Market Planning

Promotion

Data

Selling

Customer Relations

Strategy

Marketing Principles

MBA *Research*
& Curriculum Center

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Marketing Principles
(Standard)

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Course Narrative and Introduction to
Marketing Principles
(Standard)

Section 1

Introduction to *Marketing Principles (Standard)*

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

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

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

The pace at which marketing activities are changing has accelerated due to environmental shifts taking place in the business world: downsizing, outsourcing, off-shoring, mergers, global competition, world markets, and technological innovations. These changes impact the skills, attitudes, and abilities needed for success in today's workplace. Effective Marketing Education provides those skills.

To that end, the *Marketing Principles (Standard)* course has been developed to introduce students to marketing functions and their application and impact on business operations.

Goals

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

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

Program of Study

Marketing Principles (Standard) is a component of the MBA Research 4- and 3-Credit Standard Marketing Programs of Study.

Credit

1 unit

Grade Level

11

Prerequisites

Prior knowledge of and experience with introductory business/marketing concepts and skills is strongly recommended as a prerequisite to *Marketing Principles (Standard).*

Student Characteristics

Marketing Principles (Standard) is targeted at typical students as well as ESL students and other students with special needs. Students in the course represent a cross section of the student body in terms of gender, race, and ethnicity, are 16- to 17-years old, and have an interest in pursuing a career in marketing.

Course Description & Learning Outcomes

Section 2

Course Description

Marketing Principles (Standard) introduces students to the dynamic processes and activities in marketing. The course develops student understanding and skills in the functional areas of marketing, as well as business law, communication skills, customer relations, economics, human resources management, and operations. Current technology will be used to acquire information and to complete activities. Throughout the course, students are presented ethical dilemmas and problem-solving situations for which they must apply academic and critical-thinking skills.

Instructional Area: Business Law (BL)

Performance Element: Apply knowledge of business ownership to establish and continue business operations.

Performance Indicator: BL:003 Explain types of business ownership (CS) LAP-BL-001
   Objectives:
   a. Define the following terms: sole proprietorship, partnership, corporation, merger, consolidation, expansion, franchise, limited-liability company, product trade-name franchise, and business-format franchise.
   b. List two types of businesses that would probably use a sole proprietorship form of ownership.
   c. Cite the purposes of forming a partnership.
   d. List two types of partnership arrangements.
   e. Describe the process for forming a corporation.
   f. Describe three types of corporations.
   g. Explain three ways in which corporations grow.
   h. Describe the advantages and disadvantages of sole proprietorships.
   i. Describe the advantages and disadvantages of partnerships.
   j. Discuss the advantages and disadvantages of corporations.
   k. Describe the importance of franchises in our society.
   l. Explain factors which affect the choice of ownership form.

Instructional Area: Channel Management (CM)

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

Performance Indicator: CM:001 Explain the nature and scope of channel management (CS)
LAP-CM-002
Objectives:
a. Define the following terms: channel, channel intensity, channel length, distribution patterns, exclusive distribution, selective distribution, and intensive distribution.
b. Explain how channel members add value.
c. Discuss channel functions (e.g., information, promotion, contact, matching, negotiation, financing, and risk taking).
d. Explain key channel tasks (e.g., marketing, packaging, financing, storage, delivery, merchandising, and personal selling).
e. Describe when a channel will be most effective.
f. Distinguish between horizontal and vertical conflict.
g. Describe channel management decisions (i.e., selecting channel members, managing and motivating channel members, and evaluating channel members).
h. Explain channel design decisions (i.e., analyzing customer needs, setting channel objectives, identifying major alternatives—types of intermediaries, number of intermediaries, responsibilities of intermediaries).
i. Discuss the relationship between the product being distributed and the pattern of distribution it uses.

Performance Indicator: CM:003 Explain the nature of channels of distribution (CS) LAP-CM-003
Objectives:
a. Define the following terms: channels of distribution, producer, ultimate consumer, industrial user, middlemen, intermediaries, retailers, wholesalers, agents, direct channels, and indirect channels.
b. Identify types of channel members/intermediaries/middlemen.
c. Explain the importance of middlemen in the channel of distribution.
d. Describe types of channels for consumer goods and services.
e. Describe types of channels for industrial goods and services.

Performance Indicator: CM:004 Describe the use of technology in the channel management function (CS)
Objectives:
a. Identify ways that the use of technology impacts the channel management function.
b. Explain specific applications of technology in channel management.
c. Discuss ways that the use of technology in channel management impacts relationships with channel members.
d. Explain ways that the use of technology in channel management facilitates global trade.
e. Describe benefits associated with the use of technology in channel management.
f. Explain barriers to the use of technology in channel management.

Instructional Area: Communication Skills (CO)

Performance Element: Read to acquire meaning from written material and to apply the information to a task.

Performance Indicator: CO:057 Analyze company resources to ascertain policies and procedures (CS)
Objectives:
a. Distinguish between policies and procedures.
b. Discuss the need for company policies and procedures.
c. Describe the impact of ineffective policies and procedures.
d. Explain the importance of understanding company policies and procedures.
e. Identify company resources that can be accessed for policies and procedures.
f. Demonstrate how to analyze company resources to ascertain policies and procedures.

Performance Element: Apply verbal skills to obtain and convey information.

Performance Indicator: CO:084 Employ communication styles appropriate to target audience (CS)
Objectives:
a. Describe types of communication styles.
b. Discuss reasons to employ a communication style appropriate to a target audience.
c. Explain methods used to recognize listeners' communication styles.
d. Demonstrate procedures for employing communication styles appropriate to target audiences.

Performance Indicator: CO:061 Defend ideas objectively (CS)
Objectives:
a. Discuss the need to provide evidence to support a position.
b. Explain how ideas are formed.
c. Describe stages of an idea evaluation process.
d. Explain what causes people to accept new ideas.
e. Identify reasons that barriers that are established to keep from accepting new ideas.
f. Demonstrate procedures for defending ideas objectively.

Performance Indicator: CO:114 Handle telephone calls in a businesslike manner (CS)
Objectives:
a. Describe proper verbal skills needed to handle telephone calls.
b. Explain attitudes needed when handling telephone calls.
c. Explain standard procedures for taking messages.
d. Describe procedures for handling telephone calls in a businesslike manner.
e. Demonstrate procedures for handling telephone calls in a businesslike manner.

Performance Indicator: CO:053 Participate in group discussions (CS)
Objectives:
a. Explain why it is important to participate in group discussions.
b. Identify effective group discussion techniques.
c. Discuss the results of inappropriate group discussions.
d. Explain ways to improve participation in group discussions.
e. Demonstrate procedures for participating in group discussions.

Instructional Area: Communication Skills (CO) (cont'd)

Performance Element: Record information to maintain and present a report of business activity.

Performance Indicator: CO:085 Utilize note-taking strategies (CS)
Objectives:
a. Discuss the importance of taking good notes.
b. Explain note-taking strategies (e.g., Cornell two-column note-taking, outlining, mapping, charting, etc.).
c. Identify abbreviations commonly used when note-taking.
d. Describe common errors in note-taking.
e. Demonstrate note-taking strategies.

Performance Indicator: CO:086 Organize information (CS)
Objectives:
a. Discuss reasons to organize information after taking notes.
b. Explain the impact that target audience has on the organization of information.
c. Describe common approaches to organizing/ordering information (e.g., chronological order, problem/solution, most important to least important, deductive order, inductive order, etc.).
d. Explain techniques that can be used to organize information on the computer.
e. Demonstrate procedures for organizing information.

Performance Indicator: CO:087 Select and use appropriate graphic aids (CS)
Objectives:
a. Discuss reasons to use graphic aids.
b. Explain commonly used graphic aids (e.g., tables, bar graphs, line graphs, pie charts).
c. Explain methods utilized to select and use appropriate graphic aids.
d. Demonstrate procedures for selecting and using appropriate graphic aids.

Instructional Area: Customer Relations (CR)

Performance Element: Foster positive relationships with customers to enhance company image.

Performance Indicator: CR:004 Demonstrate a customer-service mindset (CS) LAP-CR-004
Objectives:
a. Identify beliefs held by employees who have a customer-service mindset.
b. Describe the importance of exhibiting a customer-service mindset.
c. Identify occasions when employees can exhibit a customer-service mindset.
d. Describe guidelines for exhibiting a customer-service mindset.
e. Demonstrate a customer-service mindset.

Instructional Area: **Customer Relations (CR)** (cont'd)

Performance Element: Foster positive relationships with customers to enhance company image.

Performance Indicator: CR:029 Develop rapport with customers (CS)
   Objectives:
   a. Define the following terms: rapport, reciprocity, mirroring, and affinity.
   b. Explain reasons for building rapport with customers (e.g., to create positive connections, to build good relationships, to break the ice).
   c. Explain the role of trust in building rapport.
   d. Describe ways to build rapport with customers (e.g., matching/mirroring customer's communication style, finding common ground, being empathetic, appreciating the customer's point of view).
   e. Explain the importance of nonverbal communication in building rapport with customers.
   f. Demonstrate techniques for developing rapport with customers.

Performance Indicator: CR:005 Reinforce service orientation through communication (CS)
   Objectives:
   a. Define the term service orientation.
   b. Explain the relationship between communication and service.
   c. Identify ways in which employees in business management can demonstrate a service orientation.
   d. Demonstrate procedures for reinforcing a service orientation through communication.

Performance Indicator: CR:006 Respond to customer inquiries (CS)
   Objectives:
   a. Explain the nature of customer inquiries.
   b. Identify the types of customer inquiries.
   c. Discuss the importance of possessing knowledge of the company (e.g., policies, history, capabilities, etc.).
   d. Discuss the importance of possessing adequate product knowledge.
   e. Describe guidelines for handling customer inquiries.
   f. Demonstrate use of proper procedure for solving a customer inquiry in a business situation.

Performance Indicator: CR:019 Adapt communication to the cultural and social differences among clients (CS)
   Objectives:
   a. Discuss the purpose of adapting communication to a client's cultural or social community.
   b. Explain the importance of context in communication.
   c. Discuss reasons for adapting communication to the cultural or social differences among clients.
   d. Explain skills associated with adapting communication (e.g., empathy, risk taking, problem solving, etc.).
   e. Describe ways to adapt communication to the cultural or social environment of clients.
   f. Demonstrate how to adapt communication to the cultural or social differences among clients.

Instructional Area: **Customer Relations (CR)** (cont'd)

Performance Element: Foster positive relationships with customers to enhance company image.

Performance Indicator: CR:007 Interpret business policies to customers/clients (CS)
    Objectives:
a. Define the term business policy.
b. Identify characteristics of effective business policies.
c. Describe reasons for having business policies.
d. Explain types of business policies that affect customers.
e. Discuss the role of employees in interpreting business policies.
f. Explain when business policies should be interpreted.
g. Explain guidelines for interpreting business policies to customers.
h. Demonstrate procedures for interpreting business policies to customers.

Performance Element: Resolve conflicts with/for customers to encourage repeat business.

Performance Indicator: CR:009 Handle difficult customers (CS) LAP-CR-009
    Objectives:
a. Define the following terms: disagreeable customer, domineering/ superior customers, dishonest customers.
b. Identify types of difficult customers.
c. Describe categories of disagreeable customers.
d. Discuss categories of domineering/superior customers.
e. Describe ways in which customers are dishonest.
f. Identify situations in which customers become difficult.
g. Explain reasons for handling difficult customers.
h. Describe general guidelines for handling difficult customers.
i. Explain specific guidelines for handling types of difficult customers.
j. Demonstrate procedures for handling difficult customers.

Performance Indicator: CR:010 Handle customer/client complaints (CS) LAP-CR-010
    Objectives:
a. Define the term complaint.
b. Identify the costs associated with customer complaints.
c. Identify reasons for customer complaints.
d. Describe the benefits of customer complaints.
e. Explain the importance of appropriately handling customer complaints.
f. Explain procedures for handling customer complaints.
g. Demonstrate procedures for handling customer complaints.

Instructional Area: Customer Relations (CR) (cont'd)

Performance Element: Reinforce company's image to exhibit the company's brand promise.

Performance Indicator: CR:001 Identify company's brand promise (CS) LAP-CR-006
    Objectives:
    a. Define the terms touch points, brand, and brand promise.
    b. Explain the importance of a company's brand promise.
    c. Describe factors impacting a company's brand promise.
    d. Demonstrate how to identify a company's brand promise.

Performance Indicator: CR:002 Determine ways of reinforcing the company's image through employee performance (CS)
    Objectives:
    a. Discuss types of company images.
    b. Describe factors that affect a company's image.
    c. Explain the importance of reinforcing the company's image.
    d. Describe ways that employees can reinforce the company's image through their performance.
    e. Demonstrate how to determine ways to reinforce the company's image through employee performance.

Instructional Area: Economics (EC)

Performance Element: Acquire knowledge of the impact of government on business activities to make informed economic decisions.

Performance Indicator: EC:008 Determine the relationship between government and business (CS) LAP-EC-016
    Objectives:
    a. Describe the role of government in a market economy.
    b. Describe how government is involved in business.
    c. Explain ways in which government regulates business.
    d. Explain how the costs of government regulation are financed.

Performance Element: Analyze cost/profit relationships to guide business decision-making.

Performance Indicator: EC:013 Explain the concept of productivity (CS) LAP-EC-018
    Objectives:
    a. Define the term productivity.
    b. Identify the effects of productivity on society.
    c. Describe how productivity is measured.
    d. Describe factors that enhance productivity.
    e. Describe factors that hinder productivity.
    f. Explain ways to increase productivity.
    g. Discuss the consequences of non-productivity.

Instructional Area: **Human Resources Management (HR)**

Performance Element: Manage staff growth and development to increase productivity and employee satisfaction.

Performance Indicator: HR:360 Orient new employees (CS)
Objectives:
a. Explain the importance of new-employee orientation.
b. Discuss the benefits of new-employee orientation.
c. Identify sources of orientation information.
d. Explain the current employee's role in orienting new employees.
e. Describe procedures for orienting new employees.
f. Conduct an orientation for new employees.

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

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

Performance Indicator: IM:012 Describe the need for marketing data (CS) LAP-IM-012
Objectives:
a. Define the following terms: facts, estimates, predictions, relationships, and marketing information.
b. Identify types of information used in marketing decision-making.
c. Identify types of marketing information useful to marketers.
d. Describe ways that marketers use marketing information.
e. Explain the impact of marketing information on marketers.

Instructional Area: **Marketing (MK)**

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

Performance Indicator: MK:001 Explain marketing and its importance in a global economy (CS) LAP-MK-004
Objectives:
a. Define the following terms: marketing and marketing concept.
b. Identify marketing activities.
c. Categorize items that are marketed.
d. Explain where marketing occurs.
e. Explain the elements of the marketing concept.
f. Explain the role of marketing in a private enterprise system.
g. Describe ways in which consumers and businesses would be affected if marketing did not exist.
h. Explain how marketing benefits our society.

Instructional Area: Marketing (MK) (cont'd)

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

Performance Indicator: MK:002 Describe marketing functions and related activities (CS) LAP-MK-001
Objectives:
a. Define the following terms: channel management, marketing-information management, pricing, product/service management, promotion, and selling.
b. Explain the purposes of each marketing function.
c. Describe the importance of each marketing function to marketing.
d. Explain the interrelationships among marketing functions.

Instructional Area: Market Planning (MP)

Performance Element: Develop marketing strategies to guide marketing tactics.

Performance Indicator: MP:001 Explain the concept of marketing strategies (CS) LAP-MP-002
Objectives:
a. Define the following terms: marketing mix, product, place, promotion, price, goals, strategies, and tactics.
b. Identify the components of the marketing mix.
c. Describe the importance of each of the components of the marketing mix.
d. Explain the relationship of goals, strategies, and tactics.
e. Describe the importance of marketing strategies.
f. Explain the factors that may cause marketing strategies to change.
g. Explain the importance of strategies in the marketing mix.

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

Performance Indicator: MP:003 Explain the concept of market and market identification (CS) LAP-MP-003
Objectives:
a. Define the following terms: market, target market, mass marketing, marketing segments, market segmentation, demographic segmentation, geographic segmentation, psychographic segmentation, and behavioral segmentation.
b. Explain the importance of target markets to businesses.
c. Describe advantages and disadvantages of mass marketing.
d. Describe advantages and disadvantages of using market segments.
e. Explain why the use of market segments is increasing.
f. Describe demographic characteristics that are analyzed by marketers.
g. Explain the value of geographic segmentation.
h. Discuss the value of psychographic segmentation.
i. Describe types of behavioral segmentation.

Instructional Area: Operations (OP)

Performance Element: Adhere to health and safety regulations to support a safe work environment.

Performance Indicator: OP:004 Describe health and safety regulations in business (PQ)
    Objectives:
    a. Define the following terms: health, safety, occupational health, hazard, outcome, risk, accident, and personal protective equipment.
    b. Discuss reasons for health and safety regulations in business.
    c. Explain the regulation of different common workplace hazard groups (e.g., mechanical hazards, chemical hazards, physical hazards, etc.).
    d. Describe employers' responsibilities in ensuring employees' health and safety.
    e. Discuss employees' role in protecting their health and safety on the job.

Performance Indicator: OP:005 Report noncompliance with business health and safety regulations (PQ)
    Objectives:
    a. Define the terms compliance and noncompliance.
    b. Describe common health and safety noncompliance issues.
    c. Explain factors that may contribute to noncompliance with business health and safety regulations.
    d. Explain the consequences of noncompliance with health and safety regulations.
    e. Discuss methods to report noncompliance with business health and safety regulations.
    f. Demonstrate procedures for reporting noncompliance with business health and safety regulations.

Performance Element: Implement safety procedures to minimize loss.

Performance Indicator: OP:006 Follow instructions for use of equipment, tools, and machinery (PQ)
    Objectives:
    a. Identify resources that commonly provide instructions for use of equipment, tools, and machinery.
    b. Explain the importance of understanding equipment, tool, and machinery instructions prior to use.
    c. Discuss consequences of not following instructions for use of equipment, tools, and machinery.
    d. Demonstrate procedures for following instructions for use of equipment, tools, and machinery.

Performance Indicator: OP:007 Follow safety precautions (PQ)
    Objectives:
    a. Identify the types of situations for which a business must take safety precautions.
    b. Identify types of safety precautions.
    c. Recognize appropriate safety precautions to be taken in a given situation.
    d. Explain the importance of using safety precautions.
    e. Discuss guidelines for using safety precautions.
    f. Demonstrate use of proper procedures in practicing good safety habits.

Instructional Area: **Operations (OP)** (cont'd)

Performance Element: Implement safety procedures to minimize loss.

Performance Indicator: OP:008 Maintain a safe work environment (CS)
> **Objectives:**
> a. Discuss ways to organize work areas to ensure the safety of workers and customers.
> b. Discuss the importance of identifying and correcting potential hazards as quickly as possible.
> c. Explain the importance of warning others about potential hazards in the workplace.
> d. Describe health and safety records that employees are commonly asked to complete.
> e. Demonstrate techniques to maintain a safe work environment.

Performance Indicator: OP:009 Explain procedures for handling accidents (CS)
> **Objectives:**
> a. Identify causes of accidents in a business environment.
> b. Identify types of accidents for which a business must employ preventative measures.
> c. Describe accident prevention techniques.
> d. Explain the importance of using accident-prevention techniques.
> e. Describe guidelines for handling accidents.

Performance Indicator: OP:010 Handle and report emergency situations (CS)
> **Objectives:**
> a. Describe types of emergency situations encountered by businesses (e.g., illness, accidents, fires, etc.).
> b. Explain appropriate emergency procedures to follow in a given situation.
> c. Explain the importance of staying calm in emergency situations.
> d. Demonstrate techniques for handling and reporting emergency situations.

Performance Element: Implement security policies/procedures to minimize chance for loss.

Performance Indicator: OP:013 Explain routine security precautions (CS)
> **Objectives:**
> a. Identify types of security problems encountered by businesses.
> b. Explain reasons that businesses need security.
> c. Identify security devices used to prevent shoplifting.
> d. Identify pilferage prevention measures.
> e. Describe measures used by businesses to prevent burglary.
> f. Explain robbery prevention measures used by businesses.
> g. Describe fraud prevention techniques.

Performance Indicator: OP:152 Follow established security procedures/policies (CS)
> **Objectives:**
> a. Describe consequences of failing to follow established security procedures/policies.
> b. Explain the role that being observant plays in maintaining workplace security.
> c. Explain security procedures/policies to follow when different security breaches occur.
> d. Discuss information to provide when reporting security breaches (e.g., who was involved, what happened, when incident occurred, where it occurred, etc.).
> e. Demonstrate how to follow established security procedures/policies.

Instructional Area: Operations (OP) (cont'd)

Performance Element: Implement security policies/procedures to minimize chance for loss.

Performance Indicator: OP:153 Protect company information and intangibles (CS)
Objectives:
a. Define the terms intangibles and intellectual property.
b. Discuss the importance of protecting company information and intangibles.
c. Discuss types of company information and intangibles that must be protected (e.g., customer lists, research results, etc.).
d. Explain methods used to protect company information and intangibles.
e. Demonstrate procedures used to protect company information and intangibles.

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 Indicator: OP:441 Explain information privacy, security, and confidentiality considerations in business (CS)
Objectives:
a. Distinguish among privacy, security, and confidentiality.
b. Discuss reasons to keep information private, secure, and/or confidential.
c. Describe types of information that a business must keep private, secure, and/or confidential.
d. Identify general guidelines for information privacy, security, and confidentiality.
e. Explain challenges in maintaining the privacy, security, and confidentiality of information in business.

Performance Indicator: OP:064 Maintain data security (CS)
Objectives:
a. Discuss the impact of data security on data integrity.
b. Explain threats to data security.
c. Describe consequences of breaches in data security.
d. Discuss the role of risk management in maintaining data security.
e. Explain data security methods, processes, and programs.
f. Demonstrate techniques for maintaining data security.

Performance Element: Implement purchasing activities to obtain business supplies, equipment, resources, and services.

Performance Indicator: OP:015 Explain the nature and scope of purchasing (CS) LAP-OP-002
Objectives:
a. Define the term purchasing.
b. Identify activities involved in purchasing.
c. Describe the importance of purchasing in the operation of a business.
d. Discuss the purchasing process used by businesses to obtain materials, equipment, and supplies used in their operation.

Instructional Area: **Operations (OP)** (cont'd)

Performance Element: Implement purchasing activities to obtain business supplies, equipment, resources, and services.

Performance Indicator: OP:016 Place orders/reorders (CS)
Objectives:
a. Explain factors to consider when placing orders/reorders.
b. Describe the use of smart cards in placing orders/reorders.
c. Identify the components of purchase orders.
d. Calculate amount of order/reorder.
e. Complete orders/reorders for goods and/or services.

Performance Indicator: OP:031 Maintain inventory of supplies (CS)
Objectives:
a. Identify supplies that businesses commonly keep in inventory.
b. Explain the importance of maintaining an inventory of supplies.
c. Discuss storage considerations for an inventory of supplies.
d. Describe the nature of inventory records that should be maintained.
e. Discuss methods used to determine appropriate inventory levels of supplies.
f. Explain the process of conducting a periodic inventory of supplies.
g. Discuss procedures to follow when receiving orders of supplies.
h. Demonstrate procedures for maintaining an inventory of supplies.

Performance Element: Understand production's role and function in business to recognize its need in an organization.

Performance Indicator: OP:017 Explain the concept of production (CS) LAP-OP-017
Objectives:
a. Define the following terms: production, operations, inputs, and outputs.
b. Identify inputs used by organizations for production.
c. Distinguish between tangible and intangible outputs.
d. Describe the importance of production to an organization.
e. Identify production activities.
f. Explain the purposes of production activities.
g. Describe goals of production activities.

Performance Element: Maintain property and equipment to facilitate ongoing business activities.

Performance Indicator: OP:442 Comply with policies and procedures for use of property and equipment (CS)
Objectives:
a. Discuss the purpose of policies and procedures governing employee use of business property and equipment.
b. Explain common policies and procedures for use of business property and equipment.
c. Describe possible consequences of failing to follow policies and procedures for use of property and equipment.
d. Demonstrate how to comply with policies and procedures for use of property and equipment.

Instructional Area: **Operations (OP)** (cont'd)

Performance Element: Understand supply chain management role to recognize its need in business.

Performance Indicator: OP:443 Explain the concept of supply chain (CS)
  Objectives:
  a. Define the term supply chain.
  b. Identify common supply chain members.
  c. Explain types of supply chain activities.
  d. Describe supply chain flows (e.g., product, information, finances).
  e. Discuss the purpose and goals of supply chain.

Instructional Area: **Professional Development (PD)**

Performance Element: Participate in career planning to enhance job-success potential.

Performance Indicator: PD:024 Explain employment opportunities in marketing (CS) LAP-PD-021
  Objectives:
  a. Identify types of businesses that offer careers in marketing.
  b. Contrast marketing careers with careers in medicine.
  c. Explain why jobs in marketing provide career potential.
  d. Describe the following marketing careers: (1) Marketing research; (2) Advertising; (3) Product management; (4) Channel management; (5) Sales; (6) Retailing; (7) Service marketing; (8) Customer service; (9) Public relations
  e. Describe well-recognized traits and skills needed for success in marketing careers.

Instructional Area: **Promotion (PR)**

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

Performance Indicator: PR:001 Explain the role of promotion as a marketing function (CS) LAP-PR-002
  Objectives:
  a. Define the term promotion.
  b. List users of promotion.
  c. Describe the benefits of using promotion.
  d. Describe the costs associated with the use of promotion.
  e. Describe types of promotional objectives.
  f. Discuss the relationship of promotion and marketing.

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

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

Performance Indicator: PR:002 Explain the types of promotion (i.e., institutional, product) (CS) LAP-PR-004
Objectives:
a. Define the following terms: product promotion, primary product promotion, secondary product promotion, institutional promotion, public service, public relations, and patronage.
b. Identify types of product promotion.
c. Describe the uses of product promotion.
d. Identify types of institutional promotion.
e. Describe uses of institutional promotion.
f. Discuss the advantages of promotional activities.
g. Discuss the disadvantages of promotional activities.

Instructional Area: **Selling (SE)**

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

Performance Indicator: SE:017 Explain the nature and scope of the selling function (CS) LAP-SE-117
Objectives:
a. Define the term selling.
b. Identify individuals, groups, or agencies that sell.
c. Explain reasons that customers buy goods and services.
d. Identify types of items that are sold.
e. Explain where selling occurs.
f. Describe how products are sold.
g. Describe the role of selling in a market economy.
h. Explain personal characteristics of salespeople that are essential to selling.

Performance Indicator: SE:076 Explain the role of customer service as a component of selling relationships (CS) LAP-SE-130
Objectives:
a. Distinguish between customer service as a process and customer service as a function.
b. Describe how businesses can use customer service to beat their competition.
c. Discuss factors that influence customer expectations of customer service.
d. Explain how customer service facilitates sales relationships.
e. Identify pre-sales opportunities for providing customer service that can facilitate sales relationships.
f. Identify post-sales opportunities when customer service can be provided to facilitate sales relationships.
g. Discuss actions a salesperson can take to make the most of her/his customer service activities.

Instructional Area: Selling (SE) (cont'd)

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

Performance Indicator: SE:932 Explain company selling policies (CS) LAP-SE-121
    Objectives:
    a. Define the following terms: selling policies, selling-activity policies, terms-of-sale policies and service policies.
    b. Identify types of selling-activity policies.
    c. Identify types of terms-of-sale policies.
    d. Identify types of service policies.
    e. Explain the importance of selling policies.
    f. Describe the characteristics of selling policies.
    g. Explain why selling policies are needed.
    h. Describe external factors that affect selling policies.
    i. Describe internal factors that affect selling policies.
    j. Describe regulatory factors that affect selling policies.
    k. Explain problems encountered with the use of selling policies.

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

Performance Indicator: SE:062 Acquire product information for use in selling (CS) LAP-SE-131
    Objectives:
    a. Identify sources of product information that provide information for use in selling.
    b. Identify types of product information that can be useful in selling.
    c. Cite occasions when product information can be used in sales presentations.
    d. Describe guidelines to follow when acquiring product information.
    e. Demonstrate procedures for acquiring product information for use in selling.

Performance Indicator: SE:019 Explain the use of brand names in selling (CS)
    Objectives:
    a. Discuss the role of brand names in building an emotional connection with customers/clients.
    b. Describe the impact of brand names on customer loyalty and repeat business.
    c. Explain benefits of selling brand names vs. products.

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

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

Performance Indicator: SE:048 Explain the selling process (CS) LAP-SE-048
     Objectives:
     a. Identify the components of the selling process.
     b. Describe the importance of establishing relationships with customers.
     c. Describe ways to discover customer needs.
     d. Describe the components of prescribing solutions to customer needs.
     e. Explain the importance of reaching closure in sales situations.
     f. Describe aspects of reaching closure in sales situations.
     g. Describe the importance of reaffirming the buyer-seller relationship.
     h. Describe ways to reaffirm the buyer-seller relationship.
     i. Explain similarities/differences in the ways businesses implement the selling process.
     j. Explain the importance of using a selling process.

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

Performance Indicator: SE:110 Establish relationship with customer/client (CS)
     Objectives:
     a. Describe the importance of establishing relationships with customers/clients during the initial contact with them.
     b. Explain techniques for establishing relationships with customers/clients during the initial contact with them.
     c. Identify factors affecting the choice of techniques to use in establishing relationships with customers/clients during initial contact.
     d. Describe characteristics of effective sales openings.
     e. Explain procedures for establishing relationships with customers/clients during initial contacts.
     f. Demonstrate how to establish relationships with customers/clients during the initial contact with them.

Performance Indicator: SE:111 Determine customer/client needs (CS)
     Objectives:
     a. Define the following terms: open-ended questions, assumptive questions, and interpretive questions.
     b. Identify examples of the types of questions used in sales situations.
     c. Explain the importance of questioning in selling.
     d. Explain the timing of questions in selling.
     e. Describe the relationship of customer type to questioning style.
     f. Explain guidelines for questioning customers.
     g. Question customers to obtain information that will help to satisfy their needs.

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

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

Performance Indicator: SE:114 Recommend specific product (CS) LAP-SE-111

    Objectives:

    a. Define the following terms: product substitution, trading-up, and trading down.

    b. Explain the importance of meeting customers' needs when recommending specific products.

    c. Explain guidelines for using buying motives when recommending specific products.

    d. Identify occasions when product substitution should be used.

    e. Explain guidelines for recommending a specific product to customers.

    f. Demonstrate procedures for recommending specific products to customers.

Sequence of Instruction

Section 3

Semester 1		
Marketing Basics		
What is marketing?	MK:001 Explain marketing and its importance in a global economy (CS) LAP-MK-004 (pp. 4-2—4-6)	8 days
	MK:002 Describe marketing functions and related activities (CS) LAP-MK-001 (pp. 4-7—4-10)	
	PD:024 Explain employment opportunities in marketing (CS) LAP-PD-021 (pp. 4-11—4-12)	
Market Planning		
What do marketers plan?	MP:001 Explain the concept of marketing strategies (CS) LAP-MP-002 (pp. 4-13—4-18)	7 days
	MP:003 Explain the concept of market and market identification (CS) LAP-MP-003 (pp. 4-19—4-24)	
	CO:053 Participate in group discussions (CS) (pp. 4-25—4-27)	
Selling & Customer Service		
Why is customer service important in selling?	SE:017 Explain the nature and scope of the selling function (CS) LAP-SE-117 (pp. 4-28—4-30)	20 days
	SE:076 Explain the role of customer service as a component of selling relationships (CS) LAP-SE-130 (pp. 4-31—4-32)	
	CR:004 Demonstrate a customer-service mindset (CS) LAP-CR-004 (pp. 4-33—4-34)	
	CR:005 Reinforce service orientation through communication (CS) (pp. 4-35—4-36)	
	CO:084 Employ communication styles appropriate to target audience (CS) (pp. 4-37—4-39)	
	CR:019 Adapt communication to the cultural and social differences among clients (CS) (pp. 4-40—4-41)	
	CR:006 Respond to customer inquiries (CS) (pp. 4-42—4-43)	
	CO:114 Handle telephone calls in a businesslike manner (CS) (pp. 4-44—4-47)	

What should you do when things go wrong for a customer?	SE:932 Explain company selling policies (CS) LAP-SE-121 (pp. 4-48—4-49)	15 days
	CO:057 Analyze company resources to ascertain policies and procedures (CS) (pp. 4-50—4-51)	
	CR:007 Interpret business policies to customers/clients (CS) (pp. 4-52—4-56)	
	CO:061 Defend ideas objectively (CS) (pp. 4-57—4-58)	
	CR:009 Handle difficult customers (CS) LAP-CR-009 (pp. 4-59—4-60)	
	CR:010 Handle customer/client complaints (CS) LAP-CR-010 (pp. 4-61—4-62)	
How and why do you represent your employer?	CR:001 Identify company's brand promise (CS) LAP-CR-006 (pp. 4-63—4-64)	5 days
	CR:002 Determine ways of reinforcing the company's image through employee performance (CS) (pp. 4-65—4-66)	
What do you need to know about products that you sell?	CO:085 Utilize note-taking strategies (CS) (pp. 4-67—4-68)	12 days
	CO:086 Organize information (CS) (pp. 4-69—4-70)	
	SE:062 Acquire product information for use in selling (CS) LAP-SE-131 (pp. 4-71—4-72)	
	CO:087 Select and use appropriate graphic aids (CS) (pp. 4-73—4-74)	
	SE:019 Explain the use of brand names in selling (CS) (pp. 4-75—4-76)	
How do you sell goods and services to customers?	SE:048 Explain the selling process (CS) LAP-SE-048 (pp. 4-77—4-84)	14 days
	CR:029 Develop rapport with customers (CS) (pp. 4-85—4-86)	
	SE:110 Establish relationship with customer/client (CS) (pp. 4-87—4-88)	
	SE:111 Determine customer/client needs (CS) (pp. 4-89—4-90)	
	SE:114 Recommend specific product (CS) LAP-SE-111 (pp. 4-91—4-92)	

Semester 2		
Promotion		
What do marketers promote?	PR:001 Explain the role of promotion as a marketing function (CS) LAP-PR-002 (pp. 4-93—4-94)	5 days
	PR:002 Explain the types of promotion (i.e., institutional, product) (CS) LAP-PR-004 (pp. 4-95—4-96)	
Marketing-Information Management		
Why do marketers need data?	IM:012 Describe the need for marketing data (CS) LAP-IM-012 (pp. 4-97—4-99)	3 days
Channel Management		
What is channel management?	CM:001 Explain the nature and scope of channel management (CS) LAP-CM-002 (pp. 4-100—4-102)	8 days
	CM:003 Explain the nature of channels of distribution (CS) LAP-CM-003 (pp. 4-103—4-104)	
	CM:004 Describe the use of technology in the channel management function (CS) (pp. 4-105—4-107)	
Operations		
What day-to-day operations activities occur?	OP:443 Explain the concept of supply chain (CS) (pp. 4-108—4-109)	15 days
	OP:017 Explain the concept of production (CS) LAP-OP-017 (pp. 4-110—4-111)	
	EC:013 Explain the concept of productivity (CS) LAP-EC-018 (pp. 4-112—4-114)	
	OP:015 Explain the nature and scope of purchasing (CS) LAP-OP-002 (pp. 4-115—4-116)	
	OP:031 Maintain inventory of supplies (CS) (pp. 4-117—4-118)	
	OP:016 Place orders/reorders (CS) (pp. 4-119—4-120)	

Safety & Security		
What regulations impact worker health and safety?	EC:008 Determine the relationship between government and business (CS) LAP-EC-016 (pp. 4-121—4-123)	8 days
	OP:004 Describe health and safety regulations in business (PQ) (pp. 4-124—4-125)	
	OP:005 Report noncompliance with business health and safety regulations (PQ) (pp. 4-126—4-127)	
How can you stay safe in the workplace?	OP:006 Follow instructions for use of equipment, tools, and machinery (PQ) (pp. 4-128—4-129)	15 days
	OP:442 Comply with policies and procedures for use of property and equipment (CS) (pp. 4-130—4-131)	
	OP:007 Follow safety precautions (PQ) (pp. 4-132—4-134)	
	OP:008 Maintain a safe work environment (CS) (pp. 4-135—4-136)	
	OP:009 Explain procedures for handling accidents (CS) (pp. 4-137—4-141)	
	OP:010 Handle and report emergency situations (CS) (pp. 4-142—4-143)	
How can you help maintain security in the workplace?	OP:013 Explain routine security precautions (CS) (pp. 4-144—4-145)	12 days
	OP:152 Follow established security procedures/policies (CS) (pp. 4-146—4-147)	
	OP:441 Explain information privacy, security, and confidentiality considerations in business (CS) (pp. 4-148—4-149)	
	OP:064 Maintain data security (CS) (pp. 4-150—4-151)	
	OP:153 Protect company information and intangibles (CS) (pp. 4-152—4-153)	
Training Others		
How do you teach processes and procedures to new employees?	HR:360 Orient new employees (CS) (pp. 4-154—4-155)	2 days
Owning a Business		
What options do you have for owning a business?	BL:003 Explain types of business ownership (CS) LAP-BL-001 (pp. 4-156—4-158)	3 days

Planning Guide Sheets

Section 4

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

LAP: LAP-MK-004
© **LAP:** 2016

Curriculum Planning Level: CS

Objectives:

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

Activity:

Review and present the Marketing and Its Importance Briefing (starting on page 4-5) to students in a lecture or discussion format. Instruct each student to identify ways in which local businesses apply the marketing concept domestically and abroad and determine how this affects the businesses' customers. Then, s/he should write an article depicting his/her findings and compete with classmates to have the best paper selected for publication in the school/local paper.

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

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Definition of marketing

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

Marketing activities

- **Channel management:** Identifying, selecting, monitoring, and evaluating sales channels; processes by which marketers ensure that products are distributed to customers efficiently and effectively

- **Marketing-information management:** Gathering, accessing, synthesizing, evaluating, and disseminating information to aid in business decisions

- **Market planning:** Creating strategies to attract the customer to a business, including setting goals, selecting target markets, creating budgets, forecasting sales, and performing analyses

- **Pricing: D**etermining and adjusting prices to maximize return and meet customers' perceptions of value

- **Product/Service management:** Obtaining, developing, maintaining, and improving a product or service mix in response to market opportunities

- **Promotion:** Communicating information about goods, services, images, and/or ideas to achieve a desired outcome

- **Selling:** Determining client needs and wants and responding through planned, personalized communication that influences purchase decisions and enhances future business opportunities

Where does marketing take place?

Marketing can take place wherever there are customers.

What kinds of things are marketed?

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

What is the marketing concept?

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

Elements of the marketing concept

- **Customer orientation:** Do it their way.

- **Company commitment:** Do it better.

- **Company goals:** Do it with success in mind.

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

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

What would happen if marketing didn't exist?

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

MK:002 Describe marketing functions and related activities

LAP: LAP-MK-001
© **LAP:** 2012

Curriculum Planning Level: CS

Objectives:

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

Activity:

Review and present the Marketing Functions Briefing (starting on page 4-9) to students in a lecture or discussion format. Then instruct students to make a list of all of the goods and services that they have used in the past 24 hours and respond to the following questions:

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

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How does marketing work?

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

Marketing activities

- **Channel management:** Identifying, selecting, monitoring, and evaluating sales channels; processes by which marketers ensure that products are distributed to customers efficiently and effectively

- **Marketing-information management:** Gathering, accessing, synthesizing, evaluating, and disseminating information to aid in business decisions

- **Market planning:** Creating strategies to attract the customer to a business

- **Pricing: D**etermining and adjusting prices to maximize return and meet customers' perceptions of value

- **Product/Service management:** Obtaining, developing, maintaining, and improving a product or service mix in response to market opportunities

- **Promotion:** Communicating information about goods, services, images, and/or ideas to achieve a desired outcome

- **Selling:** Determining client needs and wants and responding through planned, personalized communication that influences purchase decisions and enhances future business opportunities

Channel Management

- Determines who will offer products and where they will be offered

- Develops relationships with channel members

- Assesses quality of vendor performance

Marketing-Information Management

- Provides data that can be used for business decision-making

- Provides data about effectiveness of marketing efforts

- Provides data about customer satisfaction, customer loyalty, needs, and wants

Market Planning

- Sets goals

- Selects target markets

- Creates budgets

- Forecasts sales

- Performs analyses

<u>Pricing</u>

- Establishes products' prices
- Determines whether prices need to be adjusted
- Sets policies and objectives for prices

<u>Product/Service Management</u>

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

<u>Promotion</u>

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

<u>Selling</u>

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

PD:024 Explain employment opportunities in marketing

LAP: LAP-PD-021
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Curriculum Planning Level: CS

Objectives:

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

Activity:

Each student should select a marketing occupation of interest and collect information about it from as many resources as possible. Students should obtain the following pieces of information:

- Marketing occupation
- Duties and responsibilities
- Educational requirements
- Recommended courses
- Employment outlook
- Salary range
- Schools offering training
- Perquisites (Perks)
- Lifestyle associated with the occupation
- Geographic availability of jobs
- Personal traits needed
- Work environment
- Example of a positive/negative work experience
- Pictures of people in the occupation
- List of sources of career information

Each student should then create a notebook from the collected information and present the information to the class.

Ethics Case for Students: Tara, who works for a clothing retailer, was just promoted to leisurewear department manager. Recent sales figures show that a certain line of T-shirts is not selling well. When Tara investigates, she discovers that the shirts have an offensive and sexist message. Unfortunately, the retailer is contractually obligated to purchase 300 more of these T-shirts from the supplier. What should Tara do? *(Ethical Principles Involved: Integrity, Accountability, Rule of Law, Viability)*

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Author: Burrow, J.L.
References: [pp. 4-8, 45, 98, 172, 219, 279, 346, 404, 466, 509, 568, 599-601, 620, 662-663]
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Title: Marketing dynamics (3rd ed.)
Author: Clark, B., Basteri, C.G., Gassen, C., & Walker, M.
References: [pp. 10, 13, 44, 96, 140, 176, 218, 250, 291-295, 329, 379, 426, 476, 520, 567, 592, 617, 672, 700]
Publisher: Tinley Park, IL: Goodheart-Willcox.
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Title: Contemporary marketing: 2013 edition
Author: Kurtz, D.
References: (pp. A-13—A-18)
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Author: Farese, L.S., Kimbrell, G., & Woloszyk, C.A.
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Accessed on: 2017-03-27

MP:001 Explain the concept of marketing strategies

LAP: LAP-MP-002
© **LAP:** 2016

Curriculum Planning Level: CS

Objectives:

a. Define the following terms: marketing mix, product, place, promotion, price, goals, strategies, and tactics.
b. Identify the components of the marketing mix.
c. Describe the importance of each of the components of the marketing mix.
d. Explain the relationship of goals, strategies, and tactics.
e. Describe the importance of marketing strategies.
f. Explain the factors that may cause marketing strategies to change.
g. Explain the importance of strategies in the marketing mix.

Activity:

Review and present the Marketing Strategies Briefing (starting on page 4-15) to students in a lecture or discussion format. Then, ask students to imagine that each of them is the marketing manager for your school's play or other school activity. Each student should identify strategies that s/he would use to market the play/activity, explain why s/he would use them, and summarize his/her plan in a brief presentation for the play/activity directors.

