RETAIL MANAGEMENT

COLLEGIATE DECA

1 PARTICIPANT | RETAIL MANAGEMENT AND MERCHANDISING | 1 ROLE-PLAY | PREP TIME 30 | PRESENTATION TIME 15

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OBJECTIVE

The Retail Management event involves an individual participant analyzing a real-world retail management situation, developing ideas/solutions to the situation, then role-playing with a professional (judge) with experience in retail management. Participants also take a comprehensive exam.

DESCRIPTION

The Retail Management event includes multiple activities designed to measure a broad range of knowledge, skills and attitudes in the retail management career area. These are reflected in a comprehensive list of performance indicators specific to this event that are available to the participants. However, participants are not informed, prior to the actual competition, which performance indicators will be evaluated during a particular activity.

EVALUATION FORMS AND PROCEDURES

1. COMPREHENSIVE EXAM A multiple-choice written exam measuring a wide range of performance indicators. Questions are based on general business, economic, marketing, and management performance indicators, as well as performance indicators related to merchandising and retail management.

2. ROLE-PLAY The participant is given a written description of a specific situation that measures skills, knowledge and attitudes in a retail management career. The participant studies the situation and responds to the issues involved through interaction with a business/industry professional (judge). The role of the participant and of the judge will be determined by the specific role-play situation. Each role-play situation has a unique evaluation form that measures performance indicators specific to the situation.

The combination of comprehensive exams and role-play activities varies at local, district, association, regional and international competition levels. International preliminary round competition includes one comprehensive exam and one role-play, with the role-play score being double-weighted. Participants will be ranked by section and a predetermined number of participants will be named finalists. Finalists will be given a second role-play situation. The role-play will again be double-weighted and combined with the initial exam score to determine final rankings.

The following guidelines will be applied to international competition. Guidelines for competitions held at other levels (i.e., district, association) may vary.

LEARNING OUTCOMES

Through the comprehensive exam, and the analysis of the role-play situation and interaction with one or more business/industry professionals (judges), the participants will develop or reinforce the following areas in relation to retail management:

- Applying marketing/management principles and techniques to the retail industry and organizational environment
- Analyzing situations, organizing thoughts and identifying solutions
- Demonstrating knowledge/understanding of general business and industry-specific concepts
- Organizing and communicating ideas and concepts effectively

RETAIL MANAGEMENT
PARTICIPANT INSTRUCTIONS

GUIDELINES FOR THE COMPREHENSIVE EXAM

For international competition, students are challenged with one hundred (100) multiple choice items, with answers being given using a Scantron (bubble) form. Competitors are allowed ninety (90) minutes to complete the exam. Additional information is provided in the Comprehensive Exam Specifications on page 10.

GUIDELINES FOR THE ROLE-PLAY/PRESENTATION

1. The participant will be given a role-play involving a retail management situation.
2. Each participant will have thirty (30) minutes for analyzing the situation and organizing his/her response and interaction.
3. Participants may not consult anyone about the role-play situation.
4. Any cell phone use, text messaging, email, etc. is prohibited during the entire competitive event.
5. Internet access is prohibited during the entire competitive event.
6. Participants may not bring any reference materials, audio or visual aids, computers, etc. to the competitive event, except what is provided by the event manager. Only blank paper or note cards, and pens/pencils may be used (may or may not be supplied).
7. Materials appropriate for the situation may be handed to or left with the judge. Materials handed to the judge must be created using materials allowed during the designated preparation period.
8. A fifteen (15) minute time limit will be given for participants to interact with a professional (judge). This time limit includes time for the participants to interact with the judge(s) and to respond to any questions. Participants will be allowed to use notes made only during the interaction and during the time allowed for preparation.
9. Participants will be evaluated according to the specific performance indicators being evaluated in the role-play situation, as well as the overall quality of the interaction.
10. When using a presentation aid, such as singing a song, the noise level must be kept at a conversational level that does not interrupt other participants. If this guideline is not followed, the participant will be interrupted (during the prep or presentation time) and asked to follow the noise policy.
11. Competitors are also responsible for following the information provided in the General Rules and Regulations for competition found on pages 4 and 5.

Failure to follow guidelines may result in disqualification.

PRESENTATION SCHEDULE

Thirty (30) minutes to analyze the situation and organize a response/interaction (prep time)

Fifteen (15) minutes to interact with the judge(s)

Five (5) minutes for scoring by the judge(s)

RETAIL MANAGEMENT
JUDGE INSTRUCTIONS

The Retail Management event was created by Collegiate DECA in response to the career opportunities available for college graduates in the area of retail management.

Participants with career interests in retail management will analyze a role-play situation related to the industry. The participants will make decisions regarding the situation and interact with you, the judge(s). This role-play situation is presented in written form. The role of the participant and of the judge(s) will be determined by the specific role-play situation.

Participants also complete a written exam. The score given by the judge(s) for the role-play is double-weighted, then combined with the participant's exam score to arrive at a final score for the participant.

JUDGING THE PRESENTATION

1. To ensure fairness, at no time should a participant be asked where he/she is from (school, state, country, etc.).
2. Participants will be evaluated according to an Evaluation Form accompanying the role-play.
3. Participants will be scheduled for presentations at twenty (20) minute intervals. Remember, your role will be determined by the specific role-play situation.
4. Please place the participant's name and identification number (using labels if provided) on the bubble score sheet as instructed (if not already done). If a bubble sheet has not been provided, this information must be placed on the evaluation form specific to the role-play situation.
5. You will interact with the participant for up to fifteen (15) minutes. This includes time for the participants to interact with you based on the role-play situation, and for you to make comments and ask questions. Each role-play situation includes 2 to 3 standard questions that should be asked of each participant. In addition to these, you may ask additional questions for clarification specific to the current participant.
6. After the role-play is completed, please thank the participant but give no indication of the participant's performance/score. If appropriate for the situation, you may state that a decision will be made soon and that the participant will be notified of the decision.
7. During the last five (5) minutes, after the participant is excused from the judging area, you may score the participant. Refer to the Evaluation Criteria for guidelines. On the bubble sheet provided, please bubble in the appropriate score AND write the score on the corresponding line to verify accuracy. Please make sure not to exceed the maximum score possible for each item.

Please make sure to score all categories, add them for the total score, then initial the total score. The maximum score for the evaluation is one hundred (100) points.

Note: If a bubble score sheet is not provided, indicate your scores on the evaluation form.

PRESENTATION SCHEDULE | IN TWENTY (20) MINUTE INTERVALS

Fifteen (15) minutes to interact with the participant (includes questions)

Five (5) minutes for scoring by the judges

RETAIL MANAGEMENT
EVALUATION CRITERIA

EVALUATION CRITERIA

A score under the heading Exceeds Expectations in any category means that, in your opinion, the presentation/interaction is handled in an effective, creative way; in effect, nothing more could be expected of the participant.

A score under the heading Meets Expectations in any category means that, in your opinion, the presentation/interaction is handled well. There may be a few minor problems or omissions, but they are not significant. A presentation/interaction which earns this level in every category would be considered a strong presentation/interaction.

A score under the heading Below Expectations or Little/No Demonstration in any category means that some major flaw has been noted which damages the effectiveness of the presentation/interaction. This may be a major omission, a serious misstatement or any other major flaw.

JUDGING SUMMARY

Maximum score for the role-play is one hundred (100) points. An average score of 70 or better, when combined with the comprehensive exam, will earn the participant a Certificate of Excellence.

We hope you are impressed by the quality of work of these students with a career interest in retail management. If you have any suggestions for improving this event, please mention them to your event manager.

WE THANK YOU FOR YOUR HELP.

CAREER CLUSTER
Marketing

CAREER PATHWAY
Merchandising

INSTRUCTIONAL AREA
Marketing

RETAIL MANAGEMENT EVENT

PARTICIPANT INSTRUCTIONS

PROCEDURES

1. The event will be presented to you through your reading of these instructions, including the Performance Indicators and Event Situation. You will have up to 30 minutes to review this information to determine how you will handle the role-play situation and demonstrate the performance indicators of this event. During the preparation period, you may make notes to use during the role-play situation.

2. You will have up to 15 minutes to role-play your situation with a judge (you may have more than one judge).

3. You will be evaluated on how well you meet the performance indicators of this event.

4. Turn in all your notes and event materials when you have completed the role-play.

PERFORMANCE INDICATORS

1. Explain the use of visual merchandising in retailing.

2. Explain customer/client/business buying behavior.

3. Discuss actions employees can take to achieve the company's desired results.

4. Demonstrate connections between company actions and results.

5. Plan follow-up strategies for use in selling.

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EVENT SITUATION

You are to assume the role of senior vice president for WIRE TOWN, a national chain of retailers specializing in electronics and home appliances. The CEO of the chain (judge) has asked you to develop techniques to engage customers to make purchases at WIRE TOWN stores and eliminate show-rooming.

Annual sales figures for WIRE TOWN have remained steady for the last two years, keeping the chain profitable, but no significant increases. While that may seem positive, the sales figures for online sales of electronics and home appliances have jumped 72% in the last two years. Same store sales for WIRE TOWN are weakening and the success of online sales is the reason.

Consumers are much more knowledgeable about products, price and promotions because of the internet and smart phone usage. Consumers research all aspects of products and ensure they are paying the lowest price possible. Recently, consumers have been engaging in show-rooming. Show-rooming is when consumers examine merchandise in the physical store, but then make the purchase online. Because WIRE TOWN merchandise is significantly priced and meant to last for many years, show-rooming is extremely common at WIRE TOWN stores.

Show-rooming has been detrimental to WIRE TOWN for a number of reasons. First, and most important, it results in the loss of a sale. While customers do enter WIRE TOWN stores, they are not making purchases there. Second, show-rooming customers take up valuable time of employees. It is not uncommon for show-rooming customers to ask store employees questions and request demonstrations, all with the knowledge that they will not be purchasing products from that employee. And last, show-rooming leads to unnecessary wear and tear and sometimes damages model products due to constant examination.

The CEO of WIRE TOWN (judge) has asked you to develop techniques that will engage the customers that show-room and result in purchasing merchandise from the WIRE TOWN store. The CEO (judge) knows that simply price-matching will not sway show-roomers, other marketing techniques need to be in place.

You will present your marketing techniques to end show-rooming to the CEO (judge) in a role-play to take place in the CEO's (judge's) office. The CEO (judge) will begin the role-play by greeting you and asking to hear your ideas. After you have presented your techniques and have answered the CEO's (judge's) questions, the CEO (judge) will conclude the role-play by thanking you for your work.

JUDGE'S INSTRUCTIONS

DIRECTIONS, PROCEDURES AND JUDGE'S ROLE

In preparation for this event, you should review the following information with your event manager and other judges:

1. Procedures

2. Performance Indicators

3. Event Situation

4. Judge Role-play Characterization
   Participants may conduct a slightly different type of meeting and/or discussion with you each time; however, it is important that the information you provide and the questions you ask be uniform for every participant.

5. Judge's Evaluation Instructions

6. Judge's Evaluation Form
   Please use a critical and consistent eye in rating each participant.

JUDGE ROLE-PLAY CHARACTERIZATION

You are to assume the role of CEO for WIRE TOWN, a national chain of retailers specializing in electronics and home appliances. You have asked the senior vice president (participant) to develop techniques to engage customers to make purchases at WIRE TOWN stores and eliminate show-rooming.

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Consumers are much more knowledgeable about products, price and promotions because of the internet and smart phone usage. Consumers research all aspects of products and ensure they are paying the lowest price possible. Recently, consumers have been engaging in show-rooming. Show-rooming is when consumers examine merchandise in the physical store, but then make the purchase online. Because WIRE TOWN merchandise is significantly priced and meant to last for many years, show-rooming is extremely common at WIRE TOWN stores.

Show-rooming has been detrimental to WIRE TOWN for a number of reasons. First, and most important, it results in the loss of a sale. While customers do enter WIRE TOWN stores, they are not making purchases there. Second, show-rooming customers take up valuable time of employees. It is not uncommon for show-rooming customers to ask store employees questions and request demonstrations, all with the knowledge that they will not be purchasing products

from that employee. And last, show-rooming leads to unnecessary wear and tear and sometimes damages model products due to constant examination.

You have asked the senior vice president (participant) to develop techniques that will engage the customers that show-room and result in purchasing merchandise from the WIRE TOWN store. You know that simply price-matching will not sway show-roomers, other marketing techniques need to be in place.

The senior vice president (participant) will present the marketing techniques to eliminate show-rooming to you in a role-play to take place in your office. You will begin the role-play by greeting the senior vice president (participant) and asking to hear his/her ideas.

After the senior vice president (participant) has presented the techniques, you are to ask the following questions of each participant:

1. Why is it important that customers buy products from a WIRE TOWN store versus our website?

2. How does the availability of the internet actually help our sales?

3. Is there a particular demographic that show-rooms less than others?

Once the senior vice president (participant) has answered your questions, you will conclude the meeting by thanking him/her for the work.

You are not to make any comments after the event is over except to thank the participant.

JUDGE'S EVALUATION INSTRUCTIONS

Evaluation Form Information

The participants are to be evaluated on their ability to perform the specific performance indicators stated on the cover sheet of this event and restated on the Judge's Evaluation Form. Although you may see other performance indicators being demonstrated by the participants, those listed in the Performance Indicators section are the critical ones you are measuring for this particular event. Please note that an overall score of 70% indicates a *minimum level of acceptable performance.*

Evaluation Form Interpretation

The evaluation levels listed below and the evaluation rating procedures should be discussed thoroughly with your event chairperson and the other judges to ensure complete and common understanding for judging consistency.

Level of Evaluation	Interpretation Level
Exceeds Expectations	Participant demonstrated the performance indicator in an extremely professional manner; greatly exceeds business standards; would rank in the top 10% of business personnel performing this performance indicator.
Meets Expectations	Participant demonstrated the performance indicator in an acceptable and effective manner; meets at least minimal business standards; there would be no need for additional formalized training at this time; would rank in the 70-89th percentile of business personnel performing this performance indicator.
Below Expectations	Participant demonstrated the performance indicator with limited effectiveness; performance generally fell below minimal business standards; additional training would be required to improve knowledge, attitude and/or skills; would rank in the 50-69th percentile of business personnel performing this performance indicator.
Little/No Demonstration	Participant demonstrated the performance indicator with little or no effectiveness; a great deal of formal training would be needed immediately; perhaps this person should seek other employment; would rank in the 0-49th percentile of business personnel performing this performance indicator.

