCerficatesWrapping.html

NGP Printing Professionals. (n.d.). *6.5% Ohio retail sales tax chart.* Retrieved May 6, 2008, from http://www.ngpco.com/salestax.pdf

Ralph Lauren. (2008). *Customer assistance: Clothing alteration pricing schedule.* Retrieved May 6, 2008, from http://www.ralphlauren.com/helpdesk/index.jsp?display=shopping&subdisplay=product

Yahoo Small Business. (2008). *Creating a flat rate shipping rule.* Retrieved May 6, 2008, from http://help.yahoo.com/l/us/yahoo/smallbusiness/store/manage/ordersettings/ordersettings-22.html

Knowledge/ Skill Statement	Understands the concepts and actions needed to determine client needs and wants and respond through planned, personalized communication that influences purchase decisions and enhances future business opportunities
Performance Element	Process the sale to complete the exchange.
Performance Indicator	Process special orders (SE:009)
Level	Career-sustaining
SCANS	Information 5-8; Interpersonal 11; Systems 15; Basic Skills 1-2, 5-6; Thinking Skills 7-9, 12; Personal Qualities 15
21st Century Skills	Communication and Collaboration 1
Objectives	a. Define special order. b. Explain how acceptance of special orders affects retailers. c. Explain criteria for accepting special orders. d. Identify paperwork required to process special orders. e. Explain the need to obtain specific information when processing special orders. f. Explain how selling skills can be used in relation to special orders. g. Explain procedures for handling special orders. h. Demonstrate procedures for processing special orders.
Sample Activity	Visit a local retailer to determine the following about special orders: a. Types of special orders handled by the store b. Importance of processing special orders c. Procedures used in processing special orders d. Forms used in processing special orders Discuss the findings with the class.
Resources **Textbooks**	Coyle, J.J.; Bardi, E.J.; & Langley, C.J., Jr. (2003). *The management of business logistics: A supply chain perspective* (7th ed.) [pp. 88-91]. Mason, OH: Thomson/South-Western. Evenson, R. (2007). *Award-winning customer service* (pp. 54-57). New York: AMACOM.
Software/ Online	Columbus, L. (2003, September 29). *Retailers are turning special orders into cash.* Retrieved May 6, 2008, from http://www.lwcresearch.com/filesfordownloads/RetailersAreTurningSpecialOrdersIntoCash.pdf Cooley, A. (n.d.). *Special orders simplified.* Retrieved May 6, 2008, from http://www.nurseryretailer.com/Article_Archives/article_detail.asp?Key=1199 Pet Product News. (n.d.). *Tip of the day: Tips from award winning retailers.* Retrieved May 6, 2008, from http://www.marketingmypetbusiness.com/2008/01/tip-of-day-tips-from-award-winning.html

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Knowledge/ Skill Statement	Understands the concepts and actions needed to determine client needs and wants and respond through planned, personalized communication that influences purchase decisions and enhances future business opportunities
Performance Element	Process the sale to complete the exchange.
Performance Indicator	Process telephone orders (SE:835)
Level	Career-sustaining
SCANS	Information 5-8; Interpersonal 11; Systems 15; Basic Skills 1-3, 5-6; Thinking Skills 12; Personal Qualities 15, 17
21st Century Skills	Communication and Collaboration 1
Objectives	a. Describe the nature of telephone orders in selling. b. Discuss the importance of speaking slowly and clearly when processing telephone orders. c. Explain the need for accuracy when processing telephone orders in selling. d. Discuss procedures for processing telephone orders. e. Demonstrate how to process a telephone order.
Sample Activity	Participate in a small-group activity composed of three students. As a group, determine and record the actions that are important to take when processing incoming telephone orders. Convert the actions into a "Yes/No" checklist that can be used to evaluate someone's processing of telephone orders. Identify three incoming-call scenarios, and choose one scenario to role-play. Rotate through the roles of salesperson, customer, and evaluator. After all scenarios are presented, discuss the strengths and areas needing improvement.
Resources **Textbooks**	Anderson, R.E. & Dubinsky, A.J. (2004). *Personal selling: Achieving customer satisfaction and loyalty* (pp. 47-48). Boston: Houghton Mifflin Company. Evenson, R. (2007). *Award-winning customer service* (pp. 54-57). New York: AMACOM. Kotler, P. & Keller, K.L. (2006). *Marketing management* (12th ed.) [p. 611]. Upper Saddle River, NJ: Prentice-Hall. Ogden, J.R. & Ogden, D.T. (2005). *Retailing: Integrated retail management* (p. 428). Boston: Houghton Mifflin Company. Performance Research Associates. (2007). *Delivering knock your socks off service* (4th ed.) [pp. 78-86]. New York: AMACOM.
Workbooks/ Manuals	Rokes, B. (2002). *Customer service: Business 2000* (pp. 59-65). Cincinnati, OH: South-Western/Thomson Learning.
Software/ Online	Bachler, C.J. (2008). *Doing business by phone.* Retrieved May 6, 2008, from http://www.homebusinessmag.com/customer-service/doing-business-by-phone.html

Docstoc. (n.d.). *Telephone sales order form template.* Retrieved May 6, 2008,
from http://www.docstoc.com/docs/450827/Telephone-Sales-Order-
Form-template%5B1%5D

Egelhoff, T. (2004). *How to sell on the phone.* Retrieved May 6, 2008, from
http://smalltownmarketing.com/phone.html

Using Project-Based Learning and Projects

Section 6

Overview

Project-Based Learning Research

Many studies support the importance of project-based learning. Some areas that have been investigated include learning content within a relevant context, meeting the needs of different styles of learners, and inquiry as a foundation for life-long learning. Numerous sources for research are cited in this appendix. These sources have been divided into sections identifying where the source was found. Many were on the websites of nonprofit organizations dedicated to project-based learning and/or to educational advancement. Be sure to periodically check these websites (listed at the start of each section) for new research on this up-and-coming field.

Resources

? Compiled by Novel Approach Consulting Group, www.novelapproachpbl.com.