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Author: Grewal, D., & Levy, M.
References: (pp. 7-12, 38-41)
Publisher: New York: National Council on Economic Education
Copyright: 2008

Title: Basic marketing: A marketing strategy planning approach (16th ed.)
Author: Perreault, W.D., Cannon, J.P., & McCarthy, E.J.
References: [pp. 32-40]
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Copyright: 2012

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Author: Dlabay, L.R., Burrow, J.L., & Kleindl, B.
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Author: Clark, B., Basteri, C.G., Gassen, C., & Walker, M.
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Author: Kurtz, D.
References: (pp. 48-50, 344)
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Title: Mental quickies: Marketing mix. [Video].
Author: Aim High
URL: https://www.youtube.com/watch?v=deSgjT-L2W8
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How do marketers achieve results?

For marketers to achieve their desired results, they plan where they need to go and how to get there efficiently and then do what it takes to achieve those results. In other words, they set goals—objectives they plan to fulfill. Then, they establish a plan of action, or strategy, to meet their goals/objectives. These strategies are carried out with tactics—the specific actions used to carry out the strategy.

How do marketers plan their strategies?

1. They find out their company's overall plan.
2. They figure out specifically where their firm needs to be by a particular date.
3. They write down agreed-upon goals—what it is they want to achieve.
   - Example: A restaurant wants to increase this year's sales by 10% over last year's sales.
4. They lay out their plan of action—their strategy—to show how they will reach their goal.
   - Example: The restaurant evaluates its many options and decides to add a kids' menu to increase sales.
5. To be efficient, marketers choose their short-term actions—tactics—to carry out their strategy. The tactics must be in line with their goal/objectives and strategy.
   - Example: Tactics that the restaurant might use include introducing meals that kids like and/or offering a free ice-cream cone to each child selecting a kids' meal.

How do marketers choose the best option to reach their goals/objectives?

Since they have many options to choose from to reach their goals/objectives, they try to select the best option available to them by considering:

- How the marketing concept applies to their situation
- When they want to reach their goal
- Which resources are on hand

Marketers customize their strategies based on their goals/objectives and environment, adjusting and/or combining strategies to achieve their desired results.

What types of changes impact marketers' plans?

Because business situations can change rapidly, marketers always have to be on the lookout for challenges/opportunities that could impact their plans. When changes occur, marketers must react quickly and accurately to be able to achieve their goals/objectives.

Examples of changes that could impact marketers' plans include:

- Finding out that the company can't handle distribution on its own

- Hearing about a new product with better features than the one currently offered

- Figuring out that the price is too high for customers

- Seeing the company's ad in the back of the newspaper instead of in the section in which it was expected

- Learning of new government regulations that impact the business

- Watching the economy improve/worsen

What is the marketing mix?

The marketing mix is the combination of the four elements of marketing—product, price, place, and promotion. Marketers adapt their marketing mix to suit each situation.

Elements of the marketing mix

Product: The goods, services, or ideas a business will offer its customers

- Marketers conduct research and use their creativity to determine what customers need and how they will meet that need.

- Questions marketers ask to answer the question:

  o Should we offer one product—or more than one?

  o Is the product a good, service, or idea?

  o Does the product have special features?

  o Does the product have multiple uses?

  o What resources are necessary to research and develop the product?

  o What level of quality should be produced or provided?

  o Which brands should be used?

  o How should the product be packaged?

  o How might the product affect the company's image?

  o How might customers view this product in relation to others?

  o Should the company offer a warranty, maintenance contract, or other support services?

- Marketers have succeeded with the product element when customers view the product as the best solution to their needs.

Price: The amount of money a business asks in exchange for its products

- Marketers must find a good balance between customer value and satisfaction and between company cost and profit.

- Marketers start by determining their pricing objectives:

    o Getting their products into more customers' hands—might be accomplished by lowering the price

    o Helping customers view the business as distinct from its competitors—might offer something unique

    o Bringing in the amount of income they need/want—involves pricing the product high enough to cover expenses and provide a profit

    o Raising the product's value in the customer's eyes—involves getting customers to view the product as higher quality

    o Matching the product's value with what customers expect to receive—setting prices at the level customers expect

    o Marketers also determine how they will accept payment—cash, credit, debit, or check?

- They decide whether they will offer discounts.

- Marketers know they've been successful with the price element when customers feel that the benefits they receive outweigh the costs, and the business is bringing in enough revenue to make a profit, while keeping prices low enough to encourage sales.

Place: Getting a selected product in the right place at the right time

- Considerations marketers address:

    o Which businesses to buy from

    o When to buy the product

    o How much of the product to order

    o How to protect the product from damage

    o How to store the product until it's needed

    o Where to make the product available

    o How to get the product where it's needed

    o How to process customer orders

    o Which businesses to involve in the process

    o How to answer customer questions

    o How to coordinate all the steps involved

- Marketers are successful with the place element when customers can buy a desired product when and where they want.

Promotion: Letting customers know the product's value and its benefits that meet customers' current needs and refers to the various types of communication that marketers use to inform, persuade, or remind customers about their products

- Seeks a positive response from customers—they buy.
- Types of communication included:
    - o Advertising
    - o Personal selling
    - o Publicity/Public relations
    - o Sales promotion
- Factors marketers need to consider to use communication channels effectively:
    - o Which messages to send
    - o Which media to use
    - o When they want messages delivered
    - o How often they want messages delivered
    - o How to coordinate communication efforts
    - o How to evaluate results

How are the marketing mix elements interrelated?

A change to one element of the marketing mix affects the other elements. For example, improving product features will probably result in price increases, and simplifying the place element will probably result in price decreases. When marketers assemble the mix, they carefully determine which elements to include and to what degree—keeping in mind that the mix works as a unit.

MP:003 Explain the concept of market and market identification

LAP: LAP-MP-003
© **LAP:** 2012

Curriculum Planning Level: CS

Objectives:

a. Define the following terms: market, target market, mass marketing, marketing segments, market segmentation, demographic segmentation, geographic segmentation, psychographic segmentation, and behavioral segmentation.
b. Explain the importance of target markets to businesses.
c. Describe advantages and disadvantages of mass marketing.
d. Describe advantages and disadvantages of using market segments.
e. Explain why the use of market segments is increasing.
f. Describe demographic characteristics that are analyzed by marketers.
g. Explain the value of geographic segmentation.
h. Discuss the value of psychographic segmentation.
i. Describe types of behavioral segmentation.

Activity:

Review and present the Markets and Marketing Identification Briefing (starting on page 4-22) to students in a lecture or discussion format. Then, each student should create a phrase or description that s/he would use to promote a new skin cream to the following markets:

- Female athletes
- Physicians
- Men over 40
- Teenage girls
- Women in other global regions (e.g., Asia, Europe, Latin America, etc.)

Or, instruct each student to select a national company and search online to determine its target market. Each student should identify five things the business does to appeal to that market, identify additional things that the business could do to attract the market, record his/her findings, and discuss them with a classmate.

Ethics Case for Students: A beverage company has completed a demographic market segmentation and determined that a certain ethnic group is growing at a fast rate. The company wants to target this market segment using advertisements and other campaigns that speak to the interests of this ethnic group. However, some people are concerned that these targeted marketing campaigns will play on offensive stereotypes. Is it ethical to target ethnic groups using generalizations about that group? Or should the company use a different tactic? *(Ethical Principles Involved: Integrity, Respect, Viability)*

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Title: Marketing
Author: Grewal, D., & Levy, M.
References: (pp. 36-37, 209-222)
Publisher: New York: National Council on Economic Education
Copyright: 2008

Title: Basic marketing: A marketing strategy planning approach (16th ed.)
Author: Perreault, W.D., Cannon, J.P., & McCarthy, E.J.
References: [pp. 60-84]
Publisher: Boston: Irwin/McGraw-Hill
Copyright: 2008

Title: Entrepreneurial small business (3rd ed.)
Author: Katz, J. & Green, R.
References: [pp. 191, 309, 385-387]
Publisher: New York: McGraw-Hill/Irwin
Copyright: 2011

Title: Marketing (3rd ed.)
Author: Burrow, J.L.
References: [pp. 100, 182-185]
Publisher: Mason, OH: South-Western Cengage Learning
Copyright: 2012

Title: Entrepreneurship: A small business approach
Author: Bamford, C.E., & Bruton, G.D.
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Publisher: New York: McGraw-Hill
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Author: Kurtz, D.
References: (pp. 274-302)
Publisher: Mason, OH: South-Western Cengage Learning
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URL: https://www.youtube.com/watch?v=XVpZA2bect8
Copyright: 2014, April 1
Accessed on: 2017-03-21

What is a market?

A customer or potential customer who:

- has an unfulfilled desire (needs a good or service)
- Is financially able to satisfy that desire (has the resources to purchase the good or service)
- Is willing to satisfy that desire (is willing to purchase the good or service to meet a need)

What is a target market?

A particular group of customers that a business seeks to attract; the customers who fall into a particular target market share similar needs and characteristics

Why are target markets important to businesses?

Businesses identify target markets in order to make products that will effectively meet the needs of the targeted customers.

What is mass marketing?

Designing products and directing marketing activities to appeal to the whole market, which is everyone

Advantages of mass marketing

- Mass marketing can be used to communicate a broad message to as many customers as possible.
- Mass marketing allows a business to produce one product for everyone, which is more cost-effective than producing and marketing several products to several target markets.
- Mass marketing provides the most possibilities for success at the least cost.

Disadvantages of mass marketing

- Mass marketing's audience is very diverse.
- Only small percentage of that mass market is likely to purchase the product.

What is market segmentation?

Market segmentation uses the division of a total market into smaller, more specific groups. The needs and concerns of each market segment can be met more directly and carefully.

Advantages of segment marketing

- Segment marketing is more precise than mass marketing.
- Segment marketing allows for a finely tuned product, an appropriate price, and ease of distribution for the targeted market segment.
- Segment marketing encourages effective communication because its message is targeted to a specific market segment.

Disadvantages of segment marketing

- Segment marketing requires more money.
- Because segment marketing is targeted at a more specific group of people with more specific needs and expectations, the product is often more complex to produce.

Why is the use of market segments increasing?

Today's customers are more discerning with product purchases. Those customers are more educated and less swayed by mass marketing. They want to know how the good or service will benefit them directly. To address their concerns more directly, many marketers are turning to segment marketing.

Common ways to divide a market into segments

Demographic segmentation

- Demographic segmentation involves dividing a market on the basis of its physical and social characteristics.
- Demographic characteristics include:
    - Gender
    - Origin or heritage
    - Religion
    - Social or economic status
    - Life stage

Geographic segmentation

- Is the division of a market on the basis of where consumers are located—grouping customers based on where they live
- Allows marketers to determine customers' purchase preferences according to things like their climate, their political boundaries, or the population density of their area
- Helps marketers to discover where their markets are located, who their competitors are, and which media will reach their customers

Behavioral segmentation

- Marketers use behavioral segmentation to divide a market on the basis of consumers' response to a product.

- With this method, marketers look into the cause-and-effect nature of customers' purchase decisions. What do customers respond to when they buy a particular product?

- Behavioral segmentation is useful because it lines up with the marketing concept, which uses the customer's point of view to make marketing decisions.

- Customers typically ask themselves one or more of the following questions when buying a particular product:
    - How will the product benefit me?
    - Am I ready to buy it?
    - When will I use the product?
    - Am I in a comfortable buying pattern?
    - Do I feel loyal to a particular brand?

Psychographic segmentation

- Psychographic segmentation is the division of a market on the basis of consumers' lifestyles and personalities.

- Psychographic segmentation helps marketers to find out what's driving their customers to make the choices they do.

- Customers' buying decisions are influenced by their:
    - Values
    - Motives
    - Attitudes
    - Opinions
    - Interests
    - Activities
    - Personalities
    - Lifestyles

CO:053 Participate in group discussions

Quick Study LAP: LAP-QS-029
© **QS:** 2006

Curriculum Planning Level: CS

Objectives:

a. Explain why it is important to participate in group discussions.
b. Identify effective group discussion techniques.
c. Discuss the results of inappropriate group discussions.
d. Explain ways to improve participation in group discussions.
e. Demonstrate procedures for participating in group discussions.

Activity:

Divide the class into groups of three or four students each, and ask each group to select a group leader. Then, give the groups a current problem/topic of interest that would be relatively easy to research. Instruct each student to research the problem/topic individually. Then, each group should record responses to the following items:

- Identify the issue/problem that your teacher identified.
- Provide proof from your research that the issue/problem exists.
- Explain the causes of the issue/problem.
- Predict possible future effects of the issue/problem.
- Present possible solutions to the issue/problem.
- Determine advantages and disadvantages of each solution.
- Select the best solutions.

Finally, each group leader should share his/her group's findings with the class.

Ethics Case for Students: Marcus is working with a group to prepare a marketing plan for an upcoming presentation. He notices that one of his team members, Dani, is being quiet and not contributing much to the conversation. When Marcus asks her about it after the meeting, Dani says that she prefers to stay quiet and listen to what others say rather than contributing herself. While Marcus understands Dani's point of view, he knows that for the group to be successful, everyone should be speaking up and sharing their ideas. What should Marcus do? Should he make sure the group gives Dani a fair chance to contribute? Or should he respect Dani's preference to stay quiet? *(Ethical Principles Involved: Trust, Transparency, Fairness, Respect)*

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Author: Portny, S., Mantel, S.J., Meredith, J.R., Shafer, S.M., & Sutton, M.M.
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Publisher: Hoboken, NJ: John Wiley & Sons
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Author: Bovée, C.L., & Thill, J.V.
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Publisher: Upper Saddle River, NJ: Pearson Prentice Hall
Copyright: 2008

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Author: Clark, B., Basteri, C.G., Gassen, C., & Walker, M.
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Publisher: Tinley Park, IL: Goodheart-Willcox.
Copyright: 2014

Title: School to career (9th ed.)
Author: Littrell, J.J., Lorenz, J.H., & Smith, H.T.
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Publisher: Tinley Park, IL: Goodheart-Willcox.
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Title: Marketing essentials 2012
Author: Farese, L.S., Kimbrell, G., & Woloszyk, C.A.
References: (pp. 204-205)
Publisher: Columbus, OH: Glencoe/McGraw-Hill
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Title: Succeeding in the world of work
Author: Kimbrell, G.
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Publisher: Columbus, OH: McGraw-Hill Education
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Author: Aj. Jena's English Resources
URL: https://www.youtube.com/watch?v=sb2ZkJuquBg
Copyright: 2015, November 26
Accessed on: 2017-03-16

SE:017 Explain the nature and scope of the selling function

LAP: LAP-SE-117
© **LAP:** 2014

Curriculum Planning Level: CS

Objectives:

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

Activity:

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

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Title: Basic marketing: A marketing strategy planning approach (16th ed.)
Author: Perreault, W.D., Cannon, J.P., & McCarthy, E.J.
References: [pp. 396-398]
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SE:076 Explain the role of customer service as a component of selling relationships

LAP: LAP-SE-130
© LAP: 2014

Curriculum Planning Level: CS

Objectives:

a. Distinguish between customer service as a process and customer service as a function.
b. Describe how businesses can use customer service to beat their competition.
c. Discuss factors that influence customer expectations of customer service.
d. Explain how customer service facilitates sales relationships.
e. Identify pre-sales opportunities for providing customer service that can facilitate sales relationships.
f. Identify post-sales opportunities when customer service can be provided to facilitate sales relationships.
g. Discuss actions a salesperson can take to make the most of her/his customer service activities.

Activity:

Students should analyze the role of customer service in a business's sales training program to determine how the business emphasizes customer service as a component of selling and write a synopsis of the findings.

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CR:004 Demonstrate a customer-service mindset

LAP: LAP-CR-004
© **LAP:** 2015

Curriculum Planning Level: CS

Objectives:

a. Identify beliefs held by employees who have a customer-service mindset.
b. Describe the importance of exhibiting a customer-service mindset.
c. Identify occasions when employees can exhibit a customer-service mindset.
d. Describe guidelines for exhibiting a customer-service mindset.
e. Demonstrate a customer-service mindset.

Activity:

Ask each student to select a business employee whom s/he can observe to identify that person's efforts in exhibiting a customer-service mindset. Each student should record her/his observations and share them with a small group of her/his peers. After sharing their observations, group members should create a list of the five most unique ways that employees exhibited a customer-service mindset.

Ethics Case for Students: Tanisha works in customer service for a car leasing company. It is the company's policy that any request to transport a leased vehicle on the water or outside the country must be formally reviewed. A military soldier has been given orders to leave the country within two days, and he is requesting permission to transport his car overseas. Two days are not enough time to process the paperwork, and transporting the vehicle without permission would be a breach of the car lease contract. What should Tanisha do? *(Ethical Principles Involved: Trust, Fairness, Respect, Rule of Law)*

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CR:005 Reinforce service orientation through communication

Curriculum Planning Level: CS

Objectives:

a. Define the term service orientation.
b. Explain the relationship between communication and service.
c. Identify ways in which employees in business management can demonstrate a service orientation.
d. Demonstrate procedures for reinforcing a service orientation through communication.

Activity:

Ask each student to select a job in marketing and write five ways or statements that an employee in that role could reinforce a service orientation through communication.

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CO:084 Employ communication styles appropriate to target audience

Curriculum Planning Level: CS

Objectives:

a. Describe types of communication styles.
b. Discuss reasons to employ a communication style appropriate to a target audience.
c. Explain methods used to recognize listeners' communication styles.
d. Demonstrate procedures for employing communication styles appropriate to target audiences.

Activity:

Ask students to identify an appropriate communication style to use for each of the following situations:

- Business meeting with company president

- Annual company outing with family members

- Irate customer wants a problem with a product fixed

- Customer places a special order over the telephone

- Co-worker confides a personal problem to you

- Your supervisor reprimands you for arriving late at work

- A co-worker speculates about why a manager is leaving the company

When students have finished, discuss their answers as a class, and instruct students to justify their choice of communication style.

Ethics Case for Students: Devon has been assigned a speech topic about the importance of good study habits. During his research, Devon discovers that his teacher's recommended study methods are not effective techniques. Since Devon will be presenting the speech for his teacher and classmates, should Devon include the information that he discovered or omit it to avoid challenging his teacher's authority? *(Ethical Principles Involved: Transparency, Respect)*

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CR:019 Adapt communication to the cultural and social differences among clients

Curriculum Planning Level: CS

Objectives:

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

Activity:

Instruct groups of four or five students to develop skits showing how they would adapt their communication to the cultural/social differences among clients. Ask each group to explain the situation to the class and then present the skit to classmates. Audience members should identify and record how the group adapted communication to the situation. At the end of the skit, group members should ask classmates to explain what they observed and how they could improve communication.

Ethics Case for Students: Chelsea is working with a client from another country. She wants to adapt to the client's culture. However, when Chelsea is in a meeting with the company, she notices that the employees from the other country are all men, and they do not seem to be comfortable working with a woman. They have made several derogatory comments about women that have made Chelsea uncomfortable. What should Chelsea do? Should she respect the cultural differences and keep quiet? Or should she communicate her discomfort to the client? *(Ethical Principles Involved: Integrity, Transparency, Respect)*

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CR:006 Respond to customer inquiries

Curriculum Planning Level: CS

Objectives:

a. Explain the nature of customer inquiries.
b. Identify the types of customer inquiries.
c. Discuss the importance of possessing knowledge of the company (e.g., policies, history, capabilities, etc.).
d. Discuss the importance of possessing adequate product knowledge.
e. Describe guidelines for handling customer inquiries.
f. Demonstrate use of proper procedure for solving a customer inquiry in a business situation.

Activity:

Ask each student to work with a partner to develop and present a skit that illustrates how employees should handle customer inquiries. Using a performance checklist, audience members should evaluate students' demonstrations and discuss their ratings with the class.

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Author: Once a Day Marketing
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CO:114 Handle telephone calls in a businesslike manner

Curriculum Planning Level: CS

Objectives:

a. Describe proper verbal skills needed to handle telephone calls.
b. Explain attitudes needed when handling telephone calls.
c. Explain standard procedures for taking messages.
d. Describe procedures for handling telephone calls in a businesslike manner.
e. Demonstrate procedures for handling telephone calls in a businesslike manner.

Activity:

Review and present the Handling Telephone Calls Briefing (starting on page 4-46) to students in a lecture or discussion format. Help the class to develop a performance checklist for handling telephone calls in a businesslike manner. Then, ask students to demonstrate correct and incorrect ways to handle telephone calls, and instruct their classmates evaluate their performance using the checklist.

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Why should you handle telephone calls in a businesslike manner?

A great deal of business is done over the phone. Businesspeople communicate with customers and prospective customers, partners, coworkers, and supervisors via telephone. Therefore, it is important to make a good impression while talking on the phone. The person to whom you are speaking will form an opinion of you based on your word choice, tone of voice, and attitude.

When you're speaking on the phone in a business setting, you are representing your company to others. Your phone conversation skills can gain or lose customers, make or break sales, and strengthen or weaken relationships. It is important to develop the skills necessary to effectively handle telephone calls in a businesslike manner. Three skill areas that are important to focus on are attitude, verbal, and listening.

How does your attitude impact a caller's impression of you?

Even though the caller cannot see your face and body language, s/he will be able to pick up on your attitude through your voice. Whether you are smiling or frowning can actually be heard in your speech over the phone. You should sit up straight and smile when you answer the call, even if you are in a bad mood. If you do so, your voice will convey warmth and positivity. Your caller will then form a positive impression of you. On the other hand, if you are frowning and slumped over in your seat, your caller will likely feel that your attitude is poor. The caller will likely form a negative impression of you and your business.

Verbal skills needed to handle telephone calls

Verbal skills contribute to your ability to communicate effectively with others using speech. Verbal skills are incredibly important for those who do business over the phone. Your verbal skills should be professional, clear, and informational. If you lack strong verbal skills, you will confuse callers and leave them with a negative impression.

Verbal skills include:

- **Pace of speech:** The speed at which you speak
- **Volume:** The loudness or softness of your voice
- **Pitch:** The highness or lowness of your voice
- **Tone of voice:** The sound of your voice that indicates intent or meaning
- **Pronunciation:** The accurate way to say a word
- **Enunciation:** How clearly you pronounce your words
- **Conversation flow:** The way words are exchanged between individuals
- **Choice of words/phrases:** The specific words and phrases you select

Why do you need listening skills to handle telephone calls?

Listening skills are just as important (if not more so) than verbal skills. Being a good listening requires active listening – not just sitting in silence while your caller talks, but actually hearing and comprehending what s/he says. You must put away all distractions and give the call your full attention. Try sitting up straight to increase your focus. You may need to ask clarifying questions or take notes to help retain the information from the call. Minimize your own talking, and refrain from interrupting while the other person is speaking.

Steps for handling telephone calls in a businesslike manner

Putting your attitude, verbal, and listening skills into action will help you to handle business telephone calls effectively. Here are some steps you can take to make your calls go smoothly:

1. **Answer promptly with a friendly greeting.** Answer quickly with a smile, and identify the name of your organization to verify that the call has been place correctly, as well as your own name.

2. **Ask how you can be of assistance.** Asking "How may I help you?" helps you uncover the reason for the call right away.

3. **Listen attentively.** Again, being a strong active listener is essential. Remember to remove distractions and focus intently on what the caller is saying.

4. **Take written notes.** Notes can help you to remember information about your caller. They also help you to take a message and get all of the important details correct if necessary.

5. **Think security!** When speaking on the phone, it is important to be careful what you say: do not give out sensitive or private information.

6. **Provide the appropriate information, or refer the caller to the correct place.** Make sure you are equipped with the knowledge necessary to fulfill the caller's requests. If you are not, place the caller on hold to retrieve the information.

7. **Inform caller if you need to transfer the call.** The caller might need to be connected to someone more knowledgeable or equipped to help him/her. Make sure the caller knows why you are transferring the call and to whom they are being transferred.

8. **Handle any interruptions.** If you have an urgent interruption, excuse yourself to the caller. Complete your original conversation before engaging with someone else.

9. **End the call pleasantly.** Leave a good lasting impression by sincerely thanking the caller and wishing him/her a pleasant day.

SE:932 Explain company selling policies

LAP: LAP-SE-121
© **LAP:** 2013

Curriculum Planning Level: CS

Objectives:

a. Define the following terms: selling policies, selling-activity policies, terms-of-sale policies and service policies.
b. Identify types of selling-activity policies.
c. Identify types of terms-of-sale policies.
d. Identify types of service policies.
e. Explain the importance of selling policies.
f. Describe the characteristics of selling policies.
g. Explain why selling policies are needed.
h. Describe external factors that affect selling policies.
i. Describe internal factors that affect selling policies.
j. Describe regulatory factors that affect selling policies.
k. Explain problems encountered with the use of selling policies.

Activity:

Students should determine the selling policies followed by two direct competitors and discuss the similarities and differences between the two businesses' policies.

Ethics Case for Students: Gary's Gadgets is an electronics store that sells computers, phones, tablets, and other technology. Gary recently sold a set of computers to a local company. However, the installation process did not go as smoothly as expected. Because of the problems, the company's employees were unable to work for two days while the computers were being set up. The president of the company blamed Gary's Gadgets for this. She demanded that Gary compensate her for the loss of productivity caused by the computer installation.

Gary's Gadgets has a terms-of-sale policy, though, that protects the store from being liable in situations such as these. Gary does not want to damage his relationship with this client, but he also knows that according to the terms-of-sale policy, he does not owe the company anything. What is the right thing to do? Should Gary abide by his selling policy, or should he make an exception to appease the client? *(Ethical Principles Involved: Integrity, Accountability, Fairness, Respect, Viability)*

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References: (p. 526)
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Author: Ingram, T.N., LaForge, R.W., Avila, R.A., Schwepker, C.H., & Williams, M.R.
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URL: http://www.aetrex.com/return-policy-terms-of-sales/
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Author: Customer Expressions and iSight
URL: http://www.customerexpressions.com/cex/cexweb.nsf/%28GetPages%29/dc2a6eb176d042bb8525701200521182
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URL: https://www.youtube.com/watch?v=nQov5eMGhXE
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CO:057 Analyze company resources to ascertain policies and procedures

Curriculum Planning Level: CS

Objectives:

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

Activity:

Instruct students to obtain samples of businesses' materials (e.g., handbooks, employee policies, departmental policies/procedures) from local businesses and/or students' employers. In small groups, students should review and compare the different companies' policies/procedures. Each group should then record the policies and procedures that it would want employees to follow in its own business.

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Author: Daft, R.L., & Marcic, D.
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Publisher: Mason, OH: South-Western Cengage Learning
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Title: Essentials of management: Instructor's edition (8th ed.)
Author: DuBrin, A.
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Author: Dove Personnel & Labour Hire Maroochydore
URL: https://www.youtube.com/watch?v=z7cpD7ZXHYI
Copyright: 2016, October 18
Accessed on: 2017-03-15

CR:007 Interpret business policies to customers/clients

Curriculum Planning Level: CS

Objectives:

a. Define the term business policy.
b. Identify characteristics of effective business policies.
c. Describe reasons for having business policies.
d. Explain types of business policies that affect customers.
e. Discuss the role of employees in interpreting business policies.
f. Explain when business policies should be interpreted.
g. Explain guidelines for interpreting business policies to customers.
h. Demonstrate procedures for interpreting business policies to customers.

Activity:

Review and present the Interpreting Business Policies Briefing (starting on page 4-54) to students in a lecture or discussion format. Ask each student to keep a record of the policies that have to be interpreted for customers at a school-based or work-based enterprise. Lead the class in a discussion of their findings.

Ethics Case for Students: Yun works in customer service for an appliance company. He has just received a call from a customer whose washing machine has stopped working after just a few days. The company has a policy that it will replace any malfunctioning product within the first 90 days – but only if the customer specifically requests a replacement. Yun realizes that this particular customer has no idea about the company's policy. She has already told him that she plans on buying a new machine. Yun knows that, if he keeps quiet about the policy, the company will save money. If the customer does not ask for a replacement, he is not required to offer it. But is this ethical? Or should he inform the customer about the policy, even if it costs his company money? *(Ethical Principles Involved: Integrity, Accountability, Transparency, Fairness, Viability)*

Reference Books

Title: Marketing (3rd ed.)
Author: Burrow, J.L.
References:
Publisher: Mason, OH: Thomson/South-Western
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Title: Marketing essentials 2012
Author: Farese, L.S., Kimbrell, G., & Woloszyk, C.A.
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Author: Burrow, J. & Kleindl, B.
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Author: IESE Business School
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Title: Why you need workplace policies & procedures. [Video].
Author: Dove Personnel & Labour Hire Maroochydore
URL: https://www.youtube.com/watch?v=z7cpD7ZXHYI
Copyright: 2016, October 18
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What is a business policy?

A business policy is a general rule or guideline for all employees to follow in making decisions about situations that occur often. The purpose of policies is to provide direction to management, employees, and customers. Policies tell people what is expected of them and how to handle specific problems. They may be written or unwritten, but they should be clear and reasonable.

Who establishes business policies?

The managers of a business are responsible for setting policies to guide operations.

Factors that influence which policies are needed

- The nature and character of the business
- Business image
- Goals of the business

Reasons for business policies

Policies are meant to make sure that both employees and customers understand what can and cannot be done. There are many reasons that businesses have policies.

- **To keep the business running smoothly.** Policies guide the way business situations will be handled and provide a framework for operations.
- **To satisfy customers.** Business policies make sure that customers' need and wants are being met and that customers choose that business over competitors.
- **To reduce misunderstandings and ill will.** When conflict arises, policies can help keep two parties on the same page. They save time and effort for both businesses and customers.
- **To ensure fair treatment of customers.** Policies help to maintain consistency from customer to customer. They reduce the chance that businesses will be accused of being unfair or discriminatory. Fair businesses are more likely to retain customers.
- **To guide employees' actions and protect their decisions.** If they follow the established policies, employees will know they are making the right decisions and won't be punished for their actions.

Types of policies

- **Product policies.** Product policies dictate what products the business will offer. They help the business reach its target market.
- **Service policies.** Businesses establish service policies to give themselves a leg up as opposed to their competition. A company may implement a service that others do not to attract customers. Services policies include returns, delivery, wrapping/bagging, installation, and repairs.
- **Credit policies.** Most businesses offer customers the option to use credit to purchase goods and services. Credit policies determine how these transactions will be handled.

- **Promotional policies.** Sales promotions are used to attract customers and increase sales. Businesses must set policies to determine how they will promote themselves using contests, coupons, and other forms of promotion.

- **Price policies.** Price is another tool that is used to set businesses apart from competitors. Businesses establish price policies that will attract their target customers.

- **Employee policies.** Businesses must establish guidelines so their employees know how to act. Employees follow these policies to make a good impression on customers and represent the company well.

Reasons for interpreting business policies to customers/clients

Policies are useless if customers do not understand them. It is important to interpret policies to customers/clients for several reasons.

- **To promote goodwill.** Customers who understand the rules will be more comfortable doing business with the company. Clearly understood policies reduce the risk of conflict between customers and businesses and build positive relationships.

- **To build a clientele.** When policies are understood, customers are happy, and when customers are happy, they become loyal. Loyal customers will help build your customer base by spreading the word about the company to others.

- **To obtain feedback from customers.** Business should seek to learn how their customers feel about the policies. If customers aren't pleased, the policies should be changed.

- **To increase sales and profits.** Explaining business policies effectively can increase sales and profits because customers who are satisfied with the policies will return.

Who is responsible for interpreting business policies?

Employees who meet with customers need to interpret business policies to customers. These employees must have extensive knowledge about the policies and must be able to explain them to customers in understandable terms.

When do employees need to interpret policies to customers/clients?

While policies should be written and available to customers at all times, these policies might need further explanation certain situations, including:

- **When a customer asks:** Customers might need clarification or further details about policies.

- **When a customer complains:** Customers often complain about policies that they do not fully understand.

- **When a sales presentation takes place:** Policies can often be used as selling points that encourage customers to buy.

Guidelines for interpreting business policies to customers/clients

Every situation is different, but when interpreting business policies to customers, there are some strategies that can guide you in the right direction.

- **Know your business's policies.** You need a thorough knowledge of your business's policies in order to explain them to customers and answer their questions. To learn the policies, read the written handbook and speak to your manager about any unwritten policies.

- **Listen carefully.** Pay careful attention to what customers say to make sure you correctly understand the questions or comments. Listening can help you find out if the customer understands your explanation.

- **Stay calm.** Customers might not understand your explanation or might be upset about something unrelated to the policy. Recognize these situations and stay calm – you are expected to remain courteous even if the customer does not.

- **Act friendly.** Treating customers in a friendly manner will make them feel more comfortable and will make them feel that you care about their needs.

- **Present information clearly.** Make sure policies are clear and easily understood so that customers can be fully informed when making decisions.

- **Admit when you need help.** If you aren't sure how to interpret a policy for a customer, don't be afraid to ask your manager to step in. It is better to admit when you do not know something than to pretend that you do know it.

Following these guidelines will help employees properly interpret business policies for customers. Employees who can do so will build goodwill with customers and will give their companies a competitive advantage.

CO:061 Defend ideas objectively

Curriculum Planning Level: CS

Objectives:

a. Discuss the need to provide evidence to support a position.
b. Explain how ideas are formed.
c. Describe stages of an idea evaluation process.
d. Explain what causes people to accept new ideas.
e. Identify reasons that barriers that are established to keep from accepting new ideas.
f. Demonstrate procedures for defending ideas objectively.

Activity:

Explain to the class that the school is "going green" and needs ideas of how this should happen. Divide the class into groups of four or five students each. Each group should develop a list of what the school needs to do. The list should include one idea from each group member. Ask the groups to present their ideas to the class. Each group member should defend her/his idea when objections to it are raised. As a reflection, students should individually write down three things that they feel people must know/do when defending ideas, and three things people must know/do when objecting to someone's ideas. Finally, students should submit their papers for review.

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Author: Lussier, R.N., & Achua, C.F.
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Author: Daft, R.L.
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URL: https://www.youtube.com/watch?v=FSAWrqavYg0
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Author: Morrissey, C.
URL: https://www.youtube.com/watch?v=y7FiTzVeWk4
Copyright: 2016, August 19
Accessed on: 2017-03-15

CR:009 Handle difficult customers

LAP: LAP-CR-009
© **LAP:** 2015

Concept/Skill: S

Objectives:

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

Activity:

Ask each student to write a description of a situation s/he has encountered involving a difficult customer. Collect the students' descriptions and select three of the most representative examples to discuss with the class.

Ethics Case for Students: You work for a coffee roasting business. Mr. Davenport, a demanding customer, is insisting that his order of ground coffee was short by four pounds. You want to correct Mr. Davenport's order to appease him, but you are worried that he may be mistaken. What should you do? *(Ethical Principles Involved: Trust, Accountability, Fairness, Respect)*

Reference Books

Title: Professional selling: A trust-based approach (4th ed.)
Author: Ingram, T.N., LaForge, R.W., Avila, R.A., Schwepker, C.H., & Williams, M.R.
References: [pp. 245-248]
Publisher: Mason, OH: South-Western Cengage Learning
Copyright: 2008

Title: Selling today: Creating customer value (11th ed.)
Author: Manning, G.L., Reece, B.L., & Ahearne, M.
References: [pp. 339-340]
Publisher: Upper Saddle River, NJ: Prentice Hall
Copyright: 2010

Title: Marketing dynamics (3rd ed.)
Author: Clark, B., Basteri, C.G., Gassen, C., & Walker, M.
References: [p. 546-550]
Publisher: Tinley Park, IL: Goodheart-Willcox.
Copyright: 2014

Title: Marketing essentials 2012
Author: Farese, L.S., Kimbrell, G., & Woloszyk, C.A.
References: (p. 242)
Publisher: Columbus, OH: Glencoe/McGraw-Hill
Copyright: 2012

Reference Websites

Title: Customer service tactics to handle difficult customers.
Author: Business-Software.com
URL: http://www.business-software.com/article/customer-service-tactics-to-handle-difficult-customers/
Copyright: 2017
Accessed on: 2017-03-16

Title: How to handle difficult clients.
Author: McQuerrey, L.
URL: http://www.ehow.com/how_15404_handle-difficultclients.html
Copyright: 2015, September 24
Accessed on: 2017-03-16

Title: Handling difficult customers—8 strategies.
Author: James, N.
URL: http://ezinearticles.com/?Handling-Difficult-Customers---8-Strategies&id=20132
Copyright: 2005, March 10, 2014
Accessed on: 2014-06-17

Title: 10 ways to handle difficult customers.
Author: BusinessNewsDaily
URL: http://smallbusiness.foxbusiness.com/marketing-sales/2012/07/20/10-ways-to-handle-difficult-customers/
Copyright: 2012, July 20
Accessed on: 2017-03-16

Title: Dealing with unhappy customers: Turning a challenge into an opportunity.
Author: Mind Tools
URL: http://www.mindtools.com/pages/article/unhappy-customers.htm
Copyright: 2017, February 6
Accessed on: 2017-03-16

Title: 5 types of difficult customers and how to deal with them.
Author: De Leon, E
URL: https://blog.zopim.com/2013/12/04/5-types-of-difficult-customers/
Copyright: 2013, December 4
Accessed on: 2017-03-16

Title: Hostile customers—Without becoming one.
Author: Marteny, J.
URL: http://www.slideshare.net/profjim/dealing-with-difficult-customers
Copyright: n.d.
Accessed on: 2014-06-17

Title: Four tips for dealing with difficult clients. [Video].
Author: docstocTV
URL: https://www.youtube.com/watch?v=EwouPuiGsBs
Copyright: 2012, January 13
Accessed on: 2017-03-16

Title: Dealing with the irate customer. [Video].
Author: Kantola Training Solutions
URL: https://www.youtube.com/watch?v=oQtArj5U5l4
Copyright: 2012, July 16
Accessed on: 2017-03-16

CR:010 Handle customer/client complaints

LAP: LAP-CR-010
© **LAP:** 2015

Curriculum Planning Level: CS

Objectives:

a. Define the term complaint.
b. Identify the costs associated with customer complaints.
c. Identify reasons for customer complaints.
d. Describe the benefits of customer complaints.
e. Explain the importance of appropriately handling customer complaints.
f. Explain procedures for handling customer complaints.
g. Demonstrate procedures for handling customer complaints.

Activity:

Arrange for a supervisor or manager of a local business to talk with the students about frequently voiced customer complaints and how the business responds to the complaints.

Reference Books

Title: Professional selling: A trust-based approach (4th ed.)
Author: Ingram, T.N., LaForge, R.W., Avila, R.A., Schwepker, C.H., & Williams, M.R.
References: [pp. 245-248]
Publisher: Mason, OH: South-Western Cengage Learning
Copyright: 2008

Title: Selling today: Creating customer value (11th ed.)
Author: Manning, G.L., Reece, B.L., & Ahearne, M.
References: [pp. 339-340]
Publisher: Upper Saddle River, NJ: Prentice Hall
Copyright: 2010

Title: Marketing dynamics (3rd ed.)
Author: Clark, B., Basteri, C.G., Gassen, C., & Walker, M.
References: [p. 550]
Publisher: Tinley Park, IL: Goodheart-Willcox.
Copyright: 2014

Title: Marketing essentials 2012
Author: Farese, L.S., Kimbrell, G., & Woloszyk, C.A.
References: (pp. 241-242)
Publisher: Columbus, OH: Glencoe/McGraw-Hill
Copyright: 2012

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Title: Your customer complaints could be costing you more than you realize.
Author: Buttle, F.
URL: http://www.customerthink.com/article/your_customer_complaints_costing_more
Copyright: 2008, March 11
Accessed on: 2017-03-16

Title: Handling consumer complaints: A best practice guide.
Author: Customer Expressions and iSight
URL: http://www.customerexpressions.com/cex/cexweb.nsf/(GetPages)/2FEE295CD6D0BB1B85256FE900568660
Copyright: 1999-2017
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Title: How to talk to your angriest customers.
Author: Ciotti, G.
URL: https://www.helpscout.net/blog/customer-complaints/
Copyright: 2016, June 22
Accessed on: 2017-03-16

Title: 5 steps to handling a customer complaint.
Author: Swyers, M.
URL: http://www.inc.com/matthew-swyers/5-steps-to-handling-a-customer-complaint.html
Copyright: 2012, November 7
Accessed on: 2017-03-16

Title: How to deal with customer service complaints.
Author: Balle, L.
URL: http://smallbusiness.chron.com/deal-customer-service-complaints-1115.html
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Title: Handling customer complaints. [Video].
Author: DPI Training
URL: https://www.youtube.com/watch?v=ZHaCMZLjCxE
Copyright: 2015, February 3
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Title: Handling complaints and the irate customer video 3. [Video].
Author: Service First Video Library
URL: https://www.youtube.com/watch?v=Lsp-yvjnj1k
Copyright: 2008, October 13
Accessed on: 2017-03-16

CR:001 Identify company's brand promise

LAP: LAP-CR-006
© **LAP:** 2016

Curriculum Planning Level: CS

Objectives:

a. Define the terms touch points, brand, and brand promise.
b. Explain the importance of a company's brand promise.
c. Describe factors impacting a company's brand promise.
d. Demonstrate how to identify a company's brand promise.

Activity:

Each student should select a local business to identify its brand promise. S/He should record the brand promise, write a rationale for his/her findings, and participate in a small-group activity to share his/her findings and rationale.

Reference Books

Title: Marketing
Author: Grewal, D., & Levy, M.
References: (pp. 271-272, 274-285)
Publisher: New York: National Council on Economic Education
Copyright: 2008

Title: Basic marketing: A marketing strategy planning approach (16th ed.)
Author: Perreault, W.D., Cannon, J.P., & McCarthy, E.J.
References: [p. 249]
Publisher: Boston: Irwin/McGraw-Hill
Copyright: 2008

Title: Marketing (3rd ed.)
Author: Burrow, J.L.
References: [p. 245]
Publisher: Mason, OH: South-Western Cengage Learning
Copyright: 2012

Title: Marketing dynamics (3rd ed.)
Author: Clark, B., Basteri, C.G., Gassen, C., & Walker, M.
References: [p. 326]
Publisher: Tinley Park, IL: Goodheart-Willcox.
Copyright: 2014

Title: Contemporary marketing: 2013 edition
Author: Kurtz, D.
References: (p. 379)
Publisher: Mason, OH: South-Western Cengage Learning
Copyright: 2013

Title: Marketing essentials 2012
Author: Farese, L.S., Kimbrell, G., & Woloszyk, C.A.
References: (pp. 731-736)
Publisher: Columbus, OH: Glencoe/McGraw-Hill
Copyright: 2012

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Title: The language of branding: "Brand promise".
Author: Asacker, T., VanAuken, B. & Daye, D.
URL: http://www.brandingstrategyinsider.com/2008/02/the-language-of.html
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Author: Thakare, M.
URL: http://communications.webalue.com/2009/08/13/what-is-brand-promise/
Copyright: 2009
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Title: What's a brand promise?
Author: Marsh, B.
URL: http://www.billmarshjr.com/a-brand-is-a-promise-3-great-examples-of-strong-brands-that-make-strong-promises/
Copyright: 2013, May 29
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Author: LinkedIn Learning Solutions
URL: https://www.youtube.com/watch?v=lcopxtSpuaM
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Author: Siegel+Gale
URL: https://www.youtube.com/watch?v=xaJFylPMiyM
Copyright: 2011, February 3
Accessed on: 2017-03-17

Title: Brand strategy: Drive toward a brand promise (at Stanford). [Video].
Author: Kang, K.
URL: https://www.youtube.com/watch?v=2cYVb8Kbt20
Copyright: 2014, February 4
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Title: Elements of a successful brand promise.
Author: Frederiksen, L.
URL: https://hingemarketing.com/blog/story/elements-of-a-successful-brand-4-brand-promise1
Copyright: 2016, January 4
Accessed on: 2017-03-17

CR:002 Determine ways of reinforcing the company's image through employee performance

Curriculum Planning Level: CS

Objectives:

a. Discuss types of company images.
b. Describe factors that affect a company's image.
c. Explain the importance of reinforcing the company's image.
d. Describe ways that employees can reinforce the company's image through their performance.
e. Demonstrate how to determine ways to reinforce the company's image through employee performance.