RETAIL MANAGEMENT, 2014

Participant: _____

JUDGE'S EVALUATION FORM
SAMPLE EVENT

I.D. Number: _____

INSTRUCTIONAL AREA: Marketing

Did the participant:		Little/No Value	Below Expectations	Meets Expectations	Exceeds Expectations	Judged Score
PERFORMANCE INDICATORS						
1.	Explain the use of visual merchandising in retailing?	0-1-2-3-4-5	6-7-8-9-10-11	12-13-14-15	16-17-18	
2.	Explain customer/client/business buying behavior?	0-1-2-3-4-5	6-7-8-9-10-11	12-13-14-15	16-17-18	
3.	Discuss actions employees can take to achieve the company's desired results?	0-1-2-3-4-5	6-7-8-9-10-11	12-13-14-15	16-17-18	
4.	Demonstrate connections between company actions and results?	0-1-2-3-4-5	6-7-8-9-10-11	12-13-14-15	16-17-18	
5.	Plan follow-up strategies for use in selling?	0-1-2-3-4-5	6-7-8-9-10-11	12-13-14-15	16-17-18	
6.	Overall impression and response to judge's questions	0-1-2	3-4-5	6-7-8	9-10	
					TOTAL SCORE	

COLLEGIATE DECA®

MARKETING CAREER CLUSTER

THE MARKETING CAREER CLUSTER PERFORMANCE INDICATORS ARE USED FOR THE FOLLOWING EVENTS:

Business-to-Business Marketing *(Marketing Management Pathway)*

Fashion Merchandising and Marketing *(Merchandising Pathway)*

International Marketing *(Marketing Management Pathway)*

Marketing Management *(Marketing Management Pathway)*

Retail Management *(Merchandising Pathway)*

Sales Management Meeting *(Professional Selling Pathway)*

Sports and Entertainment Marketing *(Marketing Management Pathway)*

PERFORMANCE INDICATORS

COLLEGIATE DECA COMPETITIVE EVENTS

Performance indicators are used to define the parameters of the comprehensive written career cluster exam and other activities that are part of the overall competition.

This list was compiled by MBAResearch and Curriculum Center and DECA Inc. and represents efforts to support all DECA competitive events within the overall framework of the National Business Administration Standards. Individual indicators are based on a review of prior research and on extensive review of available online and print literature–both from industry and education.

For additional information on these Performance Indicators, the National Curriculum Framework, or the National Business Administration Standards, please visit the MBAResearch web site at www.MBAResearch.org. Questions may be e-mailed to betho@MBAResearch.org.

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Instructional Area: Business Law (BL)

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

Performance Element: Acquire foundational knowledge of business laws and regulations to understand their nature and scope.
Performance Indicators:
Discuss the nature of law and sources of law in the United States (SP)
Describe the United States' judicial system (SP)
Describe methods used to protect intellectual property (SP)
Describe legal issues affecting businesses (SP)
Discuss the nature and sources of international law (i.e., treaties and international customs) (MN)
Discuss the nature and sources of foreign law (i.e., country judicial and legislative actions) (MN)
Explain the impact of global legal systems on settling international business disputes (MN)

Performance Element: Understand the civil foundations of the legal environment of business to demonstrate knowledge of contracts.
Performance Indicators:
Identify the basic torts relating to business enterprises (SP)
Describe the nature of legally binding contracts (SP)

Performance Element: Explore the regulatory environment of United States' businesses to understand the diversity of regulations.
Performance Indicators:
Describe the nature of legal procedure (SP)
Discuss the nature of debtor-creditor relationships (SP)
Explain the nature of agency relationships (SP)
Discuss the nature of environmental law (SP)
Discuss the role of administrative law (SP)

Performance Element: Understand human-resources laws and regulations to facilitate business operations.
Performance Indicators:
Explain the nature of human resources regulations (SU)
Explain the nature of workplace regulations (including OSHA, ADA) (SU)
Discuss employment relationships (SU)

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Performance Element: Apply knowledge of business ownership to establish and continue business operations.
Performance Indicators:
Explain types of business ownership (CS)
Select form of business ownership (ON)

Performance Element: Acquire knowledge of commerce laws and regulations to continue business operations.
Performance Indicators:
Explain the nature of import/export law (SP)
Describe the nature of customs regulations (SP)
Explain the nature of trade regulations (MN)
Describe the impact of anti-trust legislation (MN)

Performance Element: Understand tax laws and regulations to adhere to government requirements.
Performance Indicators:
Explain the nature of tax regulations on business (ON)
Explain the nature of businesses' reporting requirements (ON)
Develop strategies for legal/government compliance (ON)

Instructional Area: Communication Skills (CO)

Standard: 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 Indicators:
Identify sources that provide relevant, valid written material (PQ)
Extract relevant information from written materials (PQ)
Apply written directions to achieve tasks (PQ)
Analyze company resources to ascertain policies and procedures (CS)

Performance Element: Apply active listening skills to demonstrate understanding of what is being said.
Performance Indicators:
Explain communication techniques that support and encourage a speaker (PQ)
Follow oral directions (PQ)
Demonstrate active listening skills (PQ)

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Performance Element: Apply verbal skills to obtain and convey information.
Performance Indicators:
Explain the nature of effective verbal communications (PQ)
Ask relevant questions (PQ)
Interpret others' nonverbal cues (PQ)
Provide legitimate responses to inquiries (PQ)
Give verbal directions (PQ)
Employ communication styles appropriate to target audience (CS)
Defend ideas objectively (CS)
Handle telephone calls in a businesslike manner (CS)
Participate in group discussions (CS)
Facilitate (lead) group discussions (SP)
Make oral presentations (SP)

Performance Element: Record information to maintain and present a report of business activity.
Performance Indicators:
Utilize note-taking strategies (CS)
Organize information (CS)
Select and use appropriate graphic aids (CS)

Performance Element: Write internal and external business correspondence to convey and obtain information effectively.
Performance Indicators:
Explain the nature of effective written communications (CS)
Select and utilize appropriate formats for professional writing (CS)
Edit and revise written work consistent with professional standards (CS)
Write professional e-mails (CS)
Write business letters (CS)
Write informational messages (CS)
Write inquiries (CS)
Write persuasive messages (SP)
Write executive summaries (SP)
Prepare simple written reports (SP)
Explain how digital communications (e.g., email, text messages, chats) exposes business to risk (SP)
Adapt written correspondence to targeted audiences (SP)
Use data visualization techniques (e.g., infographics, linked charts, etc.) (SP)
Prepare complex written reports (MN)
Write proposals (MN)

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Performance Element: Use social media to communicate with a business's stakeholders.
Performance Indicators:
Describe the impact of a person's social media brand on the achievement of organizational objectives (CS)
Distinguish between using social media for business and personal purposes (CS)

Performance Element: Communicate with staff to clarify workplace objectives.
Performance Indicators:
Explain the nature of staff communication (CS)
Choose and use appropriate channel for workplace communication (CS)
Participate in a staff meeting (CS)
Participate in problem-solving groups (CS)
Provide directions for completing job tasks (SU)
Update employees on business and economic trends (SU)
Conduct a staff meeting (SU)
Conduct planning meetings (SU)

Instructional Area: Customer Relations (CR)

Standard: 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 Indicators:
Explain the nature of positive customer relations (CS)
Demonstrate a customer-service mindset (CS)
Develop rapport with customers (CS)
Reinforce service orientation through communication (CS)
Respond to customer inquiries (CS)
Adapt communication to the cultural and social differences among clients (CS)
Interpret business policies to customers/clients (CS)
Build and maintain relationships with customers (SP)
Explain management's role in customer relations (MN)

Performance Element: Resolve conflicts with/for customers to encourage repeat business.
Performance Indicators:
Handle difficult customers (CS)
Handle customer/client complaints (CS)

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Performance Element: Reinforce company's image to exhibit the company's brand promise.
Performance Indicators:
Identify company's brand promise (CS)
Determine ways of reinforcing the company's image through employee performance (CS)

Performance Element: Understand the nature of customer relationship management to show its contributions to a company.
Performance Indicators:
Discuss the nature of customer relationship management (SP)
Explain the role of ethics in customer relationship management (SP)
Describe the use of technology in customer relationship management (SP)

Instructional Area: Economics (EC)

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

Performance Element: Understand fundamental economic concepts to obtain a foundation for employment in business.
Performance Indicators:
Distinguish between economic goods and services (CS)
Explain the concept of economic resources (CS)
Describe the concepts of economics and economic activities (CS)
Determine economic utilities created by business activities (CS)
Explain the principles of supply and demand (CS)
Describe the functions of prices in markets (CS)

Performance Element: Understand the nature of business to show its contributions to society.
Performance Indicators:
Explain the role of business in society (CS)
Describe types of business activities (CS)
Describe types of business models (SP)
Explain the organizational design of businesses (SP)
Discuss the global environment in which businesses operate (SP)
Describe factors that affect the business environment (SP)
Explain the nature of business ethics (SP)
Explain how organizations adapt to today's markets (SP)

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Performance Element: Understand economic systems to be able to recognize the environments in which businesses function.
Performance Indicators:
Explain the types of economic systems (CS)
Identify the impact of small business/entrepreneurship on market economies (CS)
Explain the concept of private enterprise (CS)
Identify factors affecting a business's profit (CS)
Determine factors affecting business risk (CS)
Explain the concept of competition (CS)

Performance Element: Acquire knowledge of the impact of government on business activities to make informed economic decisions.
Performance Indicators:
Determine the relationship between government and business (CS)
Describe the nature of taxes (SP)
Discuss the nature of monetary policy (MN)
Discuss the supply and demand for money (MN)
Explain the role of the Federal Reserve System (MN)
Explain the concept of fiscal policies (MN)
Describe the effects of fiscal and monetary policies (MN)
Describe the effects of foreign fiscal and monetary policies on the domestic economy (MN)

Performance Element: Analyze cost/profit relationships to guide business decision-making.
Performance Indicators:
Explain the concept of productivity (CS)
Analyze impact of specialization/division of labor on productivity (SP)
Explain the concept of organized labor and business (SP)
Explain the impact of the law of diminishing returns (SP)
Describe the concept of economies of scale (MN)

Performance Element: Understand economic indicators to recognize economic trends and conditions.
Performance Indicators:
Discuss the measure of consumer spending as an economic indicator (SP)
Describe the economic impact of inflation on business (SP)
Explain the concept of Gross Domestic Product (GDP) (SP)
Discuss the impact of a nation's unemployment rates (SP)
Explain the economic impact of interest-rate fluctuations (SP)
Determine the impact of business cycles on business activities (SP)

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Performance Element: Understand global trade's impact to aid business decision-making.
Performance Indicators:
Explain the nature of global trade (SP)
Discuss the impact of globalization on business (SP)
Describe the determinants of exchange rates and their effects on the domestic economy (SP)
Explain cultural considerations that impact global business relations (SP)
Discuss the impact of cultural and social environments on global trade (SP)
Describe the impact of electronic communication tools (e.g., Internet, video- and computer-conferencing, webcasts, email) on global business activities (SP)
Explain the impact of major trade alliances on business activities (SP)
Describe the impact of the political environment on world trade (SP)
Explain the impact of geography on world trade (SP)
Describe the impact of a country's history on world trade (SP)
Explain the impact of a country's economic development on world trade (SP)
Discuss the impact of bribery and foreign monetary payments on business (SP)
Identify requirements for international business travel (e.g., passport, visa, proof of citizenship, immunizations, and sponsorship letters) (SP)
Explain labor issues associated with global trade (SU)
Describe market-entry strategies for conducting business internationally (MN)
Discuss the potential impact of emerging economies on business activities (MN)

Instructional Area: Emotional Intelligence (EI)

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

Performance Element: Foster self-understanding to recognize the impact of personal feelings on others.
Performance Indicators:
Describe the nature of emotional intelligence (PQ)
Explain the concept of self esteem (PQ)
Recognize personal biases and stereotypes (PQ)
Assess personal strengths and weaknesses (PQ)

Performance Element: Develop personal traits to foster career advancement.
Performance Indicators:
Identify desirable personality traits important to business (PQ)
Exhibit self-confidence (PQ)
Demonstrate interest and enthusiasm (PQ)
Demonstrate initiative (PQ)

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Performance Element: Apply ethics to demonstrate trustworthiness.
Performance Indicators:
Demonstrate responsible behavior (PQ)
Demonstrate honesty and integrity (PQ)
Demonstrate ethical work habits (PQ)
Take responsibility for decisions and actions (PQ)
Manage commitments in a timely manner (CS)

Performance Element: Exhibit techniques to manage emotional reactions to people and situations.
Performance Indicators:
Exhibit a positive attitude (PQ)
Demonstrate self control (PQ)
Explain the use of feedback for personal growth (PQ)
Adjust to change (PQ)

Performance Element: Identify with others' feelings, needs, and concerns to enhance interpersonal relations.
Performance Indicators:
Respect the privacy of others (PQ)
Show empathy for others (PQ)
Maintain the confidentiality of others (CS)
Exhibit cultural sensitivity (CS)
Leverage personality types in business situations (SP)
Adapt management style to the personality type of others (SU)

Performance Element: Use communication skills to foster open, honest communications.
Performance Indicators:
Explain the nature of effective communications (PQ)
Explain ethical considerations in providing information (SP)
Solicit feedback (SP)
Use social media to solicit new ideas and solutions (SP)

Performance Element: Use communication skills to influence others.
Performance Indicators:
“Sell” ideas to others (SP)
Persuade others (SP)
Demonstrate negotiation skills (SP)
Offer constructive criticism (SU)

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Performance Element: Manage stressful situations to minimize potential negative impact.
Performance Indicators:
Use appropriate assertiveness (PQ)
Use conflict-resolution skills (CS)
Explain the nature of office politics (CS)
Overcome problems and difficulties associated with office politics/turf wars (CS)
Explain the nature of stress management (SP)
Manage crises in relationships (SU)

Performance Element: Implement teamwork techniques to accomplish goals.
Performance Indicators:
Participate as a team member (CS)
Use consensus-building skills (SP)
Motivate team members (SP)
Encourage team building (SU)

Performance Element: Employ leadership skills to achieve workplace objectives.
Performance Indicators:
Explain the concept of leadership (CS)
Determine personal vision (CS)
Demonstrate adaptability (CS)
Develop an achievement orientation (CS)
Lead change (CS)
Enlist others in working toward a shared vision (CS)
Coach others (CS)
Act as a role model to fulfill the organization's standards/values (SU)
Recognize/Reward others for their efforts and contributions (SU)