Grant, M. (2002). Getting a Grip on Project-Based Learning Theory, Cases and Recomendations. Meridien (5):1. Overview: *This article examines the theoretical foundations of project-based learning, particularly constructivism and constructionism, and notes the similarities and differences among implementations, including project-based science.*

Gubels, D; Dochy, F.; Van Den Bossche, P.; & Segers, M. (2005). Effects of Problem-Based Learning: A Meta-Analysis from the Angle of Assessment. *Review of Education Research.* (75):1 Overview: *This is a rigorous meta-analysis of dozens of studies. While it focuses on assessment in particular, it does provide readers with a few defining principles of PBL.*

Mergendoller, J. & Thomas, J. (2002). Managing Project Based Learning: Principles from the Field. Buck Institute for Education whitepaper. Overview*: The authors used the results from interviews with 12 teachers who use PBL in their classroom to perform a qualitative analysis that sought to define classroom management principles. Out of the analysis a series of seven themes emerged.*

Thomas, J. (2000). AutoDesk Research Review White Paper**.** Overview: *This review examines research related to a teaching and learning model popularly referred to as "Project-Based Learning" (PBL). All of the research on Project-Based Learning has taken place in the past ten years and most of it in just the last few years. Since there is not a large body of PBL research, the review is inclusive rather than selective.*

Wolff, S. (2002). Design Features for Project-Based Learning. Design Share.Com (2002). http://www.designshare.com/Research/Wolff/Project_Learning.htm. Accessed 8-14-05. Overview: *This publication is a condensed version of a doctoral research study by Susan Wolff entitled "Relationships among People and Spaces: Design Features for the Optimal Collaborative, Project-Based Learning Experience." Although the study was directed primarily at the community college level, the findings of the study are pertinent to all levels of education and have implications for physical learning environments for other types of active learning processes. The findings from the study included a synthesis of 32 design features of the physical learning environment that support and enhance collaborative, project-based learning.*

? **Compiled by Edutopia Staff, http://www.edutopia.org/project-based-learning-research** published 11/1/2001

A growing body of academic research supports the use of project-based learning in schools as a way to engage students, cut absenteeism, boost cooperative learning skills, and improve test scores. Those benefits are enhanced when technology is used in a meaningful way in the projects. Following are synopses of a range of studies on project-based learning:

British Math Study
A three-year 1997 study *(To view this study, you must be a registered user on the Edweek site. Registration is free.)* of two British secondary schools -- one that used open-ended projects and one that used more traditional, direct instruction -- found striking differences in understanding and standardized achievement data in mathematics. The study by Jo Boaler, now associate professor of education at Stanford University, found that students at the project-based school did better than those at the more traditional school both on math problems requiring analytical or conceptual thought and on those considered rote, that is, those requiring memory of a rule or formula. Three times as many students at the project-based school received the top grade achievable on the national examination in math.

Challenge 2000
In a five-year study, researchers at SRI International found that technology-using students in Challenge 2000 Multimedia Project classrooms outperformed non-technology-using students in communication skills, teamwork, and problem solving. The Center for Learning in Technology researchers, led by Bill Penuel, found increased student engagement, greater responsibility for learning, increased peer collaboration skills, and greater achievement gains by students who had been labeled low achievers. The project conducted a performance assessment designed to measure students' skills in constructing a presentation aimed at a particular audience. Students from Multimedia Project classrooms outperformed comparison classrooms in all three areas scored by researchers and teachers: student content, attention to audience, and design. The Multimedia Project involves completing one to four interdisciplinary multimedia projects a year that integrate real-world issues and practices.

Cognition and Technology Group
A 1992 study of 700 students from 11 school districts in Tennessee found that students doing projects using videotaped problems over a three-week period performed better in a number of academic areas later in the school year. The study, by the Cognition and Technology Group at Vanderbilt University, examined student competence in basic math, word problems, planning capabilities, attitudes, and teacher feedback. Students who had experience in the project work performed better in all categories. The study appeared in Educational Psychologist, 27 (3): 291-315.

Co-nect
A 1999 study by the Center for Research in Educational Policy at the University of Memphis and University of Tennessee at Knoxville found that students using the Co-nect program, which emphasizes project-based learning and technology, improved test scores in all subject areas over a two-year period on the Tennessee Value-Added Assessment System. The Co-nect schools outperformed control schools by 26 percent.

Does It Compute?
Analyzing data from the math portion of the 1996 National Assessment of Educational Progress test given to students nationwide, Educational Testing Services researcher Harold Wenglinsky found that the effectiveness of computers in the classroom depended on how they were used. In his report, "Does It Compute?" Wenglinsky found that if computers were used for drill or practice, they typically had a negative effect on student achievement. If they were used with real-world applications, such as spreadsheets, or to simulate relationships or changing variables, student achievement increased. Data were drawn from the samples of 6,227 fourth graders and 7,146 eighth graders.

Expeditionary Learning Outward Bound
Three elementary schools in Dubuque, Iowa, showed significant test score gains after incorporating the Expeditionary Learning Outward Bound (ELOB) program. At ELOB schools, students conduct three-to-six-month-long studies of a single topic with an emphasis on learning by doing. After two years in the program, two of the three schools advanced from "well below average" to "well above the district average" on the Iowa Test of Basic Skills. One elementary school raised its average score from the 39th to the 80th percentile. After four years in the program, student scores were "above the district average in almost every area." Separate analyses showed similar test score gains in ELOB programs in Denver, Boston, and Portland, Maine.

Laptops
Since 1996, ROCKMAN ET AL, an independent research firm in San Francisco, has studied the impact of widespread use of laptop technology on teaching and learning. The focus of the firm's multiyear studies has been on dozens of public and private K-12 schools participating in a pilot laptop program sponsored jointly by the Microsoft and Toshiba corporations. Through both observation and feedback from laptop-using teachers and students, researchers have documented a shift from lectures and other teacher-centered forms of delivery to lessons that are more collaborative and project-oriented. Teachers, researchers note, become facilitators in project-oriented classrooms, with students increasingly assuming the role of directors of their own learning.

In a 1998 report, researchers note that three-fourths of the teachers who participated in a ROCKMAN ET AL survey reported that project-based instruction had increased since the introduction of the laptops in their classrooms. Among the many reported benefits of this project-based approach to learning are greater student engagement, improved analytic abilities, and a greater likelihood to apply high-order thinking skills.

Laptop-using students also performed better on a ROCKMAN ET AL-administered writing examination. The research firm did not, however, identify significant differences in the standardized test scores of laptop-using students. Researchers offered two possible explanations for the lack of significant improvement in this area: 1. Standardized tests are not designed to reflect the types of learning that laptops support. 2. Because the students had been using their laptops for less than two years, it might have been too soon to see noticeable gains in areas that are covered by standardized tests.

Successful School Restructuring
A five-year study by University of Wisconsin-Madison researchers found that structural school reform works only under certain conditions: 1. Students must be engaged in activities that build on prior knowledge and allow them to apply that knowledge to new situations. 2. Students must use disciplined inquiry. 3. School activities must have value beyond school. In their report, "Successful School Restructuring," the researchers at Wisconsin's Center on Organization and Restructuring of Schools found that even innovative school improvements, such as portfolio assessment and shared decision making, are less effective without accompanying meaningful student assignments based on deep inquiry. Reseachers analyzed data from more than 1,500 elementary, middle, and high schools and conducted field studies in 44 schools in 16 states between 1990 and 1995.