Activity:

Instruct each student to use the local business and its brand promise previously identified to determine ways that the company's employees reinforce the business's image through their performance. Students should record their findings and suggest additional ways for employees to reinforce the company's image.

Ethics Case for Students: Yan is the customer-service manager for a cellphone service provider. The company, which is committed to responding quickly to customer requests, has determined that the maximum time a customer should wait to speak to a customer service representative is two minutes. Kelly, a customer-service representative, is taking frequent personal breaks due to her pregnancy--causing longer wait times for customers and affecting the performance of the entire department. Yan's supervisor has recommended that Yan fire Kelly because she is not meeting performance standards. Is it ethical to fire Kelly? *(Ethical Principles Involved: Fairness, Respect, Rule of Law)*

Reference Books

Title: Principles of marketing (12th ed.)
Author: Kotler, P., & Armstrong, G.
References: [pp. 206, 434]
Publisher: Upper Saddle River, NJ: Prentice Hall
Copyright: 2008

Title: Services marketing: Integrating customer focus across the firm (5th ed.)
Author: Zeithaml, V.A., Bitner, M.J., & Gremler, D.D.
References: [pp. 492-508]
Publisher: New York: McGraw-Hill/Irwin
Copyright: 2009

Title: Integrated advertising, promotion, and marketing communications (4th ed.)
Author: Clow, K.E, & Baack, D.
References: [pp. 360-367]
Publisher: Upper Saddle River, NJ: Prentice Hall
Copyright: 2010

Title: Marketing (3rd ed.)
Author: Burrow, J.L.
References: [p. 245]
Publisher: Mason, OH: South-Western Cengage Learning
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Title: Marketing dynamics (3rd ed.)
Author: Clark, B., Basteri, C.G., Gassen, C., &
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References: [pp. 326-332, 546-550]
Publisher: Tinley Park, IL: Goodheart-Willcox.
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Title: Contemporary marketing: 2013 edition
Author: Kurtz, D.
References: (pp. 382-383)
Publisher: Mason, OH: South-Western Cengage
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Copyright: 2013

Title: Marketing essentials 2012
Author: Farese, L.S., Kimbrell, G., & Woloszyk,
C.A.
References: (p. 731)
Publisher: Columbus, OH: Glencoe/McGraw-Hill
Copyright: 2012

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Title: Corporate identity.
Author: Reference for Business: Encyclopedia of
Business (2nd ed.)
URL: http://www.referenceforbusiness.com/en
cyclopedia/Con-Cos/Corporate-
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work to protect, project it.
Author: Marken Communications
URL: http://www.markencom.com/docs/03mar
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Copyright: 2015
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Title: 5 essential principles for growing your
small business.
Author: Hoque, F.
URL: http://www.fastcompany.com/3004395/5
-essential-principles-growing-your-small-
business
Copyright: 2013, November 5
Accessed on: 2017-03-17

Title: Importance of employee behavior in an
organization.
Author: McQuerrey, L.
URL: http://work.chron.com/importance-
employee-behavior-organization-11019.html
Copyright: 2012, October 9
Accessed on: 2017-03-17

Title: Employees role in building a brand image.
Author: JFS Branding
URL: http://jfsbranding.wordpress.com/2010/0
7/01/employees-role-in-building-a-brand-
image/
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Accessed on: 2017-03-17

Title: How are employees affecting your brand
Author: Nagel, M.
URL: http://www.huffingtonpost.com/marilyn-
nagel/employee-engagement_b_3956204.html
Copyright: 2013, September 23
Accessed on: 2017-03-17

Title: Employee brand advocates. [Video].
Author: New to HR
URL: https://www.youtube.com/watch?v=vp-
ImB4y4P4
Copyright: 2015, September 12
Accessed on: 2017-03-20

Title: Brand matters: How can employee
engagement help a brand realize its potential?
[Video].
Author: Siegel+Gale
URL: https://www.youtube.com/watch?v=R69H
nGiSlsI
Copyright: 2014, September 12
Accessed on: 2017-03

CO:085 Utilize note-taking strategies

Curriculum Planning Level: CS

Objectives:

a. Discuss the importance of taking good notes.
b. Explain note-taking strategies (e.g., Cornell two-column note-taking, outlining, mapping, charting, etc.).
c. Identify abbreviations commonly used when note-taking.
d. Describe common errors in note-taking.
e. Demonstrate note-taking strategies.

Activity:

Instruct students to implement three note-taking strategies of their choice in their classes. After utilizing the three different strategies, each student should determine which strategy s/he prefers, write a rationale for his/her choice, and submit the rationale for review.

Reference Books

Title: Business communication today (9th ed.)
Author: Bovée, C.L., & Thill, J.V.
References: 52-53, 350, 506, 511
Publisher: Upper Saddle River, NJ: Pearson Prentice Hall
Copyright: 2008

Title: Business communication (16th ed.)
Author: Lehman, C. & DuFrene, D.
References: 52-53, 326-335
Publisher: Mason, OH: South-Western
Copyright: 2011

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

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Title: Cornell notes.
Author: James Madison University
URL: http://coe.jmu.edu/learningtoolbox/cornellnotes.html
Copyright: n.d.
Accessed on: 2017-03-16

Title: Notetaking.
Author: Slatta, R.W.
URL: http://faculty.chass.ncsu.edu/slatta/hi216/takenotes.htm
Copyright: n.d.
Accessed on: 2017-03-16

Title: Effective reading and note-taking
Author: University of New South Wales
URL: https://student.unsw.edu.au/effective-reading-and-note-taking
Copyright: 2013, November 7
Accessed on: 2017-03-16

Title: Evaluate your present note-taking system: Guidelines for note-taking
Author: Illinois State University
URL: http://universitycollege.illinoisstate.edu/downloads/Notetaking%20%28Standford%20PDF%29.pdf
Copyright: n.d.
Accessed on: 2017-03-24

Title: How to take great notes. [Video].
Author: WellCast
URL: https://www.youtube.com/watch?v=UAhRf3U50lM
Copyright: 2012, October 26
Accessed on: 2017-03-16

Title: How to...Cornell notes. [Video].
Author: Sofia Tree Productions
URL: https://www.youtube.com/watch?v=w3pM5hEgBk4
Copyright: 2012, September 7
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Title: 3 tips for taking notes. [Video].
Author: Studying
URL: https://www.youtube.com/watch?v=d18cuUIZgoU
Copyright: 2016, September 10
Accessed on: 2017-03-16

CO:086 Organize information

Curriculum Planning Level: CS

Objectives:

a. Discuss reasons to organize information after taking notes.
b. Explain the impact that target audience has on the organization of information.
c. Describe common approaches to organizing/ordering information (e.g., chronological order, problem/solution, most important to least important, deductive order, inductive order, etc.).
d. Explain techniques that can be used to organize information on the computer.
e. Demonstrate procedures for organizing information.

Activity:

Instruct students to organize all of their notes from the previous activity (CO:085) using their preferred note-taking strategy. Students should then compare their organized notes with a partner, explaining the organizing/ordering approach used and why.

Reference Books

Title: Business communication today (9th ed.)
Author: Bovée, C.L., & Thill, J.V.
References: [pp. 108-111]
Publisher: Upper Saddle River, NJ: Pearson Prentice Hall
Copyright: 2008

Title: Business communication (16th ed.)
Author: Lehman, C. & DuFrene, D.
References: [pp. 418-422]
Publisher: Mason, OH: South-Western
Copyright: 2011

Title: Marketing essentials 2012
Author: Farese, L.S., Kimbrell, G., & Woloszyk, C.A.
References: (pp. 202-203)
Publisher: Columbus, OH: Glencoe/McGraw-Hill
Copyright: 2012

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Title: Examples of methods of organization.
Author: Burke, A.
URL: http://smallbusiness.chron.com/examples-methods-organization-18982.html
Copyright: 2011, August 8
Accessed on: 2017-03-24

Title: Chapter 10 lecture: Six methods for organizing data.
Author: College of Marin
URL: http://www.marin.edu/buscom/index_files/Page1347.htm
Copyright: n.d.
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Title: Organizing information.
Author:
URL: http://courses.washington.edu/css301/zander/Notes/organizeinfo.doc
Copyright: n.d.
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Title: How to organize business files using a hierarchical file structure.
Author: Richards-Gustafson, F.
URL: http://smallbusiness.chron.com/organize-business-files-using-hierarchical-file-structure-23208.html
Copyright: 2011, September 13
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Title: Organizing information in written reports.
Author: Gradous, D.
URL: http://managementhelp.org/businesswriting/how-to-organize-information.htm
Copyright: n.d.
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Author: Writing Thought Art
URL: https://www.youtube.com/watch?v=6CeWuKVc3cE
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Author: Shannon, C.
URL: https://www.youtube.com/watch?v=MLL1PBO-hf4
Copyright: 2013, August 4
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SE:062 Acquire product information for use in selling

LAP: LAP-SE-131
© **LAP:** 2015

Curriculum Planning Level: CS

Objectives:

a. Identify sources of product information that provide information for use in selling.
b. Identify types of product information that can be useful in selling.
c. Cite occasions when product information can be used in sales presentations.
d. Describe guidelines to follow when acquiring product information.
e. Demonstrate procedures for acquiring product information for use in selling.

Activity:

Each student should examine product information accompanying five products sold by local businesses, record the sources and the types of product information accompanying the products, and explain how the information can be used in sales situations.

Reference Books

Title: Basic marketing: A marketing strategy planning approach (16th ed.)
Author: Perreault, W.D., Cannon, J.P., & McCarthy, E.J.
References: [p. 411]
Publisher: Boston: Irwin/McGraw-Hill
Copyright: 2008

Title: Professional selling: A trust-based approach (4th ed.)
Author: Ingram, T.N., LaForge, R.W., Avila, R.A., Schwepker, C.H., & Williams, M.R.
References: [pp. 42, 44, 72, 195-196]
Publisher: Mason, OH: South-Western Cengage Learning
Copyright: 2008

Title: Selling today: Creating customer value (11th ed.)
Author: Manning, G.L., Reece, B.L., & Ahearne, M.
References: [pp. 28-131]
Publisher: Upper Saddle River, NJ: Prentice Hall
Copyright: 2010

Title: Marketing (3rd ed.)
Author: Burrow, J.L.
References: [p. 489]
Publisher: Mason, OH: South-Western Cengage Learning
Copyright: 2012

Title: Marketing dynamics (3rd ed.)
Author: Clark, B., Basteri, C.G., Gassen, C., & Walker, M.
References: [pp. 69, 422, 534-535]
Publisher: Tinley Park, IL: Goodheart-Willcox.
Copyright: 2014

Title: Contemporary marketing: 2013 edition
Author: Kurtz, D.
References: (pp. 567, 579, 583-584)
Publisher: Mason, OH: South-Western Cengage Learning
Copyright: 2013

Title: Marketing essentials 2012
Author: Farese, L.S., Kimbrell, G., & Woloszyk, C.A.
References: (p. 297)
Publisher: Columbus, OH: Glencoe/McGraw-Hill
Copyright: 2012

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Title: The importance of sales training on a daily basis.
Author: Deane, S.
URL: http://ezinearticles.com/?The-Importance-Of-Sales-Training-On-A-Daily-Basis&id=945400
Copyright: 2008, January 23
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Title: Importance of product knowledge in selling.
Author: Prasad, R.K.
URL: http://blog.commlabindia.com/elearning-design/product-knowledge-in-selling
Copyright: 2011, August 26
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Title: Fixing the product-knowledge gap.
Author: Selling Power
URL: http://www.sellingpower.com/content/article/?a=9830
Copyright: 1998-2017
Accessed on: 2017-03-28

Title: How to acquire product knowledge?
Author: Khanna, V.
URL: http://www.preservearticles.com/201103154532/how-to-acquire-product-knowledge.html
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Title: The importance of product knowledge. [Video].
Author: FIG ESSA
URL: https://www.youtube.com/watch?v=iiOvLJshcxQ
Copyright: 2011, December 30
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Title: Benefits of product knowledge.
Author: Hudson, M.
URL: https://www.thebalance.com/benefits-of-product-knowledge-2890302
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Title: Sales training video: Develop your product knowledge. [Video].
Author: Sticky Bites - The Free Sales Training Channel
URL: https://www.youtube.com/watch?v=hzOftYVw2YQ
Copyright: 2016, August 12
Accessed on: 2017-03-27

CO:087 Select and use appropriate graphic aids

Curriculum Planning Level: CS

Objectives:

a. Discuss reasons to use graphic aids.
b. Explain commonly used graphic aids (e.g., tables, bar graphs, line graphs, pie charts).
c. Explain methods utilized to select and use appropriate graphic aids.
d. Demonstrate procedures for selecting and using appropriate graphic aids.

Activity:

Instruct students to read each of the following situations and determine what graphic aid would be the best to use for depicting the data. Each student should create the graphic aid and write a rationale for why s/he selected the graphic aid for the scenario. Students should submit their completed graphic aids and rationales for review.

a.   The average household spends 33% of its income on housing, 17% on utilities, 20% on transportation, 6% on clothing, 10% on food, 9% on entertainment, and 5% on savings/investments.

b.   Since 1929, stock investors have averaged a growth rate of 9% a year on their investments.

c.   Every 10 years since 1975, the population of the United States has doubled. The current U.S. population is approximately 200,000,000.

d.   Colleges and universities accept an equal number of males and females into their freshman class.

e.   The price of oranges at Albertson's is 25% higher than orange prices at Walmart.

Reference Books

Title: Business communication today (9th ed.)
Author: Bovée, C.L., & Thill, J.V.
References: [pp. 360-391]
Publisher: Upper Saddle River, NJ: Pearson Prentice Hall
Copyright: 2008

Title: Marketing (3rd ed.)
Author: Burrow, J.L.
References: [p. 81]
Publisher: Mason, OH: South-Western Cengage Learning
Copyright: 2012

Title: Intro to business (7th ed.)
Author: Dlabay, L.R., Burrow, J.L., & Kleindl, B.
References: [p. 271]
Publisher: Mason, OH: South-Western Cengage Learning
Copyright: 2009

Title: Marketing essentials 2012
Author: Farese, L.S., Kimbrell, G., & Woloszyk, C.A.
References: (pp. 180-181)
Publisher: Columbus, OH: Glencoe/McGraw-Hill
Copyright: 2012

Reference Websites

Title: Visual aids to overcome barriers to communication.
Author: Brookins, M.
URL: http://smallbusiness.chron.com/visual-aids-overcome-barriers-communication-10134.html
Copyright: 2011, June 10
Accessed on: 2017-03-16

Title: Business retention and expansion (BRE) programs: Preparing a written report of survey findings and recommendations.
Author: Cothran, H.M.
URL: http://edis.ifas.ufl.edu/pdffiles/FE/FE65700.pdf
Copyright: n.d.
Accessed on: 2017-03-16

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SE:019 Explain the use of brand names in selling

Curriculum Planning Level: CS

Objectives:

a. Discuss the role of brand names in building an emotional connection with customers/clients.
b. Describe the impact of brand names on customer loyalty and repeat business.
c. Explain benefits of selling brand names vs. products.

Activity:

Prior to this lesson, select a name brand drink (e.g., Coca Cola, Minute Maid orange juice, etc.) to share with the class and obtain two different colors/types of disposable cups for each student. Provide each student with two small servings of the beverage, one in each color/type of cup. Instruct students to taste test both drinks and indicate, by a show of hands, which drink they like better. Students are likely to say that the two drinks taste the same.

Then, tell the class that the drink in one color/type of cup is the brand name product, while the drink in the other color/type is a generic brand. Ask students again to indicate which they prefer. The number of students who prefer the name brand versus the generic is likely to be much higher. Finally, ask students to discuss why they prefer the brand name versus the generic and how this experiment illustrates the advantage of using brand names in selling.

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SE:048 Explain the selling process

LAP: LAP-SE-048
© **LAP:** 2017

Curriculum Planning Level: CS

Objectives:

a. Identify the components of the selling process.
b. Describe the importance of establishing relationships with customers.
c. Describe ways to discover customer needs.
d. Describe the components of prescribing solutions to customer needs.
e. Explain the importance of reaching closure in sales situations.
f. Describe aspects of reaching closure in sales situations.
g. Describe the importance of reaffirming the buyer-seller relationship.
h. Describe ways to reaffirm the buyer-seller relationship.
i. Explain similarities/differences in the ways businesses implement the selling process.
j. Explain the importance of using a selling process.

Activity:

Review and present the Selling Process Briefing (starting on page 4-80) to students in a lecture or discussion format. Then each student should observe a sales presentation in which the salesperson used a selling process. Given a list of the components of the selling process, students should identify what was said or took place during the presentation that constituted each phase of the selling process and discuss the responses with the class.

Ethics Case for Students: Trevor, a car salesman, is currently working with an elderly customer who has great difficulty hearing. Trevor believes that the customer shouldn't be driving without special accommodations, so he shows the customer a car with many automatic safety features such as visual cues and autonomous lane correction. However, the customer says he doesn't like technology and wants something simpler. Trevor knows that the car's autonomous features would provide tremendous safety benefits to the driver as well as other people on the road. Should Trevor try to convince the customer to buy the car that would help him with an apparent disability or show him the car he wants? *(Ethical Principles Involved: Trust, Accountability, Respect, Viability)*

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Characteristics of the selling process

- Complex process
- Varies across industries, products, and customers
- No one, single, correct selling process for all situations
- General phases can be applied to all sales situations

Components/Phases of a general selling process

- Establishing relationships with customers
- Discovering customer needs
- Prescribing solutions to needs
- Reaching closure
- Reaffirming the buyer-seller relationship

Establishing relationships with customers

- Occurs during the first few minutes spent with a customer
- Often determines the outcome of the sales contact
- Can be used to:
  - Put the customer at ease
  - Encourage the customer to want to hear about your product
  - Gain customer confidence
  - Create a favorable impression
- Gives the salesperson a chance to size up the customer so that the approach can be adjusted to fit that customer
  - Provides a chance to determine whether customer is aware of their buying needs
  - Gives salesperson an opportunity to determine what buying decisions have been made
  - Lets salesperson determine the customer's personality type
- Can get a head start on establishing relationships with customers by researching the prospect
  - Try to learn about the customer's business
    - Company size
    - Purchasing practices
    - Company locations
    - Decision makers

- o Attempt to learn about the customer's personality
    - Customer's name
    - Customer's position in the company
    - Customer's educational background
    - Customer's hobbies
    - Customer's work history

Discovering customer needs

- A process that could be used involves:
    - o Questioning the customer about her/his needs
    - o Listening to the customer's answers
    - o Observing customer reactions
    - o Analyzing customer reactions and comments
- The process needs to be tailored to the sales presentation based on information gathered from the customer.
- Importance of assessing customer needs:
    - o Reduces the amount of selling time required
    - o Reduces customer dissatisfaction and returns
    - o Allows salesperson to call on/serve more customers, leading to greater profit and commissions
- This phase of the selling process is thought of as a "diagnosis" since the salesperson is diagnosing customer needs based on information the customer provides.
- This phase readies the salesperson to recommend a solution to the customer's needs.

Prescribing solutions to customer needs

- This is the prescription phase: the salesperson offers solutions to meet customer needs.
- The prescription should be based on the diagnosis of a specific customer—one prescription does not fit all.
- This phase consists of two parts:
    - o The sales talk
        - Should convince the customer of the benefits derived from purchasing the product
        - Requires salesperson to translate product features into product benefits that meet the customer's specific needs

- o The product demonstration
  - Should create interest in the product
  - Should allow the customer to interact and become involved in the selling process (e.g., customer asks questions; customer discusses important points in-depth to clarify what has been said)
- Rule-of-thumb guidelines for prescribing solutions to customer needs include:
  - o Sell the benefits of the product rather than its features.
  - o Show a limited number of products to avoid confusion.
  - o Select items that can help to define customers' specific needs.
  - o Concentrate on the main item of interest to close the sale.

Reaching closure

- Purposes of the closure phase:
  - o To identify any remaining resistance, or objections, the customer may have
  - o To get the order
- Objections defined as questions or concerns customers raise after they have been prescribed a solution to their needs.
- Salespeople should anticipate objections and use them to their advantage during the sales presentation.
- Tips for handling objections include:
  - o Welcome customer objections.
  - o Listen from the customer's point of view to identify the real objection.
  - o Restate the objection to be sure it's understood.
  - o Answer and overcome each objection completely, without arguing with the customer or losing your poise.
  - o Review buyer benefits.
  - o Try to develop customer conviction in the product.
- While overcoming objections, salespeople should look for customer clues that the time has come to close the sale.
  - o Customers express clues verbally: "This is just what we need."
  - o Customers give nonverbal clues: Closing and stacking product literature.
- The close is the logical completion to an effective sales presentation.
  - o Customers are moved too the point where they are convinced the product meets their needs.
  - o They want to purchase the product.
- Salesperson asks the customer to buy.
- Salesperson then completes paperwork—a simple sales slip or a contract.

Reaffirming the buyer-seller relationship

- Purposes of the closure phase:
    - To identify any remaining resistance, or objections, the customer may have
    - To get the order
- During this phase, the salesperson helps customers feel confident with their purchase decisions.
- The approach used depends on the nature of the sales situation and could involve any of the following:
    - Simply saying, "This was the best product for your needs"
    - Use of suggestion selling: recommending complementary products to go with the original purchase
    - Answering any lingering questions the customer may have
    - Explaining the sales contract fully
    - Checking on or being present when the product is delivered
    - Supervising installation or adjust of the product
    - Training the customer's staff in the use or the sale of the product
    - Calling the customer later to ensure satisfaction

Reasons for using the selling process

- Salespeople appear organized, which gains customer confidence.
- The process ensures that customer needs and wants are met.
- Increased company profits may result from the use of an efficient, effective sales process.

Similarities and differences in the selling process

Use of the selling process can vary from product to product and from customer to customer. All salespeople need to establish relationships with customers. They all need to discover customer needs/wants, but the time spent on doing it varies. They need to recommend specific products. They need to close the sale. They need to reaffirm the buyer-seller relationship; however, the approach taken will vary.

<u>Impact of the product and type of customer on the selling process</u>

A product's cost, size, and physical existence influence the selling process.

- Example: Customers raise more objections when buying expensive products. This will make the close more difficult and will require additional follow-up to satisfy the customer.

- Example: Real-estate salespeople take their customers to the product, thereby increasing the time required for the sales presentation and close.

- Example: When selling services, salespeople often spend more time establishing relationships, determining needs, and prescribing solutions than they would if they were selling tangible products.

The nature of the customer impacts use of the selling process.

- Little sales assistance is needed when customers buy frequently purchased items such as socks.

- Retail selling requires more time for prospecting and research when selling such intangibles as insurance or investments.

- Each phase of the selling process requires more time in business-to-business sales situations than in retail situations.

CR:029 Develop rapport with customers

Curriculum Planning Level: CS

Objectives:

a. Define the following terms: rapport, reciprocity, mirroring, and affinity.
b. Explain reasons for building rapport with customers (e.g., to create positive connections, to build good relationships, to break the ice).
c. Explain the role of trust in building rapport.
d. Describe ways to build rapport with customers (e.g., matching/mirroring customer's communication style, finding common ground, being empathetic, appreciating the customer's point of view).
e. Explain the importance of nonverbal communication in building rapport with customers.
f. Demonstrate techniques for developing rapport with customers.

Activity:

Divide the class into pairs. Assign a different method for building rapport with customers to each group (e.g., matching/mirroring customer's communication style, finding common ground, being empathetic, appreciating the customer's point of view. etc.) and instruct students to develop and present a two-minute skit involving an employee building rapport with a customer. Each group's skit should illustrate the method assigned to it and also show ways to use nonverbal communication to build rapport. When the groups are finished presenting their skits, lead the class in a discussion of the different techniques, along with situations in which each is ideal.

Ethics Case for Students: Adiva works at a farm-to-table café. During lunch at the restaurant, a repeat customer shares his views about the importance of eating organic food and states that eating non-organic food causes disorders like autism and depression. He asks Adiva if she agrees with him. Adiva does not personally share his views, but she wants to maintain a good customer relationship with him. What should she do? *(Ethical Principles Involved: Integrity, Respect)*

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SE:110 Establish relationship with customer/client

Curriculum Planning Level: CS

Objectives:

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

Activity:

Provide students with multiple situations in which a salesperson is about to open the sales presentation. Students should write two openings that could be used for each situation and discuss their responses with the class.

Ethics case for students: Carly is a salesperson for an office supply company. She is trying to establish a relationship with Owen, an office manager at a small firm. At the beginning of the conversation, Owen begins complaining about his supervisor and other coworkers. Carly feels uncomfortable. She wants to make Owen feel understood, and she wants to build a relationship with him. However, she does not want to insult people whom she doesn't know. What should Carly do? Should she participate in the negative conversation to establish rapport with Owen? Or should she keep quiet, risking the relationship? *(Ethical Principles Involved: Integrity, Trust, Respect)*

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SE:111 Determine customer/client needs

Curriculum Planning Level: CS

Objectives:

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

Activity:

Students should create a list of five products that they sell, write three questions that could be asked customers to determine their needs, and discuss their ideas with the class.

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SE:114 Recommend specific product

LAP: LAP-SE-111
© **LAP:** 2013

Curriculum Planning Level: CS

Objectives:

a. Define the following terms: product substitution, trading-up, and trading down.
b. Explain the importance of meeting customers' needs when recommending specific products.
c. Explain guidelines for using buying motives when recommending specific products.
d. Identify occasions when product substitution should be used.
e. Explain guidelines for recommending a specific product to customers.
f. Demonstrate procedures for recommending specific products to customers.

Activity:

Divide the class into groups of two or three. Each group should develop and act out a role-play situation in which product substitutions are suggested for products with which the teammates are familiar.

Ethics Case for Students: Ian is a sales representative for a medical device company. He is in a meeting with a hospital, trying to sell them a new line of surgical tools. His company offers three different product lines at three different price points. Ian knows that the hospital is looking at the medium price point, but he realizes that there is an opportunity to upsell. Ian could push the hospital to buy the most expensive products by suggesting that the midrange surgical tools are not as effective and could cause problems for patients. Ian knows that the midrange tools are just as effective as the more expensive products, but with a little convincing, he could make an even bigger sale – and no harm will truly be done to anyone. What should Ian do? Is it ethical for him to use these tactics to push an upsell? *(Ethical Principles Involved: Integrity, Trust, Transparency, Respect)*

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Accessed on: 2017-03-28

PR:001 Explain the role of promotion as a marketing function

LAP: LAP-PR-002
© **LAP:** 2016

Curriculum Planning Level: CS

Objectives:

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

Activity:

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

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

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Accessed on: 2017-03-27

PR:002 Explain the types of promotion (i.e., institutional, product)

LAP: LAP-PR-004
© **LAP:** 2016

Curriculum Planning Level: CS

Objectives:

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

Activity:

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

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Author: Kotler, P., & Armstrong, G.
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Accessed on: 2017-03-27

IM:012 Describe the need for marketing data

LAP: LAP-IM-012
© **LAP:** 2016

Curriculum Planning Level: CS

Objectives:

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

Activity:

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

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

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CM:001 Explain the nature and scope of channel management

LAP: LAP-CM-002
© **LAP:** 2015

Curriculum Planning Level: CS

Objectives:

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

Activity:

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

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

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CM:003 Explain the nature of channels of distribution

LAP: LAP-CM-003
© **LAP:** 2016

Curriculum Planning Level: CS

Objectives:

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

Activity:

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

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CM:004 Describe the use of technology in the channel management function

Curriculum Planning Level: CS

Objectives:

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

Activity:

Visit a local business to observe channel management technology in action or invite a guest speaker to discuss how the use of technology has impacted channel management at her/his business. Students should determine the types of technology the business uses and how their use has benefited the business. Finally, they should discuss their findings with the class.

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Author: Grewal, D., & Levy, M.
References: (pp. 415-418)
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Title: Basic marketing: A marketing strategy planning approach (16th ed.)
Author: Perreault, W.D., Cannon, J.P., & McCarthy, E.J.
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Author: Monczka, R.M., Handfield, R.B., Giunipero, L.C., & Patterson, J.L.
References: [pp. 143, 667-701, 754-756]
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Author: Burrow, J.L.
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Publisher: Mason, OH: South-Western Cengage Learning
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Author: Clark, B., Basteri, C.G., Gassen, C., & Walker, M.
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Author: Kurtz, D.
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Author: Farese, L.S., Kimbrell, G., & Woloszyk, C.A.
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OP:443 Explain the concept of supply chain

Curriculum Planning Level: CS

Objectives:

a. Define the term supply chain.
b. Identify common supply chain members.
c. Explain types of supply chain activities.
d. Describe supply chain flows (e.g., product, information, finances).
e. Discuss the purpose and goals of supply chain.

Activity:

Divide the class into groups of three or four students each. Instruct each group to select an object in the classroom (e.g., computer, backpack, pencil, paper, etc.) and conduct research to determine the likely path of that product through its supply chain, beginning with raw materials and ending in the classroom. Students should then use a flowchart template to illustrate this supply chain. The flowchart should identify the members of the supply chain and the responsibilities of each. When finished, each group should present its flowchart to the class and give a brief explanation of the product's supply chain.

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Author: Finch, B.J.
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Copyright: 2008

Title: Introduction to operations and supply chain management (3rd ed.)
Author: Bozarth, C.C. & Handfield, R.B.
References: 3, 6-10
Publisher: Upper Saddle River, NJ: Pearson Prentice Hall
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Title: Supply chain management: Strategy, planning, and operation (5th edition)
Author: Chopra, S., & Meindl, P.
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Copyright: 2013

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OP:017 Explain the concept of production

LAP: LAP-OP-017
© **LAP:** 2016

Curriculum Planning Level: CS

Objectives:

a. Define the following terms: production, operations, inputs, and outputs.
b. Identify inputs used by organizations for production.
c. Distinguish between tangible and intangible outputs.
d. Describe the importance of production to an organization.
e. Identify production activities.
f. Explain the purposes of production activities.
g. Describe goals of production activities.

Activity:

Instruct each student to identify five businesses that produce tangible outputs and five that produce intangible outputs. Then, compare the students' lists together as a class.

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Author: Bovée, C.L., & Thill, J.V.
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Copyright: 2008

Title: Marketing (3rd ed.)
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Title: Intro to business (7th ed.)
Author: Dlabay, L.R., Burrow, J.L., & Kleindl, B.
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Title: The future of business: The essentials (3rd ed.)
Author: Gitman, L.J. & McDaniel, C.
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Copyright: 2008

Title: Business (9th ed.)
Author: Pride, W. M., Hughes, R. J., & Kapoor, J. R.
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Copyright: 2008

Title: Marketing dynamics (3rd ed.)
Author: Clark, B., Basteri, C.G., Gassen, C., & Walker, M.
References: [pp. 45, 109-110]
Publisher: Tinley Park, IL: Goodheart-Willcox.
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Author: Farese, L.S., Kimbrell, G., & Woloszyk, C.A.
References: (pp. 61, 127)
Publisher: Columbus, OH: Glencoe/McGraw-Hill
Copyright: 2012

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Author: Ellis-Christensen, T. & Wallace, O.
URL: http://www.wisegeek.org/what-is-batch-production.htm
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Author: O'Farrell, R.
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Author: Arnold, L.A.
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EC:013 Explain the concept of productivity

LAP: LAP-EC-018
© **LAP:** 2014

Curriculum Planning Level: CS

Objectives:

a. Define the term productivity.
b. Identify the effects of productivity on society.
c. Describe how productivity is measured.
d. Describe factors that enhance productivity.
e. Describe factors that hinder productivity.
f. Explain ways to increase productivity.
g. Discuss the consequences of non-productivity.

Activity:

Students should determine how their productivity could be measured in a school-based enterprise or a local business. Each student should track his/her productivity for a week, trying to increase it each day; record the steps taken to increase productivity and the outcome of these efforts; and determine what conclusions could be drawn from the experiences.

Ethics Case for Students: Alejandro supervises a team of about 20 employees. He understands the benefits of productivity and stresses its importance to his staff. His staff members start to feel that they cannot take long breaks, socialize while working, or leave the office until their work is done. Alejandro is happy that his employees are getting more work done, but he is worried about their morale. Is it ethical for Alejandro to push his employees toward productivity to get results? Or should Alejandro take some of the pressure off of his employees? *(Ethical Principles Involved: Fairness, Respect, Viability)*

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Author: Burrow, J.L.
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Publisher: Mason, OH: South-Western Cengage Learning
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Title: Intro to business (7th ed.)
Author: Dlabay, L.R., Burrow, J.L., & Kleindl, B.
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Author: Farese, L.S., Kimbrell, G., & Woloszyk, C.A.
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Author: Miller, R.L.
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Publisher: Boston: Addison Wesley
Copyright: 2012

Title: Principles of economics (7th ed.)
Author: Gottheil, F.M.
References: [pp. 30-31]
Publisher: Mason, OH: South-Western Cengage Learning
Copyright: 2013

Title: Economics: Principles and applications (2nd ed.)
Author: Santos, R.A.
References: [pp. 63-65, 73, 248]
Publisher: Dubuque, IA: Kendall Hunt Publishing Co.
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Title: Case study on productivity (1 of 3):Henry Ford and the Model T
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Title: Henry Ford and the Model T: A case study in productivity (Part 2).
Author: Bonner, P.
URL: http://www.econedlink.org/lessons/index.php?lid=676&type=educator
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Author: Business Owner's Toolkit
URL: http://www.bizfilings.com/toolkit/sbg/office-hr/managing-the-workplace/motivating-workers-for-productivity.aspx
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Copyright: 2010, June 10
Accessed on: 2017-03-28

OP:015 Explain the nature and scope of purchasing

LAP: LAP-OP-002
© **LAP:** 2015

Curriculum Planning Level: CS

Objectives:

a. Define the term purchasing.
b. Identify activities involved in purchasing.
c. Describe the importance of purchasing in the operation of a business.
d. Discuss the purchasing process used by businesses to obtain materials, equipment, and supplies used in their operation.

Activity:

Each student should interview an employer to find out:

a. The purchasing process used by the business
b. The responsibilities of the person in charge of purchasing
c. The educational requirements for the purchasing positions in the company

Ethics Case for Students: Brad works in purchasing for a manufacturing firm. He has a meeting with a potential supplier at a nice restaurant. The supplier encourages him to order as much as he wants. At the end of the meal, the supplier insists upon paying. Brad is not sure what he should do. He is afraid that, even if he attempts to be unbiased, this free meal will influence his choice of supplier in the future. However, he also doesn't want to be rude to the supplier by turning down his offer. What should Brad do? *(Ethical Principles Involved: Integrity, Transparency, Fairness)*

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Title: Business in action (4th ed.)
Author: Bovée, C.L., & Thill, J.V.
References: [p. 89, 223-224, 246]
Publisher: Upper Saddle River, NJ: Pearson Prentice Hall
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Title: Purchasing and supply chain management (4th ed.)
Author: Monczka, R.M., Handfield, R.B., Giunipero, L.C., & Patterson, J.L.
References: [pp. 6-8, 156-178]
Publisher: Mason, OH: South-Western Cengage Learning
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Author: Burrow, J.L.
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OP:031 Maintain inventory of supplies

Curriculum Planning Level: CS

Objectives:

a. Identify supplies that businesses commonly keep in inventory.
b. Explain the importance of maintaining an inventory of supplies.
c. Discuss storage considerations for an inventory of supplies.
d. Describe the nature of inventory records that should be maintained.
e. Discuss methods used to determine appropriate inventory levels of supplies.
f. Explain the process of conducting a periodic inventory of supplies.
g. Discuss procedures to follow when receiving orders of supplies.
h. Demonstrate procedures for maintaining an inventory of supplies.

Activity:

Invite a businessperson who is responsible for ordering her/his company's supplies to speak to the class. S/He should discuss what supplies are purchased, what techniques s/he uses to determine when to order supplies, how much inventory of the supplies is needed, and what procedures/processes the person uses to maintain sufficient inventory of supplies.

Reference Books

Title: Purchasing and supply chain management (4th ed.)
Author: Monczka, R.M., Handfield, R.B., Giunipero, L.C., & Patterson, J.L.
References: [pp. 69-78, 195]
Publisher: Mason, OH: South-Western Cengage Learning
Copyright: 2009

Title: Marketing (3rd ed.)
Author: Burrow, J.L.
References: [pp. 292-295, 331]
Publisher: Mason, OH: South-Western Cengage Learning
Copyright: 2012

Title: Business in action: With real-time updates (4th ed.)
Author: Bovée, C.L., & Thill, J.V
References: [pp. 245-246]
Publisher: Upper Saddle River, NJ: Pearson Prentice Hall
Copyright: 2008

Title: Contemporary business (12th ed.)
Author: Kurtz, D.L.
References: [pp. 413-414]
Publisher: Mason, OH: South-Western Cengage Learning
Copyright: 2009

Title: Intro to business (7th ed.)
Author: Dlabay, L.R., Burrow, J.L., & Kleindl, B.
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References: [p. 387]
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Author: Clark, B., Basteri, C.G., Gassen, C., & Walker, M.
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Author: Farese, L.S., Kimbrell, G., & Woloszyk, C.A.
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Title: What forms and supplies do you need to start your business?
Author: Mayhew, R.
URL: http://smallbusiness.chron.com/forms-supplies-need-start-business-2246.html

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Author: Pacific Gas and Electric Company
URL: http://www.pge.com/b2b/purchasing/buyingfrompge/investmentrecovery/materials/
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Title: Office supply categories.
Author: TheOfficeGuide
URL: http://www.theofficeguide.com/office-categories/
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URL: https://www.youtube.com/watch?v=fsPkrUfSi_c
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Title: Inventory basics. [Video].
Author: Fishbowl
URL: https://www.youtube.com/watch?v=n71eTqT1ne8
Copyright: 2015, June 10
Accessed on: 2017-03-27

OP:016 Place orders/reorders

Curriculum Planning Level: CS

Objectives:

a. Explain factors to consider when placing orders/reorders.
b. Describe the use of smart cards in placing orders/reorders.
c. Identify the components of purchase orders.
d. Calculate amount of order/reorder.
e. Complete orders/reorders for goods and/or services.

Activity:

Students should calculate the amount of one order/reorder for a school-based enterprise. Each student should complete an order/reorder for the products and share his/her responses with someone who works for the school-based enterprise to obtain feedback on their accuracy.

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Title: Purchasing and supply chain management (4th ed.)
Author: Monczka, R.M., Handfield, R.B., Giunipero, L.C., & Patterson, J.L.
References: [pp. 58-63]
Publisher: Mason, OH: South-Western Cengage Learning
Copyright: 2009

Title: Marketing (3rd ed.)
Author: Burrow, J.L.
References: [pp. 349-350]
Publisher: Mason, OH: South-Western Cengage Learning
Copyright: 2012

Title: Entrepreneurship: Ideas in action (5th ed.)
Author: Greene, C.L.
References: [pp. 286-287]
Publisher: Mason, OH: South-Western Cengage Learning
Copyright: 2012

Title: Marketing dynamics (3rd ed.)
Author: Clark, B., Basteri, C.G., Gassen, C., & Walker, M.
References: [pp. 423-424]
Publisher: Tinley Park, IL: Goodheart-Willcox.
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Title: Marketing essentials 2012
Author: Farese, L.S., Kimbrell, G., & Woloszyk, C.A.
References: (pp. 381, 545)
Publisher: Columbus, OH: Glencoe/McGraw-Hill
Copyright: 2012

Title: Fundamentals of retail buying
Author: Hoffman, A.L.
References: (pp.96-103)
Publisher: Upper Saddle River, NJ: Pearson Education
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Title: Supply chain management: Strategy, planning, and operation (5th edition)
Author: Chopra, S., & Meindl, P.
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Author: Benoliel, I.
URL: http://www.allbusiness.com/company-activities-management/operations-supply-chain/12365224-1.html
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Author: Oracle
URL: http://docs.oracle.com/cd/E51433_01/fscm92pbr2/eng/fscm/fprc/concept_UnderstandingRequisitionandPurchaseOrderAdjustments-9f319a.html
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Author: HowStuffWorks, Inc.
URL: http://computer.howstuffworks.com/question332.htm
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Title: Business basics: What is a purchase order? [Video].
Author: eHow
URL: https://www.youtube.com/watch?v=5uqqRXIwdTw
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Author: Supply Chain Mechanic
URL: https://www.youtube.com/watch?v=Ph4tr_RtoJM
Copyright: 2010, September 13
Accessed on: 2017-03-27

EC:008 Determine the relationship between government and business

LAP: LAP-EC-016
© **LAP:** 2015

Curriculum Planning Level: CS

Objectives:

a. Describe the role of government in a market economy.
b. Describe how government is involved in business.
c. Explain ways in which government regulates business.
d. Explain how the costs of government regulation are financed.

Activity:

Each student should read an article in a current newspaper or magazine about government regulation of business and answer the following questions:

a.   What is the situation presented in the article?
b.   What industry is involved?
c.   What regulatory agency is involved and why?
d.   What regulations are being violated?
e.   Who is the regulatory agency protecting?
f.   How does the business/industry defend its position?
g.   How does the government defend its position?
h.   What is your reaction to the claims?
i.   How would you solve this situation?

Ethics Case for Students: Emma just opened her own salon, and she wants to make sure she is complying with all government regulations. One of her concerns is price discrimination. Emma wants to charge more for women's haircuts because she knows that she will have many more female clients than male. She determines that, in her city, there is no law against charging different prices to men and women. Legally, she can set higher prices for women's haircuts if she chooses to do so. However, Emma is conflicted because she knows that men's and women's haircuts aren't very different in terms of the time and skill needed. Does Emma have a right to charge whatever she likes to each gender, or is this price discrimination unethical? *(Ethical Principles Involved: Integrity, Fairness, Rule of Law, Viability)*

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Title: Marketing (3rd ed.)
Author: Burrow, J.L.
References: [pp. 2, 49, 113-114,130-131, 333, 405-406, 468]
Publisher: Mason, OH: South-Western Cengage Learning
Copyright: 2012

Title: Contemporary business (12th ed.)
Author: Kurtz, D.L.
References: [pp. 124-137, 157]
Publisher: Mason, OH: South-Western Cengage Learning
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Title: Intro to business (7th ed.)
Author: Dlabay, L.R., Burrow, J.L., & Kleindl, B.
References: [pp. 82-85, 87-91]
Publisher: Mason, OH: South-Western Cengage Learning
Copyright: 2009

Title: Marketing dynamics (3rd ed.)
Author: Clark, B., Basteri, C.G., Gassen, C., & Walker, M.
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Author: Kurtz, D.
References: (pp. 72-74, 215, 607-609)
Publisher: Mason, OH: South-Western Cengage Learning
Copyright: 2013

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Author: Farese, L.S., Kimbrell, G., & Woloszyk, C.A.
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Author: FindLaw.com
URL: http://smallbusiness.findlaw.com/business-laws-regulations/business-regulations/
Copyright: 2017
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Author: Seabury, C.
URL: http://www.investopedia.com/articles/economics/08/free-market-regulation.asp
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Author: USA.gov
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Author: Davis, M.
URL: http://www.investopedia.com/articles/economics/11/government-regulations.asp
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Author: Holt, M.
URL: http://smallbusiness.chron.com/five-areas-government-regulation-business-701.html
Copyright: 2010, June 11
Accessed on: 2017-03-20

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Author: Ingram, D.
URL: http://smallbusiness.chron.com/government-regulation-factors-business-2966.html
Copyright: 2011, February 28
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URL: https://www.youtube.com/watch?v=Td2ONly7IsE
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Author: Greechie, S.
URL: http://smallbusiness.chron.com/role-government-business-803.html
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Author: U.S. Small Business Administration
URL: https://www.sba.gov/starting-business/learn-about-business-laws
Copyright: n.d.
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Title: Business and government regulations -
Impact on business. [Video].
Author: The Ohio State University Fisher
College of Business
URL: https://www.youtube.com/watch?v=C6xp
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Accessed on: 2017-03-20

OP:004 Describe health and safety regulations in business

Curriculum Planning Level: PQ

Objectives:

a. Define the following terms: health, safety, occupational health, hazard, outcome, risk, accident, and personal protective equipment.
b. Discuss reasons for health and safety regulations in business.
c. Explain the regulation of different common workplace hazard groups (e.g., mechanical hazards, chemical hazards, physical hazards, etc.).
d. Describe employers' responsibilities in ensuring employees' health and safety.
e. Discuss employees' role in protecting their health and safety on the job.