Performance Element: Manage internal and external business relationships to foster positive interactions.
Performance Indicators:
Treat others fairly at work (PQ)
Foster positive working relationships (CS)
Maintain collaborative partnerships with colleagues (SP)
Explain the impact of political relationships within an organization (SP)
Explain the nature of organizational culture (SP)
Interpret and adapt to a business's culture (SP)
Determine stakeholder expectations (MN)
Establish strategic relationships with others (MN)
Share best practices with key individuals and groups (MN)
Leverage business relationships (MN)

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Instructional Area: Entrepreneurship (EN)

Standard: Understands the concepts, processes, and skills associated with identifying new ideas, opportunities, and methods and with creating or starting a new project or venture

Performance Element: Understand fundamental factors about entrepreneurship to recognize its role and importance in the economy
Performance Indicators:
Describe the nature of entrepreneurship (SP)
Explain the role requirements of entrepreneurs and owners (SP)
Describe small-business opportunities in international trade (SP)

Performance Element: Employ entrepreneurial discovery strategies to generate feasible ideas for business ventures.
Performance Indicators:
Explain the need for entrepreneurial discovery (ON)
Discuss entrepreneurial discovery processes (ON)
Assess global trends and opportunities for business ventures (ON)
Determine opportunities for venture creation (ON)
Assess opportunities for venture creation (ON)
Generate venture ideas (ON)
Determine feasibility of venture ideas (ON)

Performance Element: Develop concept for new business venture to evaluate its success potential.
Performance Indicators:
Describe entrepreneurial planning considerations (ON)
Explain tools used by entrepreneurs for venture planning (ON)
Assess start-up requirements (ON)
Assess risks associated with venture (ON)
Describe external resources useful to entrepreneurs during concept development (ON)
Assess the need to use external resources for concept development (ON)
Describe strategies to protect intellectual property (ON)
Use components of business plan to define venture idea (ON)

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Performance Element: Determine needed resources for a new business venture to contribute to its start-up viability.
Performance Indicators:
Describe processes used to acquire adequate financial resources for venture creation/start-up (ON)
Select sources to finance venture creation/start-up (ON)
Explain factors to consider in determining a venture's human-resources needs (ON)
Explain considerations in making the decision to hire staff (ON)
Describe considerations in selecting capital resources (ON)
Identify capital resources needed for the venture (ON)
Assess the costs/benefits associated with resources (ON)

Performance Element: Actualize new business venture to generate profit and/or meet objectives.
Performance Indicators:
Use external resources to supplement entrepreneur's expertise (ON)
Explain the complexity of business operations (ON)
Evaluate risk-taking opportunities (ON)
Explain the need for business systems and procedures (ON)
Describe the use of operating procedures (ON)
Explain methods/processes for organizing workflow (ON)
Develop and/or provide product/service (ON)
Use creative problem-solving in business activities/decisions (ON)
Explain the impact of resource productivity on venture success (ON)
Create processes for ongoing opportunity recognition (ON)
Develop plan to invest resources into improving current products or creating new ones (ON)
Adapt to changes in business environment (ON)

Performance Element: Select harvesting strategies to identify entrepreneur's role in the business venture.
Performance Indicators:
Explain the need for continuation planning (ON)
Describe methods of venture harvesting (ON)
Evaluate options for continued venture involvement (ON)
Develop exit strategies (ON)

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Instructional Area: Financial Analysis (FI)

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

Performance Element: Understand the fundamental principles of money needed to make financial exchanges.
Performance Indicators:
Explain forms of financial exchange (cash, credit, debit, electronic funds transfer, etc.) (PQ)
Identify types of currency (paper money, coins, banknotes, government bonds, treasury notes, etc.) (PQ)
Describe functions of money (medium of exchange, unit of measure, store of value) (PQ)
Describe sources of income (wages/salaries, interest, rent, dividends, transfer payments, etc.) (PQ)
Explain the time value of money (CS)
Explain the purposes and importance of credit (CS)
Explain legal responsibilities associated with financial exchanges (CS)

Performance Element: Analyze financial needs and goals to determine financial requirements.
Performance Indicators:
Explain the nature of financial needs (e.g., college, retirement, wills, insurance, etc.) (CS)
Set financial goals (CS)
Develop personal budget (CS)

Performance Element: Manage personal finances to achieve financial goals.
Performance Indicators:
Explain the nature of tax liabilities (PQ)
Interpret a pay stub (PQ)
Prepare bank account documents (e.g., checks, deposit/withdrawal slips, endorsements, etc.) (PQ)
Maintain financial records (PQ)
Read and reconcile bank statements (PQ)
Demonstrate the wise use of credit (CS)
Validate credit history (CS)
Protect against identity theft (CS)
Prepare personal income tax forms (i.e., 1040 EZ form) (CS)

Performance Element: Understand the use of financial-services providers to aid in financial-goal achievement.
Performance Indicators:
Describe types of financial-services providers (CS)
Discuss considerations in selecting a financial-services provider (CS)

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Performance Element: Use investment strategies to ensure financial well-being.
Performance Indicators:
Explain types of investments (CS)
Establish investment goals and objectives (MN)

Performance Element: Use risk management products to protect a business's financial well-being.
Performance Indicators:
Describe the concept of insurance (CS)
Obtain insurance coverage (ON)
Settle insurance losses (ON)

Performance Element: Acquire a foundational knowledge of accounting to understand its nature and scope.
Performance Indicators:
Describe the need for financial information (CS)
Explain the concept of accounting (CS)
Discuss the role of ethics in accounting (SP)
Explain the use of technology in accounting (SP)
Explain legal considerations for accounting (SP)

Performance Element: Implement accounting procedures to track money flow and to determine financial status.
Performance Indicators:
Describe the nature of cash flow statements (SP)
Prepare cash flow statements (MN)
Explain the nature of balance sheets (SP)
Describe the nature of income statements (SP)

Performance Element: Acquire a foundational knowledge of finance to understand its nature and scope.
Performance Indicators:
Explain the role of finance in business (CS)
Discuss the role of ethics in finance (SP)
Explain legal considerations for finance (SP)

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Performance Element: Implement financial skills to obtain business credit and to control its use.
Performance Indicators:
Explain the purposes and importance of obtaining business credit (ON)
Analyze critical banking relationships (ON)
Make critical decisions regarding acceptance of bank cards (ON)
Determine financing needed for business operations (ON)
Identify risks associated with obtaining business credit (ON)
Explain sources of financial assistance (ON)
Explain loan evaluation criteria used by lending institutions (ON)
Complete loan application package (ON)

Performance Element: Manage financial resources to ensure solvency.
Performance Indicators:
Describe the nature of budgets (SP)
Explain the nature of operating budgets (SU)
Describe the nature of cost/benefit analysis (MN)
Determine relationships among total revenue, marginal revenue, output, and profit (MN)
Develop company's/department's budget (MN)
Forecast sales (MN)
Calculate financial ratios (MN)
Interpret financial statements (MN)
File business tax returns (ON)
Verify the accuracy of business financial records (ON)

Instructional Area: Human Resources Management (HR)

Standard: Understands the tools, techniques, and systems that businesses use to plan, staff, lead, and organize its human resources

Performance Element: Understand the role and function of human resources management to obtain a foundational knowledge of its nature and scope.
Performance Indicators:
Discuss the nature of human resources management (CS)
Explain the role of ethics in human resources management (SP)
Describe the use of technology in human resources management (SP)

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Performance Element: Implement organizational skills to facilitate others' work efforts.
Performance Indicators:
Assist employees with prioritizing work responsibilities (SU)
Delegate work to others (SU)
Coordinate efforts of cross-functional teams to achieve project/company goals (SU)
Manage collaborative efforts (SU)
Harmonize tasks, projects, and employees in the context of business priorities (SU)
Coordinate human, capital, and fiscal resources to meet business priorities (MN)

Performance Element: Staff a business unit to satisfy work demands while adhering to budget constraints.
Performance Indicators:
Determine hiring needs (SU)
Screen job applications/résumés (SU)
Interview job applicants (SU)
Discuss employee compensation (SU)
Select and hire new employees (SU)
Conduct exit interviews (SU)
Dismiss/Fire employees (SU)
Maintain human resources records (SU)

Performance Element: Manage staff growth and development to increase productivity and employee satisfaction.
Performance Indicators:
Orient new employees (CS)
Orient new employees (management's role) (SU)
Explain the role of training and human resources development (SU)
Explain the nature of management/supervisory training (SU)
Explain the nature of leadership in organizations (SU)
Coach employees (SU)
Recognize/Reward employees (SU)
Maintain ongoing discussion of issues related to compensation (SU)
Train staff (SU)
Supervise staff (SU)
Involve staff in company activities (SU)
Foster “right” environment for employees (SU)
Assess employee performance (SU)
Ensure equitable opportunities for employees (SU)
Assess team performance (SU)

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Performance Element: Resolve staff issues/problems to enhance productivity and improve employee relationships.
Performance Indicators:
Handle employee complaints and grievances (SU)
Explain issues associated with the payroll process (SU)
Explain the nature of remedial action (SU)

Instructional Area: Marketing (MK)

Standard: 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 Indicators:
Explain marketing and its importance in a global economy (CS)
Describe marketing functions and related activities (CS)

Performance Element: Acquire foundational knowledge of customer/client/business behavior to understand what motivates decision-making.
Performance Indicators:
Explain factors that influence customer/client/business buying behavior (SP)
Discuss actions employees can take to achieve the company's desired results (SP)
Demonstrate connections between company actions and results (e.g., influencing consumer buying behavior, gaining market share, etc.) (SP)

Instructional Area: Information Management (NF)

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

Performance Element: Use information literacy skills to increase workplace efficiency and effectiveness.
Performance Indicators:
Assess information needs (CS)
Obtain needed information efficiently (CS)
Evaluate quality and source of information (CS)
Apply information to accomplish a task (CS)
Store information for future use (CS)

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Performance Element: Acquire a foundational knowledge of information management to understand its nature and scope.
Performance Indicators:
Discuss the nature of information management (CS)
Explain the role of ethics in information management (SP)
Explain legal issues associated with information management (SP)

Performance Element: Utilize information-technology tools to manage and perform work responsibilities.
Performance Indicators:
Identify ways that technology impacts business (PQ)
Explain the role of information systems (PQ)
Discuss principles of computer systems (PQ)
Use basic operating systems (PQ)
Describe the scope of the Internet (PQ)
Demonstrate basic e-mail functions (PQ)
Demonstrate personal information management/productivity applications (PQ)
Demonstrate basic web-search skills (PQ)
Demonstrate basic word processing skills (PQ)
Demonstrate basic presentation applications (PQ)
Demonstrate basic database applications (PQ)
Demonstrate basic spreadsheet applications (PQ)
Use an integrated business software application package (CS)
Demonstrate collaborative/groupware applications (CS)
Create and post basic web page (CS)
Collaborate on and aggregate complex internal documents to create a common voice (SP)
Establish specifications for selecting hardware/software systems (MN)
Determine venture's information technology needs (MN)

Performance Element: Maintain business records to facilitate business operations.
Performance Indicators:
Describe the nature of business records (SP)
Maintain customer records (SP)

Performance Element: Acquire information to guide business decision-making.
Performance Indicators:
Describe current business trends (SP)
Monitor internal records for business information (SP)
Conduct an environmental scan to obtain business information (SP)
Interpret statistical findings (SP)
Translate research findings into actionable business recommendations (SP)

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Performance Element: Create and access databases to acquire information for business decision-making.
Performance Indicators:
Explain the principles of data analysis (SP)
Explain the nature of tools that can be used to access information in the database system (SP)
Access information in the database system (SP)

Performance Element: Apply data mining methods to acquire pertinent information for business decision-making.
Performance Indicators:
Discuss the nature of data mining (CS)
Describe data mining tools and techniques (SP)
Discuss the importance of ethics in data mining (SP)
Demonstrate basic data mining techniques (SP)
Interpret data mining findings (SP)

Instructional Area: Operations (OP)

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

Performance Element: Understand operation's role and function in business to value its contribution to a company.
Performance Indicators:
Explain the nature of operations (CS)
Discuss the role of ethics in operations (SP)
Describe the use of technology in operations (SP)

Performance Element: Adhere to health and safety regulations to support a safe work environment.
Performance Indicators:
Describe health and safety regulations in business (PQ)
Report noncompliance with business health and safety regulations (PQ)

Performance Element: Implement safety procedures to minimize loss.
Performance Indicators:
Follow instructions for use of equipment, tools, and machinery (PQ)
Follow safety precautions (PQ)
Maintain a safe work environment (CS)
Explain procedures for handling accidents (CS)
Handle and report emergency situations (CS)

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Performance Element: Determine needed safety policies/procedures to protect employees.
Performance Indicators:
Identify potential safety issues (MN)
Establish safety policies and procedures (MN)

Performance Element: Implement security policies/procedures to minimize chance for loss.
Performance Indicators:
Explain routine security precautions (CS)
Follow established security procedures/policies (CS)
Protect company information and intangibles (CS)

Performance Element: Comply with security rules, regulations, and codes (e.g., property, privacy, access, confidentiality) to protect customer and company information, reputation, and image.
Performance Indicators:
Explain information privacy, security, and confidentiality considerations in business (CS)
Maintain data security (CS)

Performance Element: Develop policies/procedures to protect workplace security.
Performance Indicators:
Identify potential security issues (MN)
Establish policies to protect company information and intangibles (MN)
Establish policies to maintain a non-hostile work environment (SU)
Establish policies and procedures to maintain physical security of the work environment (MN)

Performance Element: Utilize project-management skills to improve workflow and minimize costs.
Performance Indicators:
Explain the nature of project management (SP)
Identify resources needed for project (SP)
Develop project plan (SP)
Apply project-management tools to monitor and communicate project progress (SP)
Evaluate project results (SP)

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Performance Element: Implement purchasing activities to obtain business supplies, equipment, resources, and services.
Performance Indicators:
Explain the nature and scope of purchasing (CS)
Place orders/reorders (CS)
Maintain inventory of supplies (CS)
Discuss the importance of utilizing ethical purchasing methods (SP)
Explain the impact of the purchasing process on productivity (SP)
Manage the bid process in purchasing (SP)
Select vendors (SP)
Evaluate vendor performance (SP)
Establish bid specifications (MN)

Performance Element: Understand production's role and function in business to recognize its need in an organization.
Performance Indicators:
Explain the concept of production (CS)

Performance Element: Implement quality-control processes to minimize errors and to expedite workflow.
Performance Indicators:
Identify quality-control measures (SP)
Utilize quality control methods at work (SP)
Describe crucial elements of a quality culture (SP)
Describe the role of management in the achievement of quality (MN)
Establish efficient operating systems (MN)