Union City, New Jersey School District
The Center for Children and Technology at the Education Development Center, Inc., monitored a two-year technology trial that was first implemented in the district in September of 1993. The study found that after multimedia technology was used to support project-based learning, eighth graders in Union City, New Jersey, scored 27 percentage points higher than students from other urban and special needs school districts on statewide tests in reading, math, and writing achievement. The study also found a decrease in absenteeism and an increase in students transferring to the school. Four years earlier, the state had been considering a takeover because Union City failed in 40 of 52 indicators of school effectiveness.

Source: Foundations for the Road Ahead: Project-Based Learning and Information Technologies
http://www.iste.org/Content/NavigationMenu/Research/Reports/The_Road_Ahead
_Background_Papers_1997_/Project-Based_Learning.htm#Research

Research Supporting Project-Based Learning
Project-based learning is a versatile approach to instruction that can readily be used in conjunction with other approaches. Teachers who make extensive use of project-based learning are blending a number of educational ideas—each supported by substantial research. This section contains very brief summaries of some of the areas of educational research that underlie project-based learning.

Constructivism is a widely supported educational theory that rests on the idea that students create their own knowledge in the context of their own experiences (Fosnot, 1996). Constructivism focuses on students being actively engaged in "doing," rather than passively engaged in "receiving" knowledge. Project-based learning can be viewed as one approach to creating learning environments in which students construct personal knowledge.

Howard Gardner and David Perkins are the co-directors of Project Zero at Harvard University, a large and long-continuing project that conducts research on ways to improve content, pedagogy, and assessment in education. Howard Gardner's theory of *multiple intelligences*, first put forth in 1983, supports the need for personalization of schooling (Gardner, 1995). He argues that each person has a number of different types of intelligence. For example, people have musical intelligence, linguistic intelligence, and logical-mathematical intelligence. Through appropriate training and experience, these various intelligences can be enhanced—a person can develop his or her own individual potentials. Gardner

strongly supports the use of project-based learning as one approach to creating a learning environment that enhances each student's multiple intelligences.

In his 1992 book, *Smart Schools,* David Perkins analyzes a number of different educational theories and approaches to education. His analysis is strongly supportive of Gardner's theory of multiple intelligences. Perkins' book contains extensive research-based evidence that education can be considerably improved by more explicit and appropriate teaching for transfer, focusing on higher-order cognitive skills, and the use of project-based learning.

Inquiry-based learning, or discovery-based learning, often involves hypothesis generation and testing. The emphasis may be on discovering specific facts or on developing a higher-order understanding of the topic and ideas being explored. Students are encouraged to develop curiosity as a habit, and to approach all learning with a disposition toward questioning and systematic investigation. Research indicates that hands-on, inquiry-based instruction is generally more effective than traditional didactic presentation in improving problem solving ability in particular subject domains (Helgeson, 1992, p. 53). Project-based learning often makes use of inquiry-based teaching methods.

Project-based learning frequently includes teams of students engaged in *cooperative learning* and *collaborative problem solving* as they work to complete a project. Cooperative learning has been shown to be effective in improving academic and social skills; however, successful cooperative learning requires careful organization, and sometimes explicit training in collaboration and communication (Johnson, 1986; Johnson & Johnson, 1989). Project-based learning provides an authentic environment in which teachers can facilitate students increasing their skills in cooperative learning and collaborative problem solving.

One can draw a parallel between project-based learning and *process writing.* Many teachers are familiar with presenting writing as a process, and are aware that the steps of process writing—brainstorming, organizing ideas, developing a draft, obtaining feedback, revising, and publishing—are similar to those required in many other creative projects. In many cases, reports or computer-aided presentations created through process writing constitute a project's final product.

Additional support for project-based learning can be found in the various "standards" reports that have been developed by organizations such as the National Academy of Sciences and the National Council of Teachers of Mathematics. Such reports stress the need for students being engaged in authentic and multidisciplinary tasks—which are hallmarks of many project-based learning environments.

Managing Project Based Learning:
Principles from the Field

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Abstract
This investigation describes classroom management techniques used by teachers who were expert in the use of project-based learning instructional strategies. The authors interviewed 12 teachers, and subjected their descriptions of classroom practice to a qualitative analysis. Fifty-three classroom management principles emerged, grouped under seven themes and 18 sub-themes. Themes included: Time Management, Getting Started, Establishing a Culture that Stresses Student Self-Management, Managing Student Groups, Working with Others Outside the Classroom, Getting The Most Out of Technological Resources, and Assessing Students and Evaluating Projects. Researchers are encouraged to include the wisdom of experienced teachers in future research on effective classroom practices.

For complete article, visit http://www.bie.org/files/researchmanagePBL.pdf

Introduction to Projects

Instead of using traditional classroom instructional methods (i.e., lectures), teachers can incorporate hands-on projects that become the instructional method through which students acquire understanding of the content. To that end, learning outcomes from various instructional areas are grouped together as the curricular backbone of several projects that could be incorporated into the *Marketing Principles* course. Students may address these learning outcomes simultaneously, rather than in the sequential manner occurring in traditional courses. The learning outcomes, therefore, are not specified for coverage during a specific week of the semester, but are tied to projects and can be acquired at any point during the project.

In addition to the performance indicators addressed in each project, additional components are included to guide instruction. These components include:

Project Title
Each project is identified with a project title that captures the intent of the activity. The three project titles in the Marketing Principles course guide are:
> Don't Be Such an Oxymoron
> Tick Tock, Tech Talk
> Mascot Mystery

Timeframe
A number of weeks for each project is specified to guide teachers in allocating class time for students to master the performance indicators and complete all project activities. The timeframes are flexible to allow teachers leeway with scheduling.

Briefings
For some topics, instructors should provide mini-lectures, referred to as Briefings. A topical outline for each Briefing is provided following each project.

Driving Questions
Each project addresses a "driving question" that encapsulates the purpose of the activity, the problem to be solved, or the question to be answered.

Entry Events
To catch students' attention and get them interested in the projects, an entry event has been recommended for each project. When appropriate, alternative ideas are provided for instructors to select what would be of most interest to their students and most feasible to implement at the local level.

Checkpoints
These represent the various opportunities for student assessment: deliverables, quizzes, tests, and exams. Rubrics to support assessment appear after each project.

Reflections
Research indicates that student learning is enhanced when students are given time to reflect on what they have learned. To that end, topics for reflection have been identified. Instructors should identify additional opportunities for reflection.

Teacher Tips
Reminders and information needed for project implementation are provided in Teacher Tips at the end of each project.

Instructors should make every effort to adhere to the timeframe specified so that students have adequate time to master the performance indicators associated with projects and briefings.