Activity:

Students should contact a human-resources professional to find out what health and safety regulations must be followed by the company. After the short interview, each student should make a list of the name of each finding, conduct Internet research to find out the specific requirements associated with implementation, and write a synopsis of these findings.

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Title: Marketing (3rd ed.)
Author: Burrow, J.L.
References: [pp. 546-547]
Publisher: Mason, OH: South-Western Cengage Learning
Copyright: 2012

Title: Business principles and management (12th ed.)
Author: Burrow, J.L., Kleindl, B., & Everard, K.E.
References: [pp. 376, 619-620]
Publisher: Mason, OH: South-Western Cengage Learning
Copyright: 2008

Title: Intro to business (7th ed.)
Author: Dlabay, L.R., Burrow, J.L., & Kleindl, B.
References: [pp. 77-78, 83, 188, 283]
Publisher: Mason, OH: South-Western Cengage Learning
Copyright: 2009

Title: Marketing dynamics (3rd ed.)
Author: Clark, B., Basteri, C.G., Gassen, C., & Walker, M.
References: [pp. 687-688]
Publisher: Tinley Park, IL: Goodheart-Willcox.
Copyright: 2014

Title: Marketing essentials 2012
Author: Farese, L.S., Kimbrell, G., & Woloszyk, C.A.
References: (pp. 140, 142, 805-806)
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Author: Minnesota Department of Health
URL: http://www.health.state.mn.us/divs/hpcd/cdee/occhealth/documents/lesson1.pdf
Copyright: n.d.
Accessed on: 2017-03-21

Title: Lesson 2: Recognizing workplace hazards.
Author: Minnesota Department of Health
URL: http://www.health.state.mn.us/divs/hpcd/cdee/occhealth/documents/lesson2.pdf
Copyright: n.d.
Accessed on: 2017-03-21

Title: Lesson 6: The importance of worker safety laws.
Author: Minnesota Department of Health
URL: http://www.health.state.mn.us/divs/hpcd/cdee/occhealth/documents/lesson6.pdf
Copyright: n.d.
Accessed on: 2017-03-21

Title: Lesson 7: Worker safety laws and you.
Author: Minnesota Department of Health
URL: http://www.health.state.mn.us/divs/hpcd/cdee/occhealth/documents/lesson7.pdf
Copyright: n.d.
Accessed on: 2017-03-21

Title: News about: Workplace safety.
Author: Newser.com
URL: http://www.newser.com/tag/23491/1/workplace-safety.html
Copyright: n.d.
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Title: Getting home safe and sound: Occupational Health and Safety Administration at 38.
Author: Silverstein, M.
URL: http://www.ajph.org/cgi/reprint/98/3/416
Copyright: 2008, March
Accessed on: 2017-03-21

Title: Why health and safety is important
Author: RoSPA
URL: http://www.rospa.com/occupational-safety/advice/small-firms/pack/why-important/
Copyright: 2014, November 13
Accessed on: 2017-03-21

Title: Work safely in your office. [Video].
Author: Norsk Hydro
URL: https://www.youtube.com/watch?v=cYVBVx-dX6k
Copyright: 2014, February 3
Accessed on: 2017-03-21

Title: HR management: Healthy & safety. [Video].
Author: IUSoutheast
URL: https://www.youtube.com/watch?v=V_V8SPEPmR0
Copyright: 2009, July 20
Accessed on: 2017-03-21

Title: Legal requirement
Author: Health and Safety Executive
URL: http://www.hse.gov.uk/stress/furtheradvice/legalresponsibility.htm
Copyright: (n.d.)
Accessed on: 2017-03-27

OP:005 Report noncompliance with business health and safety regulations

Curriculum Planning Level: PQ

Objectives:

a. Define the terms compliance and noncompliance.
b. Describe common health and safety noncompliance issues.
c. Explain factors that may contribute to noncompliance with business health and safety regulations.
d. Explain the consequences of noncompliance with health and safety regulations.
e. Discuss methods to report noncompliance with business health and safety regulations.
f. Demonstrate procedures for reporting noncompliance with business health and safety regulations.

Activity:

Each student should conduct an Internet search to identify real examples of noncompliance in business. Students should determine the responsible party for noncompliance and what laws/regulations/policies were violated. Students should print out their findings and discuss one of them with one student, discuss another with a second student, and continue until all examples are exhausted.

Ethics Case for Students: Haley's company is doing construction on the office building. One afternoon, Haley notices a strong chemical odor. She asks her supervisor about it, and he tells her that the construction workers are using paint and that she shouldn't worry about it. However, Haley feels that inhaling the paint might be dangerous to her and her colleagues. She doesn't want to get her supervisor or the company into trouble, though. What should Haley do? Should she report her company, or should she listen to her supervisor's request? *(Ethical Principles Involved: Trust, Accountability, Transparency, Respect, Rule of Law)*

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Title: Succeeding in the world of work
Author: Kimbrell, G.
References: (pp. 142-145)
Publisher: New York: Glencoe/McGraw-Hill
Copyright: 2012

Title: Business principles and management (12th ed.)
Author: Burrow, J.L., Kleindl, B., & Everard, K.E.
References: [pp. 376, 619-620]
Publisher: Mason, OH: South-Western Cengage Learning
Copyright: 2008

Title: Marketing dynamics (3rd ed.)
Author: Clark, B., Basteri, C.G., Gassen, C., & Walker, M.
References: [p. 688]
Publisher: Tinley Park, IL: Goodheart-Willcox.
Copyright: 2014

Title: Marketing essentials 2012
Author: Farese, L.S., Kimbrell, G., & Woloszyk, C.A.
References: (pp. 142, 152-153)
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Copyright: 2012

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Author: Henderson, K.J.
URL: http://smallbusiness.chron.com/employee-duties-regarding-osha-1305.html
Copyright: 2010, June 24
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Title: Federal OSHA complaint handling process.
Author: United States Department of Labor
URL: http://www.osha.gov/as/opa/worker/handling.html
Copyright: 2016, May 13
Accessed on: 2017-03-22

Title: How to file a complaint with OSHA.
Author: United States Department of Labor
URL: https://www.osha.gov/as/opa/worker/complain.html
Copyright: 2016, November 2
Accessed on: 2017-03-22

Title: Imminent danger.
Author: United States Department of Labor
URL: http://www.osha.gov/as/opa/worker/danger.html
Copyright: 2015, October 30
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Title: OSH Act of 1970
Author: United States Department of Labor
URL: http://www.osha.gov/pls/oshaweb/owasrch.search_form?p_doc_type=OSHACT&p_toc_level=0
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Accessed on: 2017-03-22

Title: You have the right to a safe workplace.
Author: United States Department of Labor
URL: http://www.osha.gov/workers.html
Copyright: 2017, January 17
Accessed on: 2017-03-22

Title: 5 tips for reporting workplace hazards (Division of Workers' Compensation). [Video].
Author: Texas Department of Insurance
URL: https://www.youtube.com/watch?v=-0e8nMLX5k8
Copyright: 2016, November 15
Accessed on: 2017-03-22

Title: Bird Construction - Near miss safety video 2016. [Video].
Author: Pacific Producers Group
URL: https://www.youtube.com/watch?v=xrkEDpFJq2o
Copyright: 2016, November 3
Accessed on: 2017-03-22

Title: OSHA Violations: The high cost of non-compliance
Author: Workplace Answers
URL: http://www.workplaceanswers.com/resources/hr-article-library/osha-violations-the-high-cost-of-non-compliance/
Copyright: 2015, February 16
Accessed on: 2017-03-27

OP:006 Follow instructions for use of equipment, tools, and machinery

Curriculum Planning Level: PQ

Objectives:

a. Identify resources that commonly provide instructions for use of equipment, tools, and machinery.
b. Explain the importance of understanding equipment, tool, and machinery instructions prior to use.
c. Discuss consequences of not following instructions for use of equipment, tools, and machinery.
d. Demonstrate procedures for following instructions for use of equipment, tools, and machinery.

Activity:

Students should identify equipment, tools, or machinery used in the classroom to determine what instructions should be followed for their proper use. Each student should then use the equipment, tools, or machinery following the obtained instructions.

Reference Books

Title: Succeeding in the world of work
Author: Kimbrell, G.
References: pp. 142-145
Publisher: New York: Glencoe/McGraw-Hill
Copyright: 2012

Title: Human resource management (11th ed.)
Author: Dessler, G., & Varkkey, B.
References: 636-684
Publisher: New Delhi, India: Dorling Kindersley
Copyright: 2009

Title: Business management (13th ed.)
Author: Burrow, J. & Kleindl, B.
References: [pp. 683-684]
Publisher: Mason, OH: South-Western Cengage Learning
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Title: School to career (9th ed.)
Author: Littrell, J.J., Lorenz, J.H., & Smith, H.T.
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Author: Industrial Accident Prevention Association
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Author: South African Qualifications Authority
URL: http://pcqs.saqa.org.za/showUnitStandard.php?id=8104
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Title: The control of hazardous energy (lockout/tagout).
Author: United States Department of Labor
URL: http://www.osha.gov/pls/oshaweb/owadisp.show_document?p_table=STANDARDS&p_id=9804
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Author: SAFEWork Manitoba
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Title: Tools and equipment - Key points for safe use. [Video].
Author: Enterprise Recruitment
URL: https://www.youtube.com/watch?v=jovscTSq-mg
Copyright: 2014, July 8
Accessed on: 2017-03-22

OP:442 Comply with policies and procedures for use of property and equipment

Curriculum Planning Level: CS

Objectives:

a. Discuss the purpose of policies and procedures governing employee use of business property and equipment.
b. Explain common policies and procedures for use of business property and equipment.
c. Describe possible consequences of failing to follow policies and procedures for use of property and equipment.
d. Demonstrate how to comply with policies and procedures for use of property and equipment.

Activity:

Explain to students that they will be taking part in a debate about the need for workplace computer usage polciies. Divide the class in half and instruct one group to take the position that these usage policies are essential, while the other group should take the stance that the policies are not necessary. After conducting online research on workplace computer usage policies, hold a debate in which student argue for or against the existence of these policies. Students should argue the appropriateness of common aspects of workplace computer usage policies, and throughout the debate, they should provide supporting evidence to back their claims.

Ethics Case for Students: Lauren's company has a rule that employees may not use their work computers for personal reasons. However, Lauren's favorite band is going on tour, and the tickets go on sale at 10 a.m. – during her work day. Lauren knows she isn't supposed to use her computer to buy concert tickets, but it will only take a few minutes, and otherwise, she might lose her chance to buy tickets. What should Lauren do? Is breaking the computer-use policy unethical? Or is it okay for Lauren to make an exception for a special circumstance? *(Ethical Principles Involved: Integrity, Accountability, Respect, Rule of Law)*

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Title: Succeeding in the world of work
Author: Kimbrell, G.
References: 143
Publisher: New York: Glencoe/McGraw-Hill
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Author: Burrow, J.L., Kleindl, B., & Everard, K.E.
References: [pp. 198-200]
Publisher: Mason, OH: South-Western Cengage Learning
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Author: Wanat, J.A., Pfeiffer, E.W., & Van Gulik, R.
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Author: Rawson, R.
URL: https://biz30.timedoctor.com/why-you-need-an-internet-computer-usage-policy/
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Author: Society for Human Resource Management
URL: https://www.shrm.org/resourcesandtools/tools-and-samples/policies/pages/cms_000558.aspx
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Title: Social media in the workplace: Time waster or productivity booster? [Video].
Author: HR360Inc
URL: https://www.youtube.com/watch?v=JN6FSQUnPqk
Copyright: 2014, August 6
Accessed on: 2017-03-27

OP:007 Follow safety precautions

Curriculum Planning Level: PQ

Objectives:

a. Identify the types of situations for which a business must take safety precautions.
b. Identify types of safety precautions.
c. Recognize appropriate safety precautions to be taken in a given situation.
d. Explain the importance of using safety precautions.
e. Discuss guidelines for using safety precautions.
f. Demonstrate use of proper procedures in practicing good safety habits.

Activity:

Students should identify ways that people could be hurt in the classroom or in a school-based enterprise, identify safety precautions that should be followed to prevent being hurt, and discuss their findings.

Ethics Case for Students: Your company recently set up a division in a foreign country that has no laws against using child labor. During a visit to a factory, you saw children operating dangerous equipment without protective equipment. Many of the children are orphans who are happy and proud to earn money to support their brothers and sisters. Without the jobs, they would lack food and shelter.

You understand that these jobs are solving major life challenges for them and their families, but you think it is wrong to expose them to dangerous equipment. When you asked the supervisor why no safety equipment is provided, he explained that the equipment is not designed to fit children and actually poses a greater danger of injury for the young workers if they were to wear the gear.

At this point, you aren't sure what to do. One option is to inform company management that its overseas division is not following its own hiring and safety policies, thereby putting children at risk. However, bringing attention to the issue is likely to result in all the children losing the opportunity to work or even the closing of the plant. What's the best option? *(Ethical Principles Involved: Integrity, Accountability, Transparency, Fairness, Rule of Law, Viability)*

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OP:008 Maintain a safe work environment

Curriculum Planning Level: CS

Objectives:

a. Discuss ways to organize work areas to ensure the safety of workers and customers.
b. Discuss the importance of identifying and correcting potential hazards as quickly as possible.
c. Explain the importance of warning others about potential hazards in the workplace.
d. Describe health and safety records that employees are commonly asked to complete.
e. Demonstrate techniques to maintain a safe work environment.

Activity:

Students should visit a local business to identify and list potential hazards to employee and customer safety. Each student should write a synopsis of his/her observations, make recommendations as to what should be done to eliminate or minimize the possibility of incidents occurring, and submit the synopsis for review.

Ethics Case for Students: You are the safety manager for a large company. You know that ergonomics is a pressing concern for anyone sitting or standing for the majority of the work day, and you have informed management that the company needs new worker-friendly furniture and anti-fatigue floor mats. Unfortunately, management has not purchased any of the items that you recommended. It's clear that company leadership does not see ergonomics as an important safety issue. Should you resign from your position, or should you continue to work at the company and try to make a difference for the people employed there? *(Ethical Principles Involved: Integrity, Fairness, Respect, Viability)*

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Performance Indicator: OP:009

Explain procedures for handling accidents

Performance Element: Implement safety procedures to minimize loss.

Curriculum Framework:
Business Administration Core

Concept/Skill: C

Curriculum Planning Level: CS

Objectives:

a. Identify causes of accidents in a business environment.
b. Identify types of accidents for which a business must employ preventative measures.
c. Describe accident prevention techniques.
d. Explain the importance of using accident-prevention techniques.
e. Describe guidelines for handling accidents.

Activity:

Review and present the Handling Accidents Briefing (starting on page 4-139) to students in a lecture or discussion format. Then watch the video *Preparing for Emergencies at Work: Know Your Emergency Action Plan* (https://www.youtube.com/watch?v=F3Hjr6mQ6Yk) with students. Discuss the key points identified in the video. Then, divide the class into groups of three or four students each and instruct the groups to conduct online research to determine the best methods for a business employee to respond to the different emergencies presented in the video (e.g., power outage, tornado, etc.). When finished, have each group discuss its findings with the class.

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What is an accident?

An **accident** is an unexpected happening that may result in injury, loss, or damage. Accidents typically result from types of **safety hazards** – unsafe conditions or unsafe acts. Accidents occur frequently in the workplace. They can happen anywhere and anytime.

What is an injury?

An **injury** is physical harm to a person. Injuries occur frequently in the workplace. They often go hand-in-hand with accidents.

Types of accidents

- Falls
- Electric shock
- Being struck by or running into an object
- Motor-vehicle accidents
- Machinery-related accidents
- Overexertion
- Handling harmful substances

Types of injuries

- Strains: caused by stretching or tearing ligaments at a joint
- Wounds: tissue damage (closed wounds) or break in the skin (open wounds)
- Burns: injuries caused by heat, electricity, or chemicals
- Back, head, and/or neck pain
- Repetitive motion injuries

Why should employees try to prevent accidents?

No one wants to see others get hurt or get hurt himself/herself, but there are other reasons to prevent accidents in the workplace. Accidents cost hundreds of billions of dollars each year. These costs affect both employees and employers. They create an unpleasant work environment and reduce productivity.

How are accidents costly to employees?

Employees who are injured on the job will likely miss work and lose income. They might lose opportunities for job growth or promotion, and they might have to cover the costs of all or part of their medical care. Their quality of life might suffer from being unable to participate in activities that they enjoy.

How are accidents costly to employers?

Employers must cover workers' compensation and pay for repairs to damaged equipment or merchandise. Lost productivity and overtime work to make up for lost production also lead to incurred costs. Businesses might lose sales that the injured employee might have made. Whether the company is large or small, one person's absence can have a substantial impact.

Accident prevention techniques

While accidents cannot be completely avoided, they can be reduced. Steps can be taken to prevent accidents by eliminating unsafe conditions and minimizing the risk of human error:

- **Practice good health habits.** Those who eat a balanced diet, get enough sleep, and exercise regularly are more likely to be focused, attentive, and alert. Being able to concentrate on work greatly reduces the risk of accidents. Exercise, specifically, protects the body from injury.

- **Maintain a clean work area.** Keep your workplace tidy of hazards such as puddles, boxes, garbage bins, or furniture that could cause trips or falls.

- **Lift objects properly.** Lifting heavy objects is one of the most common causes of back injuries. Proper lifting techniques include:

    o Bending and lifting using the leg muscles, rather than the back and arms

    o Asking for assistance if the object is too heavy

    o Placing your hands on the top and bottom of the object

    o Keeping your spine and neck straight

    o Refraining from arching your back or pinching your fingers when you set the object down

- **Practice general safety procedures.** Be safety conscious, follow company safety guidelines, correct or report hazards, ask questions, and never take shortcuts.

- **Drive safely.** Be a defensive, alert driver. Obey traffic laws, and be courteous to other drivers.

What should you do when an accident occurs?

Some businesses have established guidelines for handling workplace accidents, but many do not. Some guidelines for handling accidents are as follows:

- **Report accidents.** Depending on the seriousness of the accident, you may need to call 911. If the injury is not life-threatening, report it to a supervisor, nurse, or security guard. You must also report "near miss" accidents – accidents that do not result in injury.

- **Perform first aid.** Whether the injury requires just a bandage or more serious care, you should know basic first aid techniques for common injuries. You can attend training or research techniques on your own. Know where the first aid supplies are kept in the office.

- **Discuss the accident with the victim.** You must ask the right questions to properly care for the victim, but be careful not to blame or frighten the victim. Likewise, do not imply that the business takes responsibility for the incident.

- **Complete accident report forms.** Most businesses require employees to complete accident report forms, even if no injury has occurred. Forms include questions regarding where, when and how the accident occurred, who was involved, and other details. Accident report forms are used by the government, insurance, and employers themselves.

If these techniques are followed, businesses can minimize the damages resulting from workplace accidents and injuries.

OP:010 Handle and report emergency situations

Curriculum Planning Level: CS

Objectives:

a. Describe types of emergency situations encountered by businesses (e.g., illness, accidents, fires, etc.).
b. Explain appropriate emergency procedures to follow in a given situation.
c. Explain the importance of staying calm in emergency situations.
d. Demonstrate techniques for handling and reporting emergency situations.

Activity:

Invite a business owner to speak to the class about the training employees receive on handling and reporting emergency situations. Ask the person to share the policies and procedures that employees are to follow and to discuss the policy/procedure that gives employees the most difficulty. Students should discuss their findings with a classmate and determine what conclusions can be drawn from the interview.

Ethics Case for Students: You are walking through your company's warehouse, and you notice one of your coworkers trip on a wire and almost fall. Your coworker laughs it off and moves the wire out of the way, but you think that you should report this "near miss" to the safety officer. You don't want someone else to trip in the future and get seriously hurt. However, you don't want to waste company time discussing an accident that never actually happened. What should you do? *(Ethical Principles Involved: Accountability, Transparency, Rule of Law, Viability)*

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OP:013 Explain routine security precautions

Curriculum Planning Level: CS

Objectives:

a. Identify types of security problems encountered by businesses.
b. Explain reasons that businesses need security.
c. Identify security devices used to prevent shoplifting.
d. Identify pilferage prevention measures.
e. Describe measures used by businesses to prevent burglary.
f. Explain robbery prevention measures used by businesses.
g. Describe fraud prevention techniques.

Activity:

Each student should talk with a local business professional employed in a career field that interests her/him about the primary types of risk encountered by his/her business and the security precautions taken to limit the problems. Students should discuss their findings with a group of classmates who have the same or similar career interest. Each group should compile a report of the most frequently cited security precautions/measures used by that industry and present the report to the class.

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OP:152 Follow established security procedures/policies

Curriculum Planning Level: CS

Objectives:

a. Describe consequences of failing to follow established security procedures/policies.
b. Explain the role that being observant plays in maintaining workplace security.
c. Explain security procedures/policies to follow when different security breaches occur.
d. Discuss information to provide when reporting security breaches (e.g., who was involved, what happened, when incident occurred, where it occurred, etc.).
e. Demonstrate how to follow established security procedures/policies.

Activity:

Invite three guest speakers who represent a manufacturer, service-provider, and retailer to talk about their businesses' security procedures/policies. From their presentations, each student should identify three pieces of information that s/he considers to be key points in following security procedures/policies and submit the key points for review.

Or, each student could interview someone who works in a school-based enterprise to find out what security procedures and policies are used in the business. Afterwards, students should observe those individuals as they work in the school-based enterprise to determine instances when the procedures/policies are being followed and they are violated. Students should submit their ffindings to the person responsible for the school-based enterprise.

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Copyright: (n.d.)
Accessed on: 2017-03-27

OP:441 Explain information privacy, security, and confidentiality considerations in business

Curriculum Planning Level: CS

Objectives:

a. Distinguish among privacy, security, and confidentiality.
b. Discuss reasons to keep information private, secure, and/or confidential.
c. Describe types of information that a business must keep private, secure, and/or confidential.
d. Identify general guidelines for information privacy, security, and confidentiality.
e. Explain challenges in maintaining the privacy, security, and confidentiality of information in business.

Activity:

Divide the class into small groups and instruct each group to select and interview someone who is employed or owns a business. Students should ask this person about the types of information that his/her business must keep private, secure, and/or confidential, along with guidelines that the businesss has in place to keep the information private, secure, and confidential. Each group should share its findings with the class. Lastly, lead the class in a discussion of the similarities and differences among what the groups learned from their interviewees.

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Author: Beatty, J.F., & Samuelson, S.S.
References: 123, 661-662, 764-776
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Author: Burrow, J.L., Kleindl, B., & Everard, K.E.
References: [pp. 198-200]
Publisher: Mason, OH: South-Western Cengage Learning
Copyright: 2008

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Author: Burrow, J. & Kleindl, B.
References: p. 375, 496
Publisher: Mason, OH: South-Western Cengage Learning
Copyright: 2013

Title: Management Information Systems for the information age
Author: Haag, S. and Cummings, M.
References: 343-362
Publisher: New York: McGraw-Hill
Copyright: 2008

Title: E-marketing
Author: Strauss, J. & Frost, R.
References: 107-116
Publisher: Upper Saddle River, NJ: Pearson Prentice Hall
Copyright: 2014

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Title: Why is confidentiality important?
Author: Jules Halpern Associates
URL: http://www.halpernadvisors.com/why-is-confidentiality-important/
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Title: Data Security.
Author: Federal Trade Commission
URL: https://www.ftc.gov/tips-advice/business-center/privacy-and-security/data-security
Copyright: n.d.
Accessed on: 2017-03-27

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URL: https://www.youtube.com/watch?v=6vNxslcf9AE

Copyright: 2016, April 14
Accessed on: 2017-03-27

Title: Why is information security important? [Video].
Author: Security Fresh
URL: https://www.youtube.com/watch?v=7L9JerWIT3Y
Copyright: 2016, February 17
Accessed on: 2017-03-27

Title: What is the difference between privacy, confidentiality and security?
Author: Techopedia
URL: https://www.techopedia.com/7/29803/security/what-is-the-difference-between-privacy-confidentiality-and-security
Copyright: 2017
Accessed on: 2017-03-27

Title: Internet privacy and security. [Video].
Author: Brookings Institute.
URL: https://www.youtube.com/watch?v=_QBSz5YNjsc
Copyright: 2011, May 20
Accessed on: 2017-03-27

Title: 3 ways employers can protect confidentiality in the workplace
Author: DeSmit, K.
URL: http://blog.lawdepot.com/3-ways-employers-can-protect-confidentiality-in-the-workplace/
Copyright: 2014, May 8
Accessed on: 2017-03-27

Title: What is the meaning of confidentiality in the workplace?
Author: Ashe-Edmunds, S.
URL: http://work.chron.com/meaning-confidentiality-workplace-21886.html
Copyright: 2013, June 10
Accessed on: 2017-03-27

OP:064 Maintain data security

Curriculum Planning Level: CS

Objectives:

a. Discuss the impact of data security on data integrity.
b. Explain threats to data security.
c. Describe consequences of breaches in data security.
d. Discuss the role of risk management in maintaining data security.
e. Explain data security methods, processes, and programs.
f. Demonstrate techniques for maintaining data security.

Activity:

Divide the class into small groups and assign a different recent data security breach from the article *The Biggest Data Breaches in 2016* (https://www.identityforce.com/blog/2016-data-breaches) to each group. Instruct each group to research its assigned data breach, determining what data was lost and/or stolen, how many people were affected, how the breach occurred, and steps that could have been taken to reduce the risk of the breach occurring. Each group should share its findings. Finally, lead the class in a discussion of methods for organizations as well as individuals to protect their data.

This lesson is based on a more comprehensive lesson plan available from the New York Times Company's Learning Network at https://learning.blogs.nytimes.com/2014/12/11/teaching-about-cybersecurity-taking-steps-to-improve-online-safety-and-prevent-data-breaches/.

Ethics Case for Students: The company where you work as an administrative assistant has a policy that employees may not transmit any data to personal electronic devices. Your boss, a regional sales manager, left yesterday for an important trip to visit one of the company's biggest clients. Unfortunately, someone stole his laptop at the airport last night, and now your boss can't access the information that he needs for his sales presentation. He calls you in a panic and tells you to send the information directly to his personal cellphone. If you don't send the information as he has requested, he is likely to lose the client. If you do as he asks, you are breaking company policy. What should you do? *(Ethical Principles Involved: Integrity, Accountability, Respect, Rule of Law, Viability)*

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Title: Management Information Systems for the information age
Author: Haag, S. and Cummings, M.
References: 343-362
Publisher: New York: McGraw-Hill
Copyright: 2008

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References: 107-116
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Copyright: 2014

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Author: Stair, R.M. & Reynolds, G.W.
References: 153, 464-481
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Author: Cutraro, J.
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URL: https://www.entrepreneur.com/article/217484
Copyright: 2010, November 4
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Author: Federal Trade Commission
URL: https://www.ftc.gov/tips-advice/business-center/guidance/start-security-guide-business
Copyright: 2015, June
Accessed on: 2017-03-27

Title: How to secure your company's data. [Video].
Author: The Pulse on Personal Cloud
URL: https://www.youtube.com/watch?v=fEP2wdVqgLY
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Author: Bit Nine
URL: https://www.youtube.com/watch?v=k--jdYpRfvQ
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Title: How to conduct a small business security audit.
Author: Gary, S.
URL: https://startupnation.com/manage-your-business/security-audit/
Copyright: 2016, September 17
Accessed on: 2017-03-27

OP:153 Protect company information and intangibles

Curriculum Planning Level: CS

Objectives:

a. Define the terms intangibles and intellectual property.
b. Discuss the importance of protecting company information and intangibles.
c. Discuss types of company information and intangibles that must be protected (e.g., customer lists, research results, etc.).
d. Explain methods used to protect company information and intangibles.
e. Demonstrate procedures used to protect company information and intangibles.

Activity:

Divide the class into groups of three or four students each. Instruct each group to identify types of school information that must be protected, develop a procedure for protecting that information and intangibles, and share its procedure with the class.

Ethics Case for Students: ABC Corporation makes all of its employees sign a non-compete agreement. This agreement states that employees who leave the company cannot work for a competitor for two years. The purpose of this agreement is to make sure that ABC Corporation doesn't lose its trade secrets to its competitors. However, one of ABC Corporation's employees, Ron, is leaving because his wife has been accepted to graduate school in a different city. Ron has been offered a job with one of ABC Corporation's competitors in his new city. Should ABC Corporation void Ron's non-compete agreement so he can find a job in his new city? Or should it protect company information and enforce the agreement? *(Ethical Principles Involved: Trust, Fairness, Respect, Rule of Law, Viability)*

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Title: Entrepreneurship: Ideas in action (5th ed.)
Author: Greene, C.L.
References: [pp. 205-207]
Publisher: Mason, OH: South-Western Cengage Learning
Copyright: 2012

Title: Contemporary business (12th ed.)
Author: Kurtz, D.L.
References: [pp. 134-135
Publisher: Mason, OH: South-Western Cengage Learning
Copyright: 2009

Title: Intro to business (7th ed.)
Author: Dlabay, L.R., Burrow, J.L., & Kleindl, B.
References: [pp. 84-85, 283-284]
Publisher: Mason, OH: South-Western Cengage Learning
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Author: Gitman, L.J. & McDaniel, C.
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Author: McNamara, C.
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Accessed on: 2017-03-27

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Copyright: 2017, March 27
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Author: Swartz, K.
URL: http://www.i4biz.com/money-finance/protecting-intangible-assets/
Copyright: 2013, February 6
Accessed on: 2017-03-27

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Author: Crash Course
URL: https://www.youtube.com/watch?v=RQOJgEA5e1k
Copyright: 2015, April 23
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Title: BMS Group - Introducing Intangible Asset Protection. [Video].
Author: BMS Group
URL: https://www.youtube.com/watch?v=JbVxUFDu4c4
Copyright: 2012, August 13
Accessed on: 2017-03-27

HR:360 Orient new employees

Curriculum Planning Level: CS

Objectives:

a. Explain the importance of new-employee orientation.
b. Discuss the benefits of new-employee orientation.
c. Identify sources of orientation information.
d. Explain the current employee's role in orienting new employees.
e. Describe procedures for orienting new employees.
f. Conduct an orientation for new employees.

Activity:

Divide the class into groups of three. Ask each group to determine the types of orientation provided to new employees by coworkers at three local businesses. Each team should compare the orientations, discussing possible reasons for the differences among the orientations and recommending ways to improve the sessions.

Ethics Case for Students: Your company just hired a new employee, Pranav, to work in your department. A few days into his first week, Pranav seems confused. He tells you that he has only had a brief training session and is unsure what he is supposed to be doing. His supervisor is out of the office, and none of the other managers has even introduced himself/herself to Pranav yet. Pranav confesses that he feels unwelcome, and that he is looking for a different job already. What should you do? Should you talk to his supervisor or other managers about improving Pranav's onboarding process? Or should you tell them that Pranav is considering other job options? *(Ethical Principles Involved: Trust, Transparency, Fairness, Respect, Viability)*

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Title: Human resource management (11th ed.)
Author: Dessler, G., & Varkkey, B.
References: [pp. 296-298]
Publisher: New Delhi, India: Dorling Kindersley
Copyright: 2009

Title: Human resource management: Gaining a competitive advantage (7th ed.)
Author: Noe, R.A., Hollenbeck, J.R., Gerhart, B., & Wright, P.M.
References: [pp. 333-335]
Publisher: New York: McGraw-Hill/Irwin
Copyright: 2010

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Author: Farese, L.S., Kimbrell, G., & Woloszyk, C.A.
References: (pp. 262-263)
Publisher: Columbus, OH: Glencoe/McGraw-Hill
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Author: Brown, J.
URL: http://humanresources.about.com/od/retention/a/keepnewemployee_3.htm
Copyright: n.d.
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Title: A quick guide to employee orientation—Help for managers & HR.
Author: Bacal, R.
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Author: O'Toole, B.
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Author: SmallBusiness.com WIKI
URL: http://smallbusiness.com/wiki/How_to_establish_a_new_employee_orientation
Copyright: 2009, December 31
Accessed on: 2017-03-20

Title: Creative ideas for new employee orientation.
Author: Uhl, J.
URL: http://www.ehow.co.uk/list_6328276_creative-ideas-new-employee-orientation.html
Copyright: n.d.
Accessed on: 2017-03-20

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Author: University of California Berkeley
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Title: 5 tips for getting new employee job orientation right.
Author: Rodgers, D.
URL: http://www.smartrecruiters.com/blog/5-tips-for-getting-new-employee-orientation-right/
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Accessed on: 2017-03-20

Title: Tips on orienting your new employee - New employee orientation. [Video].
Author: Easy Small Business HR
URL: https://www.youtube.com/watch?v=jtsPMoM6M1s
Copyright: 2011, July 8
Accessed on: 2017-03-20

Title: Five steps to world class onboarding. [Video].
Author: Bennington, E.
URL: https://www.youtube.com/watch?v=zizhZgQTLnI
Copyright: 2011, November 8
Accessed on: 2017-03-20

BL:003 Explain types of business ownership

LAP: LAP-BL-001
© **LAP:** 2016

Curriculum Planning Level: CS

Objectives:

a. Define the following terms: sole proprietorship, partnership, corporation, merger, consolidation, expansion, franchise, limited-liability company, product trade-name franchise, and business-format franchise.
b. List two types of businesses that would probably use a sole proprietorship form of ownership.
c. Cite the purposes of forming a partnership.
d. List two types of partnership arrangements.
e. Describe the process for forming a corporation.
f. Describe three types of corporations.
g. Explain three ways in which corporations grow.
h. Describe the advantages and disadvantages of sole proprietorships.
i. Describe the advantages and disadvantages of partnerships.
j. Discuss the advantages and disadvantages of corporations.
k. Describe the importance of franchises in our society.
l. Explain factors which affect the choice of ownership form.

Activity:

Instruct each student to identify the form of ownership used by five local businesses. Then, divide the class into groups of three or four. Each small group should generate a list of reasons that the owners would have chosen those forms of ownership.

Ethics Case for Students: Zeke has been the sole proprietor of a small bookstore and coffee shop for many years. Recently, a large corporate bookstore chain opened right down the street from Zeke's store. It has lower prices and a larger selection, so it has taken away a lot of Zeke's business. He is not sure how much longer he can stay open. Was it ethical for the large corporation to move into Zeke's area? Should it have looked elsewhere? Or does it have a right to put a small business out of operation? *(Ethical Principles Involved: Accountability, Fairness, Respect, Viability)*

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Title: Entrepreneurship: Theory, process, practice (8th ed.)
Author: Kuratko, D.F.
References: [pp. 190-199]
Publisher: Mason, OH: Thomson/South-Western
Copyright: 2009

Title: Marketing (3rd ed.)
Author: Burrow, J.L.
References: [pp. 603-606]
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Author: Bamford, C.E., & Bruton, G.D.
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Author: Greene, C.L.
References: [pp. 75-80]
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Author: Kurtz, D.L.
References: [pp. 146-151, 163-175]
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Copyright: 2009

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Author: Dlabay, L.R., Burrow, J.L., & Kleindl, B.
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Author: Gitman, L.J. & McDaniel, C.
References: [pp. 144-167]
Publisher: Mason, OH: Thomson/South-Western
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Author: Pride, W. M., Hughes, R. J., & Kapoor, J. R.
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Author: Clark, B., Basteri, C.G., Gassen, C., & Walker, M.
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Copyright: 2014

Title: Contemporary marketing: 2013 edition
Author: Kurtz, D.
References: (pp. 221, 421, 428-429)
Publisher: Mason, OH: South-Western Cengage Learning
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Author: Farese, L.S., Kimbrell, G., & Woloszyk, C.A.
References: (pp. 785-790)
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Title: Forms of business ownership.
Author: AllBusiness.com
URL: http://www.allbusiness.com/forms-of-business-ownership-674-1.html
Copyright: 2010, July 1
Accessed on: 2017-03-28

Title: Corporation.
Author: AmosWEB
URL: http://www.amosweb.com/cgi-bin/awb_nav.pl?s=wpd&c=dsp&k=corporation
Copyright: 2000-2017
Accessed on: 2017-03-28

Title: Expansion.
Author: AmosWEB
URL: http://www.amosweb.com/cgi-bin/awb_nav.pl?s=wpd&c=dsp&k=expansion
Copyright: 2000-2017
Accessed on: 2017-03-28

Title: Limited liability.
Author: AmosWEB
URL: http://www.amosweb.com/cgi-bin/awb_nav.pl?s=wpd&c=dsp&k=limited+liability
Copyright: 2000-2017
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Title: Merger.
Author: AmosWEB
URL: http://www.amosweb.com/cgi-bin/awb_nav.pl?s=wpd&c=dsp&k=merger
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Title: Partnership.
Author: AmosWEB
URL: http://www.amosweb.com/cgi-bin/awb_nav.pl?s=wpd&c=dsp&k=partnership
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Author: AmosWEB
URL: http://www.amosweb.com/cgi-bin/awb_nav.pl?s=wpd&c=dsp&k=proprietorship
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Author: Business Owners Toolkit
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Author: Crystal, G. & Foster, N.
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Title: Session 5: Business organization.
Author: MyOwnBusiness.org
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Author: Mares, D.
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Marketing Principles
Projects

Section 5

Introduction to Projects

In addition to using traditional classroom instructional methods such as lectures, class discussions, and other activities as identified on the individual planning guide sheets, teachers using the *Marketing Principles (Standard)* course guide can also incorporate hands-on projects that become the instructional method through which students acquire understanding of the content.

Those three projects include:

- Marketing: Gotta Have It!

- Promotion: The Promo Blitz

- Safety and Security: Safe and Sound

Marketing: Gotta Have It!

Performance Indicators:

- MK:001 Explain marketing and its importance in a global economy (CS) LAP-MK-004
  (pp. 4-2—4-6)

- MK:002 Describe marketing functions and related activities (CS) LAP-MK-001 (pp. 4-7—4-10)

Project Description:

This project introduces students to marketing and the different marketing functions, including channel management, marketing-information management, market planning, pricing, product/service management, promotion, and selling. Working in teams, students develop public service announcements (PSAs) promoting the importance of marketing and its positive impact on daily life. Targeted at other high school students as well as parents, teachers, administrators, and other school staff, these PSAs such introduce and explain marketing, the marketing concept, the different marketing functions, etc.

Step-by-Step Guide:

- Divide the class into groups of four.

- Explain to the class that each group is responsible for developing and implementing a public service announcement (PSA) campaign to educate other students, parents, teachers, administrators, and other school staff about the importance marketing and its positive impact on daily life. Share examples of successful PSAs (www.psacentral.org is a great source) and discuss characteristics and elements that successful PSAs have.

- Instruct students to conduct research on marketing, the marketing concept, and the different marketing functions (i.e., channel management, marketing-information management, market planning, pricing, product/service management, promotion, and selling).

- Upon completion of its research, each group should review its findings to determine what aspect of marketing it wants to focus on for its PSA campaign. For example, does the group want to emphasize the role of promotion in helping consumers determine which products to buy? Or, does the group want to explain the role of channel management in making sure that the right products are in the right place at the right time for consumers?

- Each group should develop three different PSAs to be part of its campaign. The campaign should incorporate a variety of media such as posters, signs, pamphlets, commercials (to air during school announcements), emails, t-shirts, etc.

- After developing its three PSAs, each group should present them to the class for review and discussion. Finally, assist students in sharing their PSAs with/posting their PSAs for the school community.

Promotion: The Promo Blitz

Performance Indicators:

- PR:001 Explain the role of promotion as a marketing function (CS) LAP-PR-002 (pp. 4-93—4-94)

- PR:002 Explain the types of promotion (i.e., institutional, product) (CS) LAP-PR-004 (pp. 4-95—4-96)

Project Description:

This project acquaints students with types of product and institutional promotion. Students will work individually and in teams to examine these different types, gather and discuss examples of each, and evaluate the effectiveness of local businesses' product and institutional promotions.

Step-by-Step Guide:

- Divide the class into groups of three to four students each.

- Explain to the class that each student should maintain an electronic journal during this project. (Options for e-journals include Evernote, Tumblr, GoodNight Journal, word processing software, slideshow applications, etc.) The journal should contain five entries or pages: primary product promotion, secondary product promotion, public service institutional promotion, public relations institutional promotion, and patronage institutional promotion.

- Individually, students should locate at least one example of each of the five types of promotion. The target market for each promotion should include teenage students such as themselves. If possible, students should copy the actual promotions and paste them into the corresponding journal entries. If any of the promotions cannot be copied and pasted into a student's journal, s/he should write a succinct, complete description of the promotion on the appropriate page of his/her journal. In addition to pasting the promotions and/or writing descriptions of them in the journal, students should also note the goals of each particular promotional item.

- Each day, group members should meet and share their examples of a different type of promotion. They should discuss the advantages and disadvantages of each type of promotion and determine how effectively each promotion impacts the target market (teenage students).

- Following the five days of discussions about the five types of promotion, group members should collaborate to locate successful examples of primary and institutional promotion used by local businesses. Each group should share its local examples with the class. Finally, lead the class in building a "Promotion Hall of Fame" that recognizes the best, most effective promotions developed by businesses in the local community. If possible, arrange for representatives from one or more of those businesses to speak to the class about the development and use of those promotions.

Safety and Security: Safe and Sound

Performance Indicators:

- OP:004 Describe health and safety regulations in business (PQ) (pp. 4-124—4-125)

- OP:005 Report noncompliance with business health and safety regulations (PQ) (pp. 4-126—4-127)

- OP:006 Follow instructions for use of equipment, tools, and machinery (PQ) (pp. 4-128—4-129)

- OP:007 Follow safety precautions (PQ) (pp. 4-132—4-134)

- OP:008 Maintain a safe work environment (CS) (pp. 4-135—4-136)

- OP:013 Explain routine security precautions (CS) (pp. 4-144—4-145)

- OP:152 Follow established security procedures/policies (CS) (pp. 4-146—4-147)

- OP:442 Comply with policies and procedures for use of property and equipment (CS) (pp. 4-130—4-131)

Project Description:

This project introduces students to safety and security procedures in an authentic work setting such as a school-based enterprise, school office, school cafeteria, or some other workplace in the local business community. Working in groups, students do research to determine potential safety and security hazards for their assigned workspace, conduct a walk-through inspection of that area, and then develop a safety and security "report card" for supervisors overseeing that workspace, identifying further steps that supervisors should take to lessen the impact of the different hazards.