Performance Element: Implement expense-control strategies to enhance a business's financial wellbeing.
Performance Indicators:
Explain the nature of overhead/operating costs (SP)
Explain employee's role in expense control (SP)
Control use of supplies (SU)
Conduct breakeven analysis (MN)
Negotiate service and maintenance contracts (MN)
Negotiate lease or purchase of facility (MN)
Develop expense control plans (MN)
Use budgets to control operations (MN)

Performance Element: Maintain property and equipment to facilitate ongoing business activities.
Performance Indicators:
Comply with policies and procedures for use of property and equipment (CS)

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Performance Element: Understand supply chain management role to recognize its need in business.
Performance Indicators:
Explain the concept of supply chain (CS)
Explain the benefits of supply chain collaboration (SP)

Instructional Area: Professional Development (PD)

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

Performance Element: Acquire self-development skills to enhance relationships and improve efficiency in the work environment.
Performance Indicators:
Maintain appropriate personal appearance (PQ)
Demonstrate systematic behavior (PQ)
Set personal goals (CS)
Balance personal and professional responsibilities (SP)

Performance Element: Understand and follow company rules and regulations to maintain employment.
Performance Indicators:
Adhere to company protocols and policies (CS)
Follow rules of conduct (CS)
Follow chain of command (CS)

Performance Element: Achieve organizational goals to contribute to company growth.
Performance Indicators:
Determine the nature of organizational goals (SP)
Ascertain employee's role in meeting organizational goals (SP)
Establish performance standards to meet organizational goals (MN)
Monitor progress in achieving organizational goals (MN)

Performance Element: Utilize critical-thinking skills to determine best options/outcomes.
Performance Indicators:
Explain the need for innovation skills (CS)
Make decisions (CS)
Demonstrate problem-solving skills (CS)
Demonstrate appropriate creativity (SP)
Use time-management skills (SP)

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Performance Element: Participate in career planning to enhance job-success potential.
Performance Indicators:
Assess personal interests and skills needed for success in business (PQ)
Analyze employer expectations in the business environment (PQ)
Explain the rights of workers (PQ)
Identify sources of career information (CS)
Identify tentative occupational interest (CS)
Explain employment opportunities in business (CS)
Explain career opportunities in entrepreneurship (CS)

Performance Element: Implement job-seeking skills to obtain employment.
Performance Indicators:
Utilize job-search strategies (PQ)
Complete a job application (PQ)
Interview for a job (PQ)
Write a follow-up letter after job interviews (CS)
Write a letter of application (CS)
Prepare a résumé (CS)
Use networking techniques to identify employment opportunities (SP)

Performance Element: Utilize career-advancement activities to enhance professional development.
Performance Indicators:
Describe techniques for obtaining work experience (e.g., volunteer activities, internships) (PQ)
Explain the need for ongoing education as a worker (PQ)
Explain possible advancement patterns for jobs (PQ)
Identify skills needed to enhance career progression (SP)
Utilize resources that can contribute to professional development (e.g., trade journals/periodicals, professional/trade associations, classes/seminars, trade shows, and mentors) (SP)

Instructional Area: Strategic Management (SM)

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

Performance Element: Recognize management's role to understand its contribution to business success.
Performance Indicators:
Explain the concept of management (CS)
Explain the nature of managerial ethics (MN)
Discuss the nature of balanced scorecards (MN)

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Performance Element: Utilize planning tools to guide organization's/department's activities.
Performance Indicators:
Explain the nature of business plans (MN)
Develop company goals/objectives (ON)
Define business mission (ON)
Conduct an organizational SWOT (ON)
Explain external planning considerations (MN)
Identify and benchmark key performance indicators (e.g., dashboards, scorecards, etc.) (MN)
Develop action plans (ON)
Develop business plan (ON)

Performance Element: Control an organization's/department's activities to encourage growth and development.
Performance Indicators:
Select and apply metrics for measuring organizational success (MN)
Analyze operating results in relation to budget/industry (MN)
Track performance of business plan (MN)

Performance Element: Identify potential business threats and opportunities to protect a business's financial well-being.
Performance Indicators:
Explain the nature of risk management (SP)
Conduct a risk assessment of an event (SP)
Identify speculative business risks (MN)

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Instructional Area: Professional Development (PD)

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

Performance Element: Understand responsibilities in marketing to demonstrate ethical/legal behavior.
Performance Indicators:
Explain the need for professional and ethical standards in marketing (SP)

Performance Element: Participate in career planning to enhance job-success potential.
Performance Indicators:
Explain employment opportunities in marketing (CS)

Instructional Area: Channel Management (CM)

Standard: 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 Indicators:
Explain the nature and scope of channel management (CS)
Explain the relationship between customer service and channel management (CS)
Explain the nature of channels of distribution (CS)
Describe the use of technology in the channel management function (CS)
Explain legal considerations in channel management (SP)
Describe ethical considerations in channel management (SP)

Performance Element: Manage channel activities to minimize costs and to determine distribution strategies.
Performance Indicators:
Coordinate channel management with other marketing activities (SP)
Explain the nature of channel-member relationships (SP)
Explain the nature of affinity partner relationships (SP)
Explain the nature of channel strategies (MN)
Select channels of distribution (MN)
Evaluate channel members (MN)
Assess the impact of push and pull strategies on channel management (MN)

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Instructional Area: Marketing-Information Management (IM)

Standard: 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 Indicators:
Describe the need for marketing data (CS)
Identify data monitored for marketing decision making (SP)
Explain the nature and scope of the marketing information management function (IM:001, LAP-IM-002) (SP)
Explain the role of ethics in marketing-information management (SP)
Describe the use of technology in the marketing-information management function (SP)
Describe the regulation of marketing-information management (SP)

Performance Element: Understand marketing-research activities to show command of their nature and scope.
Performance Indicators:
Explain the nature of marketing research (SP)
Discuss the nature of marketing research problems/issues (SP)

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) (SP)
Describe options businesses use to obtain marketing-research data (i.e., primary and secondary research) (SP)
Discuss the nature of sampling plans (i.e., who, how many, how chosen) (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, diaries, telephone, Internet, discussion groups, interviews, scanners, tracking tools) (SP)
Explain characteristics of effective data-collection instruments (SP)

Performance Element: Interpret marketing information to test hypotheses and/or to resolve issues.
Performance Indicators:
Explain techniques for processing marketing data (SP)
Monitor/measure customer “buzz” (SP)
Explain the use of descriptive statistics in marketing decision making (SP)

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Performance Element: Assess marketing research briefs to determine comprehensiveness and clarity.
Performance Indicators:
Explain the nature of marketing research briefs (MN)
Determine usefulness of marketing research briefs (MN)

Performance Element: Evaluate marketing research procedures and findings to assess their credibility.
Performance Indicators:
Identify sources of error in a research project (e.g., response errors, interviewer errors, non-response errors, sample design) (SP)
Evaluate questionnaire design (e.g., types of questions, question wording, routing, sequencing, length, layout) (SP)
Assess appropriateness of marketing research for the problem/issue (e.g., research methods, sources of information, timeliness of information, etc.) (SP)

Instructional Area: Market Planning (MP)

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

Performance Element: Develop marketing strategies to guide marketing tactics.
Performance Indicators:
Explain the concept of marketing strategies (CS)
Identify considerations in implementing global marketing strategies (MN)

Performance Element: Select target market appropriate for product/business to obtain the best return on marketing investment (ROMI).
Performance Indicators:
Explain the concept of market and market identification (CS)
Identify market segments (MN)
Develop customer profile (MN)
Select target market (MN)

Performance Element: Employ marketing-information to plan marketing activities.
Performance Indicators:
Explain the nature of marketing planning (SP)
Explain the nature of marketing plans (SP)
Explain the role of situation analysis in the marketing planning process (SP)
Conduct market analysis (market size, area, potential, etc.) (MN)
Conduct SWOT analysis for use in the marketing planning process (MN)
Assess global trends and opportunities (MN)

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Performance Element: Employ marketing-information to plan marketing activities. (cont'd)
Conduct competitive analysis (MN)
Explain the nature of sales forecasts (SP)
Forecast sales for marketing plan (MN)
Set marketing goals and objectives (MN)
Select marketing metrics (MN)
Set marketing budget (MN)
Develop marketing plan (MN)

Performance Element: Assess marketing strategies to improve return on marketing investment (ROMI).
Performance Indicators:
Describe measures used to control marketing planning (MN)
Explain strategies for linking performance measures to financial outcomes (MN)
Translate performance measures into financial outcomes (MN)
Monitor and evaluate performance of marketing plan (MN)
Assess cost-effectiveness of measurement tools (MN)
Conduct marketing audits (MN)

Instructional Area: Pricing (PI)

Standard: 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 Indicators:
Explain the nature and scope of the pricing function (SP)
Describe the role of business ethics in pricing (SP)
Explain the use of technology in the pricing function (SP)
Explain legal considerations for pricing (SP)
Explain factors affecting pricing decisions (SP)

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Instructional Area: Product/Service Management (PM)

Standard: 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 Indicators:
Explain the nature and scope of the product/service management function (SP)
Identify the impact of product life cycles on marketing decisions (SP)
Describe the use of technology in the product/service management function (SP)
Explain business ethics in product/service management (SP)

Performance Element: Generate product ideas to contribute to ongoing business success.
Performance Indicators:
Identify product opportunities (SP)
Identify methods/techniques to generate a product idea (SP)
Generate product ideas (SP)
Determine initial feasibility of product idea (MN)
Adjust idea to create functional product (MN)
Identify champion to push ideas through to fruition (MN)
Create processes for ongoing opportunity recognition (MN)

Performance Element: Apply quality assurances to enhance product/service offerings.
Performance Indicators:
Describe the uses of grades and standards in marketing (CS)
Explain warranties and guarantees (CS)
Identify consumer protection provisions of appropriate agencies (SP)
Evaluate customer experience (MN)

Performance Element: Employ product-mix strategies to meet customer expectations.
Performance Indicators:
Explain the concept of product mix (SP)
Describe the nature of product bundling (SP)
Identify product to fill customer need (MN)
Plan product mix (MN)
Determine services to provide customers (MN)
Identify internal and external service standards (MN)

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Performance Element: Position company to acquire desired business image.
Performance Indicators:
Explain the nature of corporate branding (SP)
Describe factors used by businesses to position corporate brands (SP)
Identify customer touch points (SP)
Develop strategies to position corporate brands (MN)
Build corporate brands (ON)

Performance Element: Position products/services to acquire desired business image.
Performance Indicators:
Describe factors used by marketers to position products/services (SP)
Explain the nature of product/service branding (SP)
Describe the role of customer voice in branding (SP)
Explain the role of customer service in positioning/image (MN)
Identify company's unique selling proposition (MN)
Develop strategies to position products/services (MN)
Build product/service brand (MN)

Instructional Area: Promotion (PR)

Standard: 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 Indicators:
Explain the role of promotion as a marketing function (CS)
Explain the types of promotion (CS)
Identify the elements of the promotional mix (SP)
Describe the use of business ethics in promotion (SP)
Describe the use of technology in the promotion function (SP)
Describe the regulation of promotion (SP)

Performance Element: Understand promotional channels used to communicate with targeted audiences.
Performance Indicators:
Explain types of advertising media (SP)
Describe word-of-mouth channels used to communicate with targeted audiences (SP)
Explain the nature of direct marketing channels (SP)
Identify communications channels used in sales promotion (SP)
Explain communications channels used in public-relations activities (SP)

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Performance Element: Understand the use of an advertisement's components to communicate with targeted audiences.
Performance Indicators:
Explain the components of advertisements (SP)
Explain the importance of coordinating elements in advertisements (SP)

Performance Element: Understand the use of public-relations activities to communicate with targeted audiences.
Performance Indicators:
Identify types of public-relations activities (SP)
Discuss internal and external audiences for public-relations activities (SP)

Instructional Area: Selling (SE)

Standard: 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 Indicators:
Explain the nature and scope of the selling function (CS)
Explain the role of customer service as a component of selling relationships (CS)
Explain key factors in building a clientele (SP)
Explain company selling policies (CS)
Explain legal and ethical considerations in selling (SP)
Describe the use of technology in the selling function (SP)
Describe the nature of selling regulations (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 (CS)
Analyze product information to identify product features and benefits (SP)

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 (CS)
Discuss motivational theories that impact buying behavior (SP)

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A Marketing Communications career focuses on informing, reminding, and/or persuading a target audience. Examples of marketing communications activities include advertising, direct marketing, public relations, sales promotion, and digital marketing communications.