Project 1	**Don't Be Such an Oxymoron**
Overview	In this project, students will develop an understanding of the 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 legal and ethical issues for 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 send its work electronically to a college marketing professor who will select the best, most accurate marketing handbook. That handbook will then be distributed to college students.
Timeframe	3-4 weeks
Performance Indicators	Students should master the following performance indicators during the project through their research efforts or through briefings, identified with asterisks. The page numbers for the planning guide sheets are cited after each statement. • Explain marketing and its importance in a global economy (MK:001, BA LAP 11) (CS) (p. 5-23)* • Describe marketing functions and related activities (MK:002, MK LAP 1) (CS) (p. 5-25)* • Explain the nature and scope of channel management (CM:001) (CS) (p. 5-29) • Explain legal considerations in channel management (CM:005) (SP) (p. 5-36) • Describe ethical considerations in channel management (CM:006) (SP) (p. 5-38) • Explain the nature and scope of the marketing information management function (IM:001) (SP) (p. 5-44) • Explain the role of ethics in marketing-information management (IM:025) (SP) (p. 5-46) • Explain the nature and scope of the pricing function (PI:001, PI LAP 2) (SP) (p. 5-74) • Describe the role of business ethics in pricing (PI:015) (SP) (p. 5-76) • Explain legal considerations for pricing (PI:017) (SP) (p. 5-79) • Explain the nature and scope of the product/service management function (PM:001) (SP) (p. 5-83) • Explain business ethics in product/service management (PM:040) (SP) (p. 5-89) • Identify consumer protection provisions of appropriate agencies (PM:017) (SP) (p. 5-95) • Explain the role of promotion as a marketing function (PR:001, PR LAP 2) (CS) (p. 5-105) • Describe the use of business ethics in promotion (PR:099) (SP) (p. 5-111) • Describe the regulation of promotion (PR:101) (SP) (p. 5-115) • Explain the nature and scope of the selling function (SE:017, SE LAP 117) (CS) (p. 5-126) • Explain business ethics in selling (SE:106, SE LAP 129) (SP) (p. 5-134) • Describe the nature of selling regulations (SE:108) (SP) (p. 5-138)

Project 1	**Don't Be Such an Oxymoron (cont'd)**
Briefings	To augment the project, briefings should be provided. Content for the briefings is provided on the page numbers identified after each topic.

Topic	Briefing
Group Contracts	p. 6-12
Project Plans	p. 6-15
An Introduction to Marketing & Marketing Functions	p. 6-20

Entry Event	Display examples of oxymorons, and ask students what they have in common. Examples include: Cold heat Hell's Angels Jumbo shrimp Original copy Exact estimate Explain that they are examples of oxymorons. Ask the driving question.
Driving Question	Is ethics in marketing an oxymoron?

Checkpoints	**Details**	**Assessment**
Group Contract	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 page 6-13.	Complete/ Incomplete
Project Plan	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 page 6-16, and a blank project plan form is provided on page 6-18.	Developing a Project Plan Rubric (p. 6-22)
Rough Draft of Individual's Marketing Handbook	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. Then, each student develops a rough draft of her/his marketing handbook. Keep in mind that the intended audience is entry-level college marketing students, and the handbook serves as a teaching tool for them. The handbook contains a description and pictures of each marketing function, as well as a discussion of ethical and legal issues associated with each marketing function. The handbook should have a public service announcement (PSA) "feel" to it. For examples of PSAs, visit http://www.adcouncil.org/gallery.html	Complete/ Incomplete

Project 1	**Don't Be Such an Oxymoron (cont'd)**	
Final Draft of Group's Marketing Handbook	After each team member has finished his/her rough draft of the marketing handbook, team members will 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, each team will e-mail their handbook to their teacher and to a college marketing professor. The college professor will select the best team handbook from the class, and that handbook will be distributed to college students in introductory marketing courses.	Marketing Handbook Rubric (p. 6-24)
Teacher Tips	The following tips are offered to aid in project implementation: • 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., word 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.	

Topic	**Group Contracts**
Key Points	**Explain the purpose of group contracts.** To provide a foundation for how each group will function, addressing how problems will be handled

Identify components of group contracts.
Members' Names
Group Constitution
   Absence Policy
   Work Policy
   Leadership Policy
   Work Ethics
   Member Dismissal
   Signatures

Ask students to brainstorm ideas for other possible components of group contracts.

Optional: **Provide sample for review (pp. 6-13-6-14).**

NOTE: Providing students with a sample group contract may hinder creativity during the group contract development process, since some students will be tempted to copy the sample rather than write their own original group contract.

Discuss skills needed to set up group contracts.
Communication skills
Negotiation skills
Anticipation of potential problems
Problem-solving skills

GROUP CONTRACT

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

Group Constitution

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

a. 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.

b. 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

a. 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.

b. 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.

c. If a group member commits plagiarism, they are solely responsible and incur the punishment on their own.

Article III: Leadership

a. 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.

b. By being elected leader, the person must perform the following duties:

    1. Organize group meetings.
    2. Create and enforce a group agenda to govern group progress.
    3. Organize any out-of-school project efforts.
    4. Provide communication between group members in order to help individuals work towards the project goal.

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

a. 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

a. The following conducts will result in a group member being able to be dismissed:
  i.   Incomplete or missing group work
  ii. Plagiarism or any form of cheating
  iii. If group member decides to leave under his or her own will

b. 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.

c. If a group member leaves under the stipulation of Article V-a, 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, www.novelapproachpbl.com

Topic	**Group Project Plan**
Key Points	**Explain the purpose of a project plan.**

Explain the purpose of a project plan.
To ensure that all participants know and understand their roles and responsibilities in projects and when their work is due

Identify the components of a project plan.
Project objective
Tasks to be completed
Resources needed
Due dates for each task
Responsibility for each task
Status

Provide sample of project plan.

Suggest techniques for creating group project plan.

Ask each group to complete a project plan after the details of the project have been explained by the instructor and discussed as a class.

Explain that each group should create its own project plan with all members participating in the process.

Encourage group members to sign the project plan to encourage accountability.

Let students know that the project plan can also be used to report project status to the instructor on a weekly basis. (Determine whether you want students to submit weekly status reports using the project plan).