Step-by-Step Guide:

- Prior to the project, obtain permission for small groups of students to conduct safety and security inspections in different parts of the school (e.g., school-based enterprise, school office, school cafeteria, etc.) and/or in a local workplace.

- Divide the class into groups of five and assign a different area of the school/workplace to each group.

- Instruct each group to conduct online research to compile a listing of possible safety and security hazards for its assigned workspace.

- After compiling this listing of possible hazards, each group should do a walk-through inspection of its assigned area, noting which of these hazards are in fact present and what, if anything, the school or business has done to reduce the risk of the different hazards.

- Upon completion of its inspection, each team should prepare a safety and security "report card" for supervisors of the assigned area or workplace. The focal point of the report card should be a chart listing the different hazards present, the impact that each hazard could have on safety or security, any steps that the workspace has already taken toward limiting the effect of each

hazard, and the group's recommendations for further reducing each one. Submit students' safety and security report cards to the supervisors or, if possible, have each group present its report card and inspection findings to the supervisor responsible for the group's assigned area or workplace.

Marketing Principles Exams

Section 6

1. Which of the following is an example of a company procedure:
   A. Employees are permitted to wear open-toed shoes to work, but they may not wear flip-flops.
   B. After five years of service, staff members receive four weeks of paid vacation.
   C. Triton Manufacturing pays employees the standard gas mileage reimbursement rate of $.55 per mile.
   D. To order supplies, employees must complete the R-3 form and then give it to their immediate supervisor.

2. Why is it important to use communication styles that are appropriate to the target audience?
   A. To effectively convey information
   B. To analyze feedback
   C. To organize presentations
   D. To quickly establish control

3. It is most appropriate for businesspeople to use complex, technical jargon when they are
   A. speaking with coworkers.
   B. greeting new customers.
   C. introducing a friend to a business associate.
   D. informally conversing with an acquaintance.

4. Rosemary is making a sales presentation to a group of potential customers. What communication style is the most appropriate for Rosemary to use with this audience?
   A. Traditional
   B. Casual
   C. Cooperative
   D. Persuasive

5. What should employees be willing to accept when defending their ideas objectively?
   A. Personal attack
   B. Additional responsibility
   C. Nonverbal support
   D. Critical feedback

6. In a weekly staff meeting, Morgan presents a set of new procedures that she believes will improve the department's productivity levels. Jacob disagrees with Morgan's approach and provides an alternative for improvement. Although Morgan agrees with a couple of Jacob's points, she still thinks her plan will be better for the company in the long run. How can Morgan effectively defend her idea for improvement?
   A. Request that the group meet again, so she has time to come up with new ideas
   B. Tell Jacob that most of his ideas are weak and restate her suggestions
   C. Present supporting research for her suggestions in an unbiased way
   D. Ask the other members of the group for their input and ideas

7. You think you have the best solution for a problem at work, but your colleagues don't believe that your idea will work. What should you do?
    A. Remain patient.
    B. Become defensive.
    C. Accept defeat.
    D. Reject feedback.

8. Which of the following is a general guideline for answering the telephone in a businesslike manner:
    A. Identify the firm or department and yourself
    B. Address the caller by his/her first name
    C. Take immediate action on the caller's request
    D. Record the correct spelling of each caller's name

9. Which of the following is a technique you can use to demonstrate a positive attitude over the telephone:
    A. Smile when you answer the telephone.
    B. Use a wide vocabulary in conversations.
    C. Be informed about your business's rules.
    D. Shut out all distractions while talking.

10. A recommended way to find out why the caller has phoned your business is to
    A. wait for the caller to ask questions.
    B. ask the caller, "How may I help you?"
    C. ask the caller, "What did you want?"
    D. answer promptly with a friendly greeting.

11. When participating in group discussions, it is often helpful to
    A. try to socialize.
    B. appoint a leader.
    C. interrupt a speaker.
    D. be aggressive.

12. When you ask questions in an open-minded way, you avoid
    A. suggesting a better way to do something.
    B. stating your own opinion.
    C. attacking someone else's idea.
    D. mentioning the truth.

13. Participating in group discussions at school is important because it helps you to
    A. gain confidence when speaking to other people.
    B. learn how to control the group's conversation.
    C. express your opinions in an aggressive way.
    D. boast about your knowledge and expertise.

14. Why is it often important to take notes during meetings or presentations?
    A. Writing keeps the mind focused.
    B. Speaker is difficult to understand.
    C. Audience needs something to do.
    D. Information will be needed later.

15. Effective note-taking involves summarizing key concepts in ways that
    A. make sense to the speaker.
    B. reflect proper punctuation and grammar.
    C. are meaningful to the note taker.
    D. include personal opinion and bias.

16. Brooke is attending a meeting to discuss an upcoming project that she will be working on. To take effective notes during the meeting, Brooke must
    A. listen carefully.
    B. answer questions.
    C. express opinions.
    D. develop a briefing.

17. When organizing information to present in a business report, it is effective to
    A. interpret the data.
    B. develop an outline.
    C. remain objective.
    D. determine the purpose.

18. Which of the following is a reason why it is important to organize information before preparing a business report:
    A. To investigate the cause of the problem
    B. To understand the purpose of the report
    C. To identify the target audience
    D. To arrange findings in a logical manner

19. An employee is preparing a formal report and must present important facts in the sequence in which they occurred. The employee should prepare the report by presenting the information in _____ order.
    A. inverted
    B. chronological
    C. concurrent
    D. reverse

20. What type of graphic is best to use when you want to illustrate a sequence of events in chronological order?
    A. Timeline
    B. Pie chart
    C. Venn diagram
    D. Bar chart

21. When giving a presentation, you might use graphic aids to
    A. make the presentation longer.
    B. eliminate the need to speak.
    C. distract your audience.
    D. enhance your presentation.

22. You're giving a presentation at your job about the company's sales figures. You want to show how much profit the company has made in each of the past 12 months. Which visual aid should you choose to show this?
    A. A photograph
    B. A pie chart
    C. A line graph
    D. A video

23. How does having a customer-service mindset benefit a business's employees?
    A. It increases the employees' efficiency levels.
    B. It helps the business achieve its profit goals.
    C. It creates a competitive work environment.
    D. It helps employees advance in their careers.

24. As employees go about their daily activities, their actions should be driven by whether the actions will
    A. be witnessed by customers.
    B. result in additional sales.
    C. bring them personal fulfillment.
    D. result in customer satisfaction.

25. A customer asks a salesperson about a specific advertisement in last Sunday's newspaper. Which of the following would help the salesperson to assist the customer:
    A. Knowledge of the store's policies
    B. Knowledge of the store's promotional budget
    C. Knowledge of the products being promoted
    D. Knowledge of the customer's preferences

26. One way to show respect for foreign clients' cultural and social differences is to
    A. use slang and idioms frequently.
    B. always speak in your native language.
    C. pronounce their names correctly.
    D. embrace cultural stereotypes.

27. Businesses develop policies to help employees deal with customers the same way in similar situations so that employees will
    A. give personal favors.
    B. treat customers differently.
    C. treat customers fairly.
    D. offer special privileges.

28. Julie is a salesperson who's trying to develop rapport with her customers. When she meets a new customer, what's the first thing she should do?
    A. Give the customer a catalog that shows her company's products.
    B. Get down to business immediately and ask the customer about his/her budget.
    C. Make promises and tell the customer what s/he wants to hear.
    D. Get the customer to relate to her by engaging in pleasant small talk.

29. What kind of customer would ask "If I buy this product, how can I be sure it will do what you say it will"?
    A. Domineering/Superior
    B. Eager
    C. Slow/Methodical
    D. Suspicious

30. The most important factor in carrying out brand promise is
    A. brand personality.
    B. business environment.
    C. corporate culture.
    D. employees.

31. One way a company can reinforce its image is by
    A. training its employees.
    B. developing a financial plan.
    C. conducting a competitive analysis.
    D. identifying economic resources.

32. Determine whether the following statement is true or false: Company commitment is unnecessary for the success of the marketing concept.
    A. False, company commitment is essential to the success of the marketing concept.
    B. True, company commitment is unnecessary for the success of the marketing concept.
    C. True, if company employees support the concept, company commitment is unnecessary.
    D. False, employee support is sufficient for the success of the marketing concept.

33. Which function of marketing determines how much gross profit a business will make on a good or service?
    A. Promotion
    B. Channel management
    C. Risk management
    D. Pricing

34. The element of marketing that is concerned with having the selected product in the right location at the right time is
    A. product.
    B. place.
    C. price.
    D. promotion.

35. Markets are composed of people with unfulfilled desires who are willing and able to
    A. change habits.
    B. spend money.
    C. go shopping.
    D. choose products.

36. Selling is often referred to as personal selling because it
    A. involves interaction with customers.
    B. follows a standardized format.
    C. can take place in the customer's home.
    D. provides specific product information.

37. Selling policies concerned with pricing, product availability, and discounts are categorized as _____ policies.
    A. delivery
    B. selling-activity
    C. service
    D. terms-of-sale

38. Which of the following types of product information is best obtained from customers:
    A. Appearance and style
    B. Construction and materials
    C. Uses and performance
    D. Unique and novel features

39. Brand names are useful in selling because many brand-name products
    A. are guaranteed to satisfy consumers' needs.
    B. represent a certain level of quality to consumers.
    C. are priced lower than unbranded products.
    D. appeal to all customers.

40. What is a reason why selling brand-name goods often is important to retailers?
    A. Financial leverage
    B. Vendor cooperation
    C. Display assistance
    D. Customer recognition

41. Retailers often sell brand-name products to
    A. create more attractive displays.
    B. build loyalty among customers.
    C. make customers stay longer in stores.
    D. encourage customers to buy expensive merchandise.

42. Salespeople offer solutions to customers' needs by demonstrating their products and encouraging customers to _____ the products.
    A. handle
    B. admire
    C. watch
    D. approve

43. Salespeople provide the most valuable service to customers when they help them
    - A. buy better products than their neighbors.
    - B. meet their needs.
    - C. try new things.
    - D. get high interest rates.

44. What type of information concerning policies and procedures do employees often extract from an internal business report?
    - A. Customer profiles
    - B. New personnel regulations
    - C. Industry research data
    - D. Former local competitors

45. What type of information should employees be able to locate in their company's employee handbook?
    - A. The company's annual report
    - B. The company's list of current job openings
    - C. The use of company property
    - D. The number of vacation days that an employee has taken

46. What should you do to demonstrate a customer-service mindset in the following situation: An irate business customer yells at you because of a billing error.
    - A. Make sure the mistake is corrected.
    - B. Blame the billing department.
    - C. Get as upset as the customer.
    - D. Call the customer's supervisor to complain.

47. What should employees do to maintain a customer-service mindset?
    - A. Listen to the words of soothing songs
    - B. Devote their full attention to customers
    - C. Maximize conversations with coworkers
    - D. Decide how to spend their break time

48. How do service-oriented companies often improve their levels of service?
    - A. By evaluating internal product development procedures
    - B. By requesting input through employee and customer surveys
    - C. By providing customers with product testimonials
    - D. By conducting a feasibility analysis for company expansion

49. What is one of the benefits to a business of reinforcing service orientation through communication?
    - A. Promotes the sale of new products
    - B. Builds positive relationships with customers
    - C. Rewards customers for their support
    - D. Encourages employees to be aggressive

50. What is a guideline for employees to follow in handling customer inquiries?
    A. Spend as little time as possible answering customers' inquiries
    B. Try to make a sale while you're answering each inquiry
    C. Don't try to handle inquiries when you are busy with a sale
    D. Make sure you clearly understand customers' inquiries

51. What is a businesslike way for employees to handle a situation in which they must obtain information requested by customers and call the customers back?
    A. Tell the customers exactly when they will be called
    B. Ask the customers when it would be convenient to call them
    C. Explain how much effort will be required to get the requested information
    D. Ask the customers to call back if they don't receive a call within 24 hours

52. What are businesspeople who fail to adapt their communication styles to appeal to their international clients likely to do?
    A. Offend the clients
    B. Earn the clients' trust
    C. Impress the clients
    D. Persuade the clients to buy

53. What should help businesspeople adapt their communication styles to appeal to clients from other cultures?
    A. Being respectful, indifferent, and honest demanding
    B. Being confident, biased, and manipulative
    C. Being sensitive, transparent, and
    D. Being patient, flexible, and empathetic

54. What is a factor that affects a business's selection of policies to guide its operations?
    A. Communication skills of employees
    B. Personal preferences of management
    C. Nature of the business
    D. Space available to display policies

55. What is one of the purposes of having business policies?
    A. To encourage customers to make frequent exchanges
    B. To make sure the business's actions are consistent
    C. To ensure that the business makes a profit
    D. To allow employees to make decisions regarding customers

56. What should salespeople do when they must cope with customers who are being disagreeable?
    A. Speed up the sale to minimize opportunity for disagreement
    B. Use product knowledge to prove they are wrong
    C. Listen patiently and try to stay calm
    D. Ask them to come back when they are ready to buy

57. What kind of customer would make the following statement: "I just don't know which of these my girlfriend would like best. I had better come back at another time."
    A. Disagreeable
    B. Suspicious
    C. Slow/Methodical
    D. Dishonest

58. What is a cost associated with customer complaints?
    A. Markups on inventory
    B. Additional advertising
    C. Higher commissions
    D. Loss of sales

59. Which of the following would be the most likely cause of customer complaints:
    A. Institutional ads
    B. Product quality
    C. Extended hours
    D. Price reductions

60. What should you do to eliminate any misunderstandings that you or your customer might have concerning the customer's complaint?
    A. Thank the customer.
    B. Explain company policy.
    C. Take immediate action.
    D. Restate the complaint.

61. Are noncomplainers a more difficult problem for businesses than complainers?
    A. Yes, because records of the complaints cannot be maintained.
    B. Yes, because the salesperson does not have an opportunity to handle the complaint.
    C. No, because noncomplainers do not express ill feelings.
    D. No, because the salesperson can satisfy the noncomplainer within company guidelines.

62. When a business publicly pledges to provide all of its customers with quick, courteous service, what is it doing?
    A. Making a brand promise
    B. Developing a campaign platform
    C. Stating industry policies
    D. Establishing product position

63. What will probably happen to a business if it continuously fails to deliver on its brand promise?
    A. Lose credibility
    B. Improve sales volume
    C. Increase market share
    D. Decrease liability

64. What is an example of an employee reinforcing a firm's image through his/her job performance?
    A. A customer waits on the telephone for several minutes while Matt confirms shipping information.
    B. Susan advises her customer that the sofa is only available by special order.
    C. Jack politely asks if his customer would like a beverage while s/he waits for car service.
    D. Angela, a human resources manager, prepares the firm's employee newsletter every month.

65. Which of the following is a policy that the WNJ Company might implement to reinforce its image as an efficient and responsive business?
    A. Requiring employees to respond to customer inquiries within 24 hours
    B. Requesting that employees sign their timecards at the end of a pay period
    C. Ensuring that employees wear clean uniforms during their shifts
    D. Allowing employees to establish their own service standards

66. What does applying the customer-orientation element of the marketing concept enable the business to do?
    A. Offer products that consumers want to buy
    B. Persuade customers to buy its products
    C. Provide more products than consumers need
    D. Coordinate its marketing activities

67. By increasing awareness of the need for environmental controls, what has marketing done?
    A. Made buying more convenient
    B. Regulated the standard of living
    C. Improved the quality of life
    D. Added usefulness to products

68. According to the marketing concept, which of the following options shows company commitment:
    A. Leaving marketing to the marketing department
    B. Teaching marketing to college marketing students
    C. Setting aside funds to research what customers want
    D. Pricing a product to maximize profitability per item

69. Which marketing function helps businesspeople forecast how much will be sold in a given period?
    A. Market planning
    B. Risk management
    C. Promotion
    D. Channel management

70. After the popularity of a product dropped, the business needed a new product to promote that would help to improve its image. Which marketing function would come up with the new product?
    A. Channel management
    B. Product/Service management
    C. Selling
    D. Promotion

71. What does the selling function involve that makes it so important?
    A. Setting high prices
    B. Displaying products
    C. Contacting customers
    D. Obtaining feedback from vendors

72. What is the overall reason that marketing strategies are designed and implemented?
    A. To improve management techniques
    B. To achieve planned goals immediately
    C. To change the image of the business
    D. To increase business profits

73. Dennis has a great idea for a new type of tennis ball that, if produced, would be better than any ball currently on the market. He pitches his idea to a few investors. Which of the four Ps should these investors consider first?
    A. Product
    B. Price
    C. Promotion
    D. Place

74. To promote its summer menu, Danielle's Café plans to email a $5.00-off coupon to its regular customers next Tuesday. The coupon will be valid from June 1 through June 15. What does use of the coupon represent?
    A. A tactic
    B. A strategy
    C. A goal
    D. A trend

75. Sue is a 12th-grade student who loves the new Ferrari convertible which retails for approximately $300,000. She works part-time at the local movie theater and has approximately $150 in her savings and checking accounts. Is Sue a part of the market for the Ferrari?
    A. No, she is not financially willing to purchase the Ferrari.
    B. Yes, she has an unfulfilled desire for the Ferrari.
    C. Yes, she has an unfulfilled desire and is financially able and willing to satisfy that desire.
    D. No, she is not financially able to purchase the Ferrari.

76. Which market segment do customers in cold climates who need snow shovels and snow blowers represent?
    A. Geographic
    B. Psychographic
    C. Behavioral
    D. Occupational

77. A business determines that it can increase its market share by 12 percent by promoting its goods and services to Hispanic females who are 18- to 34-years old. How is the business segmenting the market?
    A. By geographics
    B. By psychographics
    C. By demographics
    D. By behavior

78. What marketing career involves determining why customers do what they do?
    A. Advertising
    B. Distribution/Warehousing
    C. Sales
    D. Marketing research

79. What marketing career involves catching customers' attention, informing them of products, and persuading them to buy?
    A. Marketing research
    B. Advertising
    C. Public relations
    D. Product management

80. Kwacky Kwackers needs a new package design for its crackers. What marketing professional would be responsible for creating the new package?
   - A. Marketing research
   - B. Product management
   - C. Advertising
   - D. Channel management

81. What is at the center of all marketing activities?
   - A. Math
   - B. Technological know-how
   - C. Purchasing
   - D. Communication

82. What does a salesperson need to do to be successful in selling?
   - A. Always attempt to sell related merchandise
   - B. Ask management to limit the number of brands
   - C. Describe the disadvantages of competing brands
   - D. Learn the features unique to the brands s/he sells

83. Joe is a salesperson who will sometimes forgo a sale in order to satisfy a customer's needs. Carol always attempts to close a sale at all costs. Who is likely to be the more successful salesperson?
   - A. Joe, because he is a nice person
   - B. Carol, because Joe is too timid to close a sale
   - C. Joe, because he will get more repeat business
   - D. Carol, because she will make more sales

84. What can salespeople do to maintain good relationships with existing customers?
   - A. Ask for new referrals
   - B. Use customers in advertisements
   - C. Live up to their promises
   - D. Send customers expensive gifts

85. What is an effective follow-up activity that salespeople can use to provide good service and develop strong relationships with customers?
   - A. Asking for customer referrals
   - B. Calling to make sure the products are satisfactory
   - C. Explaining the company's business plan
   - D. Sending articles about local competitors

86. Which is a pre-sale opportunity for salespeople to provide customer service?
   - A. Providing ample product information
   - B. Shipping and delivery
   - C. Maintenance and repair
   - D. Technical assistance and support

87. What should a salesperson do when dealing with a customer who wants to return an unsatisfactory item?
   - A. Exchange the item
   - B. Refer the customer to the manufacturer
   - C. Consult the buyer
   - D. Follow the business's selling policies

88. What is an internal factor that affects the selling policies of a business?
   - A. Customer requests
   - B. Actions of competitors
   - C. Financial resources
   - D. Government legislation

89. What type of product information might a salesperson be able to obtain from a manufacturer's representative?
   - A. How the product is made
   - B. What credit terms are available
   - C. How the product became popular
   - D. What inventory method to use

90. A customer asks a specific product question that a new salesperson cannot answer. What should the new salesperson do?
   - A. Tell the customer to contact the manufacturer
   - B. Explain that s/he is new and doesn't know
   - C. Try to serve the customer as best s/he can
   - D. Ask an available, experienced employee

91. After learning that a customer is interested in a computer that can produce sophisticated graphics, what should be the salesperson's next step?
   - A. Trying to reach closure with the customer
   - B. Suggesting a specific computer to the customer
   - C. Trying to make the customer feel more relaxed
   - D. Giving the customer a price list

92. The emphasis put on each phase of the selling process varies most significantly by
   - A. state and local laws.
   - B. economic climate.
   - C. product and the client.
   - D. geographic area.

93. Why should salespeople create favorable impressions during the initial contact with customers?
   - A. Customers want to ask for assistance.
   - B. First impressions are difficult to change.
   - C. First impressions seldom last very long.
   - D. Customer rapport is unimportant.

94. What should the salesperson do when s/he is helping a customer and another customer enters the selling area?
   - A. Apologize to the first customer for helping the second customer
   - B. Leave the first customer to help the second customer
   - C. Acknowledge the second customer as soon as possible
   - D. Ignore the second customer until finished with the first customer

95. A customer has been looking at different brands of the same product for several minutes. What is the most appropriate sales approach to use under these circumstances?
   - A. "May I help you?"
   - B. "Good morning. How are you?"
   - C. "Brand X is on sale today."
   - D. "What can I do for you today?"

96. If you feel you are asking too many questions but have not determined the customer's need or want, what can you do to vary your approach?
    - A. Use questioning statements.
    - B. Wait for the customer to ask questions.
    - C. Ask questions more slowly.
    - D. Speed up the pace of your questions.

97. The speed at which a salesperson asks customers questions depends on the
    - A. type of product that is being sold.
    - B. number of other customers waiting.
    - C. amount of time left before the business closes.
    - D. pace of the customer's responses to questions.

98. What is good advice for a salesperson to follow when questioning customers?
    - A. Ask each customer the same questions
    - B. Ask impersonal questions
    - C. The more questions you ask, the better
    - D. Make sure customers answer your questions

99. What should a salesperson explain to a customer when recommending a substitute item?
    - A. Buying motives
    - B. Exchange policies
    - C. Comparable features
    - D. Fringe benefits

100. Analyze the following situation to determine how the sale was lost: Ms. Garcia asked a sales representative for a handheld scanner she'd seen at a trade show. The sales representative said, "You don't want that scanner. It's too slow and inaccurate. For a few more dollars, you can have this quality scanner instead." Ms. Garcia didn't buy. What had the sales representative done?
    - A. Pointed out features of the scanner
    - B. Suggested trading-down
    - C. Criticized the original request
    - D. Referred to the new item as a substitute

1. D

   To order supplies, employees must complete the R-3 form and then give it to their immediate supervisor. Businesses develop policies and procedures to ensure that employees carry out business activities in fair and systematic ways. Policies are general rules to be followed by company personnel, and procedures are the step-by-step processes personnel follow in performing specific tasks. Because the correct answer states the steps of a process (ordering supplies), it is a procedure. Dress codes, vacation time, and reimbursement rates are examples of policies because they are general in nature.

   SOURCE: CO:057
   SOURCE: DifferenceBetween.net. (2011, February 20). *Difference between policy and procedure.* Retrieved March 24, 2017, from http://www.differencebetween.net/miscellaneous/difference-between-policy-and-procedure/

2. A

   To effectively convey information. Certain communication styles are more appropriate for some audiences than for others. It is important to understand the target audience in order to use the style that will most effectively convey information. For example, the communication style that is effective when speaking to coworkers on the same level is probably not the same style that will be effective when speaking to a group of managers or customers. Feedback is a response to a certain behavior or attitude. Organizing presentations involves gathering information and developing visuals. It is not important to use communication styles to establish control.

   SOURCE: CO:084
   SOURCE: eHow. (2015, September 24). *Types of communication in the workplace*. Retrieved March 27, 2017, from http://www.ehow.com/info_7742528_types-communication-workplace.html

3. A

   Speaking with coworkers. Jargon is a specialized language known only to a certain group of people. Industries and companies often use jargon that is meaningful to their businesses and may not be easily understood by people outside their industries or companies. Coworkers are more likely to use jargon because they are familiar with the terms and their meanings or applications. New customers, friends, business associates, and acquaintances may not be familiar with a specific industry's jargon.

   SOURCE: CO:084
   SOURCE: Lehman, C. & DuFrene, D. (2011). *Business communication* (16th ed.) [p. 100]. Mason, OH: South-Western.

4. D
Persuasive. Because Rosemary is making a sales presentation, she must present herself in a professional way that will encourage the audience to buy the product. To do this, she must persuasively communicate information. Casual communication is generally used with family and friends. When you cooperate with people, you are trying to get along with them. Traditional is not a communication style.
SOURCE: CO:084
SOURCE: Lehman, C. & DuFrene, D. (2011). *Business communication* (16th ed.) [pp. 422-429]. Mason, OH: South-Western.

5. D
Critical feedback. When employees present their ideas to management or coworkers, they should be prepared to defend those ideas and provide supporting information. They also should be willing to accept critical feedback because others might not agree with the ideas or have different opinions. Being prepared will help employees remain objective and be able to offer logical evidence to back up their ideas. Critical feedback is often useful because it allows employees to view their ideas from a different perspective. Defending ideas usually does not involve accepting additional responsibility or nonverbal support. It is not acceptable to attack employees on a personal level because of their ideas.
SOURCE: CO:061
SOURCE: Lehman, C. & DuFrene, D. (2011). *Business communication* (16th ed.) [pp. 279-281]. Mason, OH: South-Western

6. C
Present supporting research for her suggestions in an unbiased way. By providing supporting facts, Morgan can actually show the staff how and why her ideas can improve the department's productivity. If Morgan presents research that indicates that other companies' productivity levels have improved by using approaches similar to the one that she is suggesting, then she is defending her ideas effectively. Telling Jacob in front of the group that his ideas are weak is likely to create unnecessary conflict. Restating suggestions, coming up with new ideas, and asking other group members for input are not ways to defend an existing suggestion for improvement.
SOURCE: CO:061
SOURCE: Lehman, C. & DuFrene, D. (2011). *Business communication* (16th ed.) [pp. 279-281]. Mason, OH: South-Western

7. A
Remain patient. It may take some time and work to convince your coworkers that your idea is the best option, so it's important to remain patient. Becoming defensive and rejecting feedback will not help you be objective. Even though you don't want to become defensive, you also shouldn't go to the other extreme and accept defeat when people disagree with you.
SOURCE: CO:061
SOURCE: Baldoni, J. (2010, 22 April). *Defend your idea without being defensive*. Retrieved March 24, 2017, from https://hbr.org/2010/04/defend-yourself-without-being

8. A
   Identify the firm or department and yourself. General guidelines for answering a business telephone include greeting the caller, identifying yourself and the business or department, and asking how you can be of assistance to the caller. It is not always necessary to get the correct spelling of the caller's name. Immediate action may also not be required. Callers should not be called by their first names unless they are personal acquaintances of the individual answering the telephone.
   SOURCE: CO:114
   SOURCE: Clark, B., Basteri, C.G. Gassen, C., & Walker, M. (2014). *Marketing dynamics* (3rd ed.) [p. 455]. Tinley Park, IL: Goodheart-Wilcox

9. A
   Smile when you answer the telephone. Your attitude is projected over the telephone. A smile or a frown can actually be "heard" in your voice by the person on the other end of the line. A smile indicates a positive attitude, and a frown indicates a negative attitude. Using a wide vocabulary, being informed about the business's rules, and shutting out distractions while you are talking to a caller are all helpful in providing service, but they are not ways to demonstrate a positive attitude.
   SOURCE: CO:114
   SOURCE: Clark, B., Basteri, C.G. Gassen, C., & Walker, M. (2014). *Marketing dynamics* (3rd ed.) [p. 455]. Tinley Park, IL: Goodheart-Wilcox

10. B
    Ask the caller, "How may I help you?" This question requires callers to identify the purpose of their calls. It is courteous, since you cannot provide assistance until you know what is needed. Asking, "What did you want?" sounds abrupt and impolite. Waiting for callers to ask questions would waste your time and that of the caller. Answering promptly with a friendly greeting is a guideline for giving good telephone service but would not identify the purpose of the call.
    SOURCE: CO:114
    SOURCE: Clark, B., Basteri, C.G. Gassen, C., & Walker, M. (2014). *Marketing dynamics* (3rd ed.) [p. 455]. Tinley Park, IL: Goodheart-Wilcox

11. B
    Appoint a leader. When participating in group discussions, it is often helpful to appoint a leader so someone will be able to guide and control the discussion. The leader will be able to encourage all members to participate and keep the discussion on track. Without a leader, the group might lose its focus and discuss issues that are not relevant. A leader can keep the discussion moving rather than allow the group to socialize. Also, a leader can prevent others from interrupting or slow down someone who is dominating the discussion. A leader should be assertive rather than aggressive.
    SOURCE: CO:053
    SOURCE: QS LAP 29—Put In Your Two Cents (Participating in Group Discussions)

12. C
Attacking someone else's idea. When you ask questions in an open-minded way, you avoid attacking someone else's idea. You evaluate what you have to say before you say it and avoid all sarcasm. Your goal is to phrase your question in a way that seeks helpful information. You do not avoid suggesting a better way to do something, stating your own opinion, or mentioning the truth.
SOURCE: CO:053
SOURCE: LAP-QS-029—Put In Your Two Cents (Participating in Group Discussions)

13. A
Gain confidence when speaking to other people. Even if you feel uncomfortable when speaking in front of others, you are likely to feel more at ease when you regularly participate in group discussions. It is often helpful to look at the situation as an opportunity to practice your public speaking skills to gain confidence. Remember that everyone should have the opportunity to openly express his/her ideas and opinions in a group discussion. Therefore, you should try not to control the conversation, nor should you express your opinions in an aggressive way—a way that may offend others. While sharing your knowledge and expertise may contribute to the discussion, you should not do so in a boastful way. If you are boastful, others are less likely to take you seriously.
SOURCE: CO:053
SOURCE: LAP-QS-029—Put In your Two Cents (Participating in Group Discussions)

14. D
Information will be needed later. In many situations, the information provided during meetings or presentations will be needed later. Therefore, it is often important for participants to take notes so they will have access to the information in the future. For example, participants may need to write a summary of the meeting to give to supervisors. If the speaker is difficult to understand, participants should ask questions. The audience does not take notes to have something to do. Writing does not necessarily keep the mind focused.
SOURCE: CO:085
SOURCE: Illinois State University. (n.d.). Evaluate your present note-taking system: guidelines for note-taking. Retrieved March 24, 2017, from http://universitycollege.illinoisstate.edu/downloads/Notetaking%20%28Standford%20PDF%29.pdf

15. C

Are meaningful to the note taker. Effective note-taking involves writing down the most important information or key points for future reference. Writing or typing key phrases, words, or symbols that are meaningful to the note taker are ways of capturing the most important information. Because the notes are for personal use, they do not need to reflect proper punctuation and grammar or make sense to the speaker. Notes do not always include personal opinion and bias.

SOURCE: CO:085

SOURCE: Illinois State University. (n.d.). Evaluate your present note-taking system: Guidelines for note-taking. Retrieved March 24, 2017, from http://universitycollege.illinoisstate.edu/downloads/Notetaking%20%28Standford%20PDF%29.pdf

16. A

Listen carefully. Brooke must listen to the speaker so she can identify the key points that she wants to write down. By noting the key points, Brooke will be able to refer to the most important information when she needs it later. Effective note-taking does not involve answering questions or expressing opinions. Brooke might need her notes to develop a briefing, which is a summary of important information or instructions.

SOURCE: CO:085

SOURCE: Illinois State University. (n.d.). *Evaluate your present note-taking system: Guidelines for note-taking.* Retrieved March 24, 2017, from http://universitycollege.illinoisstate.edu/downloads/Notetaking%20%28Standford%20PDF%29.pdf

17. B

Develop an outline. It is necessary to organize information to present it in a logical manner in a business report. An effective way to organize information is to develop an outline. The outline serves as the plan for the report and helps the writer arrange the information in the order that will make the message clear to readers. A writer determines the purpose of the report before gathering and interpreting the data. Then it is appropriate to develop an outline. It is important to remain objective while writing the business report.

SOURCE: CO:086

SOURCE: Burke, A. (2011, August 8). *Examples of methods of organization*. Retrieved March 24, 2017, from http://smallbusiness.chron.com/examples-methods-organization-18982.html

18. D
To arrange findings in a logical manner. Before preparing a business report, it is important to organize the information so the findings are arranged in a logical manner. The facts and findings should be presented in a logical manner so readers will be able to understand the message. If the information is out of order, the message may not be clear. Before the information can be organized, it is necessary to understand the purpose of the report, identify the target audience, and investigate the cause of the problem.
SOURCE: CO:086
SOURCE: Burke, A. (2011, August 8). *Examples of methods of organization*. Retrieved March 24, 2017, from http://smallbusiness.chron.com/examples-methods-organization-18982.html

19. B
Chronological. When describing a process or historical information, the writer may need to present the facts in chronological order. By describing the steps or events in the sequence in which they occur, the writer is presenting the information in a logical manner, which helps the readers understand the content. When presenting information in an inverted order, the writer is describing the steps or processes in reverse order. Concurrent means that activities are being performed at the same time.
SOURCE: CO:086
SOURCE: Burke, A. (2011, August 8). *Examples of methods of organization*. Retrieved March 24, 2017, from http://smallbusiness.chron.com/examples-methods-organization-18982.html

20. A
Timeline. A timeline is a graphic depiction of events that happen within a period of time and are arranged in chronological order. Many software programs provide attractive templates that enable you to illustrate events on a timeline. A pie chart shows the parts of a whole. A Venn diagram indicates the overlapping relationships among finite sets of data. A bar chart compares two or more variables in a graphical format.
SOURCE: CO:087
SOURCE: Farese, L.S., Kimbrell, G., & Woloszyk, C.A. (2012). *Marketing essentials* (pp. 180-181). Columbus, OH: Glencoe/McGraw-Hill.

21. D
Enhance your presentation. Graphic aids should be used to enhance your presentation and engage your audience. They can help you add visual interest, better communicate information to your audience, condense information, save time, and make information easier to remember. Graphic aids do not eliminate your need to speak; you will still need to explain your graphic aids and give the rest of your presentation. Graphic aids are not intended to distract your audience.
SOURCE: CO:087
SOURCE: ELC PolyU. (2013, April 24). *Presentations: designing effective visual aids*. Retrieved March 24, 2017, from https://www.youtube.com/watch?v=S3tuT0yimfM

22. C
A line graph. Line graphs are best used to show changes (particularly small changes) over time. For example, if you want to demonstrate your company's profit in each of the past 12 months, a line graph would be one effective method. Pie charts are more commonly used to show how categories relate to the whole. A photograph or a video would likely not showcase the data you want to present.
SOURCE:	CO:087
SOURCE:	NCES. (n.d.). *How to choose which type of graph to use*. Retrieved March 24, 2017, from https://nces.ed.gov/nceskids/help/user_guide/graph/whentouse.asp

23. D
It helps employees advance in their careers. Employees who are customer-oriented often receive compliments from customers, positive performance evaluations, and raises and/or promotions. Efficiency levels and the level of competitiveness vary from person to person. Achieving the business's profit goals benefits the employer.
SOURCE:	CR:004
SOURCE:	LAP-CR-004—Set Your Mind to It (Customer-Service Mindset)

24. D
Result in customer satisfaction. Making customers feel important is a goal of demonstrating a customer-service mindset. Customers should feel welcome and that their satisfaction is important to everyone concerned. By focusing on the customers' needs, employees can increase sales and, in most cases, bring themselves personal fulfillment. The customer-service mindset should be practiced by all employees regardless of whether employees have direct contact with customers.
SOURCE:	CR:004
SOURCE:	LAP-CR-004—Set Your Mind to It (Customer-Service Mindset)

25. C
Knowledge of the products being promoted. Information regarding planned promotions of products prepares salespeople to handle customer inquiries. The store's promotional budget and policies would not provide information pertinent to this customer's inquiry. Personal customer information also would not help to answer the customer's question.
SOURCE:	CR:006
SOURCE:	Farese, L.S., Kimbrell, G., & Woloszyk, C.A. (2012). *Marketing essentials* (p. 402). Columbus, OH: Glencoe/McGraw-Hill.

26. C

Pronounce their names correctly. One way to show respect for foreign clients, their families, and their cultures is to learn to say their names properly. If you mispronounce a client's name, you might insult the person or hurt his/her feelings. If you can speak a client's native tongue, converse with that client in her/his language, rather than always speaking in your own native language. Especially if your clients' knowledge of the English language is limited, you should avoid using slang and idioms—your clients may not understand what you really mean by such words and phrases. When communicating with clients of different cultures, do not base your actions on cultural stereotypes.

SOURCE: CR:019
SOURCE: Kimbrell, G. (2012) *Succeeding in the world of work* (p. 193). New York: Glencoe/McGraw-Hill.

27. C

Treat customers fairly. Management establishes policies that help employees to deal with customers in the same way for the same situation to be fair. Customers who are not treated fairly may take their business elsewhere. Businesses do not develop policies to treat customers differently, to offer special privileges, or to give personal favors.

SOURCE: CR:007
SOURCE: Farese, L.S., Kimbrell, G., & Wolosyk, C.A. (2012). *Marketing essentials* (pp. 355-357). Columbus, OH: Glencoe/McGraw-Hill.

28. D

Get the customer to relate to her by engaging in pleasant small talk. When meeting a new customer, it's important for Julie to create a personal connection. If she immediately gets down to business, she'll have a hard time building a relationship with the customer. By discussing pleasant but neutral topics first, Julie can get to know her customer and show that she's interested in her/his life. Although making promises and telling the customer what s/he wants to hear may make the customer like her, it won't help Julie in the long run if she can't fulfill those promises. Julie should give her customer a catalog, but that should not be the first interaction she has with the customer.

SOURCE: CR:029
SOURCE: Wolski, C. (2015). *How to build rapport in customer service*. Retrieved March 24, 2017, from http://smallbusiness.chron.com/build-rapport-customer-service-2034.html

29. D

Suspicious. Suspicious customers question everything and may want facts and proof before being convinced that something is true. Eager customers tend to make quick, sometimes impulsive purchasing decisions. Domineering/Superior customers are overly self-confident and feel that they know more and are better than the average person. Slow/Methodical customers require a lot of time to make a purchase because of shyness or difficulty in making a choice or buying decision.

SOURCE: CR:009
SOURCE: LAP-CR-003—Making Mad Glad (Handling Difficult Customers)

30. D
Employees. The most important factor in carrying out brand promise is the employees themselves. Do they have the knowledge, experience, abilities, and willingness they need to complete this very important task? Successful businesses consider this question with every new individual they hire. Business environment, corporate culture, and brand personality are also factors that affect how a business carries out brand promise, but they are not as critical as the "human factor."
SOURCE: CR:001
SOURCE: LAP-CR-006—Share the Promise (Identifying Brand Promise)

31. A
Training its employees. A company's image, or brand, is the way a person or group views the company; it's the combined impressions and experiences associated with the company. The manner in which employees perform their tasks affects the way people view the company. For example, a business that wants to portray an upscale image might train its employees to respond to and service customers in a specific way or by following a set of procedures. To reinforce the upscale image, the business might require an employee to greet the customer in a certain way, provide extra amenities, wear certain apparel, or follow certain cleaning procedures to maintain the facility. Although it is important for a business to develop a financial plan, conduct a competitive analysis, and identify necessary resources, these activities do not directly affect how employees convey a certain image.
SOURCE: CR:002
SOURCE: Siegel+Gale. (2014, September 12). *Brand matters: How can employee engagement help a brand realize its potential?* Retrieved March 24, 2017, from https://www.youtube.com/watch?v=R69HnGiSlsI

32. A
False, company commitment is essential to the success of the marketing concept. The marketing concept is based on satisfying consumer wants and needs while achieving company goals. An organization that applies the marketing concept requires the support of management and staff.
SOURCE: MK:001
SOURCE: LAP-MK-004—Have It Your Way (Nature of Marketing)

33. D
Pricing. This marketing function involves determining and adjusting prices to maximize return and meet customers' perceptions of value. Pricing includes setting an amount to charge a customer for a product, which usually is based on the item's cost, expenses, and desired profit. Communicating information about goods, services, images, and/or ideas to achieve a desired outcome is promotion. Risk management, which is not a marketing function, involves the planning, controlling, preventing, and procedures used by management to limit business loss. Channel management involves identifying, selecting, monitoring, and evaluating sales channels.
SOURCE: MK:002
SOURCE: LAP-MK-001—Work the Big Six (Marketing Functions)

34. B

Place. The place element of marketing is concerned with having the selected product in the right location at the right time. Considerations involved with the place element are channels of distribution, storage, transportation, and inventory handling and control. The product element refers to what goods, services, or ideas a business will offer its customers. The promotion element refers to communicating information about goods, services, images, and/or ideas to achieve a desired outcome. The price element involves determining and adjusting prices to maximize return and meet customers' perceptions of value.

SOURCE: MP:001
SOURCE: LAP-MP-002—Pick the Mix (Nature of Marketing Strategies)

35. B

Spend money. A market is a customer or potential customer who has an unfulfilled desire and is financially able and willing to satisfy that desire. Unless potential customers have the money to buy products, they cannot be considered a market—even if they are willing to spend time going shopping or choosing products. Being willing to change habits would not turn a customer into a market unless the change provided the customer with money to spend.

SOURCE: MP:003
SOURCE: LAP-MP-003—Have We Met? (Market Identification)

36. A

Involves interaction with customers. Selling is referred to as personal selling because salespeople interact with their customers and try to meet their individual needs. Providing specific product information is one of the ways salespeople meet those needs. Selling seldom follows a standardized format except in situations such as telemarketing. Personal selling can take place in a variety of places, including the home, but it is the interaction with customers that gives it its name.

SOURCE: SE:017
SOURCE: LAP-SE-117—Sell Away (Nature of Selling)

37. D

Terms-of-sale. Selling policies concerned with pricing, product availability, and discounts are categorized as terms-of-sale policies. These are the policies about which customers are usually the most concerned and are at the heart of a sale. Service policies are designed to govern the support a company provides to customers after the sale, while selling-activity policies focus on providing salespeople with guidelines for activities involving interaction with customers. Delivery policies are an example of service policies.

SOURCE: SE:932
SOURCE: LAP-SE-121—Sell Right (Selling Policies)

38. C
Uses and performance. When customers return to tell you of a product's performance and the way(s) in which they have used the product, that information can be utilized in making future sales. Information about unique and novel features, construction, and materials is best obtained from manufacturer's brochures and advertising materials. Information regarding the appearance and style of the product may be obtained from the product itself.
SOURCE: SE:062
SOURCE: LAP-SE-131—Get Informed (Acquiring Product Information for Use in Selling)

39. B
Represent a certain level of quality to consumers. Brand-name products are usually of consistent quality, and consumers return to purchase brands they trust. This makes brand names easy to sell. Not all brand names appeal to all customers. Brand-name products generally command a higher price than unbranded products. Brand names may carry warranties or guarantees that apply to the products themselves, but these do not guarantee that consumers' specific needs will be satisfied.
SOURCE: SE:019
SOURCE: Farese, L.S., Kimbrell, G., & Wolosyk, C.A. (2012). *Marketing essentials* (pp. 731-737). Columbus, OH: Glencoe/McGraw-Hill.