Instructional Area: Business Law (BL)

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

Performance Element: Acquire information about business laws and regulations to show command of their nature and scope.
Performance Indicators:
Explain the nature of contract exclusivity (SP)
Explain regulations impacting digital marketing (SP)

Instructional Area: Communication Skills (CO)

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

Performance Element: Apply verbal skills to obtain and convey information.
Performance Indicators:
Make client presentations (includes strategies and research findings) (SP)

Performance Element: Write internal and external business correspondence to convey and obtain information effectively.
Performance Indicators:
Prepare contact reports (SP)
Maintain day-to-day content on social platforms (SP)
Write white papers (SP)
Write pitch/sales letters (SP)
Write new-business pitches (SP)
Write management reports (MN)

Performance Element: Manage communications efforts to protect brand viability.
Performance Indicators:
Explain the nature of communications plans (SP)
Implement a communications plan (SP)
Monitor communications plan (SP)
Develop communications plan (SP)
Adjust communications plan (SP)
Develop a crisis management plan (MN)

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Performance Element: Communicate with staff to clarify workplace objectives.
Performance Indicators:
Conduct marketing communications planning meetings (MN)
Conduct creative briefing (MN)

Instructional Area: Customer Relations (CR)

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

Performance Element: Foster positive relationships with customers to enhance sales.
Performance Indicators:
Use social media to enhance customer post-sales experience (CS)

Instructional Area: Emotional Intelligence (EI)

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

Performance Element: Use communication skills to foster ethical interactions.
Performance Indicators:
Apply ethics to digital communications (CS)
Gain commitment from client (SP)
Obtain buy-in to strategic thinking (MN)

Performance Element: Manage stressful situations to minimize negative workplace situations.
Performance Indicators:
Maintain composure when receiving/delivering bad news (SP)
Resolve problems with workflow (SU)
Manage crisis in client relationships (MN)

Performance Element: Manage internal and external business relationships to foster positive interactions.
Performance Indicators:
Determine and respond appropriately to personality types (SP)
Foster client-agency relationship (SP)
Build rapport with suppliers (SP)

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Instructional Area: Financial Analysis (FI)

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

Performance Element: Implement accounting procedures to track money flow and to determine financial status.
Performance Indicators:
Verify accuracy of bills (CS)

Performance Element: Manage marketing finances to monitor and measure return on marketing investment (ROMI).
Performance Indicators:
Estimate project costs (MN)
Set/track promotional budget (MN)
Control marketing communications budget (MN)

Instructional Area: Human Resources Management (HR)

Standard: Understands the tools, techniques, and systems that businesses use to plan, staff, lead, and organize its human resources

Performance Element: Implement organizational skills to facilitate others' work efforts.
Performance Indicators:
Act as a liaison (e.g., between agency and others, between creative department/agency) (SP)

Performance Element: Lead staff growth and development to increase productivity and employee satisfaction.
Performance Indicators:
Motivate members of an agency team (SU)
Promote innovation (SU)

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Instructional Area: Information Management (NF)

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

Performance Element: Acquire information to guide business decision-making.
Performance Indicators:
Describe current issues/trends in marketing communications (SP)
Identify trends in social-media space (SP)

Performance Element: Utilize information-technology tools to manage and perform marketing-communications responsibilities.
Performance Indicators:
Explain ways that technology impacts marketing communications (SP)
Compare the capabilities of SMS with MMS (SP)
Explain the capabilities of tools used in web-site creation (SP)
Discuss considerations in using mobile technology for promotional activities (SP)
Demonstrate effective use of audiovisual aids (SP)
Describe considerations in using databases in marketing communications (SP)
Maintain databases of information for marketing communications (SP)
Mine databases for information useful in marketing communications (SP)
Use analytical tracking tools for marketing communications (SP)
Demonstrate basic desktop publishing functions to prepare promotional materials (SP)
Integrate software applications to prepare promotional materials (SP)
Explain how to effectively incorporate video into multimedia (SP)
Evaluate the impact of mobile-device capabilities and usage patterns on social-media effectiveness (SP)

Instructional Area: Marketing (MK)

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

Performance Element: Understand the relationship between marketing and marketing communications to show command of their nature and scope.
Performance Indicators:
Differentiate between service marketing and product marketing (CS)
Discuss the relationship between promotion and marketing (CS)

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Instructional Area: Operations (OP)

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

Performance Element: Determine technology security issues to protect customer information and company image.
Performance Indicators:
Maintain marketing communications data security (SP)
Explain security considerations in marketing communications (SP)
Identify strategies for protecting business's digital assets (e.g., website, social media, email, etc.) (MN)
Identify strategies to protect digital customer data (e.g., information about customers, customers' credit-card numbers, passwords, customer transactions) (MN)

Performance Element: Implement organizational skills in marketing communications to improve efficiency and workflow.
Performance Indicators:
Develop schedule for marketing communications assignment (SP)
Develop action plan to carry out marketing communications assignment (MN)

Performance Element: Analyze vendor performance to choose vendors providing the best service materials for use in marketing communications.
Performance Indicators:
Evaluate vendors' services (SP)
Negotiate terms with vendors (SP)

Performance Element: Apply techniques to monitor production of marketing communications materials.
Performance Indicators:
Monitor production of marketing communications materials (MN)

Performance Element: Implement expense-control strategies to manage a client's budget.
Performance Indicators:
Explain the need to manage a client's budget (MN)
Manage client's budget (MN)

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Instructional Area: Professional Development (PD)

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

Performance Element: Acquire information about the marketing communications industry to aid in making career choices.
Performance Indicators:
Describe traits important to the success of employees in marketing communications (CS)
Describe employment opportunities in the marketing communications industry (structure, jobs in, structures in different size agencies, key departments in) (SP)
Explain factors affecting the growth and development of the marketing communications industry (SP)
Discuss the economic and social effects of marketing communications (SP)
Analyze marketing communications careers to determine careers of interest (SP)

Performance Element: Utilize career-advancement activities to enhance professional development in marketing communications.
Performance Indicators:
Conduct self-assessment of marketing-communications skill set (SP)
Identify requirements for professional certifications in marketing communications (SP)
Assess the services of professional organizations in marketing communications (SP)

Instructional Area: Marketing-Information Management (IM)

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

Performance Element: Plan marketing-research activities to ensure appropriateness and adequacy of data-collection efforts.
Performance Indicators:
Analyze media research tools (MN)
Select appropriate research techniques for marketing communications (MN)

Performance Element: Design qualitative marketing-communications research study to ensure appropriateness of data-collection efforts.
Performance Indicators:
Design qualitative research study (MN)
Develop discussion guide for a qualitative marketing-communications research study (MN)
Develop screener for a qualitative marketing-communications research study (MN)
Determine sample for qualitative marketing-communications research study (MN)

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Performance Element: Collect marketing information to ensure accuracy and adequacy of data for decision-making in marketing communications.
Performance Indicators:
Gather brand information (SP)
Conduct pre-campaign testing (SP)
Track performance of promotional activities (SP)
Monitor competitors' promotional efforts (SP)
Monitor daily social-media analytics (SP)
Monitor online brand and reputation (SP)
Track trends (e.g., social, buying, social media, advertising agency, etc.) (SP)
Analyze customer behavior (e.g., media-consumption, buying, etc.) (SP)
Use sampling in multichannel marketing (MN)
Conduct marketing communications idea-generation session (MN)
Moderate research groups (MN)

Performance Element: Process marketing information to test hypotheses and/or to resolve issues.
Performance Indicators:
Interpret qualitative research findings (SP)

Instructional Area: Market Planning (MP)

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

Performance Element: Select target market appropriate for product/business to obtain the best return on marketing investment (ROMI).
Performance Indicators:
Identify ways to segment markets for marketing communications (SP)
Describe the nature of target marketing in marketing communications (SP)
Use digital tools to aid in market segmentation (MN)

Performance Element: Utilize planning tools to guide marketing's activities.
Performance Indicators:
Evaluate market opportunities (MN)

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Instructional Area: Pricing (PI)

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

Performance Element: Employ pricing strategies to determine optimal pricing.
Performance Indicators:
Explain pricing practices used in marketing communications (MN)
Discuss the nature of pricing models (MN)
Explain considerations in website pricing (MN)
Set price objectives for marketing communications services (MN)
Calculate break-even point (MN)
Negotiate charges with vendors (MN)
Set price of marketing communications services (MN)
Select pricing strategies (MN)
Adjust prices to maximize profitability (MN)

Instructional Area: Product/Service Management (PM)

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

Performance Element: Understand product/service management activities to demonstrate in-depth understanding of their nature and scope.
Performance Indicators:
Explain the concept of “product” in marketing communications (SP)
Describe services offered by the marketing-communications industry (SP)

Performance Element: Generate marketing-communications ideas to contribute to ongoing marketing communications success.
Performance Indicators:
Generate marketing communications ideas (SP)
Screen marketing communications ideas (MN)
Develop a creative concept (MN)

Performance Element: Employ product-mix strategies to meet customer expectations.
Performance Indicators:
Explain the nature of product extension in services marketing (SP)
Identify product extensions that can be used in marketing communications (MN)

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Performance Element: Position products/services to acquire desired business image.
Performance Indicators:
Identify opportunities in the social-media space (SP)
Establish credibility with Internet users (SP)
Explain equity positioning (MN)
Evaluate effectiveness of marketing-communications services (MN)
Determine strategies for balancing standardization and personalization of services (MN)

Performance Element: Evaluate the effectiveness of the marketing-communications mix to make product-mix decisions.
Performance Indicators:
Identify techniques that can be used to evaluate product-mix effectiveness (MN)
Modify product mix (MN)

Instructional Area: Promotion (PR)

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

Performance Element: Understand promotion activities to show an in-depth understanding of their nature and scope.
Performance Indicators:
Explain considerations affecting global promotion (SP)
Explain the marketing-communications development process (SP)

Performance Element: Utilize word-of-mouth strategies to build brand and to promote products.
Performance Indicators:
Explain the nature of word-of-mouth (WOM) strategies (SP)
Discuss the role of customer voice in word-of-mouth strategies (SP)
Select word-of-mouth strategies appropriate for promotional objectives (MN)
Explain the nature of buzz-marketing (SP)
Develop buzz-marketing strategies (MN)
Explain considerations in developing viral marketing campaigns (SP)
Develop viral marketing strategies (MN)
Describe considerations in developing customer evangelists (SP)
Create customer evangelist strategy (MN)
Explain the use of celebrities/influencers as a WOM strategy (SP)
Select celebrity/influencer to deliver promotional message (MN)
Describe referral programs that can be used to build brand/promote products (SP)
Develop referral program to build brand/promote products (MN)

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Performance Element: Use product placement to build brand and to promote products.
Performance Indicators:
Explain the use of product placement (SP)
Identify opportunities for product placement (MN)

Performance Element: Understand the use of direct marketing to attract attention and to build brand.
Performance Indicators:
Discuss types of direct mail tactics (SP)
Explain the nature of online advertising (e.g., advergaming, virtual worlds, display ads, banner ads, pop-up ads, pay-per-click ads, etc.) (SP)
Explain the nature of e-mail marketing tactics (SP)
Explain the role of business websites in digital marketing (SP)
Explain the use of social media for digital marketing (SP)
Describe the use of blogging for marketing communications (SP)
Explain the use of RSS feeds (SP)
Discuss the use of podcasts/webcasts (SP)
Discuss the use of social bookmarking/tagging (SP)
Explain the use of video/images for digital marketing (SP)
Describe mobile marketing tactics (SP)
Explain mobile marketing applications (SP)
Discuss the use of search-engine optimization tactics for digital marketing (SP)

Performance Element: Develop content for use in marketing communications to create interest in product/business/idea.
Performance Indicators:
Identify effective advertising headlines (SP)
Explain the use of storytelling in marketing (SP)
Describe the nature of copy strategies (SP)
Write copy for advertisements (SP)
Critique ad copy (MN)
Discuss the nature of effective direct-mail copy (SP)
Write direct-mail letters (SP)
Critique direct mail copy (MN)
Describe the nature of effective Internet ad copy (SP)
Write e-mail marketing copy (SP)
Execute targeted emails (SP)
Write content for use on the website (SP)
Write content for use in social media (SP)
Maintain a consistent brand voice in social content (SP)
Develop and package content for social distribution (SP)
Explain the nature of effective mobile ad copy (SP)

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Performance Element: Develop content for use in marketing communications to create interest in product/business/idea. (cont'd)
Write mobile marketing content (SP)
Assess marketing promotional content in digital media (MN)
Repurpose content for use in multiple platforms (SP)
Develop content marketing strategy (MN)
Measure content marketing results (MN)

Performance Element: Understand design principles to be able to communicate needs to designers.
Performance Indicators:
Describe the use of color in advertisements (SP)
Describe the elements of design (SP)
Explain the use of illustrations in advertisements (SP)
Discuss the nature of typography (SP)
Explain type styles used in advertisements (SP)
Describe effective advertising layouts (SP)
Identify types of drawing media (SP)
Explain the impact of color harmonies on composition (SP)
Describe digital color concepts (SP)

Performance Element: Critique advertisements to ensure achievement of marketing communications goals/objectives.
Performance Indicators:
Check advertising proofs (SP)
Evaluate storyboards for broadcast advertisements (MN)
Assess collateral pieces for direct marketing (MN)
Critique advertisements (MN)

Performance Element: Understand how a website presence can be used to promote business/product.
Performance Indicators:
Explain website-development process (SP)
Identify strategies for attracting targeted audience to website (SP)
Identify technologies to improve website ranking/positioning on search engines/directories (MN)
Explain website linking strategies (MN)
Identify website design/components (MN)

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Performance Element: Manage media planning and placement to enhance return on marketing investment.
Performance Indicators:
Determine advertising reach of media (SP)
Read media schedule (SP)
Calculate media costs (SP)
Select advertising media (MN)
Choose appropriate media outlets (SP)
Negotiate terms with media owner (SP)
Schedule ads and commercials (SP)
Select placement of advertisements (SP)
Buy ad space/time (SP)
Identify techniques to increase ad response time (SP)
Set media buying objectives (MN)
Plan strategy to guide media-buying process (MN)
Develop a media plan (includes budget, media allocation, and timing of ads) (MN)

Performance Element: Leverage media buys to maximize marketing investment.
Performance Indicators:
Select strategies to leverage media buys (MN)
Implement strategies to leverage media buys (MN)

Performance Element: Utilize publicity to inform stakeholders of business activities.
Performance Indicators:
Explain the impact of digital techniques on public relations practices (SP)
Write a press release (SP)
Create a public-service announcement (SP)
Create a press kit (SP)
Coordinate press releases (MN)
Cultivate media relationships (SP)
Evaluate media relations (MN)
Obtain publicity (MN)

Performance Element: Utilize publicity/public-relations activities to create goodwill with stakeholders.
Performance Indicators:
Analyze costs/benefits of company participation in community activities (SP)
Explain current issues/trends in public relations (SP)
Describe the use of crisis management in public relations (SP)
Develop a customer retention plan (MN)
Create a public-relations campaign (MN)
Develop a public-relations plan (MN)

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Performance Element: Employ sales-promotion activities to inform or remind customers of business/product.
Performance Indicators:
Create promotional signage (SP)
Collaborate in the design of slogans/taglines (SP)
Set and develop strategy for brand identifiers (e.g., marks, characters, etc.) (MN)
Collaborate in the design of collateral materials to promote frequency/loyalty marketing program (SP)
Explain considerations in designing a frequency/loyalty marketing program (MN)
Develop frequency/loyalty marketing strategy (MN)
Analyze use of specialty promotions (MN)
Participate in the design of collateral materials to promote special event (SP)
Develop strategy for creating a special event (MN)
Set up cross-promotions (SP)
Explain how businesses can use trade-show/exposition participation to communicate with targeted audiences (SP)
Participate in trade shows/expositions (SP)
Explain considerations used to evaluate whether to participate in trade shows/expositions (SP)
Develop a sales-promotion plan (MN)

Performance Element: Develop marketing/creative briefs to apprise staff and client of promotional strategy.
Performance Indicators:
Discuss the use of marketing/creative briefs (SP)
Prepare marketing/creative briefs (MN)

Performance Element: Work with advertising agency to create marketing communications.
Performance Indicators:
Explain the use of advertising agencies (SP)
Select advertising agency (MN)
Evaluate advertising agency work (MN)