PROJECT MANAGEMENT PLAN **-** *Sample*

This document serves two purposes in every project:
  - A) Project planning guide
  - B) Project status report

Instructions:
- ★ Each team works together to determine
    - o Project objective
    - o Tasks to be completed for a successful fulfillment of the project objective
    - o Resources needed to complete each task (if any)
    - o Person(s) responsible for completing each task
    - o 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
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		

Task	Who Is Responsible	Resources Needed	Due	Status	Date turned in
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_____

PROJECT MANAGEMENT PLAN

This document serves two purposes in eve ry project:
- A) Project planning guide
- B) Project status report

Instructions:
- ★ Each team works together to determine
    - o Project objective
    - o Tasks to be completed for a successful fulfillment of the project objective
    - o Resources needed to complete each task (if any)
    - o Person(s) responsible for completing each task
    - o 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
						❑
						❑
						❑
						❑
						❑
						❑
						❑
						❑

Task	Who Is Responsible	Resources Needed	Due	Status	Date turned in	Check off box
						❑
						❑
						❑

Team Signatures:

_____   _____

_____   _____

_____   _____

Topic   **Marketing and Its Importance and Marketing Functions**

Key Points   **Define marketing.**

Identify marketing activities.
1. Planning
2. Pricing
3. Promoting
4. Distributing

Explain that marketing can take place wherever customers are.

Categorize items that are marketed.
1. Goods
   a. Durable
   b. Nondurable
2. Services
3. Organizations
4. Places
5. Ideas
6. People

Define _marketing concept._
Marketing concept defined: 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

Explain the elements of the marketing concept.
1. Customer orientation: _Do it their way._
2. Company commitment: _Do it better._
3. Company goals: _Do it with success in mind._

Explain the role of marketing in a private enterprise system.
1. Marketing fits into every facet of our lives.
2. Marketing provides benefits that make our lives better, promote using
   natural resources more wisely, and encourage international trade.
3. Without marketing, we would be forced to be self-sufficient.

Explain how marketing benefits our society.
1. Makes our lives better.
2. Promotes using the earth's resources more wisely.
3. Encourages trade between nations.

**Describe ways in which consumers and businesses would be affected if
marketing did not exist.**
1. Without marketing, our nation would have difficulty linking producers
   with customers.
2. Without marketing, our own routines would be different because
   marketing shapes even the little things we do.

Topic

Marketing and Its Importance and Marketing Functions (cont'd)

Explain that marketing functions are interrelated activities that must work together to get goods and services from producers to customers.

Key Points

Explain that the six marketing functions must work together to attract target customers to the business.

Describe the six marketing functions.

1. **Channel management** involves identifying, selecting, monitoring, and evaluating sales channels
2. **Marketing-information management** involves gathering, accessing, synthesizing, evaluating, and disseminating information.
3. **Pricing** involves determining and adjusting prices to maximize return and meet customers' perceptions of value.
4. **Product/Service management** involves obtaining, developing, maintaining, and improving a product or service mix in response to market opportunities.
5. **Promotio**n involves communicating information about goods, services, images, and/or ideas to achieve a desired outcome.
6. **Selling** involves determining client needs and wants and responding through planned, personalized communication that influences purchase decisions and enhances future business opportunities.

Discuss the importance of each marketing function.
1. **Channel management**
   a. Determines who will offer products and where they will be offered
   b. Develops relationships with channel members
   c. Assesses quality of vendor performance
2. **Marketing-information management**
   a. Provides data that can be used for business decision-making
   b. Provides data about effectiveness of marketing efforts
   c. Provides data about customer satisfaction, customer loyalty, needs, and wants
3. **Pricing**
   a. Establishes products' prices
   b. Determines whether prices need to be adjusted
   c. Sets policies and objectives for prices
4. **Product/service management**
   a. Helps to determine which products a business will offer and in what quantities
   b. Aids in determining and developing a company's/product's image
   c. Provides direction for other marketing activities based on changes in a product's life cycle
5. **Promotion**
   a. Reminds customers about products/businesses
   b. Informs customers about products/businesses
   c. Persuades customers about products/businesses
6. **Selling**
   a. Creates a following of loyal customers
   b. Completes the exchange transaction
   c. Provides services for customers

Rubric: Developing a Project Plan

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.
	❑ 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.

Rubric: Developing a Project Plan

Criteria	Professional	Experienced	Developing	Novice
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.
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 grammatical errors that were distracting.	❑ The project plan was messy, with many errors in spelling and grammar.

Rubric: Marketing Handbook

Criteria	Professional	Experienced	Developing	Novice
Content The ethical and legal issues associated with channel management, marketing-information management, market planning, pricing, product/ service management, promotion, and selling 40 points	❑ 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..
	❑ 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.
Communication Ability to express oneself so as to be understood by others 30 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.
	❑ Visual aids and sound effects supported, focused, clarified, and reinforced information given.	❑ Visual aids and sound effects added some support to the information given.	❑ Visual aids and sound effects were related to the information given, but did not clarify or reinforce it.	❑ Visual aids and sound effects detracted from the presentation raising many questions.
	❑ 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.
	❑ Message was personal for the intended audience, delivered a core thought, and grabbed their attention with the first sentence.	❑ Message was personal for the intended audience, delivered a core thought, but failed to immediately catch their attention.	❑ Message was personalized for the intended audience and attracted their attention, but delivered several ideas rather than a core idea.	❑ Message was untargeted, rambling, and failed to attract attention.

Rubric: Marketing Handbook

Criteria	Professional	Experienced	Developing	Novice
Organization How the information is put together; the flow of the marketing handbook as public service announcements 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 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.
	❑ Supporting documentation was complete and clearly presented so that the media would know when and for how long to run the public service announcement.	❑ 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.
	❑ 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.

Project 2	Tick Tock, Tech Talk
Overview	In *Tick Tock, Tech Talk*, students become acquainted with forms of technology used by marketing personnel at different local businesses. Each team pulls a slip of paper from a "hat." That slip of paper will contain the name and/or type of business that the team needs to research and visit. Each team should have a different business to research and visit. Team members conduct secondary research to become acquainted with their assigned business and marketing technology, and after completing its research, each team visits its business and interviews marketing personnel there. The team should inquire about the use of technology in each of the marketing functions at its business. If possible, team members should use their cell phones to take photos of the technology in action. After visiting a business, each team creates an informal PowerPoint presentation containing their photos and shares its presentation with the class. The class should compare technology across the marketing functions and businesses and discuss possible reasons for similarities and differences. After a class discussion, each student reflects on what technology his/her local business could adopt to improve the productivity and effectiveness of its marketing functions.
Timeframe	2 weeks
Performance Indicators	Students should master the following performance indicators during the project through their research efforts. The page numbers for the planning guide sheets are cited after each statement. • Describe the use of technology in the channel management function (CM:004) (CS) (p. 5-34) • Describe the use of technology in the marketing-information management function (IM:183) (SP) (p. 5-48) • Explain the use of technology in the pricing function (PI:016) (SP) (p. 5-78) • Describe the use of technology in the promotion function (PR:100) (SP) (p. 5-113) • Describe the use of technology in the product/service management function (PM:039) (SP) (p. 5-87) • Describe the use of technology in the selling function (SE:107) (SP) (p. 5-136)

Project 2	**Tick Tock, Tech Talk (cont'd)**	
Briefings	There are no briefings provided to augment the project.	
Entry Event	Show clips from shows that demonstrate the progression of technology. Access the following websites for visuals depicting the progression of the telephone and the cell phone: http://www.pbs.org/wgbh/amex/telephone/gallery/index.html http://mobile.mmess.net/in-pictures-a-history-of-cell-phones/ Ask the driving question.	
Driving Question	How do local marketers use technology?	