40. D
Customer recognition. A reason why many retailers sell brand-name goods is because customers recognize the brands. Selling brand-name goods often is fairly easy because of national advertising that promotes the brand to all customers. Customers often associate brand names with quality and acceptability which makes it easier for salespeople to persuade them to buy. Retailers usually receive cooperation from all vendors regardless of the type of good. Retailers generally design their own displays unless they are using a type of point-of-purchase display. Financial leverage refers to a business's economic condition.
SOURCE: SE:019
SOURCE: Farese, L.S., Kimbrell, G., & Wolosyk, C.A. (2012). *Marketing essentials* (pp. 731-737). Columbus, OH: Glencoe/McGraw-Hill.

41. B
Build loyalty among customers. Most customers rely on brand names to distinguish among the massive selection of products available to them. Customers come to have certain expectations from certain brands and develop loyalty not only to the brands themselves, but also to the retailers who carry them. Positive images are associated with both the brands and the retailers. Brand-name products are not necessarily the most expensive merchandise but those with clear values and images, which customers identify with and are drawn to. Brand-name products do not necessarily create the most attractive displays, nor do they make customers stay longer in stores. Simply, brand names make a promise to consumers and deliver on it—time and time again.
SOURCE: SE:019
SOURCE: Farese, L.S., Kimbrell, G., & Wolosyk, C.A. (2012). *Marketing essentials* (pp. 731-737). Columbus, OH: Glencoe/McGraw-Hill.

42. A

Handle. Salespeople demonstrate products to show customers how the products will solve customers' problems or meet their needs. Salespeople try to appeal to customers' senses by getting the product into the customers' hands and showing them how it works. Handling a product makes customers feel a sense of ownership and encourages them to buy. Having customers handle the product is more likely to encourage customers to buy than letting them watch the salesperson handle the product. The final objective of any demonstration is not just to have the customer admire or approve of the product but to purchase it.

SOURCE: SE:048
SOURCE: LAP-SE-048—Set Your Sales (The Selling Process)

43. B

Meet their needs. Salespeople provide the most valuable service to customers when they help them meet their needs. A restaurant customer doesn't just want lunch—s/he wants to satisfy hunger. A customer at your car dealership doesn't just want a vehicle—s/he wants a reliable method of transportation. Salespeople might help customers buy better products than their neighbors or try to things, but this is not the most valuable service they provide. Customers usually want low interest rates-not high ones!

SOURCE: SE:114
SOURCE: LAP-SE-111—Get Specific (Recommending Specific Product)

44. B

New personnel regulations. Most businesses prepare a variety of internal reports that are intended to inform employees about changes in policies and procedures. These internal reports often explain new personnel regulations. If employees analyze the reports, they will be able to understand and comply with the new personnel policies and procedures. Businesses do not share customer profiles with all employees. Internal business reports concerning policies and procedures usually do not explain industry research data or list former local competitors.

SOURCE: CO:057
SOURCE: Clark, B. & Commers, J. (2013). *Entrepreneurship* (pp. 400-401). Tinley Park, IL: Goodheart-Wilcox.

45. C
The use of company property. Businesses often develop employee handbooks, which provide information about their general policies and procedures. Employee handbooks are usually given to new employees when they are hired. Employee handbooks usually provide information about overtime and vacation policies, disciplinary and grievance procedures, pay schedules, dress codes, and behavioral expectations in its employee handbook. Many employee handbooks include information about employees and their personal use of company property. Company-property issues that the handbook might address include making personal long-distance phone calls on the company phone and using the office copy machine or printer for non-business purposes. Lists of the company's current job openings and personal information about vacation days are usually available through the human-resources department and are not included in the employee handbook. Additionally, the company's annual report is not usually included in the employee handbook. Often, corporations post their annual reports on the company's website.
SOURCE: CO:057
SOURCE: DifferenceBetween. (2017). Difference between policy and procedure. Retrieved March 24, 2017, from http://www.differencebetween.info/difference-between-policy-and-procedure

46. A
Make sure the mistake is corrected. The customer wants you to resolve the problem. To do this, you must find solutions and correct the mistake without getting as upset as the customer, being defensive, or placing blame. You must find out what happened so that you know what to do next. Calling the customer's supervisor is inappropriate. You should look at this problem as an opportunity to discover how you can improve your customer-service skills.
SOURCE: CR:004
SOURCE: LAP-CR-004—Set Your Mind to It (Customer-Service Mindset)

47. B
Devote their full attention to customers. Maintaining a customer-service mindset requires employees to set their minds on customers. They should not become distracted by other things around them, such as songs on the radio, conversations with coworkers, the amount of work piling up on their desks, or what they will be doing after work or during breaks. Distractions turn their focus away from customers and prevent them from providing quality service.
SOURCE: CR:004
SOURCE: LAP-CR-004—Set Your Mind to It (Customer-Service Mindset)

48. B
By requesting input through employee and customer surveys. Service-oriented companies are generally committed to providing exceptional service levels. Service-oriented companies are always looking for ways to improve their service levels. Requesting feedback from employees and customers regarding service levels is one way businesses can evaluate and improve service. Testimonials are statements by identified users of a product proclaiming the benefits received from the use of a product. Distributing testimonials, evaluating product development procedures, and conducting a feasibility analysis are not methods that businesses generally use to improve their service levels.
SOURCE: CR:005
SOURCE: Clark, B., Basteria, C.G., Gassen, C., & Walker, M. (2014). *Marketing dynamics* (3rd ed.) [pp. 546-550]. Tinley Park, IL: Goodheart-Wilcox.

49. B
Builds positive relationships with customers. A service orientation is the business philosophy of providing quality service. One way to do this is to communicate effectively with customers so they trust the business. The benefit of creating trust by providing accurate and credible information is that it tends to build positive relationships with customers. Customers often remain loyal to a business if they have confidence that the business will treat them well and provide quality service. The purpose of reinforcing service orientation through communication is not to promote the sale of new products, reward customers for their support, or encourage employees to be aggressive.
SOURCE: CR:005
SOURCE: Clark, B., Basteria, C.G., Gassen, C., & Walker, M. (2014). *Marketing dynamics* (3rd ed.) [pp. 546-550]. Tinley Park, IL: Goodheart-Wilcox.

50. D
Make sure you clearly understand customers' inquiries. Customers' inquiries are not always phrased in such a way that employees can easily determine what customers want to know. Employees should find out exactly what the customers are asking to give them the most accurate answers. Inquiries should be handled as courteously as sales, which means spending whatever time is needed to answer them. In many cases, it would be inappropriate to try to sell something to a customer who asks a question. Employees who are busy with a sale can often take a moment to answer a single question for another customer without being rude to the first customer. If the second customer has additional questions, s/he should be asked to wait until you can give those questions your full attention.
SOURCE: CR:006
SOURCE: Clark, B., Basteria, C.G., Gassen, C., & Walker, M. (2014). *Marketing dynamics* (3rd ed.) [pp. 546-550]. Tinley Park, IL: Goodheart-Wilcox.

51. B
   Ask the customers when it would be convenient to call them. When employees must gather information requested by customers and call them later, the employees should ask the customers when the customers would like to be called. The call should be scheduled to suit the customers' convenience, not that of the business. The employees should explain that the information is not available at the moment but will be obtained. Explaining how much effort will be required to obtain the information sounds like a complaint about the customers' request. Employees should make sure that they follow through on their promise of a return call, rather than asking customers to call back if they don't receive a call.
   SOURCE: CR:006
   SOURCE: Clark, B., Basteria, C.G., Gassen, C., & Walker, M. (2014). *Marketing dynamics* (3rd ed.) [pp. 546-550]. Tinley Park, IL: Goodheart-Wilcox.

52. A
   Offend the clients. Businesspeople should try to learn as much as they can about a client's culture, customs, and social values. By understanding and being aware of cultural differences, businesspeople can adapt their communication styles to make a positive impression on their clients, earn their clients' trust, and persuade their clients to buy. Businesspeople who adapt their communication styles are aware of actions that a particular client might view as hospitable as well as behaviors that the client might find offensive. Offensive behaviors can hinder the ability to build long-term relationships with international clients.
   SOURCE: CR:019
   SOURCE: Kimbrell, G. (2012) *Succeeding in the world of work* (p. 193). New York: Glencoe/McGraw-Hill.

53. D
   Being patient, flexible and empathetic. So that businesspeople don't do something that will offend their clients, they should adapt their communication styles with clients from different cultures. To develop positive relationships with international clients, businesspeople should try to learn as much as they can about their clients' cultures, customs, and social values. Adapting communication styles requires businesspeople to be patient, flexible, empathetic, respectful, confident (but not overly so), honest (transparent), and sensitive to their clients' cultures and customs. Projecting biased, demanding, manipulative, or indifferent attitudes may offend the clients.
   SOURCE: CR:019
   SOURCE: Kimbrell, G. (2012) *Succeeding in the world of work* (p. 193). New York: Glencoe/McGraw-Hill.

54. C

Nature of the business. A business's policies must be appropriate for the type of business. For example, a policy that might be appropriate for an investment business might be inappropriate for a hardware store. Not all business policies are written, and it would not be necessary to display them. The personal preferences of management should not be a consideration. Employees who lack good communication skills can receive training that will improve their skills in communicating policies to customers.

SOURCE: CR:007
SOURCE: Farese, L.S., Kimbrell, G., & Woloszyk, C.A. (2012). *Marketing essentials* (pp. 355-357). Columbus, OH: Glencoe/McGraw-Hill.

55. B

To make sure the business's actions are consistent. Business policies keep the day-to-day operations running smoothly and consistently. Policies ensure that employees will handle the same situations in the same manner, rather than making decisions regarding each customer, because the policies provide guidelines for employees to follow. Business policies cannot ensure profits. Policies usually set rules for exchanges of goods, but they do not encourage customers to make exchanges frequently.

SOURCE: CR:007
SOURCE: Farese, L.S., Kimbrell, G., & Woloszyk, C.A. (2012). *Marketing essentials* (pp. 355-357). Columbus, OH: Glencoe/McGraw-Hill.

56.C

Listen patiently and try to stay calm. To keep the channel of communication open, the employee must remain calm and courteous. S/He should listen carefully to the individual and give him/her plenty of time to say what s/he feels. Proving someone else is wrong seldom improves a situation and may make it worse. Speeding up the sale is not an effective way to deal with disagreeable individuals and may even make them more disagreeable.

SOURCE: CR:009
SOURCE: LAP-CR-003—Making Mad Glad (Handling Difficult Customers)

57. C

Slow/Methodical. Slow/Methodical customers require a lot of time to make a purchase because of shyness or difficulty in making a choice or buying decision. Disagreeable customers are unpleasant and hard to help because they are argumentative, complaining, irritable/moody, insulting, impatient, and/or have a leave-me-alone attitude. Dishonest customers intentionally attempt to avoid paying part or all of the cost of a good or service. Suspicious customers question everything and may want facts and proof before being convinced that something is true.

SOURCE: CR:009
SOURCE: LAP-CR-003—Making Mad Glad (Handling Difficult Customers)

58. D
   Loss of sales. When customer complaints are handled improperly, the salesperson stands to lose the customer's current and future purchases. In addition, the unhappy customer often expresses the dissatisfaction to friends, to relatives, and to coworkers. This can also result in loss of sales. Only in rare cases would additional advertising be used to respond to customer complaints since most businesses would prefer that complaints not be made public. Markup on inventory is a routine procedure not connected to customer complaints. Higher commissions would be a cost associated with increased sales.
   SOURCE: CR:010
   SOURCE: Farese, L.S., Kimbrell, G., & Woloszyk, C.A. (2012). *Marketing essentials* (pp. 241-242). Columbus, OH: Glencoe/McGraw-Hill.

59. B
   Product quality. Poor quality products that do not perform properly or break are a common cause for complaint. Other causes include the business itself, its policies, and its personnel. Price reductions are usually pleasing to customers. Extended hours give customers more time to shop. Institutional ads promote the image of the business and are not likely to be the subject of complaints.
   SOURCE: CR:010
   SOURCE: Clark, B., Basteri, C.G., Gassen, C., & Walker M. (2014). *Marketing dynamics* (3rd ed.) [p. 550]. Tinley Park, IL: Goodheart-Wilcox.

60. D
   Restate the complaint. Restating the complaint involves putting the customer's complaint into your own words. Including all relevant facts when you restate the complaint helps to ensure that you fully understand the customer's complaint. This also provides the customer an opportunity to correct any errors in your understanding of the problem. Explaining company policy and taking action should be done after you restate the complaint. Thanking the customer for bringing the problem to your attention helps to calm the customer's anger.
   SOURCE: CR:010
   SOURCE: Farese, L.S., Kimbrell, G., & Woloszyk, C.A. (2012). *Marketing essentials* (pp. 241-242). Columbus, OH: Glencoe/McGraw-Hill.

61. B
   Yes, because the salesperson does not have an opportunity to handle the complaint. Salespeople are not able to satisfy noncomplainers because they do not express their dissatisfaction to anyone associated with the business. They do, however, express ill feelings to friends, to relatives, and to coworkers. In this way, they create a poor image of the business. Because of this, they are a much bigger problem than complainers. Once salespeople know the source of customer complaints, they can seek ways to satisfy the complainers within company guidelines.
   SOURCE: CR:010
   SOURCE: Farese, L.S., Kimbrell, G., & Woloszyk, C.A. (2012). *Marketing essentials* (pp. 241-242). Columbus, OH: Glencoe/McGraw-Hill.

62. A
   Making a brand promise. A brand promise is a business's agreement, spoken or unspoken, with customers that it will consistently meet their expectations and deliver on its brand characteristics and values. In the example, the brand promise is to provide all customers with quick, courteous service. Developing a campaign platform, stating industry policies, and establishing product position are not activities in which a business is making a pledge or promise to customers.
   SOURCE: CR:001
   SOURCE: LAP-CR-006—Share the Promise (Identifying Brand Promise)

63. A
   Lose credibility. A brand promise is a business's agreement, spoken or unspoken, with customers that it will consistently meet their expectations and deliver on its brand characteristics and values. An example of a brand promise is a large company that pledges to deliver backorders within 24 hours. If the company consistently fails to deliver backorders within 24 hours, customers are likely to become upset, which may cause the company to lose its credibility. A business that loses credibility with its customers tends to lose sales and market share because its customers will likely find new sources to fulfill their needs. Liability refers to a debt, (e.g., money), that the company owes and does not always affect a company's ability to fulfill its brand promise.
   SOURCE: CR:001
   SOURCE: LAP-CR-006—Share the Promise (Identifying Brand Promise)

64. C
   Jack politely asks if his customer would like a beverage while s/he waits for car service. The manner in which employees perform their tasks is an important factor that affects how customers view a business. When an employee is polite and asks a customer if s/he would like a beverage while waiting for service, the employee is reinforcing a positive view or image of the business. On the other hand, placing a customer on hold, especially if it happens often, might anger the customer and reinforce a negative image of the business. There is not enough information to determine if preparing a newsletter or telling a customer that an item is only available by special order is reinforcing or creating a certain image.
   SOURCE: CR:002
   SOURCE: Clark, B., Basteria, C.G., Gassen, C., & Walker, M. (2014). *Marketing dynamics* (3rd ed.) [pp. 546-550]. Tinley Park, IL: Goodheart-Wilcox.

65. A
Requiring employees to respond to customer inquiries within 24 hours. A business's employees can have a dramatic impact on the ways in which customers view the business. If one customer has a poor experience with one employee, that customer often develops a poor attitude about the entire business. And, that customer often shares those negative opinions with others. Therefore, a business should take steps to ensure that its employees understand how their actions affect the business's image. Businesses often develop policies to ensure that employees are engaging in behaviors that support the company's image. Because WNJ wants to project an image of being responsive to its customers' needs, it developed a policy that employees must respond to inquiries within 24 hours. This may include a quick phone call just to tell the customer that the business is working on a problem or issue. Requiring signed timecards is a personnel policy rather than a way to reinforce the business's public image. Although clean uniforms can affect the business's image, the uniforms do not indicate how responsive the business is in meeting its customers' needs. Because individuals often have different perspectives about excellent service, it is not a good idea to allow employees to set their own service standards.
SOURCE: CR:002
SOURCE: Clark, B., Basteria, C.G., Gassen, C., & Walker, M. (2014). *Marketing dynamics* (3rd ed.) [pp. 546-550]. Tinley Park, IL: Goodheart-Wilcox.

66. A
Offer products that consumers want to buy. Businesses that implement the customer-orientation element of the marketing concept base their decision making on customer wants and needs. They determine what customers want and offer that, rather than deciding on their own what they want to sell. Promotional activities help the business to persuade customers to buy. Providing more products than consumers need would not benefit a business. Having a customer orientation does not coordinate a business's marketing activities.
SOURCE: MK:001
SOURCE: LAP-MK-004—Have It Your Way (Nature of Marketing)

67. C
Improved the quality of life. Marketing has improved the quality of life by encouraging the development of safer, better goods and services. In addition, marketing has increased awareness of the need for environmental controls to protect our physical surroundings, which has led to an improvement in our existence. Making people aware of the need for environmental controls does not add usefulness to products or make buying more convenient, although those are other benefits of marketing. Marketing does not regulate the standard of living but usually helps to raise it by improving the general conditions in which people live.
SOURCE: MK:001
SOURCE: LAP-MK-004—Have It Your Way (Nature of Marketing)

68. C
Setting aside funds to research what customers want. Company commitment involves everyone in the organization embracing the marketing concept and putting customers' interests first. One way to demonstrate a commitment to the marketing concept is to set aside money to fund the research needed to develop a product according to customers' wishes. Leaving marketing to the marketing department prevents the rest of the company from being involved in marketing. Teaching marketing to college marketing students is honorable, but it does not demonstrate the marketing concept's theme of company commitment. Pricing a product to maximize profitability per item allows the company to earn as much money as it can, but customers may not be willing to purchase the product at that high of a price. Pricing a product to maximize profitability per item puts the company's interests before the customers', which goes against the marketing concept.
SOURCE: MK:001
SOURCE: LAP-MK-004—Have It Your Way (Nature of Marketing)

69. A
Market planning. Market planning is a marketing function that addresses the principles and tools used to determine and to target marketing strategies to a select audience. Risk management is not a marketing function. Promotion involves communicating information about goods, services, images, and/or ideas to achieve a desired outcome. Channel management is the processes by which marketers ensure that products are distributed to customers efficiently and effectively.
SOURCE: MK:002
SOURCE: LAP-MK-001—Work the Big Six (Marketing Functions)

70. B
Product/Service management. This is a marketing function that involves obtaining, developing, maintaining, and improving a product or service mix in response to market opportunities. This includes selecting products that help to promote a certain image for the business. Selling is a marketing function that involves determining client needs and wants and responding through planned, personalized communication that influences purchase decisions and enhances future business opportunities. Promotion is a marketing function that communicates information about goods, services, images, and/or ideas to achieve a desired outcome. Channel management is the processes by which marketers ensure that products are distributed to customers efficiently and effectively.
SOURCE: MK:002
SOURCE: LAP-MK-001—Work the Big Six (Marketing Functions)

71. C
Contacting customers. The selling function is very important because it involves contact with customers. If customers are not satisfied with the sales experience, they often will not buy even if they need the product and the price is right. The selling function does not necessarily involve displaying products, setting high prices, or obtaining feedback from vendors.
SOURCE: MK:002
SOURCE: LAP-MK-001—Work the Big Six (Marketing Functions)

72. B

To achieve planned goals. The business's goals and strategies for achieving those goals may change frequently. Changing the business's image, increasing its profits, or improving management techniques might be specific goals at any point in time.
SOURCE: MP:001
SOURCE: LAP-MP-002—Pick the Mix (Nature of Marketing Strategies)

73. A

Product. Before a company introduces a new product, it should determine if there is a market for the product. The investors should first determine if there is a market for a new type of tennis ball before creating a company. After product is considered, the investors would have to think about how to price the new ball, where and how it should be promoted, how to ship the product, and where it should be sold.
SOURCE: MP:001
SOURCE: LAP-MP-002—Pick the Mix (Nature of Marketing Strategies)

74. A

A tactic. Because emailing the coupon is a specific action to increase short-term sales, it is a marketing tactic. Marketing tactics are used to carry out the business's marketing strategies, which are broader in scope and serve as "road maps" to achieve the business's marketing goals. A trend is the general direction in which people or events are moving. Businesses evaluate trends when setting marketing objectives, determining marketing strategies, and executing marketing tactics.
SOURCE: MP:001
SOURCE: LAP-MP-002—Pick the Mix (Nature of Marketing Strategies)

75. D

No, she is not financially able to purchase the Ferrari. To be part of a market, the customer must have an unfulfilled desire and be financially able and willing to satisfy that desire. Sue lacks the financial ability to purchase a Ferrari.
SOURCE: MP:003
SOURCE: LAP-MP-003—Have We Met? (Market Identification)

76. A

Geographic. Geographic segmentation groups people by the areas in which they are located. This includes customers in cold climates. Occupations are a basis for demographic segmentation. Psychographic segmentation groups people by lifestyles and personalities. Behavioral segmentation groups people by their response to a product.
SOURCE: MP:003
SOURCE: LAP-MP-003—Have We Met? (Market Identification)

77. C

By demographics. Demographics are the physical and social characteristics of the population. A business that segments the market on the basis of demographics considers factors such as the age, gender, and ethnicity of the population. Psychographic segmentation is the division of a market on the basis of consumers' lifestyles and personalities, which are influenced by their behavior. Geographic segmentation involves dividing a market on the basis of location (e.g., zip code).

SOURCE: MP:003
SOURCE: LAP-MP-003—Have We Met? (Market Identification)

78. D

Marketing research. A marketing researcher could be classified as the "Sherlock Holmes" of marketing. These investigators look for clues as to what customers want and need, as well as why customers do what they do. Careers in advertising involve catching customer attention and informing customers about products, companies, and/or ideas. Sales careers involve satisfying customer needs with products. Distribution/Warehousing is not typically considered to be a marketing career.

SOURCE: PD:024
SOURCE: Clark, B., Basteria, C.G., Gassen, C., & Walker, M. (2014). *Marketing dynamics* (3rd ed.) [p. 13]. Tinley Park, IL: Goodheart-Wilcox.

79. B

Advertising. Advertisers use a variety of media to catch customers' attention, inform them of products, and persuade them to buy. Some of these media are the Internet, radio, television, newspapers, magazines, billboards, and catalogs. Marketing researchers are responsible for determining what customers need and want and why customers do what they do. Product managers create, test, and decide how a product will be packaged. They direct and coordinate all aspects of the product. Public relations professionals strive to build and maintain positive relationships with the public by anticipating problems, handling complaints, communicating with the media, and building a positive public image for the company.

SOURCE: PD:024
SOURCE: Farese, L.S., Kimbrell, G., & Woloszyk, C.A. (2012). *Marketing essentials* (pp. 441-459). Columbus, OH: Glencoe/McGraw-Hill.

80. B
Product management. Product managers create, test, and decide how a product will be packaged. They direct and coordinate all aspects of the product. Advertisers develop messages and images to catch customers' attention, inform them of products, and persuade them to buy. They use a variety of media to communicate with customers. Some of these media are the Internet, radio, television, newspapers, magazines, billboards, and catalogs. Marketing researchers are responsible for determining what customers need and want and why customers do what they do. Channel management is the processes by which marketers ensure that products are distributed to customers efficiently and effectively.
SOURCE: PD:024
SOURCE: Clark, B., Basteria, C.G., Gassen, C., & Walker, M. (2014). *Marketing dynamics* (3rd ed.) [pp. 291-295]. Tinley Park, IL: Goodheart-Wilcox.

81. D
Communication. Communication, the exchange of information in which the words and gestures are understood in the same way by both the speaker and the listener, is at the center of all marketing activities. Whether employees are working with customers or working with a team member, they need to effectively exchange ideas and information. Communicating with people is crucial in marketing because marketing involves continuous interaction with customers and coworkers. Purchasing is not considered to be a marketing function. Although math skills and technological know-how are often needed to carry out marketing activities, their successful completion and use are based on communication.
SOURCE: PD:024
SOURCE: Clark, B., Basteria, C.G., Gassen, C., & Walker, M. (2014). *Marketing dynamics* (3rd ed.) [p. 13]. Tinley Park, IL: Goodheart-Wilcox.

82. D
Learn the features unique to the brands s/he sells. Typically, all products have unique features with which the salesperson should be familiar. Not all products have related items. Asking management to limit the number of brands the business carries would indicate the salesperson is not willing to learn about other brands. It is a better selling technique to point out the advantages of the brands you sell than to describe the disadvantages of competing brands.
SOURCE: SE:017
SOURCE: LAP-SE-117—Sell Away (Nature of Selling)

83. C
Joe, because he will get more repeat business. In the long run, Joe will be more successful because he makes a sincere effort to satisfy the customer's needs, which will establish repeat clients. He will not establish repeat clients just because he is nice. Joe is not too timid to close a sale; he just has the customer's best interests in mind. Because sales situations differ, attempts to close a sale do not always result in a sale. Carol may get more sales initially but will probably have very little repeat business.
SOURCE: SE:017
SOURCE: LAP-SE-117—Sell Away (Nature of Selling)

84. C
Live up to their promises. An important part of providing quality customer service involves salespeople doing what they say they will do. By living up to their promises, salespeople will be able to maintain good relationships with existing customers. Customers will know that they can rely on salespeople and that they will receive the service and support that they need. Breaking promises is a sure way to lose valuable customers. Businesses sometimes use customers in advertisements but that is not a way of maintaining good relationships. Salespeople often ask for referrals from customers with whom they have good relationships, but asking for referrals does not maintain the relationships. It is usually considered inappropriate to send customers expensive gifts that may be misinterpreted as bribes.
SOURCE: SE:076
SOURCE: Clark, B., Basteria, C.G., Gassen, C., & Walker, M. (2014). *Marketing dynamics* (3rd ed.) [pp. 530-533]. Tinley Park, IL: Goodheart-Wilcox.

85. B
Calling to make sure the products are satisfactory. Following up with customers is one way to provide good service and develop strong relationships. There are several effective follow-up activities and one is to call customers to make sure the products are satisfactory. Customers appreciate knowing that their business is important and that salespeople care enough to call to check on the products they sell. Salespeople who follow up usually create goodwill and develop strong relationships with customers who often continue to buy from the salespeople. Asking for referrals is a way of identifying potential new customers. Salespeople usually do not explain the company's business plan. Salespeople might follow up by sending information about the company and new products, but they would not send articles about local competitors.
SOURCE: SE:076
SOURCE: Clark, B., Basteria, C.G., Gassen, C., & Walker, M. (2014). *Marketing dynamics* (3rd ed.) [p. 539]. Tinley Park, IL: Goodheart-Wilcox.

86. A
Providing ample product information. Providing ample product information is a pre-sale opportunity for salespeople to provide customer service. Successful salespeople make sure that customers have all the information they need to make sound, well-informed decisions. This occurs during the sales presentation. Shipping and delivery, maintenance and repair, and technical assistance and support are all post-sale aspects of customer service.
SOURCE: SE:076
SOURCE: SE LAP 130—Go Beyond the Sale (Customer Service in Selling)

87. D
   Follow the business's selling policies. Selling policies are the general rules set down by
   management to guide the personal-selling effort, and they include service policies that are
   designed to govern the support a company provides to customers after the sale. Policies
   governing the return of goods are covered under a business's selling policies. A salesperson should
   know the accepted procedure for handling returns and not refer the customer to the
   manufacturer or consult the buyer. The customer may not want to exchange the item but obtain a
   credit or refund.
   SOURCE: SE:932
   SOURCE: LAP-SE-121—Sell Right (Selling Policies)

88. C
   Financial resources. Financial resources are categorized as an internal factor over which a business
   has some control. If a firm has limited financial resources, its selling policies may contain strict
   requirements for credit approval. Actions of competitors, government legislation, and customer
   requests are examples of external factors operating in the business environment over which the
   business has little or no control.
   SOURCE: SE:932
   SOURCE: LAP-SE-121—Sell Right (Selling Policies)

89. A
   How the product is made. Manufacturers' representatives can provide salespeople with detailed
   information about the manufacturing process. They can explain why certain materials and
   procedures are used. Salespeople who understand how products are made are better able to pass
   on this information to customers and encourage them to buy. The salesperson's company would
   decide what type of credit terms to make available and what inventory method to use. A
   manufacturer's representative might not know how a product became popular.
   SOURCE: SE:062
   SOURCE: LAP-SE-131—Get Informed (Acquiring Product Information for Use in Selling)

90. D
   Ask an available, experienced employee. Experienced employees such as coworkers, supervisors,
   or buyers are generally willing to help new employees by sharing product information. This
   enables the new salesperson to serve customers more effectively and to give accurate answers to
   their questions. Salespeople who tell their customers to contact the manufacturer are not
   providing good customer service. New salespeople should not make excuses for their lack of
   knowledge or try to help customers without having the right information.
   SOURCE: SE:062
   SOURCE: LAP-SE-131—Get Informed (Acquiring Product Information for Use in Selling)

91. B
    Suggesting a specific computer to the customer. After learning about the customer's needs, the next step is to prescribe a solution (specific computer). The salesperson should be well informed about the products s/he sells to suggest the most appropriate product. Price should be discussed as part of prescribing a solution to the customer's need, but giving the customer a price list at this point would disrupt the selling process. Making the customer feel relaxed and at ease is part of establishing a relationship with the customer. The salesperson should not try to reach closure before a suitable product has been recommended and demonstrated.
    SOURCE: SE:048
    SOURCE: LAP-SE-048—Set Your Sales (The Selling Process)

92. C
    Product and the client. The different phases of the selling process can be made more or less important according to what kind of product is being sold and according to the client to whom it is being sold. The part of the country in which the sale occurs, the economic situation at the time, and the state/local laws would not affect the situation.
    SOURCE: SE:048
    SOURCE: LAP-SE-048—Set Your Sales (The Selling Process)

93. B
    First impressions are difficult to change. When customers receive a negative first impression from the salesperson, it may become permanent. This often results in lost sales. Therefore, the salesperson must attempt to make a positive first impression with customers and establish good rapport, or understanding. This should include offering the customer whatever assistance might be needed since customers do not usually like to ask for help.
    SOURCE: SE:110
    SOURCE: Clark, B., Basteria, C.G., Gassen, C., & Walker, M. (2014). *Marketing dynamics* (3rd ed.) [pp. 536-538]. Tinley Park, IL: Goodheart-Wilcox.

94. C
    Acknowledge the second customer as soon as possible. All customers should be acknowledged as soon as possible after entering the selling area. Even if the salesperson is busy with another customer, some form of acknowledgement should be given. It may be a smile, a nod, or some other gesture to let the waiting customer know that the salesperson is aware of his/her presence. It is not appropriate, though, to leave the first customer until proper service has been provided and apologizing to the first customer would not make it correct.
    SOURCE: SE:110
    SOURCE: Clark, B., Basteria, C.G., Gassen, C., & Walker, M. (2014). *Marketing dynamics* (3rd ed.) [pp. 536-538]. Tinley Park, IL: Goodheart-Wilcox.

95. C

"Brand X is on sale today." This is an example of a merchandise approach—a comment or question that helps direct the customer's attention to the merchandise. It usually refers to goods on display in which the customer seems to be showing an interest. The other alternatives are different versions of the greeting, or welcome, approach—a warm, friendly greeting that makes the customer feel welcome and important.

SOURCE: SE:110
SOURCE: Farese, L.S., Kimbrell, G., & Woloszyk, C.A. (2012). *Marketing essentials* (pp. 405-411). Columbus, OH: Glencoe/McGraw-Hill.

96. A

Use questioning statements. These are statements used to gain a response from the customer, but they are not stated in question form. Asking questions at a slower or faster pace would not reduce the number of questions. It is the salesperson's responsibility, not the customer's, to ask questions that will help to determine the customer's needs.

SOURCE: SE:111
SOURCE: Clark, B., Basteria, C.G., Gassen, C., & Walker, M. (2014). *Marketing dynamics* (3rd ed.) [pp. 537-540]. Tinley Park, IL: Goodheart-Wilcox.

97. D

Pace of the customer's responses to questions. A customer who is quick to answer may be asked more direct questions at a faster pace. A customer who is slow in answering questions may be frustrated or become confused by your asking him/her questions too quickly. The number of other customers waiting, the type of product being sold, or the amount of time left before the business closes should have no bearing on treating the customer with courtesy and respect and making every attempt to satisfy a need or want.

SOURCE: SE:111
SOURCE: Clark, B., Basteria, C.G., Gassen, C., & Walker, M. (2014). *Marketing dynamics* (3rd ed.) [pp. 537-540]. Tinley Park, IL: Goodheart-Wilcox.

98. B

Ask impersonal questions. Salespeople should ask general questions because personal questions are inappropriate. The number of questions should be limited. If asked too many questions, customers may feel that the salesperson is trying to control or quiz them. The questions should be tailored to the type of customer: decided, undecided, or just-looking. Customers should not feel compelled to answer questions.

SOURCE: SE:111
SOURCE: Clark, B., Basteria, C.G., Gassen, C., & Walker, M. (2014). *Marketing dynamics* (3rd ed.) [pp. 537-540]. Tinley Park, IL: Goodheart-Wilcox.

99. C

Comparable features. When recommending a substitute item, salespeople should point out the features and benefits so that the customer can make a buying decision. Salespeople will need to tell the customer how the features of the item are like those of the item requested. Customers usually will not purchase substitute items unless they are comparable to the items originally requested. Exchange policies are a business's guidelines for replacing goods with goods of an equal price. Fringe benefits are nonmonetary payments that workers receive in addition to wages. Buying motives are customers' reasons for buying goods or services.

SOURCE: SE:114

SOURCE: LAP-SE-111—Get Specific (Recommending Specific Product)

100. C

Criticized the original request. Customers may be insulted when sales representatives criticize the requested item. Instead, the sales representative should have discussed the similarities between Ms. Garcia's request and the suggested item. The sales representative suggested trading up, rather than down, to a more expensive scanner than requested. The sales representative should point out features and benefits of products; however, the sales representative should not refer to an item as being a substitute.

SOURCE: SE:114

SOURCE: LAP-SE-111—Get Specific (Recommending Specific Product)

1. Lois and Lora plan to open a florist shop. Lois is unable to devote herself full time to the daily operations of the shop but wishes to provide financial support. Which form of business partnership is most likely to appeal to Lois?
   A. General
   B. Nonprofit
   C. Limited
   D. Private

2. Jake wanted to run his own business but was unsure that he had adequate business skills to be successful. Which type of business would give Jake the help he needs?
   A. Business-format franchise
   B. Sole proprietorship
   C. Private corporation
   D. Product trade-name franchise

3. Quantex is organized as a partnership with eight equal partners. The partners would like to expand their business but limit the amount of money they could personally lose if the business were to fail. What form of ownership should Quantex consider?
   A. Sole proprietorship
   B. Corporation
   C. Monopoly
   D. Partnership

4. Jason would like to start a small business which he could operate from his home. His business would not cost a great deal to start, and he has experience and interest in that type of business. What form of ownership should he consider?
   A. Partnership
   B. Monopoly
   C. Corporation
   D. Sole proprietorship

5. Channel members should share an equal commitment to the product's
   A. price.
   B. quality.
   C. name.
   D. packaging.

6. A manufacturer advises its distributors that they must achieve an extremely high level of sales next year to continue as channel members. This action is most likely to create
   A. vertical conflict.
   B. channel enlargement.
   C. complex distribution patterns.
   D. a comparative advantage.

7. Indirect channels of distribution are the only channels that involve
   A. industrial consumers.
   B. intermediaries.
   C. producers.
   D. ultimate consumers.

8. Which of the following is an example of a direct channel of distribution for consumer goods:
   A. Producer to retailer to consumer
   B. Producer to agent to retailer to consumer
   C. Producer to consumer
   D. Producer to wholesaler to retailer to consumer

9. An intermediary function that makes goods available to consumers where they are wanted and needed is
   A. transporting and storing.
   B. extending credit.
   C. servicing sales.
   D. providing management services.

10. Technological advances that allow music to be sent and received over the Internet have moved the music industry from physical distribution to _____ distribution.
    A. service
    B. digital
    C. binomial
    D. selective

11. What is a primary advantage to businesses that use an electronic data interchange (EDI) system?
    A. Reduces vertical channel conflict
    B. Eliminates shipping errors
    C. Ensures that employees follow procedures
    D. Shortens order cycle time

12. As the size and power of U.S. businesses have increased over time, the federal government's involvement in the U.S. economy has
    A. increased.
    B. become unimportant.
    C. stayed the same.
    D. decreased.

13. Government can prevent unqualified persons from operating a business by
    A. refusing to grant them a license.
    B. closing their bank accounts.
    C. raising their taxes.
    D. helping their competitors.

14. The two main sources of revenue used to pay the costs of government regulation are
    A. taxpayers and nontaxpayers.
    B. business and labor.
    C. taxes and borrowing.
    D. government and industry.

15. One of the positive effects that government regulation has on business is that many of the laws are intended to _____ business.
    A. restrict
    B. protect
    C. defend
    D. conserve

16. Providing unemployment compensation and aid to dependent children are ways that government intervenes in the economy to
    A. manage yearly spending.
    B. protect private property.
    C. set safety standards.
    D. improve public welfare.

17. Research and development programs can increase productivity by
    A. offering workers the option of flextime.
    B. trying to prevent conflicts between employees.
    C. discovering better methods of production.
    D. offering "perks" to improve the work-life quality.

18. Dividing the dollar value of total sales by the cost of making those sales is one way that businesses often measure their
    A. profitability.
    B. productivity.
    C. liability.
    D. accountability.

19. Which of the following is one way that businesses can motivate employees to increase productivity:
    A. Send top management to workshops
    B. Eliminate division of labor
    C. Offer inflexible working hours
    D. Use participative decision making

20. A positive effect that productivity has on a business is helping it to
    A. stop inflation.
    B. determine the health of the nation's economy.
    C. increase the standard of living.
    D. increase sales and profits.

21. One of the purposes of providing orientation for new employees is to
    A. assess the employees' job progress.
    B. fulfill government requirements.
    C. get the employees off to a good start.
    D. assign the employees to appropriate jobs.

22. Businesses often ask a new employee's coworkers to help _____ the new employee.
    A. question
    B. supervise
    C. test
    D. train

23. Which of the following is a benefit to businesses of orienting new employees:
    A. Increases profit
    B. Reduces turnover
    C. Provides information
    D. Eliminates training

24. A well-prepared new employee orientation program should
    A. outline the employer's specific financial goals.
    B. communicate the employer's philosophy and expectations.
    C. verify the new employees' job qualifications.
    D. set aside time to negotiate the employees' salary requirements.

25. Businesses often obtain marketing information to
    A. implement procedures.
    B. monitor trends.
    C. delegate authority.
    D. investigate terms.

26. The Norton Company conducts a survey to obtain feedback about the quality of its goods and services from the people who use them. The reason for conducting the survey is to
    A. obtain demographic data.
    B. predict the feasibility of a product idea.
    C. learn about trends in the marketplace.
    D. determine customer-satisfaction levels.

27. Having appropriate data helps marketers to set goals that are
    A. open-ended.
    B. realistic.
    C. general.
    D. difficult.

28. One way a business can reduce the risk of accidents in the workplace is by providing its employees with
    A. supply manuals.
    B. electronic data interchange (EDI).
    C. safety training.
    D. weight-loss programs.

29. Which of the following is an example of a business that is most likely violating a safety regulation:
    A. Porter Manufacturing inspects its production equipment several times a month.
    B. Ingram Industries stores its combustible products in well-marked storage containers.
    C. A manager monitors the restaurant to ensure that no more than 200 patrons are in the building.
    D. The Hoffman Supply Company blocks several of its doors with furniture and boxes.

30. The FGH Company has received several warnings from a government agency to fix unsafe electrical wiring throughout the company's facility. According to common law, the company has breached its duty of
    A. reasonable care.
    B. personal reform.
    C. general authority.
    D. charitable trust.

31. It is important to report noncompliance with business health and safety regulations
    A. to correct dangerous situations.
    B. to ensure that the business pays a fine.
    C. to support whistleblowing policies.
    D. to protect business records.

32. Jane works in a factory. She has noticed that sections of the factory floor are consistently slippery because oil drips on them. She has reported this to her manager twice, but the problem hasn't been corrected. Jane is so worried that an employee could slip and fall that she contacts the government agency that handles workplace safety. This is an example of
    A. whistleblowing.
    B. being a tattle tale.
    C. handling an accident appropriately.
    D. establishing security procedures.

33. If a business doesn't comply with health and safety regulations, it will most likely
    A. get a citation and possibly pay a fine.
    B. gain a better reputation among the public.
    C. go bankrupt.
    D. have happier employees.

34. A marketing-communications firm has confidential client data stored on its computer. Which of the following is the best way for the firm to limit the number of employees who can view the information:
    A. Secure the website using encryption techniques
    B. Disable the firm's computer networking capabilities
    C. Restrict computer access by assigning passwords
    D. Ask new employees to sign confidentiality agreements

35. One way that an advertising agency can keep information secure from unauthorized personnel is by using
    A. data mining.
    B. encryption technology.
    C. spam filters.
    D. updated equipment.

36. Chandra is in charge of data security in a large corporation. To make sure the data security is effective, Chandra should hire a third party to conduct a yearly
    A. audit.
    B. encryption standard.
    C. backup.
    D. employee background check.

37. What should businesses do to help employees follow instructions for the use of equipment and machinery?
    A. Require hand washing
    B. Display first aid posters
    C. Install sprinkler system
    D. Provide training

38. Jackie is starting a t-shirt business. When should Jackie read the instructions for the heat press, vinyl cutter, and printer that he'll be using to create his products?
    A. Before using the equipment for the first time
    B. When any of the equipment malfunctions
    C. Never; he can figure out the equipment on his own
    D. When he hires his first employee

39. Sharon is attempting to use a new machine at a factory. She reads the instructions that are included with the machine, but she still isn't sure what to do. What should she do?
    A. Take part in a safety workshop at her workplace
    B. Make an educated guess on how to use the machine
    C. Decide not to operate the machine
    D. Talk to her supervisor and ask her/him for clarification

40. Accidents that happen on the job are often caused by
    A. the use of safety equipment.
    B. sufficient lighting.
    C. strict safety standards.
    D. human error.

41. Most businesses have policies against employees' using drugs and alcohol while on the job because these substances may
    A. be expensive and difficult to obtain.
    B. cause carelessness or violence.
    C. be impossible to monitor accurately.
    D. encourage a relaxed atmosphere.

42. Which of the following might increase if a business has many worker accidents:
    A. Personal benefits
    B. Productivity rates
    C. Insurance costs
    D. Operating profits

43. What agency sets mandatory standards that businesses must follow concerning safety in the workplace?
    A. Equal Employment Opportunity Commission (EEOC)
    B. Consumer Product Safety Commission (CPSC)
    C. Occupational Safety and Health Administration (OSHA)
    D. Environmental Protection Agency (EPA)

44. To help create a safe environment in the workplace, each employee should
    A. make sure that s/he develops a list of safety procedures to follow.
    B. report all problems to the company's president or CEO.
    C. memorize the company's entire training manual.
    D. be aware of things or situations that create hazardous conditions.

45. What can managers do to ensure that their employees are following the business's safety procedures in the workplace?
    A. Monitor employees' computer usage
    B. Conduct safety inspections
    C. Install security equipment
    D. Include safety policies in the employee handbook

46. Who is responsible for maintaining a safe work environment?
    A. External safety inspectors
    B. Government legislators
    C. Department managers
    D. All employees

47. Which of the following is a cost to a business whose employees have accidents:
    A. Decreased production
    B. Increased flexibility in scheduling workers
    C. Increased sales
    D. Decreased opportunities for job promotions

48. Employees should report all injuries that occur on the job to the
    A. emergency squad.
    B. police.
    C. supervisor.
    D. media.