Performance Element: Plan marketing communications to maximize effectiveness and to minimize costs.
Performance Indicators:
Explain the nature of a promotional plan (SP)
Coordinate activities in the promotional mix (SP)
Use past advertisements to aid in promotional planning (MN)
Develop offline campaign to drive traffic to online platforms (MN)
Determine appropriateness of promotional strategy across product lines (MN)
Establish promotional mix (MN)
Prepare advertising budget (MN)
Prepare promotional budget (MN)

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Performance Element: Plan marketing communications to maximize effectiveness and to minimize costs. (cont'd)
Develop an advertising campaign (MN)
Develop digital marketing campaign (MN)
Develop digital marketing strategies (MN)
Develop social media plan (MN)
Develop an integrated approach for social media content creation (MN)
Develop promotional plan for a business (MN)
Develop a communications audit plan (MN)

Performance Element: Implement and monitor promotional activities to maximize return on promotional efforts.
Performance Indicators:
Monitor user-generated content (UGC) (SP)
Moderate social chats (SP)
Leverage social networks for customer engagement (SP)
Implement strategies to grow social-media following (SP)
Implement digital marketing campaign (SP)
Manage day-to-day content on social platforms (MN)
Implement strategies for advertising campaign (MN)
Follow up with media on "make-good advertisements" (MN)
Manage risks associated with the content of digital messages (MN)
Implement an integrated social-media strategy (MN)
Manage promotional allowances (MN)

Performance Element: Evaluate long-term and short-term results of promotional efforts.
Performance Indicators:
Evaluate creative work (MN)
Identify metrics to assess results of promotional efforts (MN)
Evaluate effectiveness of advertising (MN)
Quantify contribution of social media (metrics and goals, finding what is good, measuring and adjusting on the fly, reporting and sharing insights) (MN)
Assess web analytics (MN)
Evaluate media's contribution to campaign's effectiveness (MN)
Evaluate digital marketing efforts (MN)
Analyze costs/benefits of direct marketing (MN)
Assess direct-marketing strategy (MN)
Measure results of promotional mix (MN)

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Instructional Area: Selling (SE)

Standard: 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 be equipped to solve customer/ client's problems.
Performance Indicators:
Acquire knowledge of client's products/brands (CS)

Performance Element: Utilize sales processes and techniques to determine and satisfy customer needs.
Performance Indicators:
Pitch marketing communications idea to client (SP)
Present an advertising campaign to clients (SP)

Performance Element: Utilize sales-support activities to increase customer satisfaction.
Performance Indicators:
Provide service after the sale (SP)

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Careers in Marketing Management focus on requiring broad, cross-functional knowledge of marketing and management. These functions include marketing-information management, pricing, product/service management, promotion, and selling.

Instructional Area: Emotional Intelligence (EI)

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

Performance Element: Manage internal and external business relationships to foster positive interactions.
Performance Indicators:
Explain the impact of business customs and practices on global trade (SP)
Describe the nature of business customs and practices in the North American market (SP)
Explain the nature of business customs and practices in Western Europe (SP)
Explain the nature of business customs and practices in Eastern Europe (SP)
Explain the nature of business customs and practices in Latin America (SP)
Describe the nature of business customs and practices in the Pacific Rim (SP)
Discuss the nature of business customs and practices in the Middle East (SP)
Explain the nature of business customs and practices in South Asia (SP)
Describe the nature of business customs and practices in Northern Africa (SP)
Discuss the nature of business customs and practices in Sub-Saharan Africa (SP)

Instructional Area: Financial Analysis (FI)

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

Performance Element: Implement accounting procedures to track money flow and to determine financial status.
Performance Indicators:
Explain the financial implications of product cannibalization (MN)
Determine product-line profitability (MN)

Performance Element: Manage marketing finances to monitor and measure return on marketing investment (ROMI).
Performance Indicators:
Allocate marketing budget (MN)
Calculate return on marketing investment (ROMI) (MN)
Measure cost-effectiveness of marketing expenditures (MN)
Control marketing budget (MN)
Report marketing return on investment (ROMI) (MN)

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Instructional Area: Human Resources Management (HR)

Standard: Understands the tools, techniques, and systems that businesses use to plan, staff, lead, and organize its human resources

Performance Element: Implement organizational skills to facilitate others' work efforts.
Performance Indicators:
Determine internal/external resource requirements and responsibilities for projects (MN)

Performance Element: Utilize techniques to staff an organization or a department within an organization.
Performance Indicators:
Staff key marketing positions (MN)

Performance Element: Manage staff growth and development to increase productivity and employee satisfaction.
Performance Indicators:
Ensure staff understanding of responsibilities, duties, functions, and authority levels (SU)
Supervise marketing positions (SU)
Determine adequacy of training courses (MN)
Assess marketing personnel's ability to react to market developments (MN)

Instructional Area: Information Management (NF)

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

Performance Element: Utilize information-technology tools to manage and perform work responsibilities.
Performance Indicators:
Analyze the impact of technology on marketing (SP)
Use software to automate services (SP)
Use analytical tracking tools (SP)
Use Marketing Operations Management software (i.e., software that automates marketing operations processes) (MN)
Determine types of technology needed by company/agency (MN)

Performance Element: Acquire information to guide business decision-making.
Performance Indicators:
Use analytical software (e.g., SPSS, SAS, Excel, etc.) (SP)

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Instructional Area: Operations (OP)

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

Performance Element: Implement purchasing activities to obtain business supplies, equipment, and resources.
Performance Indicators:
Determine sources of relevant, new marketing data (SP)
Evaluate options to purchase or sell marketing data (SP)
Develop processes to acquire marketing data from external sources (MN)
Purchase marketing data (MN)
Purchase services (MN)

Performance Element: Determine technology security issues to protect customer information and company image.
Performance Indicators:
Maintain security of marketing data (SP)
Explain security considerations in marketing management (SP)
Develop strategies to protect digital data (MN)

Performance Element: Apply operational policies to perform procedures and activities that ensure marketing's efficiency and effectiveness.
Performance Indicators:
Cleanse existing marketing data to maintain relevancy (SP)
Apply marketing analytics (SP)
Identify marketing data needs (MN)
Create dashboards to monitor marketing performance (MN)

Performance Element: Implement organizational skills to improve efficiency and work flow.
Performance Indicators:
Coordinate activities with those of other departments (SP)
Manage cross-functional projects (MN)
Assign work to external partners (MN)
Develop an operational plan of marketing activities/initiatives (MN)

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Performance Element: Utilize business systems to expedite workflow and enhance a business's image.
Performance Indicators:
Document marketing processes (SP)
Define uniform marketing processes to streamline communications (MN)
Improve marketing processes (MN)
Manage system for housing marketing assets (e.g., marketing collateral, promotional items, graphics, letterhead, logos) (MN)
Standardize/automate marketing workflows (MN)
Develop marketing campaign workflows (MN)

Performance Element: Implement expense-control strategies to enhance a business's financial wellbeing.
Performance Indicators:
Track invoices (CS)
Track marketing budgets (MN)
Adjust marketing budget in response to new market opportunities (MN)

Instructional Area: Professional Development (PD)

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

Performance Element: Utilize career-advancement activities to enhance professional development in marketing.
Performance Indicators:
Assess the services of professional organizations in marketing (SP)
Utilize professional development opportunities in marketing (e.g., continuing education courses, certifications, journals, online activities/courses) (SP)
Employ career-advancement strategies in marketing (SP)

Performance Element: Acquire information about marketing management to aid in making career choices.
Performance Indicators:
Explain the nature of marketing management (SP)
Explain career opportunities in marketing management (SP)

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Instructional Area: Strategic Management (SM)

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

Performance Element: Utilize planning tools to guide organization's/department's activities.
Performance Indicators:
Align marketing activities with business objectives (MN)
Provide input into strategic planning (MN)
Conduct gap analysis to determine organization's capability (MN)
Develop departmental structure (MN)
Determine strategic marketing planning structure (MN)

Performance Element: Control an organization's/department's activities to encourage growth and development.
Performance Indicators:
Show the effect of marketing strategy on marketing goals/objectives (MN)
Monitor achievement of marketing objectives (MN)
Set marketing policies (MN)
Establish a marketing cost-control system (MN)
Select metrics for measuring success (MN)
Design a marketing performance measurement system (MN)
Modify marketing strategies based on performance results (MN)

Instructional Area: Channel Management (CM)

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

Performance Element: Develop channel-management strategies to minimize costs.
Performance Indicators:
Establish distribution points (MN)
Develop performance standards for suppliers (MN)
Develop new channels for products/services (MN)
Develop collaborative relationships with channel members (MN)
Develop channel-management strategies (MN)

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Performance Element: Assess channel-management strategies to improve their effectiveness and to minimize their costs.
Performance Indicators:
Monitor distributors' performance standards (MN)
Evaluate buyer-seller relationships (MN)
Assess distribution channels (MN)
Conduct total cost analysis of channel (MN)

Instructional Area: Marketing-Information Management (IM)

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

Performance Element: Assess marketing information needs to develop a marketing-information management system.
Performance Indicators:
Assess marketing-information needs (MN)
Identify issues and trends in marketing-information management systems (MN)
Develop marketing-information management system (MN)

Performance Element: Determine marketing-information needs to communicate issues/problems/questions to others.
Performance Indicators:
Write marketing research briefs (MN)

Performance Element: Scrutinize analytical patterns to make informed marketing decisions.
Performance Indicators:
Identify industry/economic trends that will impact business activities (MN)
Analyze market needs and opportunities (MN)
Anticipate market changes (MN)
Determine current market position (MN)

Performance Element: Employ marketing-information to aid in making and evaluating channel-management decisions.
Performance Indicators:
Collect product quality data to aid in making channel-management decisions (SP)
Track channel management cost data (SP)
Obtain and track information about domestic and foreign suppliers/manufacturers (SP)

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Performance Element: Report findings to communicate research information to others.
Performance Indicators:
Display data in charts/graphs or in tables (SP)
Provide sales analysis reports (SP)
Prepare and use presentation software to support reports (SP)
Prepare written reports for decision-making (SP)

Performance Element: Interpret analytical patterns to predict/analyze consumer behavior.
Performance Indicators:
Predict demand patterns (MN)
Conduct demand analysis (MN)
Forecast changes in customer expectations (MN)
Evaluate product usage (MN)
Analyze purchasing behavior (MN)
Estimate repeat purchase rate (MN)
Estimate purchase cycle (MN)
Determine attitudes and behaviors towards products and brands (MN)
Conduct customer-satisfaction studies (MN)
Analyze service sensitivity (MN)

Performance Element: Apply pricing information to facilitate pricing decisions.
Performance Indicators:
Determine price sensitivity (MN)

Performance Element: Analyze marketing information to facilitate product/service management decisions.
Performance Indicators:
Measure brand equity (MN)
Measure brand value (MN)
Measure customer loyalty (MN)
Predict brand share (MN)
Estimate market share (MN)
Conduct needs gap analysis (MN)
Conduct product analysis (MN)
Evaluate competitive products (MN)
Conduct product/brand situation analysis (MN)
Identify new-product opportunities (MN)
Determine needed product adaptations (MN)
Test product concepts (MN)
Design and conduct product tests (MN)
Evaluate potential growth and niche opportunities (MN)
Conduct service-quality studies (MN)
Prepare trend analyses (MN)

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Performance Element: Manage marketing information to guide and assess promotional activities.
Performance Indicators:
Measure media audience (SP)
Leverage data to recommend personalized, relevant campaigns (SP)
Leverage data to support real-time customization of customer interactions (SP)
Evaluate promotional activity (MN)

Performance Element: Assess quality of marketing-research activities to determine needed improvements.
Performance Indicators:
Evaluate quality of marketing research studies (e.g., sampling, validity/reliability, bias, etc.) (MN)
Evaluate the appropriateness of the research design for the research problem, issue, or opportunity (MN)
Assess satisfaction with contracted research firms (MN)

Instructional Area: Market Planning (MP)

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

Performance Element: Utilize planning tools to guide marketing's activities.
Performance Indicators:
Align sales and marketing plans (MN)
Evaluate market opportunities (MN)

Instructional Area: Pricing (PI)

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

Performance Element: Employ pricing strategies to determine optimal pricing.
Performance Indicators:
Determine cost of product (breakeven, ROI, markup) (MN)
Calculate break-even point (MN)
Establish pricing objectives (MN)
Select pricing policies (MN)
Determine discounts and allowances that can be used to adjust base prices (MN)
Determine terms of trading (MN)
Set prices (MN)
Adjust prices to maximize profitability (MN)

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Performance Element: Assess pricing strategies to identify needed changes and to improve profitability.
Performance Indicators:
Ensure price fairness (MN)
Assess changes in price structure (MN)
Analyze variances to planned pricing (MN)
Evaluate pricing decisions (MN)

Instructional Area: Product/Service Management (PM)

Standard: 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 Indicators:
Determine the impact of product standards' issues associated with global business (SP)

Performance Element: Employ product-development processes to maintain up-to-date product pipeline.
Performance Indicators:
Explain new product-development processes (SP)
Determine product-development objectives (MN)
Evaluate and process innovations (MN)

Performance Element: Employ product-mix strategies to meet customer expectations.
Performance Indicators:
Analyze product needs and opportunities (MN)
Adapt product range to needs of targeted market segments (MN)
Develop product search methods (MN)
Determine product priorities (MN)
Monitor market innovations (MN)

Performance Element: Plan product/service management activities to facilitate product development.
Performance Indicators:
Create a product/brand plan (MN)
Plan/Manage product/brand lifecycle (MN)
Develop new-product launch plan (MN)
Coordinate product launches (MN)

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Performance Element: Assess product/service management activities to increase profitability.
Performance Indicators:
Evaluate alternative marketing techniques and procedures for achieving product-development objectives (MN)
Evaluate product mix (MN)
Assess product-development activities (MN)
Evaluate product/service launches (MN)
Measure brand performance (MN)
Conduct product/brand audit (MN)

Performance Element: Assess product packaging to improve its function and to improve its brand recognition.
Performance Indicators:
Assess product-packaging requirements (SP)
Evaluate graphic design on packages (SP)
Evaluate adequacy of product packaging (SP)
Conduct reviews of product packaging (MN)

Performance Element: Position products/services to acquire desired business image.
Performance Indicators:
Develop positioning concept for a new product idea (SP)
Communicate core values of product/service (SP)
Identify product's/service's competitive advantage (SP)
Develop strategies to protect brand’s reputation (MN)
Define brand strategy (MN)
Align branding strategies to ensure consistent end-to-end communications and actions (MN)
Use co-branding strategies (MN)
Leverage product's/service's competitive advantage (MN)
Determine brand reputation (MN)
Determine brand identity (MN)
Design brand experience (MN)
Identify need to rebrand (MN)