Checkpoints	Details	Assessment
Group Contract	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 of a group contract is provided on page 6-13.	Complete/ Incomplete
Project Plan	Team develops a written project plan to be used as a guide for completing tasks within the project. A sample of a project plan is provided on p. 6-16, and a blank project plan form is provided on page 6-18.	Developing a Project Plan Rubric (p. 6-22)
Individual Summaries of Local Business and Marketing Technology	Each student conducts secondary research to gather information about his/her team's local business, as well as general use of technology in marketing functions. After conducting research, each student writes a one-page report containing two sections. Section 1 contains information about the local business. Section 2 describes how technology is used in marketing functions, based on secondary research.	Complete/ Incomplete
Team Technology Presentation	Team develops an informal PowerPoint presentation showcasing forms of technology used in the marketing functions at a local business. Team members discuss the business and technology informally with the class.	Complete/ Incomplete
Individual Reflection	After all teams have given their presentations and the class has discussed forms of technology used in the marketing functions at local businesses, each student writes a one-page reflection piece describing what different technology could be used in the marketing functions at his/her local business to improve the productivity and effectiveness of the marketing functions.	Written Report Rubric (p. 6-29)

Project 2	**Tick Tock, Tech Talk (cont'd)**	
Teacher Tips	The following tips are offered to aid in project implementation: • If local businesses do not allow students to photograph their technology, students should search the Internet to locate photos of that type of technology for use in their presentation. • Remind students to use their marketing handbooks to determine the marketing functions. • Teachers should determine what local businesses to put into the "hat." Take into consideration who does the marketing at these local businesses and whether the marketing functions actually use any technology there. If necessary, locate businesses further away that students could visit.	

Rubric: Written Report

Criteria	Professional	Experienced	Developing	Novice
Content Description of different technologies that could be used in the marketing functions at a local business to improve the productivity and effectiveness of the marketing functions 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.
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.

Rubric: Written Report

Criteria	Professional	Experienced	Developing	Novice
	❑ 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.

Project 3	**Mascot Mystery**
Overview	In this project, students are introduced to the scope and nature of marketing information and research. Students are told that the school is facing a dilemma— that it must change the school mascot—and it is up to the students to develop a marketing research plan to gather information to help solve the dilemma. Each team conducts extensive research and develops a marketing research plan to submit to the school principal and business members of the advisory committee. The principal and business professionals study the marketing research plan, ask the teams questions, and then select the best thought-out marketing research plan.
Timeframe	3-4 weeks
Performance Indicators	Students should master the following performance indicators during the project through their research efforts or through briefings, identified with asterisks. The page numbers for the planning guide sheets are cited after each statement. • Describe the need for marketing information (IM:012) (CS) (p. 5-40) • Identify information monitored for marketing decision making (IM:184) (SP) (p. 5-42) • Explain the nature of marketing research (IM:010) (SP) (p. 5-52) • Describe methods used to design marketing-research studies (i.e., descriptive, exploratory, and causal) (IM:284) (SP) (p. 5-56) • Describe options businesses use to obtain marketing-research data (i.e., primary and secondary research, quantitative and qualitative research) (IM:281) (SP) (p. 5-58)* • Discuss the nature of marketing research problems/issues (IM:282) (SP) (p. 5-54) • Describe data-collection methods (e.g., observations, mail, telephone, Internet, discussion groups, interviews, scanners, etc.) (IM:289) (p. 5-62)
Briefings	To augment the project, briefings should be provided during the week specified. Content for the briefings is provided on the page numbers identified after each topic.<table><tr><th>Topic</th><th>Briefing</th></tr><tr><td>Sources of Primary and Secondary Data</td><td>p. 6-34</td></tr></table>

Project 3	**Mascot Mystery (cont'd)**

Entry Event	Show the video clip of the 2008 NBA mascot bloopers found at http://www.youtube.com/watch?v=cS55Za2R4Ng Afterwards, ask the driving question. OR . . . Arrange for the school's mascot to visit the classroom to tell the students, "I've been fired." Since some mascots are not allowed to talk, the mascot could pantomime being fired, and the students would need to determine the problem. Ask the driving question.

Driving Question	What is the best way to choose a new school mascot since ours can no longer be used?

Checkpoints	**Details**	**Assessment**
Group Contract	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 page 6-13.	Complete/ Incomplete
Project Plan	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 page 6-16, and a blank project plan form is provided on page 6-18.	Developing a Project Plan Rubric (p. 6-22)
Individual Primary/ Secondary Sources Worksheet	Following the briefing on sources of primary and secondary data, each student completes the *Primary/Secondary Sources* worksheet found on page 6-36. Each student will need access to the Internet to complete the handout.	Primary/ Secondary Sources Answer Key (p. 6-39)
Team Marketing Research Plan	Each team does extensive research on methods used to design marketing-research studies, options used to obtain marketing-research data, research methods, and research approaches. After completing its research, the team determines a marketing-research problem/issue and develops a written marketing research proposal to address the issue. An outline of the proposal is provided on page 6-42.	Marketing Research Proposal Rubric (p. 6-43)
Team Q & A Session	After completing its written marketing research proposal, each team will submit its plan to the school principal and business members of the advisory committee. The principal and business professionals review the marketing research proposals at their convenience and then come to class in order to ask each team any questions they might have. After each team has had the chance to answer these questions, the principal and business professionals select the marketing research proposal that they deem is the best.	Complete/ Incomplete

Project 3	**Mascot Mystery (cont'd)**	
Teacher Tips	The following tips are offered to aid in project implementation: • If there is a more pertinent local issue or dilemma that the school or community is facing, use it as the basis of the marketing research proposal instead of changing the school mascot.	

Topic	**Sources of Primary and Secondary Data**
Key Points	**Distinguish 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.

Identify sources of primary data.

1. Current customers
2. Vendors
3. Employees
4. Management
5. Former customers
6. Channel members
7. Prospective customers

Explain advantages of using primary data.

1. Addresses specific problem/issue at hand
2. Provides researcher a greater level of control over data collection
3. Improves likelihood that research money will be spent effectively
4. Eliminates others' access of to data
5. Provides current data

Discuss disadvantages of using primary data.