49. What type of form do many businesses require employees to complete when they are injured on the job?
    A. Medical record
    B. Accident report
    C. Legal document
    D. Insurance application

50. What should all companies have on the premises to handle accidents?
    A. Emergency personnel
    B. First-aid supplies
    C. Hospital equipment
    D. Trained technicians

51. To best handle serious illnesses or injuries in the workplace, employees should thoroughly understand the company's _____ procedures.
    A. medical emergency
    B. fire escape
    C. robbery reporting
    D. security lockdown

52. When Josh arrived at work this morning, he saw that the company safe was open, the office was in disarray, and his laptop computer was missing. Josh should immediately report the situation to the local
    A. police department.
    B. fire department.
    C. health organization.
    D. insurance provider.

53. Mandy sees that a fire has started in the business's warehouse. What should Mandy do to alert her coworkers that they should evacuate the building immediately?
    A. Call the fire department
    B. Use the fire extinguisher
    C. Trigger the fire alarm
    D. Recite the escape route

54. Which of the following is a good way for a business to prevent burglaries:
    A. Train employees to identify counterfeit bills and bad credit cards
    B. Monitor the amount of cash in registers throughout the day
    C. Follow proper procedures for closing a business at the end of the day
    D. Notify the proper authorities when cash shortages are discovered

55. Preventing security problems is important to businesses because the financial losses from these problems may force the businesses to
    A. reorganize.
    B. expand.
    C. move.
    D. close.

56. A business can protect itself from shoplifting by
    A. having several entrances and exits.
    B. using dividers between departments.
    C. stocking goods on tall shelf units.
    D. using closed-circuit television.

57. Which of the following is an example of point-of-sale fraud:
    A. Competitors accessing computer files
    B. Employees undercharging their friends
    C. Customers replacing price tags
    D. Vendors taking funds from the register

58. Why is it important for business employees to follow established security procedures?
    A. To avoid the risk of accidents
    B. To create a pleasant facility
    C. To reduce the possibility of loss
    D. To develop a healthy environment

59. Although your coworker Edward has always been a pessimistic person, his attitude has been very negative lately. He obviously has an extreme dislike for the new manager, and recently, his favorite topics of conversation have been guns and knives. Knowing all this, what should you do?
    A. Say nothing because Edward will probably calm down soon.
    B. Share this information with your supervisor or the HR department.
    C. Call the local sheriff or police chief to discuss Edward's mood.
    D. During a staff meeting, accuse Edward of plotting to kill the manager.

60. To maintain workplace security and minimize breaches, you must be
    A. friendly.
    B. distracted.
    C. a team-player.
    D. observant.

61. Ben recently developed a logo for his new business. What can Ben do to legally protect the logo from unauthorized use?
    A. Trademark the logo
    B. Register the logo as copyrighted material
    C. File a patent request
    D. Obtain a subpoena from the government

62. Under what circumstances should a business obtain copyright protection for its intellectual property?
    A. When it produces an original artistic work
    B. If it develops a unique manufacturing process
    C. If it owns a distinctive mark or emblem
    D. When it maintains a comprehensive customer list

63. A business should obtain a patent when it
    A. develops an innovative product.
    B. designs a new logo.
    C. publishes an informative article.
    D. has an extensive customer list.

64. One reason that buyers might decide to use only a few suppliers is to
    A. gain an increased selection.
    B. encourage vendor competition.
    C. obtain quantity discounts.
    D. acquire a greater variety of goods.

65. What are three types of buying?
    A. Buying for transformation, buying for business use, and buying for wholesalers
    B. Buying for resale, buying for make-or-buy decisions, and buying for retailers
    C. Buying for resale, buying for transformation, and buying for retailers
    D. Buying for resale, buying for transformation, and buying for business use

66. Jeremiah purchases sterling silver necklaces and bracelets from Native American artisans and sells the items to jewelry stores and gift shops. What kind of buyer is Jeremiah?
    A. Retail
    B. Wholesale
    C. Industrial
    D. Business use

67. Suzette purchases sporting goods from several different manufacturers and sells the items in her shop, Suzy's Sports. What kind of buyer is Suzette?
    A. Industrial
    B. Wholesale
    C. Retail
    D. Business use

68. If the delivery date is an important factor when placing an order, a buyer must consider the vendor's
    A. unit pricing.
    B. quantity discounts.
    C. lead time.
    D. billing process.

69. Arnie needs to buy printer toner and copy paper from the company's office-supply vendor. What is the first step that Arnie should take?
    A. Request an invoice
    B. Prepare a purchase order
    C. Submit a receipt
    D. Complete an expense form

70. Which of the following is a primary factor that helps a business determine when it should place another order for a regularly stocked item:
    A. Accounts receivable
    B. Profit margin
    C. Buyer's preferences
    D. Reorder point

71. Which of the following might a business use to effectively maintain an inventory of supplies:
    A. Surveillance device
    B. Emergency response plan
    C. Automatic reorder system
    D. Stock handling method

72. Maintaining an inventory of supplies helps a business to
    A. operate efficiently.
    B. establish sales goals.
    C. locate vendors.
    D. evaluate processes.

73. What is likely to happen if a business fails to monitor its inventory of office supplies?
    A. Restocking fees decrease.
    B. Restocking fees increase.
    C. Employee productivity increases.
    D. Employee productivity decreases.

74. Which of the following is a characteristic of mass production:
    A. It produces one-of-a-kind items.
    B. It is considered inefficient.
    C. It often uses assembly lines.
    D. It is primarily used for small quantities.

75. What type of parts is used in the mass production of large quantities of the same product?
    A. Individualized
    B. Standardized
    C. Computerized
    D. Customized

76. Which of the following is a production activity:
    A. Advertising
    B. Receiving
    C. Marketing
    D. Scheduling

77. A commercial printing company that prints several different jobs each day is using what type of production system?
    A. Mass
    B. Batch
    C. Unit
    D. Custom

78. What is one way that employers can avoid conflict over use of company property?
    A. Put clear, specific guidelines and consequences in writing.
    B. Allow minor misuse of company property.
    C. Enact a zero-tolerance policy for property misconduct.
    D. Appoint an employee to handle all conflicts.

79. One of the major reasons that companies strive to have the most optimized supply chain is to
    A. increase inventory.
    B. increase suppliers.
    C. eliminate defects.
    D. lower costs.

80. Which of the following is a way to protect confidential information:
    A. Confidential information should never be printed out.
    B. Employees should discuss confidential information in public places.
    C. Confidential documents should be kept in locked cabinets or rooms.
    D. Documents should never be marked "confidential" to avoid drawing attention to them.

81. At his company, Paul is responsible for making sure the organization is complying with its privacy policy. Which privacy principle is Paul fulfilling?
    A. Collection limitation
    B. Openness
    C. Accountability
    D. Purpose specification

82. One of the purposes of promotion is to _____ consumers about the existence of a company or a product.
    A. caution
    B. reassure
    C. warn
    D. remind

83. Promotion benefits a business by helping it to
    A. reduce taxes.
    B. control expenses.
    C. sell its products.
    D. protect the environment.

84. The ultimate intent of effective promotion is to
    A. achieve a desired outcome.
    B. put pressure on consumers.
    C. conduct marketing research.
    D. promote the price of goods/services.

85. An example of primary product promotion is
    A. Coke versus Pepsi.
    B. Cheer versus Tide.
    C. Tropicana versus Citrus Hill.
    D. soft drinks versus fruit juices.

86. One of the ways in which institutional promotion can be used is to
    A. create excitement about a new product.
    B. make the public aware of a company's name.
    C. build a reputation for a product.
    D. make consumers aware of a good or service.

87. Which of the following is considered to be a disadvantage of promotion:
    A. Promotion may enhance a company's image.
    B. Promotional activities educate consumers.
    C. Promotion can encourage a higher standard of living.
    D. Promotion can encourage consumers to buy unwanted goods.

88. What is one way that businesses use marketing information?
    A. To develop new products
    B. To determine credit scores
    C. To change economic trends
    D. To prepare sales invoices

89. What does continuously monitoring internal marketing information enable businesses to do?
    A. Investigate competitors
    B. Evaluate market share
    C. Identify problems
    D. Analyze economic changes

90. How do channel members add value to a product?
    A. By performing certain channel activities expertly
    B. By making the product more costly
    C. By making the product available in all locations
    D. By pursuing individual goals

91. What do marketers want to achieve by determining distribution intensity?
    A. Ideal market exposure
    B. Complete market coverage
    C. Perfect market balance
    D. Total market saturation

92. A business should use an exclusive distribution pattern when it
    A. prefers to have its intermediaries promote the product.
    B. needs to maintain tight control over a product.
    C. chooses to eliminate intermediaries.
    D. wants the product to be available in all possible locations.

93. What is an advantage for producers in using the producer to wholesaler to retailer to consumer distribution channel?
    A. It enables them to control channel activities.
    B. Wholesalers do not take title to the goods.
    C. Wholesalers usually buy in large quantities.
    D. It enables them to reach large retailers directly.

94. What indirect channel of distribution is used to reach large retailers when the producer does not want responsibility for the selling activities?
    A. Producer to wholesaler to retailer to consumer
    B. Producer to agent to retailer to consumer
    C. Producer to consumer
    D. Producer to retailer to consumer

95. Which of the following examples demonstrates the use of satellite tracking within a distribution channel:
    A. An inventory specialist enters product status information into a handheld electronic device.
    B. A computer system performs warehouse functions that are usually executed by humans.
    C. A technological system creates an efficient routing plan for transportation companies.
    D. A dispatcher has current knowledge of a delivery truck's location and destination.

96. Which of the following is a true statement about technology in relation to channel management:
    A. Some businesses have the capacity to distribute most or all of their products through the Internet.
    B. Because technology continues to evolve, vertical conflict among channel members is occurring less often.
    C. Technological advancements generally require businesses to increase the number of intermediaries they use.
    D. For most businesses, technology makes it more difficult to monitor the channel members' activities.

97. What is an example of an external factor that affects promotion?
    A. Reorganization of the business
    B. Increase in a product's price
    C. Government regulation of ads
    D. A change in distribution methods

98. How does promotion benefit customers?
    A. Causes them to postpone making buying decisions
    B. Enables them to identify their buying motives
    C. Helps them to select appropriate products
    D. Requires them to spend more on products

99. What type of promotion is depicted by a business's one-time announcement of its half-price sale in the local newspaper?
    A. Product promotion
    B. Word-of-mouth advertising
    C. Free publicity
    D. Sales promotion

100. What is an objective of institutional advertising?
    A. To support personal selling activities
    B. To demonstrate the organization's role in community affairs
    C. To introduce new goods or services
    D. To create consumer interest in a specific good or service

1. C
   Limited. Limited partnership permits a partner to invest in a business but have limited responsibility. A general partnership is one in which all partners are liable for the business's losses. Private refers to a corporation that is owned by a few people and does not offer its shares for sale to the general public. A nonprofit corporation is a business that has a specific mission or purpose other than making a profit. Many times, the mission or purpose of the organization is to help society. Any income made by a nonprofit organization is used to cover expenses.
   SOURCE: BL:003
   SOURCE: LAP-BL-001—Own It Your Way (Types of Business Ownership)

2. A
   Business-format franchise. A business-format franchise is a franchise agreement in which the franchisee must operate under the trade name of the parent company that provides continuous assistance in setting up and operating the business. This kind of business arrangement would give Jake more assistance than any of the other alternatives. A sole proprietorship is a form of business ownership in which the business is owned by one person who takes all of the risk and responsibility. A private corporation is a type of corporation owned by a few people that does not offer its shares for sale to the public. A product trade-name franchise is based on an independent sales relationship between a franchisor and a franchisee to stock and sell a specific line of goods.
   SOURCE: BL:003
   SOURCE: LAP-BL-001—Own It Your Way (Types of Business Ownership)

3. B
   Corporation. A corporation would benefit the partners by allowing them to have limited liability and greater financial power by issuing stock. A partnership is a form of business ownership in which the business is owned by two or more persons who combine the capital, but the partners have unlimited financial liability. A sole proprietorship is a form of business ownership in which the business is owned by one person who has limited capital and unlimited liability. A monopoly is a condition in which a market is controlled by one supplier, and there are no substitute goods or services readily available.
   SOURCE: BL:003
   SOURCE: LAP-BL-001—Own It Your Way (Types of Business Ownership)

4. D
   Sole proprietorship. A sole proprietorship is a form of business ownership in which the business is owned by one person and is easy to open, but the owner has limited capital and limited capabilities. Jason will not need a great sum of money, and he has experience in that type of business. A partnership is a form of business ownership in which the business is owned by two or more persons who combine their capital and capabilities. It is relatively easy to start. A corporation is owned by issuing stock and is difficult to form and operate. A monopoly is a condition in which a market is controlled by one supplier, and there are no substitute goods or services readily available.
   SOURCE: BL:003
   SOURCE: LAP-BL-001—Own It Your Way (Types of Business Ownership)

5. B
   Quality. Channel members should share an equal commitment to the product's quality. Channels are effective only when channel members share this common goal. Channel members may not have an equal commitment to a product's price, name, or packaging.
   SOURCE: CM:001
   SOURCE: LAP-CM-002—Chart Your Channels (Channel Management)

6. A
   Vertical conflict. Vertical conflict occurs between channel members at different levels within the same channel. In the example, the distributors might feel that the manufacturer has set unreasonable sales goals, which may cause vertical conflict. If the distributors do not reach their sales goals, the manufacturer will drop the less productive channel members, thereby reducing the size of the distribution channel. Distribution patterns are the strategies (intensive, selective, or exclusive) that businesses use to move products through the distribution channel. There is not enough information provided about the manufacturer's distribution patterns to determine their impact on changes within the distribution channel. Comparative advantage is the advantage achieved by a nation when it specializes in producing goods and services at which it is relatively most efficient.
   SOURCE: CM:001
   SOURCE: LAP-CM-002—Chart Your Channels (Channel Management)

7. B
   Intermediaries. Intermediaries are also called middlemen and include sales agents, wholesalers, and retailers who perform specific functions in the movement of goods from producers to consumers. Direct channels of distribution do not involve intermediaries. All channels of distribution involve producers and either industrial or ultimate consumers.
   SOURCE: CM:003
   SOURCE: LAP-CM-003—Channel It (Channels of Distribution)

8. C
   Producer to consumer. Producer to consumer is a direct channel of distribution because it does not involve the use of an intermediary to move the product to the customer. The alternatives all employ at least one intermediary and are, therefore, indirect channels.
   SOURCE: CM:003
   SOURCE: LAP-CM-003—Channel It (Channels of Distribution)

9. A

Transporting and storing. Intermediaries transport and store goods so that they will be available to consumers or industrial users where and when they are wanted or needed. In this way, goods are on hand when consumers or industrial users are ready to buy them rather than when they are produced. Other functions performed by intermediaries include providing market information to producers, promoting the sale of goods and services, extending credit, servicing sales, and providing management services.

SOURCE: CM:003
SOURCE: LAP-CM-003—Channel It (Channels of Distribution)

10. B

Digital. Digital technology allows music to be downloaded over the Internet and saved to disk, thereby eliminating intermediaries, cutting cycle time, and moving the music industry away from traditional physical distribution methods. A service is an intangible object that can be sold, such as a haircut or life insurance. Bionomial distribution is a type of probability distribution that involves experiments. Selective distribution is a distribution pattern in which a producer sells a product through a limited number of middlemen in a geographic area.

SOURCE: CM:004
SOURCE: Clark, B., Basteri, C.G., Gassen, C., & Walker, M. (2014). *Marketing dynamics* (3rd ed.) [pp. 405-413]. Tinley Park, IL: Goodheart-Willcox.

11. D

Shortens order cycle time. An electronic data interchange (EDI) system allows a business to share information with other companies, such as its vendors and customers. EDI systems automatically create and send a business's purchase orders via computer to vendors. This increases efficiency because it reduces phone calls and paperwork, which shortens the order cycle time—the time that it takes to receive, process, and deliver the order. EDI systems do not eliminate shipping errors, ensure that employees follow procedures, or reduce vertical channel conflict.

SOURCE: CM:004
SOURCE: Farese, L.S., Kimbrell, G., & Woloszyk, C.A. (2012). *Marketing essentials* (pp. 565-567). Columbus, OH: Glencoe/McGraw-Hill.

12. A

Increased. As the country has grown and business has expanded, the role of government in business has grown as well. Government's role now includes not only passing laws that affect business but enforcing those laws. Other causes of government's increased involvement in the economy include changes in people's attitudes, concern for the environment, and increasing industrialization.

SOURCE: EC:008
SOURCE: LAP-EC-016—Regulate and Protect (Government and Business)

13. A
Refusing to grant them a license. In some types of businesses, owners/operators must meet certain standards to obtain a license to operate the business. Government can refuse to grant a license to unqualified applicants. Government cannot use unfair practices such as helping competitors or raising individual taxes. The holder of a bank account has control of the account.
SOURCE: EC:008
SOURCE: LAP-EC-016—Regulate and Protect (Government and Business)

14. C
Taxes and borrowing. Government collects taxes from taxpayers to pay the costs of regulating business and providing services. The taxes collected are not sufficient to cover government expenses which make government borrowing necessary. Nontaxpayers don't provide money to government. Business, labor, and industry are types of taxpayers.
SOURCE: EC:008
SOURCE: LAP-EC-016—Regulate and Protect (Government and Business)

15. B
Protect. Government regulation has a positive effect on businesses by protecting them from unfair competitive practices of other businesses. Regulations about the use of resources gives all businesses fair access to those resources. Also, a business's patents, trademarks, or copyrights provide legal protection for a company's products. The purpose of government regulation is not to restrict business, although some laws may limit what businesses are permitted to do. Businesses are expected to operate without government intervention designed specifically to conserve or defend them.
SOURCE: EC:008
SOURCE: LAP-EC-016—Regulate and Protect (Government and Business)

16. D
Improve public welfare. Government intervenes in the economy by operating public welfare programs for the benefit of people who are unable to provide for themselves. Some of these public welfare programs are food stamps, aid to dependent children, and unemployment compensation. These programs not only benefit the persons who need them, but they benefit business as well. Providing unemployment compensation and aid to dependent children are not ways that government intervenes in the economy to protect private property, set safety standards, or manage yearly spending.
SOURCE: EC:008
SOURCE: LAP-EC-016—Regulate and Protect (Government and Business)

17. C

Discovering better methods of production. In addition, research and development programs can increase productivity by developing new products, discovering effective ways to combine resources, finding new ways to meet customer needs, locating new sources of resources, and determining the best ways to invest the company's profits. The other alternatives are ways that businesses can create a good quality of work life.

SOURCE: EC:013
SOURCE: LAP-EC-018—Make the Most of It (Productivity)

18. B

Productivity. Productivity is the amount and the value of goods and services produced (output) from set amounts of resources (input). The method of measuring a business's productivity will vary from one business to another according to the type of business. One method used by businesses to measure their productivity involves dividing the dollar value of total sales by the cost of making those sales. Profitability is the degree or level of profit of a business or a product. Liabilities are debts that the business owes. Accountability involves being responsible for one's actions, such as a business being responsible for paying its bills.

SOURCE: EC:013
SOURCE: LAP-EC-018—Make the Most of It (Productivity)

19. D

Use participative decision making. Employees usually are more productive when they participate in decision making because they feel that they have some control over their work. When employees participate in the decision making of a business, they work harder and do better quality work. Eliminating division of labor might lead to inefficiency and to lower productivity. Businesses should offer flexible working hours to provide a quality of work life that fosters productivity. Sending only top management to training workshops will not increase productivity levels among all employees.

SOURCE: EC:013
SOURCE: LAP-EC-018—Make the Most of It (Productivity)

20. D

Increase sales and profits. A positive effect that productivity has on a business is helping it to increase sales and profits. Productivity allows a business to produce more from set resources. Greater output may result in lower prices, which in turn may result in higher sales and profits. Productivity can be used to measure the strength of the nation's economy, but this is not a benefit that is specifically related to businesses. Productivity can affect society by increasing the standard of living. Productivity can limit, but not stop, inflation.

SOURCE: EC:013
SOURCE: LAP-EC-018—Make the Most of It (Productivity)

21. C
Get the employees off to a good start. A good orientation program answers basic questions for new employees and helps them to feel welcome and comfortable in their new surroundings. This gets them off to a good start on the job. There is no government requirement that businesses must provide orientation. New employees have already been hired to do a specific job before they are given orientation. Assessing job progress cannot take place until after the employee has done the job for a while.
SOURCE: HR:360
SOURCE: Farese, L.S., Kimbrell, G., & Woloszyk, C.A. (2012). *Marketing essentials* (pp. 262-263). Columbus, OH: Glencoe/McGraw-Hill.

22. D
Train. Businesses often assign new employees to work with experienced employees who will be able to help train them. Current employees can help new employees learn their jobs and provide them with information about company procedures. Coworkers would not be asked to supervise, question, or test new employees.
SOURCE: HR:360
SOURCE: Greene, C.L. (2012). *Entrepreneurship: Ideas in action* (5th ed.) [p. 331]. Mason, OH: South-Western Cengage Learning.

23. B
Reduces turnover. The purpose of orienting new employees is to introduce them to the business and their new work environment, which includes supervisors and coworkers. When new employees are oriented properly, the turnover rate decreases because the new employees feel comfortable in their new surroundings and understand their role. One cause of high turnover among new employees is a lack of proper orientation because they do not know what is expected of them. Orienting new employees does not necessarily increase profit or eliminate training. The purpose of orientation is to provide information.
SOURCE: HR:360
SOURCE: Brown, J. (n.d.). *Employee orientation: Keeping new employees on board*. Retrieved March 27, 2017, from https://www.thebalance.com/employee-orientation-keeping-new-employees-on-board-1919035

24. B
Communicate the employer's philosophy and expectations. A good orientation program sets the tone for the new hire's experience with the company. It answers basic questions for new employees and helps them to feel welcome and comfortable in their new surroundings. It often involves giving tours to familiarize the employees with the facilities, completing the required paperwork, distributing employee handbooks, and introducing them to their new colleagues. A very important aspect of orientation is to communicate the employer's philosophy and behavioral expectations so the employee can adapt accordingly. The purpose of the orientation session is not to go over specific financial goals. Job qualifications are verified during the interview process. Salaries are negotiated after the employer extends the job offer and before the candidate (new employee) accepts the offer.
SOURCE: HR:360
SOURCE: Brown, J. (n.d.). *Employee orientation: Keeping new employees on board*. Retrieved March 27, 2017, from https://www.thebalance.com/employee-orientation-keeping-new-employees-on-board-1919035

25. B
Monitor trends. Marketing information is all of the marketing-related data available from inside and outside the business. One reason that a business obtains marketing information is to monitor trends, or the general direction in which people or events are moving. By monitoring trends, a business can make decisions that will help it accomplish its goals, which may include targeting a new market or developing a new product. Businesses do not obtain marketing information to implement procedures, delegate authority, or investigate terms.
SOURCE: IM:012
SOURCE: LAP-IM-012—Data Do It (Need for Marketing Data)

26. D
Determine customer-satisfaction levels. Businesses obtain and use marketing information for many reasons. Businesses often ask customers for feedback to determine how satisfied the customers are with their goods and services. Some tools that businesses use to obtain this information are written surveys and telephone and personal interviews. After a business collects the information, it can determine what it is doing well and where it might need to make changes to improve customer-satisfaction levels. The primary purpose of conducting the survey is not to obtain demographic data, predict the feasibility of a product idea, or learn about trends in the marketplace.
SOURCE: IM:012
SOURCE: LAP-IM-012—Data Do It (Need for Marketing Data)

27. B
Realistic. Having appropriate data helps marketers to set realistic goals. Looking at the available data helps marketers to create SMART goals—specific (rather than general), measurable, achievable, realistic, and time-bound (rather than open-ended). Having appropriate data does not necessarily mean that marketers will set difficult goals.
SOURCE: IM:012
SOURCE: LAP-IM-012—Data Do It (Need for Marketing Data)

28. C
Safety training. Safety training is formal instruction about ways to prevent danger or injury. Businesses can reduce the risk of accidents by instructing employees about how to use equipment properly, how to spot hazardous conditions, and what procedures to follow if safety is compromised. Supply manuals will not reduce the risk of accidents in the workplace. No evidence exists that ties a person's weight to accident reduction. Electronic data interchange (EDI) enables businesses and their vendors to maintain up-to-date inventory information.
SOURCE: OP:004
SOURCE: Farese, L.S., Kimbrell, G., & Woloszyk, C.A. (2012). *Marketing essentials* (pp. 805-806). Columbus, OH: Glencoe/McGraw-Hill.

29. D
The Hoffman Supply Company blocks several of its doors with furniture and boxes. Businesses are required to follow various laws to ensure the safety of their employees, customers, and visitors. Most jurisdictions have laws that prohibit businesses from placing items such as furniture, supplies, and other items in front of exits. Blocked exits make it difficult for people to evacuate if an emergency (e.g., fire) occurs. Inspecting production equipment, storing products in appropriate containers, and monitoring building occupancy rates are legal activities.
SOURCE: OP:004
SOURCE: Farese, L.S., Kimbrell, G., & Woloszyk, C.A. (2012). *Marketing essentials* (pp. 805-806). Columbus, OH: Glencoe/McGraw-Hill.

30. A
Reasonable care. The duty of reasonable care is a common-law principle supporting the idea that each person and business should use caution, watch out for one another, and act in a socially responsible way. A business that fails to fix unsafe electrical wiring after several warnings is being socially irresponsible. Therefore, it is breaching its duty of reasonable care because it is placing its employees and customers in danger. The example is not a breach of duty of personal reform, general authority, or charitable trust.
SOURCE: OP:004
SOURCE: Health and Safety Executive. (n.d.). *Legal requirement.* Retrieved March 27, 2017, from http://www.hse.gov.uk/stress/furtheradvice/legalresponsibility.htm

31. A

    To correct dangerous situations. It is important to report noncompliance with business health and safety regulations to force businesses to correct dangerous situations. Certain governmental agencies have developed health and safety regulations that businesses are expected to follow to provide employees with a safe work environment. If businesses or employees do not comply with these regulations, they should be reported so the necessary action can be taken to solve the problem and make the workplace safe for employees. The goal is to correct dangerous situations; however, businesses may be fined if they continue to ignore the regulations. During the process of investigating a report of noncompliance, it may be necessary to obtain business records. The primary purpose of reporting noncompliance is not to support whistleblowing policies. Whistleblowing policies and legislation is to protect employees from employer retribution for reporting noncompliance.

    SOURCE: OP:005

    SOURCE: Kimbrell, G. (2012) *Succeeding in the world of work* (pp. 142-145). New York: Glencoe/McGraw-Hill.

32. A

    Whistleblowing. A whistleblower is a person who reveals any wrongdoings or malpractices that are taking place within an organization. Jane attempted to resolve a potential problem internally with her manager, but needed to go outside her organization to get the problem resolved. Countries such as the U.S. and Canada have whistleblower laws that protect whistleblowers from retaliation. Attempting to ensure the safety of others is not being a tattle tale—it is being a responsible adult. Because it can be interpreted by some people as tattling, whistleblower laws may be used to protect the person who reports noncompliance. Jane is attempting to prevent an accident; one has not occurred yet. Security procedures are set in place by a company's management. The company may decide to establish new security procedures as a result of Jane reporting the noncompliance.

    SOURCE: OP:005

    SOURCE: Farese, L.S., Kimbrell, G., & Woloszyk, C.A. (2012). *Marketing essentials* (pp. 152-153). Columbus, OH: Glencoe/McGraw-Hill.

33. A

    Get a citation and possibly pay a fine. When a business doesn't comply with health and safety regulations, it will most likely be cited and charged with a fine. Noncompliance with health and safety regulations does not help a business gain a better reputation or have happier employees. Although it's possible that a large violation could cost a business a significant amount of money, most violations do not cause a company to go bankrupt.

    SOURCE: OP:005

    SOURCE: Workplace Answers. (2015, February 16). *OSHA Violations: The high cost of non-compliance*. Retrieved March 27, 2017, from http://www.workplaceanswers.com/resources/hr-article-library/osha-violations-the-high-cost-of-non-compliance/

34. C

Restrict computer access by assigning passwords. Many marketing-communications firms have access to clients' confidential information. An example of confidential information is a client's customer list that the firm uses to coordinate a direct mailing. The marketing-communications firm must follow government regulations to ensure the privacy of those on the mailing list. Also, the firm does not want to risk the chance that the client's competitors could obtain the information. The best way to secure confidential computer information is to restrict access so that only the employees who need the information can obtain it, which is often done by assigning the employees passwords that they must enter into the computer to access the information. Disabling the firm's computer network will prevent computer communication among employees and their clients, so this would not be an effective action to take. The client's information may not be stored on the firm's website. Confidentiality agreements do not prevent employees from accessing computer data, nor do they adequately ensure that employees will not distribute private information.

SOURCE: OP:064
SOURCE: Federal Trade Commission. (2015, June). *Start with security: A guide for business*. Retrieved March 27, 2017, from https://www.ftc.gov/tips-advice/business-center/guidance/start-security-guide-business

35. B

Encryption technology. Encryption is the process of transforming information into a secret code so that only the designated person or recipient can read it. Encryption is a tool (a computer chip) that an advertising agency can use to protect confidential information and keep unauthorized personnel from accessing it. Data mining is a searching mechanism that locates information from large databases. Spam filters are computer programs that keep unsolicited junk mail from reaching an email destination (address). Updated equipment does not necessarily help the advertising agency protect its clients' information.

SOURCE: OP:064
SOURCE: Federal Trade Commission. (2015, June). *Start with security: A guide for business*. Retrieved March 27, 2017, from https://www.ftc.gov/tips-advice/business-center/guidance/start-security-guide-business

36. A

Audit. A yearly audit by a third party is good practice to make sure business rules are being implemented properly by all team members. A third party will ensure unbiased results. Encryption standards should be implemented, but it isn't necessary to have a third party inspect the encryption tools unless there is a known breach. Backups of secure information should be done daily or as often as possible. Employee background checks are customary for new hires but don't make sense financially to do yearly.

SOURCE: OP:064
SOURCE: Gary, S. (2016, September 17). *How to conduct a small business security audit*. Retrieved March 27, 2017, from https://startupnation.com/manage-your-business/security-audit/

37. D

Provide training. Depending on the type of business, employees may be required to use equipment and machinery that may be complicated to operate. To help employees follow instructions and use the equipment and machinery in a safe manner, it is often necessary to provide training. During training, employees learn correct operating procedures which will minimize the possibility of accidents or injuries. Displaying first aid posters or installing a sprinkler system will not help employees follow instructions for the use of equipment and machinery. Depending on the equipment or machinery, employees may be required to wash their hands before or after use.

SOURCE: OP:006

SOURCE: Burrow, J. & Kleindl, B. (2013). *Business management* (13th ed.) [pp. 683-684]. Mason, OH: South-Western Cengage Learning.

38. A

Before using the equipment for the first time. If Jackie's equipment comes with written instructions, he should read the instructions carefully prior to using any of the devices. By reading the instructions prior to use, he is more likely to operate the equipment properly and safely. And if he operates the equipment properly and safely from the beginning, he is likely to save himself much time, energy, and trouble in the long run. He should not wait until the equipment malfunctions or until he hires an employee to read the instructions.

SOURCE: OP:006

SOURCE: Littrell, J.J., Lorenz, J.H., & Smith, H.T. (2012). *School to career* (9th ed.) [pp. 174-197]. Tinley Park, IL: Goodheart-Willcox.

39. D

Talk to her supervisor and ask her/him for clarification. If Sharon doesn't understand the instructions for a machine, she should not attempt to use it before first asking for clarification. If she did so, she would risk getting hurt. Instead, she should talk to her supervisor to get clarification. Since this is Sharon's job, she cannot choose to simply not operate the machine. Taking part in a safety workshop is a good idea, but it does not solve this particular problem.

SOURCE: OP:006

SOURCE: Littrell, J.J., Lorenz, J.H., & Smith, H.T. (2012). *School to career* (9th ed.) [pp. 174-197]. Tinley Park, IL: Goodheart-Willcox.

40. D

Human error. Most accidents, both on and off the job, are caused by human error. Employees who are careless, tired, or poorly trained make mistakes that may result in accidents. Using safety equipment, following strict safety standards, and having adequate light all help to prevent accidents on the job.

SOURCE: OP:007

SOURCE: Littrell, J.J., Lorenz, J.H., & Smith, H.T. (2012). *School to career* (9th ed.) [pp. 174-197]. Tinley Park, IL: Goodheart-Willcox.

41. B
Cause carelessness or violence. Use of alcohol and drugs can affect behavior, the ability to make decisions, and reaction time. These substances may cause carelessness or violence which may result in accidents, injuries, or death. Most businesses have policies against employees using drugs and alcohol because it jeopardizes safety on the job. Businesses do not have policies against the use of drugs and alcohol on the job because they are expensive and difficult to obtain, impossible to monitor accurately, or encourage a relaxed atmosphere.
SOURCE: OP:007
SOURCE: Littrell, J.J., Lorenz, J.H., & Smith, H.T. (2012). *School to career* (9th ed.) [pp. 174-197]. Tinley Park, IL: Goodheart-Willcox.

42. C
Insurance costs. Businesses that have many worker accidents may experience an increase in their insurance costs. If workers are frequently injured on the job, the insurance company may consider the business a risky environment. As a result, the business may have to pay more for insurance protection. Businesses that have many worker accidents usually have a decrease in productivity rates and operating profits. Personal benefits include vacation time, health insurance, retirement, etc.
SOURCE: OP:007
SOURCE: Burrow, J. & Kleindl, B. (2013). *Business management* (13th ed.) [pp. 625-627]. Mason, OH: South-Western Cengage Learning.

43. C
Occupational Safety and Health Administration (OSHA). OSHA is the regulatory agency that promotes safety in the workplace; it also works to eliminate work-related diseases and injury. The CPSC enforces safety standards on consumer products. The EEOC enforces laws prohibiting job discrimination. The EPA enforces environmental standards.
SOURCE: OP:007
SOURCE: Littrell, J.J., Lorenz, J.H., & Smith, H.T. (2012). *School to career* (9th ed.) [pp. 174-197]. Tinley Park, IL: Goodheart-Willcox.

44. D
Be aware of things or situations that create hazardous conditions. One way to prevent hazardous conditions is to be aware of the things that create these types of situations. For example, if someone leaves an item in a high-traffic aisle, it can cause another person to trip, fall, and become injured. By being aware, and perhaps by moving a small object or notifying someone to move a heavy object, a single employee can prevent injuries from occurring. It is not usually necessary for each employee to develop his/her own safety procedures. Companies often develop and document these types of procedures, including the contact person to whom safety concerns are directed. This person is not always the president or CEO of the company. A training manual is a tool that provides guidelines to complete a task or activity. A departmental training manual does not always address general safety issues that apply to the entire company.
SOURCE: OP:008
SOURCE: Littrell, J.J., Lorenz, J.H., & Smith, H.T. (2012). *School to career* (9th ed.) [pp. 174-197]. Tinley Park, IL: Goodheart-Willcox.

45. B
Conduct safety inspections. By periodically inspecting the work environment, managers can determine if employees are following the business's safety procedures. To determine if employees are following the safety procedures, managers may monitor employees who are operating production equipment, or they may check the facility to make sure that aisles and exits are not blocked by boxes. Monitoring computer usage will not ensure that employees are following the business's safety procedures. Simply installing security equipment, such as surveillance cameras, will not ensure that employees are following safety rules—the business must review the surveillance video to determine if employees are violating safety procedures. Including safety policies in the employee handbook is a way to inform the employees about the business's safety policies and procedures; however, this action does not ensure that employees follow the procedures.
SOURCE: OP:008
SOURCE: Littrell, J.J., Lorenz, J.H., & Smith, H.T. (2012). *School to career* (9th ed.) [pp. 174-197]. Tinley Park, IL: Goodheart-Willcox.

46. D
All employees. To reduce the risk of injury to themselves and to others, all employees are responsible for performing their work carefully. Mangers are employees who guide and monitor other employees' activities. Governments establish the safety laws that businesses must follow. Governments often require designated agencies to conduct safety inspections to ensure that businesses are following safety laws.
SOURCE: OP:008
SOURCE: Clark, B., Basteri, C.G., Gassen, C., & Walker, M. (2014). *Marketing dynamics* (3rd ed.) [pp. 687-688]. Tinley Park, IL: The Goodheart-Willcox Co.

47. A
Decreased production. Production may be lost due to employee absence and/or equipment damage, and this reduces the business's total income. A business may also lose sales if injured employees are not at work and cannot easily be replaced. Employees, rather than employers, may lose opportunities for job promotions during absences. When employees must miss work due to work-related injuries, employers have less flexibility in scheduling workers.
SOURCE: OP:009
SOURCE: Forbes.com. (2013, July 10). *The causes and costs of absenteeism in the workplace.* Retrieved March 27, 2017, from http://www.forbes.com/sites/investopedia/2013/07/10/the-causes-and-costs-of-absenteeism-in-the-workplace/

48. C
Supervisor. All injuries that occur on the job should be reported to the supervisor. Employees may need to contact the supervisor for assistance if the injury is serious. Employees should report even minor injuries so that the hazardous situation that caused the injury to be corrected. The police and emergency squad do not need to be contacted unless the injury is life-threatening or caused by an illegal action. The media would not be contacted.
SOURCE: OP:009
SOURCE: Littrell, J.J., Lorenz, J.H., & Smith, H.T. (2012). *School to career* (9th ed.) [pp. 195-197]. Tinley Park, IL: Goodheart-Willcox.

49. B
Accident report. An accident report is a form completed by employees and/or supervisors to report specific details of workplace accidents. Many businesses require employees to complete an accident report form immediately or soon after an accident. Most forms require the employee to write a detailed account of the accident and its outcome. Businesses do not require employees to complete insurance application, medical records, or legal documents when they are injured on the job.
SOURCE: OP:009
SOURCE: Littrell, J.J., Lorenz, J.H., & Smith, H.T. (2012). *School to career* (9th ed.) [pp. 195-197]. Tinley Park, IL: Goodheart-Willcox.

50. B
First-aid supplies. Companies of all sizes should have adequate first-aid supplies available for use in the event that accidents occur. Basic first-aid supplies enable employees to provide immediate treatment to an injured or ill person until medical help is available. Employees should know where the supplies are located to administer basic first aid as quickly as possible. Most businesses do not have emergency personnel, hospital equipment, or trained technicians on the premises, although some large corporations maintain an in-house medical facility.
SOURCE: OP:009
SOURCE: Littrell, J.J., Lorenz, J.H., & Smith, H.T. (2012). *School to career* (9th ed.) [pp. 174-197]. Tinley Park, IL: Goodheart-Willcox.

51. A
Medical emergency. Businesses often develop procedures for handling medical emergencies. In many cases, businesses provide employees with certified training (e.g., CPR, first aid) that will help them handle certain types of medical emergencies. Fire escape, robbery, and security are important issues that businesses address wen developing policies and procedures, however these issues do not directly relate to illness or injury in the workplace.
SOURCE: OP:010
SOURCE: Littrell, J.J., Lorenz, J.H., & Smith, H.T. (2012). *School to career* (9th ed.) [pp. 174-197]. Tinley Park, IL: Goodheart-Willcox.

52. A
Police department. To take appropriate action during an emergency, an employee must determine what the problem is. Because the safe was open, the office was in disarray, and a computer was missing, the business was probably robbed. In case the robber is still in the building, Josh should leave the business immediately and seek a safe environment. Then, following company procedures, Josh should notify his supervisor or the local law enforcement authorities (police). Josh should call the fire department if a fire occurs. The local health department handles issues associated with health risks. The owner should file a claim with the business's insurance company after the robbery has been reported to the appropriate law-enforcement authorities.
SOURCE: OP:010
SOURCE: Clark, B., Basteri, C.G., Gassen, C., & Walker, M. (2014). *Marketing dynamics* (3rd ed.) [pp. 678-688]. Tinley Park, IL: Goodheart-Willcox.

53. C
Trigger the fire alarm. A fire is an example of an emergency situation that employees should be prepared to handle. One of the first procedures to follow if a fire is detected in the facility is to evacuate the premises to protect the safety of employees and customers. To alert coworkers about a fire, Mandy should trigger the fire alarm. The sound of the alarm will indicate that individuals should evacuate the premises. Using a fire extinguisher may help put out or contain the fire but does not alert others about the fire. The fire department should be called after employees are alerted about the fire. Reciting the escape route will not alert others to evacuate the building.
SOURCE: OP:010
SOURCE: AFSCME. (2017). *Elements of an emergency action plan*. Retrieved March 24, 2017, from http://www.afscme.org/news/publications/workplace-health-and-safety/are-you-prepared-a-guide-to-emergency-planning-in-the-workplace/elements-of-an-emergency-action-plan

54. C

Follow proper procedures for closing a business at the end of the day. Burglary is an illegal entry into a building to commit a theft and often occurs when the business is closed. Closing procedures might include removing all cash, checking to be sure that windows and doors are locked, and training employees to use the security system if there is one. Monitoring the amount of cash in the register throughout the day and notifying the proper authorities when cash shortages are discovered are not actions that will prevent burglaries from occurring. Training employees to identify counterfeit bills and bad credit cards reduces fraud, which is deceiving or cheating a business out of money or property.

SOURCE: OP:013
SOURCE: Clark, B., Basteri, C.G., Gassen, C., & Walker, M. (2014). *Marketing dynamics* (3rd ed.)
[pp. 686-687]. Tinley Park, IL: Goodheart-Willcox.

55. D

Close. Security problems are a risk to businesses because the financial losses they cause are sometimes so large that the businesses are forced to close. Therefore, businesses try to prevent security problems to succeed. A business faced with financial losses because of security problems would not be able to expand. Reorganizing and moving would not prevent financial losses unless the security problems were solved.

SOURCE: OP:013
SOURCE: Clark, B., Basteri, C.G., Gassen, C., & Walker, M. (2014). *Marketing dynamics* (3rd ed.)
[pp. 686-687]. Tinley Park, IL: Goodheart-Willcox.

56. D

Using closed-circuit television. A closed-circuit television system can be set up to monitor vulnerable areas of the business, such as storage areas and areas near entrances and exits. Other means of preventing shoplifting include having one main entrance and exit that can be monitored if needed, using shelf units that are not tall enough to hide shoplifting activity, and providing employees with an unobstructed view of as much of the selling floor as possible.

SOURCE: OP:013
SOURCE: Clark, B., Basteri, C.G., Gassen, C., & Walker, M. (2014). *Marketing dynamics* (3rd ed.)
[pp. 686-687]. Tinley Park, IL: Goodheart-Willcox.

57. B
Employees undercharging their friends. Point-of-sale fraud are attempts to cheat a business out of money at the time of purchase. Employees sometimes commit fraud at the point of sale, which results in financial losses for the business. Employees who undercharge their friends when ringing up their purchase are committing point-of-sale fraud because they are selling items for less than the actual value. The business is losing part of the money it should have received for the sale. Customers who replace price tags are committing a type of fraud known as price-ticket switching. Vendors who take funds from a business's register are pilfering. Competitors who access a business's computer files are committing computer fraud.
SOURCE: OP:013
SOURCE: Clark, B., Basteri, C.G., Gassen, C., & Walker, M. (2014). *Marketing dynamics* (3rd ed.) [pp. 686-687]. Tinley Park, IL: Goodheart-Willcox.