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Instructional Area: Promotion (PR)

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

Performance Element: Understand design principles to be able to communicate needs to designers.
Performance Indicators:
Describe the use of color in advertisements (SP)
Describe the elements of design (SP)
Explain the use of illustrations in advertisements (SP)
Discuss the nature of typography (SP)
Explain type styles used in advertisements (SP)
Describe effective advertising layouts (SP)
Identify types of drawing media (SP)
Explain the impact of color harmonies on composition (SP)
Describe digital color concepts (SP)

Performance Element: Participate in company's community outreach involvement to foster a positive company image and to meet other professionals.
Performance Indicators:
Explain the importance of company involvement in community activities (SP)
Propose community issues for company involvement (SP)
Participate in community outreach activities (SP)

Performance Element: Plan marketing communications to maximize effectiveness and to minimize costs.
Performance Indicators:
Explain the nature of a promotional plan (SP)
Coordinate activities in the promotional mix (SP)
Develop communications objectives (MN)
Develop promotional-mix activities (MN)
Develop advertising plans to achieve communications objectives (MN)
Develop sales promotion plan to achieve communications objectives (MN)
Develop public relations/publicity plan to achieve communications objectives (MN)

Performance Element: Utilize outside agency/consultant to aid in promotional planning and development.
Performance Indicators:
Create written briefs for outside agencies/consultants (SP)
Assess outside agency/consultant relationships (MN)

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Performance Element: Evaluate long-term and short-term results of promotional efforts.
Performance Indicators:
Identify ways to track marketing-communications activities (SP)
Select metrics to measure effectiveness of marketing communications (MN)
Implement metrics to assess results of promotional efforts (MN)
Evaluate allocation of promotional effort (MN)

Instructional Area: Selling (SE)

Standard: 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: Guide sales staff to improve their success rate and to minimize staff turnover.
Performance Indicators:
Explain the nature of the sales staff's induction program (SU)
Conduct knowledge gap analysis of sales staff (SU)
Analyze sales staff activity and results (SU)

Performance Element: Influence sales procedures/activities to improve return on investment.
Performance Indicators:
Monitor sales management's ability to conduct customer-service operations (MN)
Assess sales staff's compensation package (MN)
Support sales operations (MN)

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Careers in Marketing Research focus on utilizing qualitative and quantitative research methods to determine information needs, design data-collection processes, collect data, analyze data, and present data to be used to make business decisions.

Instructional Area: Information Management (NF)

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

Performance Element: Utilize information-technology tools to manage and perform work responsibilities.
Performance Indicators:
Assess the impact of technology on marketing research (SP)
Use analytical tracking tools (SP)
Determine types of technology needed by company/agency for marketing research (MN)

Performance Element: Acquire information to guide business decision-making.
Performance Indicators:
Identify emerging customer trends through social networking (SP)
Use analytical software (e.g., SPSS, SAS, Excel, etc.) (SP)

Instructional Area: Operations (OP)

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

Performance Element: Implement purchasing activities to obtain business supplies, equipment, and resources.
Performance Indicators:
Purchase information services (MN)

Performance Element: Determine technology security issues to protect customer information and company image.
Performance Indicators:
Explain security considerations in marketing research (SP)
Maintain security of marketing data (SP)
Develop strategies to protect digital data (MN)

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Instructional Area: Professional Development (PD)

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

Performance Element: Acquire information about the marketing research industry to aid in making career choices.
Performance Indicators:
Identify career opportunities in marketing research (SP)
Explain the role and responsibilities of marketing researchers (SP)

Performance Element: Utilize career-advancement activities to enhance professional development in marketing research.
Performance Indicators:
Determine professional certification requirements in marketing research (SP)
Assess the services of professional organizations in marketing research (SP)

Instructional Area: Strategic Management (SM)

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

Performance Element: Utilize planning tools to guide organization's/department's activities.
Performance Indicators:
Provide input into strategic planning (MN)

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Instructional Area: Marketing-Information Management (IM)

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

Performance Element: Assess marketing information needs to develop a marketing-information management system.
Performance Indicators:
Assess marketing-information needs (MN)
Identify issues and trends in marketing research (MN)
Develop marketing-information management system (MN)

Performance Element: Monitor business data to stay abreast of trends and changes that could impact business decision-making.
Performance Indicators:
Obtain information from customer databases (SP)
Maintain information on marketing partners' activities (e.g., vendors, others in supply/distribution channels) (SP)
Identify challenges with the use of unstructured data (SP)
Obtain marketing information from online sources (e.g., search engines, online databases, blogs, forums, listserves, web analytics, social media, geolocation services, etc.) (SP)
Conduct sentiment analysis (SP)
Obtain marketing information from publications (e.g., newspapers, magazines--current trends, regulations, consumer issues) (SP)
Collect product quality data (e.g., customer complaints, returns, quality control) (SP)
Data mine clickstream data using web analytics for marketing information (SP)
Track environmental changes that impact a business (e.g., technological changes, consumer trends, economic changes, regulatory changes, etc.) (SP)
Monitor and mine sales data (by volume, product, territory, channel, time period, etc.) (SP)
Identify transactional data through electronic means (e.g., bar coding, optical scanners, automatic replenishment systems, electronic data interchange [EDI], and reader-sorters) (SP)
Monitor competitors' activities (SP)
Develop insights using trends occurring in other industries (SP)
Track brand health (MN)
Measure market size and composition (SP)
Monitor inventory data (MN)
Track cost data (MN)

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Performance Element: Determine the need for and value of marketing research to optimize use of business resources.
Performance Indicators:
Explain the nature of actionable research (SP)
Compare business objectives with the expected use of the marketing-research outcomes (SP)
Identify the marketing-research problem/issue (MN)
Translate business problems/challenges into research objectives (MN)
Evaluate the relationship between the research purpose and the marketing research objectives (MN)
Estimate the value of the research information (MN)
Determine appropriate level and depth of information needed for decision-making (MN)
Select research method appropriate for the research problem (i.e., exploratory, descriptive, or causal) (MN)
Determine research approaches (e.g., observation, survey, experiment; quantitative or qualitative) appropriate to the research problem (MN)

Performance Element: Determine who and how many respondents are needed for marketing research findings to adequately represent the population's views.
Performance Indicators:
Explain the nature of the sampling design process (SP)
Explain the nature of sample sources (e.g., MR sampling companies, general list brokers, customer lists) (SP)
Select sample sources in marketing research (SP)
Discuss sampling issues with international marketing research projects (SP)
Explain sampling techniques for probability and non-probability samples (SP)
Discuss sampling techniques and issues associated with Internet sampling (SP)
Describe statistical concepts associated with sampling (SP)
Minimize threats to validity (MN)
Determine how to improve response rates (MN)
Select methods to compensate for non-response (MN)
Select sampling technique (MN)
Design sample for qualitative marketing-research study (MN)
Develop sampling plans (i.e., who, how many, how chosen) (MN)
Execute sampling process (MN)

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Performance Element: Determine how to obtain needed data to address the business problem/issue.
Performance Indicators:
Select data-collection methods (e.g., observations, mail, telephone, Internet, online communities, social media, virtual platforms, discussion groups, interviews, case studies, text analyses, scanners) (MN)
Select measurement scales (i.e., nominal, ordinal, interval, ratio) (MN)
Plan marketing research study (MN)
Write marketing research proposals (MN)

Performance Element: Develop data-collection instruments to facilitate data-collection process.
Performance Indicators:
Describe types of rating scales (including Likert scales, semantic differential scales, behavior intention scales, etc.) (SP)
Develop rating scales (including Likert scales, semantic differential scales, behavior intention scales, etc.) (MN)
Determine questions to ask to elicit needed data for marketing research problem/issue (MN)
Identify questionnaire design issues for international marketing research projects (MN)
Create simple questionnaires (e.g., types of questions, question wording, routing, sequencing, length, layout) (MN)
Test questionnaire prior to full implementation (MN)
Prepare diaries (e.g., product, media-use, contact) (MN)
Develop discussion guide for a qualitative marketing-research study (MN)
Develop screener for a qualitative marketing-research study (MN)
Control sources of error and bias in data-collection instrument (e.g., response errors, interviewer errors, sample design) (MN)

Performance Element: Collect marketing-research data to answer research questions or to resolve issues.
Performance Indicators:
Apply approaches to increase participant cooperation with data collection (SP)
Administer questionnaires (SP)
Conduct telephone interviews (SP)
Employ techniques to assess ongoing behavior (e.g., business records; manual record sheets; electronic recording devices for telephone, personal, and computer interviewing; smart cards; video recording) (SP)
Test alternatives (e.g., web pages, ads, appeals, etc.) (SP)
Conduct in-depth interviews (SP)
Conduct focus groups (MN)
Conduct continuous panel research (MN)
Conduct test markets (MN)
Conduct experiments (e.g., lab and field experiments) (MN)

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Performance Element: Process data to translate marketing information into useful insights/knowledge.
Performance Indicators:
Edit/clean research data (SP)
Code research data (SP)
Apply methods to treat missing data (SP)
Conduct error detection/edit routines (SP)
Transcribe conversations/interviews (SP)
Tabulate data (SP)
Create data matrix (SP)
Select and use appropriate data support systems (SP)
Analyze narrative text (e.g., sorting, classifying/categorizing, identifying patterns, interpreting, selecting mechanical analysis approaches) (SP)

Performance Element: Apply statistical methods and software systems to aid in data interpretation.
Performance Indicators:
Set confidence levels (SP)
Test for relationships (SP)
Test for associations (SP)
Test for significant differences (SP)
Use statistical inferences to make estimates or to test hypotheses (SP)
Identify types of modeling techniques (SP)
Apply mathematical modeling techniques (SP)

Performance Element: Interpret research data into information for decision-making.
Performance Indicators:
Interpret descriptive statistics for marketing decision making (SP)
Interpret correlations (SP)
Determine issues associated with interpretation of international marketing research data (MN)
Translate findings into actionable business recommendations (MN)

Performance Element: Report findings to communicate research information to others.
Performance Indicators:
Display data in charts/graphs or in tables (SP)
Write executive summary of research report (SP)
Prepare and use presentation software to support reports (SP)
Present findings orally (SP)
Prepare written reports for decision-making (SP)
Post marketing research results electronically (SP)

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Performance Element: Interpret analytical patterns to predict/analyze consumer behavior.
Performance Indicators:
Predict demand patterns (MN)
Conduct demand analysis (MN)
Evaluate product usage (MN)
Analyze purchasing behavior (MN)
Determine attitudes and behaviors towards products and brands (MN)
Conduct customer-satisfaction studies (MN)
Analyze and segment consumer behaviors in various markets (MN)

Performance Element: Apply pricing information to facilitate pricing decisions.
Performance Indicators:
Determine price sensitivity (MN)
Determine optimal prices (MN)

Performance Element: Analyze marketing information to facilitate product/service management decisions.
Performance Indicators:
Conduct product analysis (MN)
Evaluate competitive products (MN)
Identify new-product opportunities (MN)
Test product concepts (MN)
Design and conduct product tests (MN)
Conduct service-quality studies (MN)
Prepare trend analyses (MN)
Recommend needed product adaptations (MN)
Conduct segmentation studies to understand how to segment markets (MN)

Performance Element: Manage marketing information to guide and assess promotional activities.
Performance Indicators:
Pre-test promotional campaign (e.g., advertising, direct marketing, etc.) (SP)
Measure media audience (SP)
Measure response rates (SP)
Conduct advertising tracking studies (SP)

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Performance Element: Assess quality of marketing-research activities to determine needed improvements.
Performance Indicators:
Evaluate quality of marketing research studies (e.g., sampling, validity/reliability, bias, etc.) (MN)
Evaluate the appropriateness of the research design for the research problem, issue, or opportunity (MN)
Assess satisfaction with contracted research firms (MN)
Measure the impact of marketing research (MN)
Suggest improvements to marketing-research activities (MN)
Manage issues associated with international marketing research studies (MN)

Performance Element: Compare marketing research proposals to select agency providing most value.
Performance Indicators:
Evaluate proposed research methodology (MN)
Determine which agency shows the best insight into the research issue (MN)
Determine the level of commentary/analysis the agency will provide on the findings (MN)

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Careers in Merchandising focus on efficient and effective product planning, product selection, buying, licensing, and inventory control.