1. Costly to collect
2. Hard to recruit participants
3. Sporadic availability of data
4. Declining quality with lengthy data collection

Identify sources of secondary data.

Examples of internal sources (sources that are inside the company):
1. Company sales records/invoices
2. Financial statements (income statements and balance sheets)
3. Customer databases
4. Ad campaign results
5. Data from the use of loyalty cards
6. Sales activity reports
7. Product returns and exchanges
8. Customer complaints
9. Company blogs
10. Customer comment cards

Examples of external sources (sources that are outside the company):
1. **Government sources**
   a. U.S. Census Data
   b. U.S. Census Reports
   c. U.S. Department of Commerce Data
   d. Federal Reserve data
   e. Economic indicators

2. **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
3. **Statistical sources**
   Examples: Standard and Poor's Industrial Surveys, American Statistics Index, Statistical Reference Index, Federal
4. **Trade associations and publications**
5. **Newspapers**
6. **Competitors' websites**
7. **Competitors' annual reports**
8. **Media Panel Data Sources**
   Examples: Nielsen Media Research (TV); Arbitron, Inc. (radio); Roper Starch (magazine ads); and Simmons Annual Report on Media & Markets
9. **Syndicated data source s** (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
10. **Search engines** such as Google and Yahoo!

A good online resource that contains information about secondary sources and provides several exercises can be found at:
http://comm2.fsu.edu/faculty/comm/Sapolsky/netres/SecondaryDataSources.pdf

Discuss advantages of secondary data:

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

Describe disadvantages of secondary data:

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

Primary and Secondary Data Sources: Seek and Find

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 on-line 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 TV shows last week?
    a. Show #1: _____
    b. Show #2: _____
    c. Show #3: _____
    d. Show #4: _____
    e. 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 last year?
    a. Vehicle #1: _____
    b. Vehicle #2: _____
    c. Vehicle #3: _____

URL accessed: _____
Process for locating the answer: _____
_____
_____
How could a marketer use this information? _____
_____
_____
_____

3. Which five states in 2000 were home to the largest number of persons who are 65-years-old or older?
    a. State #1: _____
    b. State #2: _____
    c. State #3: _____
    d. State #4: _____
    e. State #5: _____

URL accessed: _____
Process for locating the answer: _____
_____
_____

What five states in 2000 had the largest percentage increase in population ages 65 or more since 1990?
    a. State #1: _____
    b. State #2: _____
    c. State #3: _____
    d. State #4: _____
    e. State #5: _____

URL accessed: _____
Process for locating the answer: _____
_____
_____

If you were trying to decide in what state to locate a seniors-only athletic facility, would you choose FL or NV? Why?
_____
_____
_____
_____

4.   What were the top three fitness magazines last year?
    a. Magazine #1: _____
    b. Magazine #2: _____
    c. 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 the top three women's fashion trends predicted for next fall?
    a. Fashion trend #1: _____
    b. Fashion trend #2: _____
    c. 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 Hyatt on Capital 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? _____
_____
_____
_____

Primary and Secondary Data Sources: Seek and Find Answer Guide

For each of the following questions, determine whether primary or secondary data is needed. If primary data is 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 on-line 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 TV shows last week?

   a. Show #1: _____

   b. Show #2: _____

   c. Show #3: _____

   d. Show #4: _____

   e. Show #5: _____

URL accessed: http://television.aol.com/news/nielsen-ratings
Process for locating the answer: Entered "top rated TV shows" into the search engine. Nielsen Ratings should be the first option that appears. Clicked on that option, and then clicked on "Main." Scrolled down the page to the Nielson Ratings on the right-hand side of the screen.

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.

2. What were the top three best selling motor vehicles last year?

   a. Vehicle #1: _____

   b. Vehicle #2: _____

   c. Vehicle #3: _____

URL accessed: http://www.msnbc.msn.com/id/22099975/
Process for locating the answer: Entered "top selling vehicles" 2007 into the search engine. (Year entered will change.) Clicked on first option—msnbc.com, and scrolled down the page to see a chart of the best and worst vehicles for that year.

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. 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 2000 were home to the largest number of persons who are 65-years-old or older?

   a. State #1: California

   b. State #2: Florida

   c. State #3: New York

   d. State #4: Texas

   e. State #5: Pennsylvania

URL accessed: http://www.census.gov/population/cen2000/phc-t13/tab01.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 homepage, clicked on Subjects A-Z.

Accessed the Subjects Index at http://www.census.gov/main/www/subjects.html and selected Age Data.

Accessed Age Data of the United States at http://www.census.gov/population/www/socdemo/age.html and clicked on Census 2000 Gateway

Accessed Census 2000 Gateway at http://www.census.gov/main/www/cen2000.html and clicked on Population and Ranking Tables of the Older Population for the United States, States, Puerto Rico, Places of 100,000 or More Population, and Counties (PHC-T-13) at http://www.census.gov/population/www/cen2000/phc-t13.html

Accessed that table at http://www.census.gov/population/cen2000/phc-t13/tab01.pdf

What five states in 2000 had the largest percentage increase in population ages 65 or older since 1990?
- a. State #1: Florida
- b. State #2: Pennsylvania
- c. State #3: West Virginia
- d. State #4: Iowa
- e. State #5: North Dakota

If you were trying to decide in what state to locate a seniors-only athletic facility, would you choose FL or NV? Why?

Florida. Although Nevada had a 71.5% increase in the 65+ population between 1990 and 2000, the actual number of people in that age category was less than in Florida since Florida has a much larger population. (This is an important lesson since percentages can be deceiving.)

4. What were the top three fitness magazines last year?
- a. Magazine #1: _____
- b. Magazine #2: _____
- c. Magazine #3: _____

URL accessed: http://www.allyoucanread.com/Top20/index.asp?idCat=18

Process for locating the answer: Entered "most read fitness magazines" into the search engine. Clicked on first option—allyoucanread.com, and found a listing of the top 20 health and fitness magazines.

How could a marketer use this information? Marketers whose target audience is fitness- and health-oriented individuals could use the information to select the most popular fitness 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://209.51.193.89/Scripts/mw5conv.pl Will vary from based on location.

Process for locating the answer: Entered "Franklin County Auditor" into the search engine. (County will vary.) Clicked on first option—Joseph W. Testa—Franklin County Auditor/Welcome. Chose departments from top of page, then real estate, and finally transfer and conveyance. Then clicked on daily conveyances about halfway down the page.

How could a marketer use this information? Marketers could use this information to target prospective buyers of new-home associated products and services, such as furniture, insurance, paint, home improvement services, etc. The marketer can then send direct mail, use telemarketing, etc. to solicit business.

6. What are the top three women's fashion trends predicted for next fall?
    a. Fashion trend #1: _____
    b. Fashion trend #2: _____
    c. Fashion trend #3: _____

URL accessed:
http://www.associatedcontent.com/article/601329/top_womens_fashion_trends_for_fall.html?cat=46

Process for locating the answer: Entered "top women's fashion trends fall 2008" into the search engine. Clicked on the second option, Associated Content, and found a listing of the top women's fashion trends for fall 2008 on the right side of the page.

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 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 Hyatt on Capital Square in Columbus, Ohio?
_____

URL accessed: _____

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.

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; 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.

Marketing Research Proposal Outline

A.   What is the marketing research problem/issue?

B.   What are the objectives of the marketing research project?

C.   What design will the marketing research study use?

D.   What data-collection methods will be used in marketing research study?

E.   What methods will be used to analyze the marketing research data?

F.   Who will be involved in the marketing research study?

G.   How much time will be needed to conduct the marketing research study?

H.   What materials will be needed to conduct the marketing research study?

Rubric: Marketing Research Proposal

Criteria	Professional	Experienced	Developing	Novice
Content The information contained in and communicated by the marketing research proposal 70 points	❑ All components of the marketing research proposal were complete and in writing.	❑ All components of the marketing research proposal were addressed in writing, but some aspects needed further description.	❑ Most of the marketing research proposal's components were in writing; the missing elements diminished the proposal's effectiveness.	❑ Many of the marketing research proposal's components lacked sufficient detail to take action or were missing altogether.
	❑ The marketing research proposal's marketing problem clearly and concisely described the focus of the research.	❑ The marketing research proposal's marketing problem described the focus of the research well, but some clarification was required.	❑ The marketing research proposal's marketing problem was difficult to follow/understand.	❑ The marketing research proposal'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.
	❑ The selected research design was clearly stated, explained, and appropriate for the research project.	❑ The selected research design was clearly stated, somewhat explained, and appropriate for the research project, but some further explanation was needed.	❑ The selected research design was stated and appropriate for the research project, but no explanation of the design was provided.	❑ The selected research design was inappropriate for the project or missing altogether.
	❑ Data collection method(s) were clearly identified, explained in detail, and appropriate for the research project.	❑ Data collection method(s) were clearly identified, somewhat explained, and appropriate for the research project, but further detail was required.	❑ Data collection method(s) were identified and appropriate for the research project, but no explanation was provided.	❑ Data collection method(s) were inappropriate or missing.

Rubric: Marketing Research Proposal

Criteria	Professional	Experienced	Developing	Novice
	❑ The marketing research proposal clearly specified and explained proposed data analysis method(s).	❑ For the most part, the marketing research proposal clearly specified and explained proposed data analysis method(s).	❑ The marketing research proposal did not clearly specify and explain proposed data analysis method(s).	❑ The marketing research proposal did not contain proposed data analysis method(s).
	❑ The marketing research proposal clearly specified time, personnel, and supplies needed to carry out the marketing research.	❑ For the most part, the marketing research proposal clearly specified time, personnel, and supplies needed to carry out the marketing research.	❑ The marketing research proposal did not clearly specify time, personnel, and supplies needed to carry out the marketing research.	❑ The marketing research proposal did not contain a listing of time, personnel, and supplies needed to carry out the marketing research.
Communication Skills The ability to express oneself so as to be understood by others 15 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 proposal was neat, grammatically correct, and error-free.	❑ Completed marketing research proposal was neat but contained minor errors.	❑ Completed marketing research proposal contained spelling and grammatical errors that were distracting.	❑ Completed marketing research proposal was messy, with many errors in spelling and grammar.
Organization The way in which the information is put together 15 points	❑ Marketing research proposal components were clearly identified.	❑ Marketing research proposal components were identified, but not always clearly.	❑ Marketing research proposal components were identified, but not clearly.	❑ Marketing research proposal 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.

Appendix A

SCANS Competencies and Skills

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. The SCANS competencies and foundations are identified and defined on the following pages. The number referenced before each of them relates to the SCANS identified in each unit guide sheet.

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.

Appendix B

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 content
- Learning and thinking skills
- Information and communications technology literacy
- Life 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. For the purposes of the *Marketing Principles* crosswalk, numbers have been given to each skill.
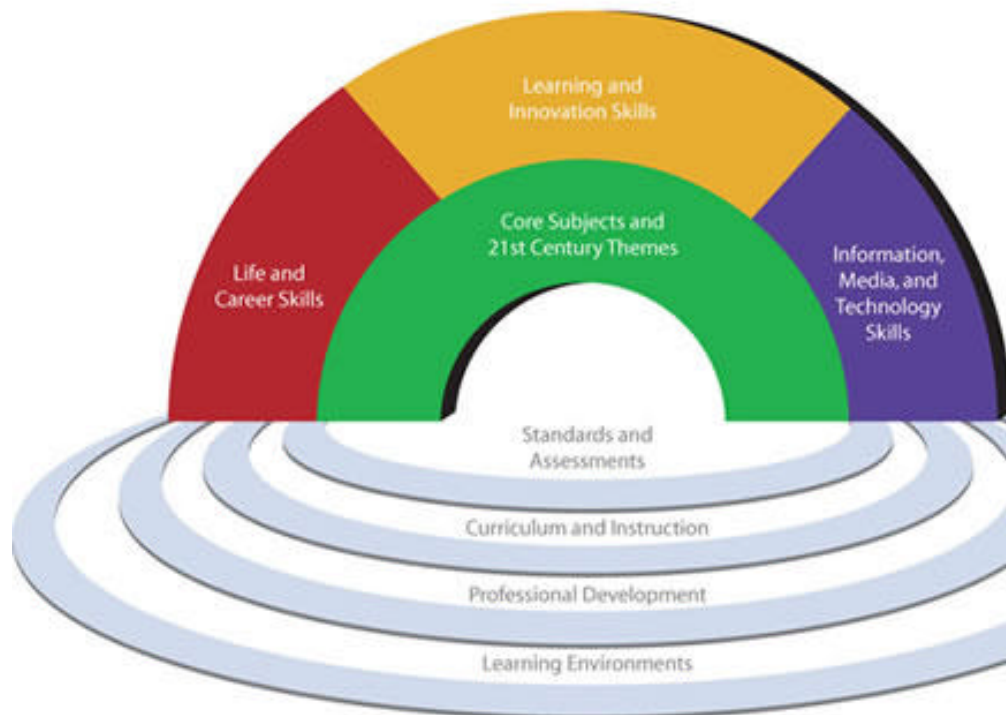
Mastery of core subjects and 21st century themes is essential for students in the 21st century. Core subjects include:

- 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:

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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

Source: Partnership for 21ˢᵗ Century Skills. (2007). *Framework for 21st century learning.* Retrieved April 2, 2008, from http://www.21stcenturyskills.org