Instructional Area: Economics (EC)

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

Performance Element: Understand global trade's impact to aid business decision-making.
Performance Indicators:
Identify the effects of global trade on retailing (SP)
Explain current retail trends driven by global trade (SP)

Instructional Area: Human Resources Management (HR)

Standard: Understands the tools, techniques, and systems that businesses use to plan, staff, lead, and organize its human resources

Performance Element: Manage staff growth and development to increase productivity and employee satisfaction.
Performance Indicators:
Conduct product “show and tell” (SU)
Conduct contests to motivate employees (SU)
Hold special events for employees (SU)

Instructional Area: Information Management (NF)

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

Performance Element: Utilize information-technology tools to manage and perform merchandising responsibilities.
Performance Indicators:
Analyze the impact of technology on retailing (SP)
Utilize merchandising software (SP)
Obtain information from retail databases to aid in product planning and control (SP)

Performance Element: Maintain marketing information to facilitate merchandising activities.
Performance Indicators:
Maintain purchase orders (SP)
Maintain order logs (SP)

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Instructional Area: Marketing (MK)

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

Performance Element: Acquire an understanding of marketing's role and function in business to facilitate work among departments.
Performance Indicators:
Distinguish between retailing and marketing (CS)
Explain the importance of merchandising to retailers (CS)

Instructional Area: Operations (OP)

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

Performance Element: Implement security policies/procedures to minimize chance for loss.
Performance Indicators:
Explain policies/procedures for handling shoplifters (CS)
Devise/Enact merchandise security measures to minimize inventory shrinkage (SP)

Performance Element: Implement organizational skills to improve efficiency and work flow.
Performance Indicators:
Follow up orders (CS)
Coordinate activities with those of other departments (SP)

Performance Element: Prepare registers/terminals for sales operations.
Performance Indicators:
Prepare cash drawers/banks (CS)
Open/Close register/terminal (CS)

Performance Element: Acquire foundational knowledge of distribution to understand its role in retailing.
Performance Indicators:
Explain distribution issues and trends (SP)
Discuss the use of electronic data interchange (EDI) (SP)

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Performance Element: Utilize order-fulfillment processes to move product through the supply chain.
Performance Indicators:
Explain the relationship between customer service and distribution (CS)
Use an information system for order fulfillment (CS)
Fulfill orders (CS)
Analyze capabilities of electronic business systems to facilitate order fulfillment (MN)
Assess order fulfillment processes (MN)

Performance Element: Implement receiving processes to ensure accuracy and quality of incoming shipments.
Performance Indicators:
Explain the receiving process (CS)
Explain stock-handling techniques used in receiving deliveries (CS)
Process incoming merchandise (CS)
Resolve problems with incoming shipments (CS)
Establish receiving schedules (MN)

Performance Element: Utilize stock-handling procedures to process incoming inventory.
Performance Indicators:
Attach source and anti-theft tags (CS)
Price mark merchandise (CS)
Make and record price changes (SP)
Identify hang-tag needs (SP)
Assign codes to each product item (SP)
Route stock to sales floor (CS)
Rotate stock (CS)
Process returned/damaged product (CS)
Transfer stock to/from branches (SP)
Enter product descriptions into a PoS system (SP)
Manage markdown process (MN)

Performance Element: Utilize warehousing procedures to store inventory until needed.
Performance Indicators:
Explain storing considerations (CS)
Explain the nature of warehousing (CS)
Store inventory (CS)
Select appropriate storage equipment (MN)
Plan storage space (MN)

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Performance Element: Understand transportation processes to move products through the supply chain.
Performance Indicators:
Explain shipping processes (CS)
Identify factors considered when selecting best shipping method (SP)

Performance Element: Utilize inventory-control methods to minimize costs and to meet customer demand.
Performance Indicators:
Maintain inventory levels (CS)
Report out-of-stocks (CS)
Complete inventory counts (CS)
Monitor merchandise classification system (SP)
Allocate merchandise to stores/regions (SP)
Track stock by location for department/class/vendor level (SP)
Describe inventory control systems (CS)
Explain types of unit inventory-control systems (SP)
Determine inventory shrinkage (SP)
Maintain inventory-control systems (SP)
Implement category management process (SP)
Plan merchandise flow (turnover, lead time, peak seasons, delivery dates, etc.) (MN)
Develop inventory-control systems (MN)

Performance Element: Manage distribution activities to minimize costs and to determine distribution strategies.
Performance Indicators:
Ensure timely delivery of advertised merchandise (SP)
Allocate shelf space (MN)
Develop collaborative relationships with channel members in retailing (MN)
Interpret channel strategies (MN)
Establish system for processing dead/excess merchandise (MN)

Performance Element: Assess distribution strategies to improve their effectiveness and to minimize their costs.
Performance Indicators:
Identify new vendors (MN)
Assess sales and stock performance (MN)
Conduct inventory valuation (LIFO, FIFO) (MN)
Evaluate inventory status/performance (stock turnover, gross margin, return on inventory, open to buy, etc.) (MN)

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Instructional Area: Professional Development (PD)

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

Performance Element: Acquire information about merchandising to aid in making career choices.
Performance Indicators:
Explain the evolution of retailing (CS)
Describe the role of merchandisers in retailing (CS)

Performance Element: Understand career opportunities in retailing to make career decisions.
Performance Indicators:
Identify career opportunities in retailing (CS)
Explain career opportunities in merchandising (CS)

Instructional Area: Marketing-Information Management (IM)

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

Performance Element: Apply pricing information to facilitate pricing decisions.
Performance Indicators:
Determine price sensitivity (MN)

Performance Element: Utilize marketing information to drive merchandising activities.
Performance Indicators:
Analyze information from suppliers (SP)
Scan marketplace to identify factors that could influence merchandising decisions (SP)
Analyze competitors' offerings (SP)
Reconcile marketing plans with assortment and financial plans (MN)
Assess trading area (MN)

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Instructional Area: Market Planning (MP)

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

Performance Element: Employ marketing information to determine and meet customer needs.
Performance Indicators:
Profile target customer (MN)
Determine market needs (MN)
Determine customer demand for merchandise (MN)

Instructional Area: Pricing (PI)

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

Performance Element: Employ pricing strategies to determine optimal pricing.
Performance Indicators:
Select approach for setting a base price (cost, demand, competition) (MN)
Determine cost of product (breakeven, ROI, markup) (MN)
Calculate break-even point (MN)
Describe pricing strategies (MN)
Select pricing strategies (MN)
Set prices (MN)
Adjust prices to maximize profitability (MN)
Develop seasonal pricing strategies (MN)

Performance Element: Assess pricing strategies to identify needed changes and to improve profitability.
Performance Indicators:
Ensure price fairness (MN)
Assess changes in price structure (MN)
Analyze variances to planned pricing (MN)
Evaluate pricing decisions (MN)

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Instructional Area: Product/Service Management (PM)

Standard: 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 Indicators:
Determine the impact of product standards' issues associated with global business (SP)

Performance Element: Utilize assortment-mix strategies to create maximum mix of products at minimum cost.
Performance Indicators:
Obtain samples (SP)
Determine quality of merchandise to offer (SP)
Determine width and depth of assortment strategies (MN)
Select mix of brands (MN)
Plan merchandise assortment (e.g., styling, sizes, quantities, colors) (SP)
Identify new private brand opportunities (MN)
Develop seasonal assortment strategies (MN)
Develop style out strategy (MN)

Performance Element: Develop merchandise plans (budgets) to guide selection of retail products.
Performance Indicators:
Explain the nature of merchandise plans (budgets) (SP)
Calculate open-to-buy (SP)
Create/maintain daily sales plan (SP)
Identify emerging trends (SP)
Plan stock (SP)
Plan reductions (e.g., anticipated markdowns, employee/other discounts, stock shortages) (SP)
Plan purchases (SP)
Compare and contrast buying from domestic sources with that of foreign sources (SP)
Determine final cost of purchases from domestic and international sources (SP)
Plan gross margin (MN)
Prepare merchandising plans (budgets) (MN)

Performance Element: Perform buying activities to obtain products for resale.
Performance Indicators:
Write purchase orders (SP)
Analyze the use of central buying (SP)
Determine stock turnover (SP)
Determine what to buy/reorder (SP)
Determine quantities to buy/reorder (SP)
Determine when to buy/reorder (SP)
Establish reorder points (SP)

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Performance Element: Analyze vendor performance to choose vendors and merchandise.
Performance Indicators:
Evaluate vendors' merchandise (SP)
Choose vendors (SP)
Negotiate terms with suppliers (SP)

Performance Element: Position products/services to acquire desired business image.
Performance Indicators:
Identify components of a retail image (SP)
Implement techniques to increase customer's product exposure (MN)
Obtain product exclusives (MN)

Instructional Area: Promotion (PR)

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

Performance Element: Advertise to communicate promotional messages to targeted audiences.
Performance Indicators:
Proof ads (SP)
Analyze ad performance (MN)

Performance Element: Utilize special events to increase sales.
Performance Indicators:
Plan special events (SP)
Prepare store/department for special event (SP)

Performance Element: Employ visual merchandising techniques to increase interest in product offerings.
Performance Indicators:
Explain the use of visual merchandising in retailing (CS)
Distinguish between visual merchandising and display (CS)
Place merchandise for impact (SP)
Determine on-floor assortments (SP)
Use cross-merchandising techniques (SP)
Read/Implement planograms (SP)
Create planograms (MN)

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Performance Element: Implement display techniques to attract customers and increase sales potential.
Performance Indicators:
Explain types of display arrangements (CS)
Maintain displays (CS)
Dismantle/Store displays/display fixtures/forms (CS)
Create promotional signs (SP)
Select and use display fixtures/forms (SP)
Use lighting to highlight products (SP)
Set up point-of-sale displays and handouts (SP)
Create displays (SP)

Performance Element: Manage promotional activities to maximize return on promotional efforts.
Performance Indicators:
Develop promotional calendar (SP)
Plan/Schedule displays/themes with management (SP)
Execute seasonal vendor co-op participation plans (MN)
Develop visual presentation guidelines (MN)
Plan promotional strategy (promotional objectives, budget, promotional mix, etc.) (MN)
Measure success of promotional efforts (MN)

Instructional Area: Selling (SE)

Standard: 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 Indicators:
Explain the use of brand names in selling (CS)

Performance Element: Employ sales processes and techniques to enhance customer relationships and to increase the likelihood of making sales.
Performance Indicators:
Establish relationship with customer/client (CS)
Determine customer/client needs (CS)
Recommend specific product (CS)
Demonstrate good/service (SP)
Convert customer/client objections into selling points (SP)
Close the sale (SP)
Demonstrate suggestion selling (SP)
Plan follow-up strategies for use in retail selling (SP)

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Performance Element: Implement support activities to facilitate the selling process.
Performance Indicators:
Arrange delivery of purchases (CS)
Pack and wrap purchases (CS)
Process special orders for retail sales (CS)
Sell gift certificates (CS)
Process retail telephone orders (CS)
Process returns/exchanges (CS)
Process retail sales documentation (SP)

Performance Element: Collect payment from customer to complete customer transaction.
Performance Indicators:
Calculate miscellaneous charges for retail sales (CS)
Process sales transactions (CS)
Accept checks from customers (CS)
Operate register/terminal (CS)

Performance Element: Guide sales staff to improve their success rate and to minimize staff turnover.
Performance Indicators:
Provide information about incoming merchandise to sales staff (SP)
Monitor on-floor selling activities (SP)

Performance Element: Control sales activities to meet sales goals/objectives.
Performance Indicators:
Analyze sales performance (MN)

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Careers in Professional Selling focus on offering services, equipment, machines, supplies, parts, and finished goods to other businesses to use for business operations, for the manufacture of other products, for samples passed on to others, or for resale/provision to others. These occupations require in-depth knowledge of the target customer such as the customer's needs, business, competitors, and products; pre-sales activities; sales processes and techniques; and servicing after the sale.

Instructional Area: Customer Relations (CR)

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

Performance Element: Foster positive relationships with customers to enhance sales.
Performance Indicators:
Use social media to enhance customer post-sales experience (CS)

Instructional Area: Professional Development (PD)

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

Performance Element: Acquire information about the sales industry to aid in making career choices.
Performance Indicators:
Explain the nature of professional selling (SP)
Explain employment opportunities in professional selling (SP)
Discuss the economic and social effects of professional selling (SP)

Performance Element: Utilize career-advancement activities to enhance professional development in professional selling.
Performance Indicators:
Identify professional certification requirements available for professional salespeople (SP)
Assess the services of professional organizations in selling (SP)

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Instructional Area: Marketing-Information Management (IM)

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

Performance Element: Process marketing information to test hypotheses and/or to resolve issues.
Performance Indicators:
Analyze market information (SP)

Performance Element: Employ marketing information to plan marketing activities.
Performance Indicators:
Describe the use of target marketing in professional selling (SP)

Instructional Area: Selling (SE)

Standard: 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 activities to show command of their nature and scope.
Performance Indicators:
Explain the impact of sales and buying cycles (SP)
Describe the impact that digital communication is having on selling (SP)

Performance Element: Acquire product knowledge to communicate product benefits and to ensure appropriateness of product for the customer.
Performance Indicators:
Differentiate between consumer and organizational buying behavior (SP)
Identify emerging trends for use in selling (SP)

Performance Element: Perform pre-sales activities to facilitate sales presentation.
Performance Indicators:
Explain the use of marketing-research information in professional selling (SP)
Prospect for customers (SP)
Conduct preliminary customer/client qualification (SP)
Conduct pre-visit research (e.g., customer's markets/products, customer's competitors, and competitors' offerings) (SP)
Determine sales strategies (SP)
Book appointments with prospective clients (SP)
Prepare sales presentation (SP)
Prepare and/or assemble sales materials (SP)

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Performance Element: Employ sales processes and techniques to enhance customer relationships and to increase the likelihood of making sales.
Performance Indicators:
Build rapport and credibility with prospect (SP)
Respond appropriately to prospect's individual personality type (SP)
Determine prospect's buying motives for use in selling (SP)
Facilitate prospect's buying decisions (SP)
Question/probe to acquire understanding of prospect [priorities, problems, trends, issues, corporate aims and objectives, processes, buying process and criteria, and trading preferences] (SP)
Assess prospect's needs in relation to product offering (SP)
Propose solution to prospect's needs/challenges (sales talk, sales proposal presentation) (SP)
Demonstrate product solution for prospect's needs (SP)
Convert customer/client objections into selling points (SP)
Close the sale (SP)
Negotiate sales terms/agreement (SP)
Oversee fulfillment/completion of sale (SP)
Sell good/service/idea to individuals (SP)
Sell good/service/idea to groups (SP)

Performance Element: Process the sale to complete the exchange.
Performance Indicators:
Calculate miscellaneous charges (CS)
Process special orders (CS)
Process telephone orders (CS)
Process sales documentation (SP)

Performance Element: Conduct sales-support activities to meet prospect's needs/requirements.
Performance Indicators:
Write product/service proposal (SP)
Present proposal (SP)

Performance Element: Conduct post-sales follow-up activities to foster ongoing relationships with customers.
Performance Indicators:
Plan follow-up strategies for use in selling (SP)
Prepare sales reports (SP)
Provide post-sales service (SP)
Gather customer/client feedback to improve service (SP)
Conduct self-assessment of sales performance (SP)
Maintain ongoing relationship with client (SP)

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Performance Element: Plan sales activities to increase sales efficiency and effectiveness.
Performance Indicators:
Plan strategies for meeting sales quotas (SP)
Develop strategies to win back former customers (SP)
Develop a sales-call pattern (MN)
Establish sales terms (MN)
Explain the nature of key account management (SP)
Identify key accounts (MN)
Design/Implement a key account plan (MN)
Prepare and implement sales plans (MN)

Performance Element: Staff sales force to meet customer and organizational objectives.
Performance Indicators:
Determine structure of sales department/unit (MN)
Determine sales force size (MN)
Recruit/Hire salespeople (MN)
Establish sales territories (MN)

Performance Element: Guide sales staff to improve their success rate and to minimize staff turnover.
Performance Indicators:
Explain the nature of sales management (SU)
Adapt leadership style for salesperson (MN)
Identify sales-training needs (MN)
Conduct sales training (MN)
Determine strategies to motivate sales staff (MN)
Conduct field accompaniments (MN)
Conduct sales meetings (MN)

Performance Element: Control sales activities to meet sales goals/objectives.
Performance Indicators:
Set sales quotas (MN)
Analyze sales reports (MN)
Monitor sales performance (MN)
Manage salesperson's underperformance (MN)
Design incentive programs (MN)
Control sales plans (MN)

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