58. C
To reduce the possibility of loss. Businesses establish security procedures, which are activities that employees should follow to protect the business from loss. These security procedures are intended to reduce the risk of robbery, assault, and other violent crimes, all of which might result in a loss for the business. For example, robbery usually results in financial loss. Employees do not follow established security procedures to create a pleasant facility, avoid the risk of accidents, or develop a healthy environment.
SOURCE: OP:152
SOURCE: Farese, L.S., Kimbrell, G., & Woloszyk, C.A. (2012). *Marketing essentials* (pp. 801-807). Columbus, OH: Glencoe/McGraw-Hill.

59. B
Share this information with your supervisor or the HR department. Discussing weapons at work and displaying obvious signs of anger or hostility are indicators of potentially dangerous behavior. While there is some chance that Edward will calm down soon, it would be wise to share your observations with your supervisor or the HR department, especially given his recent attitude and behavior. Your supervisor or the HR department can then decide how to handle the situation. Rather than contacting the local sheriff or police chief to discuss Edward's mood, you should start by sharing your knowledge with someone inside your company, such as your supervisor or a member of the HR department. Accusing Edward of plotting to kill the manager during a staff meeting is likely to antagonize Edward, making the situation worse.
SOURCE: OP:152
SOURCE: Occupational Safety & Health Administration. (n.d.). *Workplace violence.* Retrieved March 27, 2017, from https://www.osha.gov/SLTC/workplaceviolence/

60. D

Observant. By staying alert, aware, and observant of your surroundings, you can help maintain workplace security. This means paying attention to customers activities, making sure customers are visible, and being on the lookout for suspicious activity. Being distracted will heighten the risk of a robbery or other security breach. Being a team-player and being friendly are both important workplace skills, but neither are helpful in this specific situation.

SOURCE: OP:152

SOURCE: University of Florida Police Department. (2012). *Robbery prevention for businesses.* Retrieved March 24, 2017, from http://www.police.ufl.edu/community-services/robbery-prevention-for-businesses/

61. A

Trademark the logo. A business can legally protect its logo from unauthorized use by registering the logo with the appropriate government agency. If an unauthorized entity compromises or uses the logo in harmful, embarrassing, or negative ways, trademark protection provides the business with legal recourse. Copyrights provide legal protection for written, musical, and artistic works. Patents are obtained to legally protect inventions and certain types of processes for a limited amount of time. A subpoena is a formal request issued by the court for an individual to submit evidence or serve as a witness at trial.

SOURCE: OP:153

SOURCE: Farese, L.S., Kimbrell, G., & Woloszyk, C.A. (2012). *Marketing essentials* (pp. 114-115). Columbus, OH: Glencoe/McGraw-Hill.

62. A

When it produces an original artistic work. Intellectual property is the business's intangible assets that result from thinking processes. A business can legally protect its intellectual property from unauthorized use by registering it with the appropriate government agency. A copyright legally protects artistic works such as books, music, paintings, etc. A patent protects manufacturing processes and inventions. A trademark legally protects symbols, designs, or words used by producers to identify their goods or services. Trade-secret laws protect property such as customer lists and recipes.

SOURCE: OP:153

SOURCE: Farese, L.S., Kimbrell, G., & Woloszyk, C.A. (2012). *Marketing essentials* (pp. 114-115). Columbus, OH: Glencoe/McGraw-Hill.

63. A

Develops an innovative product. Businesses should legally protect their intellectual property from unauthorized use by others. Businesses and inventors obtain patents to legally protect their inventions from unauthorized use for a limited amount of time. Trademarks protect unique symbols, designs (e.g., logo), or words that businesses use to identify their brands. Copyrights provide legal protection for written (e.g., articles), musical, and artistic works. Things such as recipes and customer lists are protected under trade-secret laws.

SOURCE: OP:153
SOURCE: Farese, L.S., Kimbrell, G., & Woloszyk, C.A. (2012). *Marketing essentials* (pp. 114-115). Columbus, OH: Glencoe/McGraw-Hill.

64. C

Obtain quantity discounts. Buyers can use several types of buying strategies. A concentrated strategy utilizes only a few suppliers in the hope of gaining quantity discounts, lower transportation costs, and improved vendor relationships. A buyer has a better chance of negotiating a discount with a vendor if the buyer purchases large quantities of goods at one time. Using only a few suppliers means that a buyer will purchase more from each one than if the buyer purchased goods from many suppliers. A buyer who uses many suppliers encourages vendor competition and may be able to acquire a greater variety of goods and gain an increased selection.

SOURCE: OP:015
SOURCE: LAP-OP-002—Buy Right (Purchasing)

65. D

Buying for resale, buying for transformation, and buying for business use. Three types of purchasing are buying for resale, buying for transformation, and buying for business use. Purchasing specialists make make-or-buy decisions prior to purchasing. Retailers and wholesalers conduct buying for resale.

SOURCE: OP:015
SOURCE: LAP-OP-002—Buy Right (Purchasing)

66. B

Wholesale. Jeremiah is a wholesale buyer because he purchases goods from manufacturers to resell to retailers. Retail buyers purchase goods from wholesalers or manufacturers to resell to customers. Industrial buyers purchase raw materials or components for transformation and sophisticated machinery and equipment for business use. Purchasing specialists who buy for business use purchase goods and services for internal use by their own companies.

SOURCE: OP:015
SOURCE: LAP-OP-002—Buy Right (Purchasing)

67. C
   Retail. Suzette is a retail buyer because she purchases goods from manufacturers and wholesalers to resell to consumers. Wholesale buyers purchase goods from manufacturers to resell to retailers. Industrial buyers purchase raw materials or components for transformation and sophisticated machinery and equipment for business use. Purchasing specialists who buy for business use buy goods and services for internal use by their own companies.
   SOURCE: OP:015
   SOURCE: LAP-OP-002—Buy Right (Purchasing)

68. C
   Lead time. Lead time is the amount of time it takes a vendor to process and deliver an order. Lead time is affected by many factors including the distance from the shipper to the recipient, the type of transportation the vendor uses, and the type of product. For example, a custom-made product usually requires more lead time because part or all of the product is not produced until the order is placed. If a product takes three months to produce, the buyer should make sure to order the product at least three months before it is needed and should make sure to add delivery time. Quantity discounts, unit pricing, and billing issues are important factors that the buyer considers when placing an order, but they do not directly relate to the delivery date.
   SOURCE: OP:016
   SOURCE: Chopra, S., & Meindl, P. (2013). *Supply chain management: Strategy, planning, and operation* (5th ed.) [p. 316]. Upper Saddle River, NJ: Pearson Education.

69. B
   Prepare a purchase order. Arnie needs to prepare a purchase order, which is the form that a business (buyer) fills out to order goods from a vendor (seller). The purchase order typically contains information such as the item's description, part number, quantity, price, and the company's shipping and billing addresses. An invoice is an itemized statement of money owed for a good or service and is generated by the vendor (seller). A receipt is an acknowledgement of the sale and transfer of goods and services, and is typically provided by the seller to the buyer in consumer retail transactions. Employees complete expense forms so their employers can reimburse them for business-related out-of-pocket expenses.
   SOURCE: OP:016
   SOURCE: Farese, L.S., Kimbrell, G., Woloszyk, C.A. (2012). *Marketing essentials* (p. 381). Columbus, OH: Glencoe/McGraw-Hill.

70. D
    Reorder point. The reorder point is the level of inventory at which the business needs to place a reorder with the vendor to replenish the inventory, which prevents stock-out situations. The business considers the normal demand for the product, its safety stock, and the vendor's lead time to determine the reorder point of a particular item. Profit margin, buyer's preferences, and accounts receivable are not primary factors that a business considers when it determines when to place a reorder for a regularly stocked item.
    SOURCE: OP:016
    SOURCE: Farese, L.S., Kimbrell, G., & Woloszyk, C.A. (2012). *Marketing essentials* (p. 545). Columbus, OH: Glencoe/McGraw-Hill.

71. C
    Automatic reorder system. When businesses use an automatic reorder system, an order for additional supplies is placed when the inventory decreases to an established level. This makes it possible for a business to effectively maintain an inventory of supplies at the right level. The business does not tie up funds by purchasing too many supplies, or risk running out of supplies. Surveillance devices are used to control theft. An emergency response plan is designed to handle emergency situations. Stock handling methods involve the way a business receives and processes orders.
    SOURCE: OP:031
    SOURCE: Clark, B., Basteri, C.G., Gassen, C., & Walker, M. (2014). *Marketing dynamics* (3rd ed.) [pp. 420-421]. Tinley Park, IL: Goodheart-Willcox.

72. A
    Operate efficiently. When businesses do not have the supplies available for their employees to use, the employees cannot perform their jobs efficiently. When employees cannot perform their jobs efficiently, the business does not operate efficiently. Therefore, it is important for a business to maintain a certain level of supplies for employees to perform their work. Maintaining an inventory of supplies does not help a business to establish sales goals, locate vendors, or evaluate business processes.
    SOURCE: OP:031
    SOURCE: Clark, B., Basteri, C.G., Gassen, C., & Walker, M. (2014). *Marketing dynamics* (3rd ed.) [pp. 427-433]. Tinley Park, IL: Goodheart-Willcox.

73. D

Employee productivity decreases. Businesses need office supplies to operate efficiently. If a business runs out of necessary supplies, the employees' productivity decreases because they do not have the tools available to do their jobs efficiently. For example, if a business runs out of copy paper and forms, its employees cannot print letters, reports, or invoices or conduct other activities that are necessary to keep the business operating smoothly. Many businesses develop inventory control procedures to monitor their supplies to reduce the risk of running out of supplies. Businesses (e.g., manufacturers) charge their customers restocking fees for returning ordered goods that the customers no longer want or need. Restocking fees are part of the business's return policies rather than its operating polices.

SOURCE: OP:031

SOURCE: Clark, B., Basteri, C.G., Gassen, C., & Walker, M. (2014). *Marketing dynamics* (3rd ed.) [pp. 427-433]. Tinley Park, IL: Goodheart-Willcox.

74. C

It often uses assembly lines. Mass production is the production of a few products in large quantities. To turn out large quantities efficiently, mass production often uses assembly lines in which the product moves past workers who each do one assigned production task. This is a very efficient production method, but it can only be used for standard products, not for unique items.

SOURCE: OP:017

SOURCE: LAP-OP-017—Can You Make It? (Nature of Production)

75. B

Standardized. Most products that are mass-produced have standardized, interchangeable parts. The use of standardized parts enables manufacturers to produce large quantities quickly and efficiently. Standardization of parts also helps to hold down production costs. Customized and individualized parts are unique and can be used to produce small quantities of specialty items. Computerized equipment is often used to direct automated production processes.

SOURCE: OP:017

SOURCE: LAP-OP-017—Can You Make It? (Nature of Production)

76. D

Scheduling. Scheduling is the production activity that establishes the timetable to be followed in production. Businesses establish schedules to have the necessary raw materials and the right number of employees on hand to produce the goods. Scheduling helps businesses to produce the goods that customers need and have those goods available when customers want them. Marketing is the process of planning and executing the conception, pricing, promotion, and distribution of ideas, goods, and services to create exchanges that satisfy individual and organizational objectives. Advertising is any paid form of nonpersonal presentation of ideas, goods, or services. Receiving is the acceptance of a shipment of goods.

SOURCE: OP:017

SOURCE: LAP-OP-017—Can You Make It? (Nature of Production)

77. B

Batch. Batch production is the system of making small batches of a product at one time, such as running several different printing jobs in a day. This system is also known as intermittent production because the process operates for short periods, stops while adjustments or changes are made, and starts up again to make a different product. Unit or custom production produces one item at a time or small quantities of an item at one time. Mass production is the system of making large quantities of a standard product, such as televisions and radios.

SOURCE: OP:017
SOURCE: LAP-OP-017—Can You Make It? (Nature of Production)

78. A

Put clear, specific guidelines and consequences in writing. The more clearly policies are laid out, the easier it is to handle any disputes that may arise with company property without conflict. Allowing minor misuse of company property may be a company-wide policy, but it does not necessarily prevent conflict because it may become difficult to know what is acceptable and what is not. Likewise, enacting a zero-tolerance policy will not necessarily prevent conflict because it does not account for accidental or minute infractions. Employees may not feel that they are being treated fairly because they are being held to impossibly high standards. Finally, while appointing an employee to handle conflicts is a good practice, it does not necessarily help to avoid conflict in the first place.

SOURCE: OP:442
SOURCE: Burrow, J. & Kleindl, B. (2013). *Business management* (13th ed.) [pp. 88-89]. Mason, OH: South-Western Cengage Learning.

79. D

Lower costs. Optimized supply chains lower costs by eliminating unnecessary transactions and suppliers. Increasing suppliers and increasing inventory are not goals linked to an optimized supply chain and would most likely have a negative effect. Supply chain does not attempt to eliminate defects; instead, it tries to streamline processes and lower costs for the company.

SOURCE: OP:443
SOURCE   Chopra, S., & Meindl, P. (2013). *Supply chain management: Strategy, planning, and operation* (5th ed.) Upper Saddle River, NJ: Pearson Education.

80. C

Confidential documents should be kept in locked cabinets or rooms. Limiting access to confidential documents is a good way to protect them. Employees should not discuss confidential information in public places because they might be overheard. Confidential information can be printed out, but it should be kept secure or shredded when no longer needed. Documents should be marked confidential to ensure that their recipients are aware of the need for security.

SOURCE: OP:441
SOURCE: Burrow, J. & Kleindl, B. (2013). *Business management* (13th ed.) [pp. 375, 496]. Mason, OH: South-Western Cengage Learning.

81. C
Accountability. Accountability involves ensuring that organizations are held responsible for their privacy policies. Organizations should establish at least one person who is in charge of monitoring compliance with these policies. Openness refers to being forthcoming about the existence and nature of privacy policies. Collection limitation means that companies should collect only the data that are necessary to conduct business. Finally, purpose specification means that the purpose of any information gathering should be determined at the time that it is collected.
SOURCE: OP:441
SOURCE: Burrow, J. & Kleindl, B. *(2013). Business management* (13th ed.) [pp. 375, 496]. Mason, OH: South-Western Cengage Learning.

82. D
Remind. Some companies need to remind customers that they and their products exist. Promotion might be used to reassure customers about a problem product, but customers would already be aware of its existence. A business would want the customer to be attracted to the product, not warned or cautioned about it.
SOURCE: PR:001
SOURCE: LAP-PR-002—Razzle Dazzle (Nature of Promotion)

83. C
Sell its products. This is the most obvious benefit of promotion for the business. Promotion adds to the firm's expenses. It cannot reduce the company's taxes or protect the environment.
SOURCE: PR:001
SOURCE: LAP-PR-002—Razzle Dazzle (Nature of Promotion)

84. A
Achieve a desired outcome. Promotion is the marketing function that communicates information about goods, services, images, and/or ideas to achieve a desired outcome. Promotion is not intended to put pressure on customers—rather it should catch attention, arouse interest, and create desire, in order to achieve a desired outcome. Marketing research can be conducted to determine the effectiveness of promotion; however, promotion is not done so that marketing research can be conducted. The price of an item is often included in promotions, but that is not the sole intent of promotion.
SOURCE: PR:001
SOURCE: LAP-PR-002—Razzle Dazzle (Nature of Promotion)

85. D
Soft drinks versus fruit juices. This is an example of primary product promotion because a business or industry is competing against other industries to stimulate consumer desire for an entire class of goods or services. Promotions for Coke versus Pepsi, Cheer versus Tide, and Tropicana versus Citrus Hill are examples of secondary product promotion that stimulate demand for a specific brand.
SOURCE: PR:002
SOURCE: LAP-PR-004—Know Your Options (Product and Institutional Promotion)

86. B
    Make the public aware of a company's name. The purpose of institutional promotion is to create an image in the eyes of consumers. Building a reputation for a product, creating excitement about a new product, and making consumers aware of goods or services are ways product promotion can be used.
    SOURCE: PR:002
    SOURCE: LAP-PR-004—Know Your Options (Product and Institutional Promotion)

87. D
    Promotion can encourage consumers to buy unwanted goods. Therefore, some people consider promotion to be manipulative. In certain cases, promotion is considered either to be in bad taste, vulgar, or insulting to human intelligence. The fact that promotional activities educate, encourage a higher standard of living, and enhance a company's image are advantages of promotion.
    SOURCE: PR:002
    SOURCE: LAP-PR-004—Know Your Options (Product and Institutional Promotion)

88. A
    To develop new products. Businesses need to obtain and analyze a wide variety of marketing information to make decisions for the future. One way that businesses use this information is to develop new products and improve existing products to satisfy customers' needs. To make marketing decisions that will keep them competitive, businesses are constantly gathering information about customers' preferences and about why customers buy certain products. Businesses do not use marketing information to prepare sales invoices. Businesses obtain marketing information to monitor economic trends, but they are not able to change those trends. Credit scoring is a function of finance that helps a company determine a customer's credit worthiness.
    SOURCE: IM:012
    SOURCE: LAP-IM-012—Data Do It (Need for Marketing Data)

89. C
    Identify problems. Marketing information is data available inside (internal) and outside (external) the business. Internal marketing information that businesses monitor includes inventory reports, customers' sales records, customers' feedback from surveys, etc. Comparing current and past marketing information can often reveal problems, such as a sudden drop in sales of a particular product. A drop in sales may indicate that the business needs to provide new or improved products or increase promotional efforts. Businesses need to review various forms of external marketing information to effectively investigate competitors, evaluate market share, and analyze economic changes.
    SOURCE: IM:012
    SOURCE: LAP-IM-012—Data Do It (Need for Marketing Data)

90. A

By performing certain channel activities expertly. Channel members add value to a product by performing certain channel activities expertly. Moving the product smoothly through the channel benefits all channel members. Channels are not meant to make products more costly or more difficult for consumers to find. Channels work best and deliver value-added products when channel members work together toward common goals.
SOURCE: CM:001
SOURCE: LAP-CM-002—Chart Your Channels (Channel Management)

91. A

Ideal market exposure. Marketers determine distribution intensity so they can achieve ideal market exposure—that is, they want to make their product available to each and every customer who might buy it, but they *don't* want to over-distribute the product and waste money. This condition is not known as complete market coverage or total market saturation—ideal market exposure often does not cover an entire market. It is also not referred to as perfect market balance.
SOURCE: CM:001
SOURCE: LAP-CM-002—Chart Your Channels (Channel Management)

92. B

Needs to maintain tight control over a product. Exclusive distribution involves selling a product through one intermediary or middleman in a geographic area. Exclusive distribution is often preferred for specialty, highly complex, and technical products or products that require special handling or training, such as airplanes or large machinery. When a business wants to deal with intermediaries that will do the best job to promote and sell their products, it would use selective distribution. Selective distribution means selling a product through a limited number of wholesalers and retailers in a geographic location. A business that wants to bypass middlemen (intermediaries) would choose a direct-distribution strategy. Intensive distribution involves selling a product (e.g., candy bars) through every available wholesaler and retailer in a geographic area where consumers might look for the product.
SOURCE: CM:001
SOURCE: LAP-CM-002—Chart Your Channels (Channel Management)

93. C

Wholesalers usually buy in large quantities. Many producers cannot afford to fill requests for small orders; however, small retailers are usually unable to place large orders. Therefore, wholesalers help to fill the gap between producers and small retailers by buying large quantities and selling smaller quantities to individual retailers. By using intermediaries, producers are giving up some of their channel control. Wholesalers do take title to goods, but agents do not. Producers use the producer to retailer to ultimate consumer channel to reach large retailers indirectly.
SOURCE: CM:003
SOURCE: LAP-CM-003—Channel It (Channels of Distribution)

94. B

Producer to agent to retailer to consumer. Some producers don't want to take the responsibility or spend the time or money to sell their own goods but are prepared to handle other marketing functions. These producers contract with an agent to sell the goods to retailers. When the producer to retailer to consumer channel is used, the producer retains control of selling activities. The producer to wholesaler to retailer to consumer channel is frequently used to reach small retailers. Producer to consumer is a direct channel of distribution.

SOURCE: CM:003
SOURCE: LAP-CM-003—Channel It (Channels of Distribution)

95. D

A dispatcher has current knowledge of a delivery truck's location and destination. Satellite tracking is the use of satellites and technological systems that allow for the transmission of information between two parties. Satellite tracking would help a business locate a package while it is en route to provide an estimated arrival time to the package recipient. Computer systems that perform warehouse functions that are usually executed by humans are called artificial intelligence systems. A computer software program would be used to create routing plans for transportation companies, not a satellite tracking system. Satellites are not generally needed to enter information into an electronic device.

SOURCE: CM:004
SOURCE: Cophra, S., & Meindl, P. (2013). *Supply chain management: Strategy, planning, and operation* (5th ed.) [pp. 422-424]. Upper Saddle River, NJ: Pearson Education.

96. A

Some businesses have the capacity to distribute most or all of their products through the Internet. Some businesses provide pure services that do not require the use of intermediaries. For example, it is possible for business consultants or freelance copyrighters to deliver their services directly to the end users through their websites. Many financial services, such as bank loans and stock trades, are available online without the use of intermediaries. Because some businesses are bypassing intermediaries and selling products directly to the end users through their websites, vertical conflict among channel members continues to be a problem. When businesses decide to sell directly to consumers, the number of intermediaries they use is reduced. In many ways, technological advancements make the distribution process more efficient. For example, extranets make it easier for channel leaders to monitor channel activities and for channel members to communicate with one another.

SOURCE: CM:004
SOURCE: Clark, B., Basteri, C.G., Gassen, C., & Walker, M. (2014). *Marketing dynamics* (3rd ed.) [p. 405]. Tinley Park, IL: Goodheart-Willcox.

97. C
Government regulation of ads. Government regulations, such as the one prohibiting radio and television cigarette advertising, are external factors that affect promotion. Changes in the product's price or distribution methods or a reorganization of the business are examples of internal factors that affect promotion.
SOURCE: PR:001
SOURCE: LAP-PR-002—Razzle Dazzle (Nature of Promotion)

98. C
Helps them to select appropriate products. Promotion helps the customer determine which product is the most appropriate, right one for him/her. Promotion introduces new products to consumers and assists with decision making. It does not help consumers to spend more on products or delay decisions. It is the salesperson's job to identify the customer's buying motives, or reasons for buying.
SOURCE: PR:001
SOURCE: LAP-PR-002—Razzle Dazzle (Nature of Promotion)

99. A
Product promotion. Product promotion attempts to persuade consumers to buy a good or service. A half-price sale is attempting to do just that. Since the business is paying for its own announcement, this is not publicity. Sales promotion includes promotional activities other than advertising, personal selling, and publicity that stimulate customer purchases. Word-of-mouth advertising is provided by customers who tell others of their satisfaction with the business. A newspaper ad is typically not a form of word-of-mouth advertising.
SOURCE: PR:002
SOURCE: LAP-PR-004—Know Your Options (Product and Institutional Promotion)

100. B
To demonstrate the organization's role in community affairs. Institutional promotions aim to create a certain image in the eyes of consumers. Supporting personal selling activities, introducing new goods or services, and creating consumer interest in specific goods or services are all objectives of promotional advertising.
SOURCE: PR:002
SOURCE: LAP-PR-004—Know Your Options (Product and Institutional Promotion)

Guide to the Business Administration Standards

Appendix A

Business Administration Curriculum

The business administration curricular structure consists of four tiers of specificity: Business Administration Core, Cluster Core, Pathways, and Specialties. The content of the broad-based Business Administration Core is fundamental to an understanding of business and can be viewed as co-requisites and as prerequisites for all business administration courses.

Business Administration Core

The content of the Business Administration Core should be mastered in order for cluster-specific content to have relevance to student learning. There are 13 Business Administration instructional areas: Business Law, Communication Skills, Customer Relations, Economics, Emotional Intelligence, Entrepreneurship, Financial Analysis, Human-Resources Management, Information Management, Marketing, Operations, Professional Development, and Strategic Management.

Cluster Core

The Cluster Core tier represents the skills and knowledge that were identified as common across the Pathways in a cluster. The Finance Cluster Core, for example, is composed of six instructional areas: Compliance, Customer Relations, Financial Analysis, Financial-Information Management, Professional Development, and Risk Management.

Pathways

The Pathways tier addresses the content of a variety of broad-based occupational opportunities within a cluster. In the Business and Administrative Services Cluster, for instance, the skills and knowledge that are common across jobs in operations management appear in the Operations Management Pathway.

Specialties

The fourth tier, Specialties, focuses on specific job opportunities that are tied to a pathway. The job opportunities identified in the Specialties require knowledge and skills unique to a product or service. In Marketing, for example, Specialties for the Professional Selling Pathway include pharmaceutical sales, advertising sales, heavy-equipment sales, and medical-equipment sales.

Thus, the business administration curriculum can be viewed as a continuum that begins in the primary grades with career awareness and exploration and continues through postsecondary education with the emphasis becoming more specialized to the learner's individual interest in business. A graphic depicting the relationship among the four ties is shown in Figure 1.
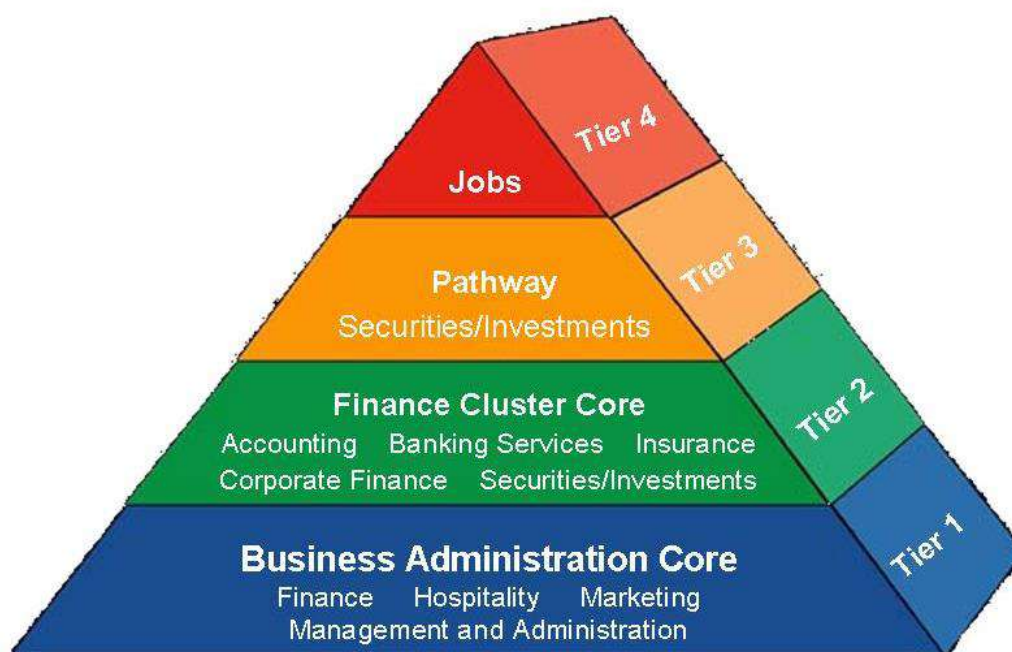
Figure 1. Relationship of Tiers

Curricular Organization

Within each tier, the curricular content has been organized into Standards (Knowledge and Skill Statements), Performance Elements, and Performance Indicators.

Standards

The broadly-based Standards identify what students should know and be able to do as a result of instruction in any of the business-related clusters. These statements encapsulate the overarching intent/purpose of a work function. The Standards identified for the **Business Administration Core** are:

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

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

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

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

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

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

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

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

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

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

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

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

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

Performance Elements

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

Business Law
Apply knowledge of business ownership to establish and continue business operations.

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

Communication Skills
Read to acquire meaning from written material and to apply the information to a task.
Apply verbal skills to obtain and convey information.
Record information to maintain and present a report of business activity.

Customer Relations
Foster positive relationships with customers to enhance company image.
Resolve conflicts with/for customers to encourage repeat business.
Reinforce company's image to exhibit the company's brand promise.

Economics

Acquire knowledge of the impact of government on business activities to make informed economic decisions.

Analyze cost/profit relationships to guide business decision-making.

Human Resources Management

Manage staff growth and development to increase productivity and employee satisfaction.

Marketing-Information Management

Acquire foundational knowledge of marketing-information management to understand its nature and scope.

Marketing

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

Market Planning

Develop marketing strategies to guide marketing tactics.

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

Operations

Adhere to health and safety regulations to support a safe work environment.

Implement safety procedures to minimize loss.

Implement security policies/procedures to minimize chance for loss.

Comply with security rules, regulations, and codes (e.g., property, privacy, access, confidentiality) to protect customer and company information, reputation, and image.

Implement purchasing activities to obtain business supplies, equipment, resources, and services.

Understand production's role and function in business to recognize its need in an organization.

Maintain property and equipment to facilitate ongoing business activities.

Understand supply chain management role to recognize its need in business.

Professional Development

Participate in career planning to enhance job-success potential.

Promotion

Acquire a foundational knowledge of promotion to understand its nature and scope.

Selling

Acquire a foundational knowledge of selling to understand its nature and scope.

Acquire product knowledge to communicate product benefits and to ensure appropriateness of product for the customer.

Understand sales processes and techniques to enhance customer relationships and to increase the likelihood of making sales.

Employ sales processes and techniques to enhance customer relationships and to increase the likelihood of making sales.

Performance Indicators

Performance Elements are defined through Performance Indicators that are specific work-based actions—either knowledge or skills. They specify what an individual worker must know or be able to do to achieve the Performance Elements. These learning outcomes are measureable (i.e., can be assessed). For example, the Performance Indicators for the Customer Relations Performance Element "Resolve conflicts with/for customers to encourage repeat business" are:

CR:009 Handle difficult customers (CS) LAP-CR-009
CR:010 Handle customer/client complaints (CS) LAP-CR-010

Objectives

Each of the Performance Indicators is further defined through a series of Objectives. This organizational component specifies the scope of each Performance Indicator. Their use tells teachers what content to include or exclude from their instruction. For example, the Performance Indicator "Handle difficult customers" is defined through Objectives as follows:

a. Define the following terms: disagreeable customer, domineering/ superior customers, dishonest customers.

b. Identify types of difficult customers.

c. Describe categories of disagreeable customers.

d. Discuss categories of domineering/superior customers.

e. Describe ways in which customers are dishonest.

f. Identify situations in which customers become difficult.

g. Explain reasons for handling difficult customers.

h. Describe general guidelines for handling difficult customers.

i. Explain specific guidelines for handling types of difficult customers.

j. Demonstrate procedures for handling difficult customers.

Curriculum Planning Levels

Each performance indicator is assigned to one of six curriculum-planning levels that represent a continuum of instruction ranging from simple to complex. The levels can serve as building blocks for curriculum development in that students should know and be able to perform the performance indicators at one level before tackling more complex skills and knowledge at the next level. The levels can also be used as the basis for developing an unduplicated sequence of instruction for articulation between high school and postsecondary business courses. In these cases, instructors can agree as to how far along the continuum students will advance in high school so that postsecondary instructors can initiate instruction at that point in the continuum. This will enable students to focus on new, more advanced subject matter rather than on content previously mastered. The six curriculum-planning levels are described as follows:

Prerequisite (PQ): Content develops employability and job-survival skills and concepts, including work ethics, personal appearance, and general business behavior.

Career Sustaining (CS): Content develops skills and knowledge needed for continued employment in or study of business based on the application of basic academics and business skills.

Specialist (SP): Content provides in-depth, solid understanding and skill development in all business functions.

Supervisor (SU): Content provides the same in-depth, solid understanding and skill development in all business functions as in the specialist curriculum, and in addition, incorporates content that addresses the supervision of people.

Manager (MN): Content develops strategic decision-making skills in all business functions needed to manage a business or department within an organization.

Owner (ON): Content develops strategic decision-making skills in all aspects of business that are needed to own and operate a business.

Curriculum Frameworks

In general, a framework is a skeleton structure that supports or encloses something. In education, frameworks are used to support and enclose the curriculum of a discipline by defining the discipline's main elements, thereby providing a big picture overview of the discipline's curriculum. They can act as gatekeepers by helping educators and curriculum developers make decisions about what should be addressed or eliminated from consideration in a curriculum. Once educators have determined what content should be addressed, they can use the scaffolding that frameworks provide as a basis around which curricular content is developed, organized, and implemented. Its visual presentation, or schematic, can serve as a communications tool to share with those interested in a discipline. It quickly communicates the main topics or areas of instruction that will be addressed.

In *Marketing Principles (Standard)*, eight of the 13 Business Administration Core's Standards and five of the seven Marketing Core's Standards are addressed. The title of each Standard in the entire Business Administration Core and the Marketing Core are depicted in Figure 2. The schematic also shows that the study of marketing integrates academic concepts from Language Arts, Mathematics, Social Sciences, and Social Studies. The successful application of these academic skills is imperative for obtaining a marketing career and advancing in business.
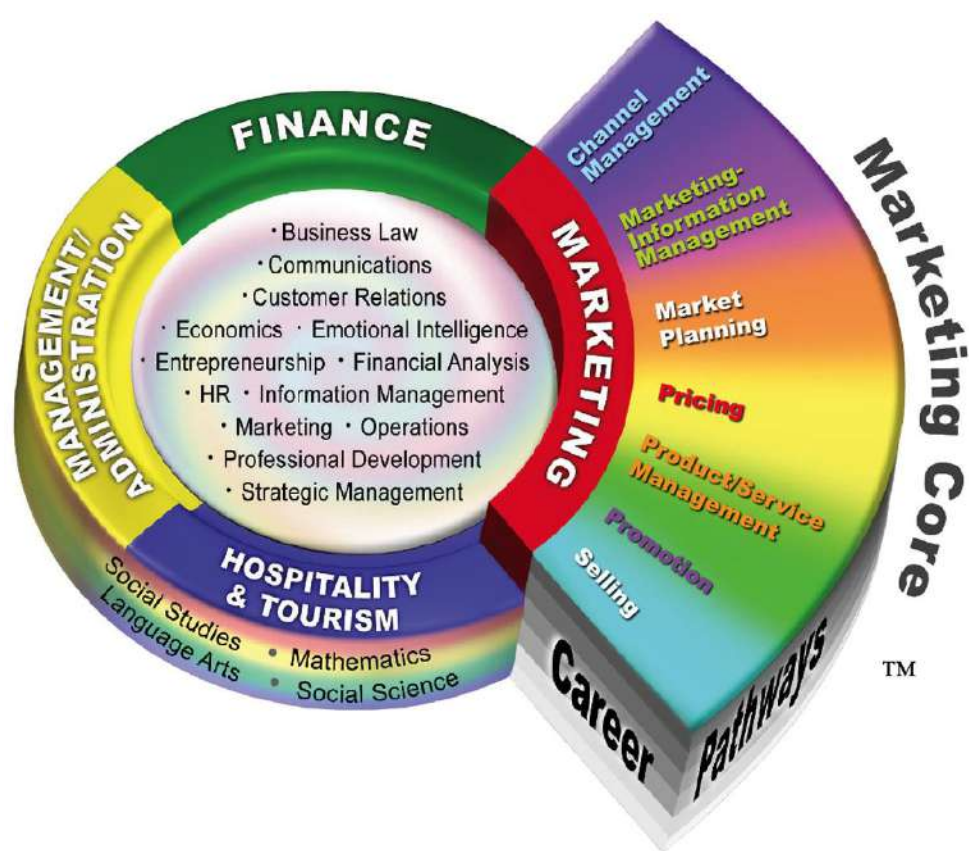
Figure 2. Schematic of Curriculum Framework for the Business Administration Core and Marketing Core

SCANS Competencies & Skills

Appendix B

SCANS

Background

The Secretary's Commission on Achieving Necessary Skills (SCANS) was established in February 1990 to examine the demands of the workplace and to determine whether the current and future work force is capable of meeting those demands. Commission members included 31 representatives from the nation's schools, businesses, unions and government. The Commission issued its first report, "What Work Requires of Schools," in June 1991. This report told educators and employers what students and workers need to know and be able to do in order to succeed in the workplace. This kind of information is especially vital today, when more than half of our young people leave school without the basic skills required to find and hold a good job.

Specifically, the Commission was directed to advise the Secretary of Labor on the type and level of skills required to enter employment. In carrying out this charge, the Commission was asked to:

1. Define the skills needed for employment;

2. Propose acceptable levels in those skills;

3. Suggest effective ways to assess proficiency; and

4. Develop a strategy to disseminate the findings to the nation's schools, businesses and homes.

The Commission identified two types of skills: competencies and foundations. Competencies are the skills necessary for success in the workplace and are organized into five areas. Foundations are skills and qualities that underlie the competencies. The competencies and foundations are generic—most of them are required for most jobs.

Competencies

Resources

1   Allocates Time—Selects relevant, goal-related activities; ranks them in order of importance; allocates time to activities; and understands, prepares and follows schedules. Competent performance in allocating time includes properly identifying tasks to be completed; ranking tasks in order of importance; developing and following an effective, workable schedule based on accurate estimates of such things as importance of tasks, time to complete tasks, time available for completion and task deadlines; avoiding wasting time; and accurately evaluating and adjusting a schedule.

2   Allocates Money—Uses or prepares budgets, including making cost and revenue forecasts, keeps detailed records to track budget performance and makes appropriate adjustments. Competent performance in allocating money includes accurately preparing and using a budget according to a consistent and orderly accounting method; accurately calculating future budgetary needs based on projected costs and revenues; accurately tracking the extent to which actual costs and revenues differ from the estimated budget; and taking appropriate and effective actions.

3   Allocates Material and Facility Resources—Acquires, stores and distributes materials, supplies, parts, equipment, space or final products in order to make the best use of them. Competent performance in allocating material and facility resources includes carefully planning the steps involved in the acquisition, storage and distribution of resources; safely and efficiently acquiring, transporting or storing them; maintaining them in good condition; and distributing them to the end user.

4   Allocates Human Resources—Assesses knowledge and skills and distributes work accordingly, evaluates performance and provides feedback. Competent performance in allocating human resources includes accurately assessing peoples' knowledge, skills, abilities and potential; identifying present and future workload; making effective matches between individual talents and workload; and actively monitoring performance and providing feedback.

Information

5   Acquires and Evaluates Information—Identifies need for data, obtains them from existing sources or creates them and evaluates their relevance and accuracy. Competently performing the tasks of acquiring data and evaluating information includes analytic questions to determine specific information needs; selecting possible information and evaluating its appropriateness; and determining when new information must be created.

6   Organizes and Maintains Information—Organizes, processes and maintains written or computerized records and other forms of information in a systematic fashion. Competently performing the tasks of organizing and maintaining information includes understanding and organizing information from computer, visual, oral and physical sources in readily accessible formats, such as computerized data bases, spreadsheets, microfiche, video disks, paper files, etc.; when necessary, transforming data into different formats in order to organize them by the application of various methods such as sorting, classifying or more formal methods.

7   Interprets and Communicates Information—Selects and analyzes information and communicates the results to others using oral, written, graphic, pictorial or multi-media methods. Competently performing the tasks of communicating and interpreting information to others includes determining information to be communicated; identifying the best methods to present information (e.g., overheads, handouts); if necessary, converting to desired format and conveying information to others through a variety of means including oral presentation, written communication, etc.

8   Uses Computers to Process Information—Employs computers to acquire, organize, analyze and communicate information. Competently using computers to process information includes entering, modifying, retrieving, storing and verifying data and other information; choosing format for display (e.g., line graphs, bar graphs, tables, pie charts, narrative); and ensuring the accurate conversion of information into the chosen format.

Interpersonal

9   Participates as a Member of a Team—Works cooperatively with others and contributes to group with ideas, suggestions and effort. Demonstrating competence in participating as a member of a team includes doing own share of tasks necessary to complete a project; encouraging team members by listening and responding appropriately to their contributions; building on individual team members' strengths; resolving differences for the benefit of the team; taking personal responsibility for accomplishing goals; and responsibly challenging existing procedures, policies or authorities.

10   Teaches Others—Helps others learn. Demonstrating competence in teaching others includes helping others to apply related concepts and theories to tasks through coaching or other means; identifying training needs; conveying job information to allow others to see its applicability and relevance to tasks; and assessing performance and providing constructive feedback/reinforcement.

11   Serves Clients/Customers—Works and communicates with clients and customers to satisfy their expectations. Demonstrating competence in serving clients and customers includes actively listening to customers to avoid misunderstandings and identifying needs; communicating in a positive manner especially when handling complaints or conflict; and efficiently obtaining additional resources to satisfy client needs.

12   Exercises Leadership—Communicates thoughts, feelings and ideas to justify a position; encourages, persuades, convinces or otherwise motivates an individual or groups, including responsibly challenging existing procedures, policies or authority. Demonstrating competence in exercising leadership includes making positive use of the rules/values followed by others; justifying a position logically and appropriately; establishing credibility through competence and integrity; and taking minority viewpoints into consideration.

13   Negotiates to Arrive at a Decision—Works toward an agreement that may involve exchanging specific resources or resolving divergent interests. Demonstrating competence in negotiating to arrive at a decision involves researching opposition and the history of the conflict; setting realistic and attainable goals; presenting facts and arguments; listening to and reflecting on what has been said; clarifying problems and resolving conflicts; adjusting quickly to new facts/ideas; proposing and examining possible options; and making reasonable compromises.

14   Works with Cultural Diversity—Works well with men and women and with a variety of ethnic, social or educational backgrounds. Demonstrating competence in working with cultural diversity involves understanding one's own culture and those of others and how they differ; respecting the rights of others while helping them make cultural adjustments where necessary; basing impressions on individual performance, not on stereotypes; and understanding concerns of members of other ethnic and gender groups.

Systems

15   Understands Systems—Knows how social, organizational and technological systems work and operates effectively within them. Demonstrating competence in understanding systems involves knowing how a system's structures relate to goals; responding to the demands of the system/organization; knowing the right people to ask for information and where to get resources; and functioning within the formal and informal codes of the social/organizational system.

16   Monitors and Corrects Performance—Distinguishes trends, predicts impact of actions on system operations, diagnoses deviations in the function of a system/organization and takes necessary action to correct performance. Demonstrating competence in monitoring and correcting performance includes identifying trends and gathering needed information about how the system is intended to function; detecting deviations from system's intended purpose; troubleshooting the system; and making changes to the system to rectify system functioning and to ensure quality of product.

17   Improves and Designs Systems—Makes suggestions to modify existing systems to improve products or services and develops new or alternative systems. Demonstrating competence in improving or designing systems involves making suggestions for improving the functioning of the system/organization; recommending alternative system designs based on relevant feedback; and responsibly challenging the status quo to benefit the larger system.

Technology

18   Selects Technology—Judges which set of procedures, tools or machines, including computers and their programs, will produce the desired results. Demonstrating competence in selecting technology includes determining desired outcomes and applicable constraints; visualizing the necessary methods and applicable technology; evaluating specifications; and judging which machine or tool will produce the desired results.

19   Applies Technology to Task—Understands the overall intent and the proper procedures for setting up and operating machines, including computers and their programming systems. Demonstrating competence in how to apply technology to task includes understanding how different parts of machines interact and how machines interact with broader production systems; on occasion installing machines including computers; setting up machines or systems of machines efficiently to get desired results; accurately interpreting machine output; and detecting errors from program output.

20   Maintains and Troubleshoots Technology—Prevents, identifies or solves problems in machines, computers and other technologies. Demonstrating competence in maintaining and troubleshooting technology includes identifying, understanding and performing routine preventative maintenance and service on technology; detecting more serious problems; generating workable solutions to correct deviations; and recognizing when to get additional help.

Foundation Skills

Basic Skills

1   Reading—Locates, understands and interprets written information in prose and documents—including manuals, graphs and schedules—to perform tasks; learns from text by determining the main idea or essential message; identifies relevant details, facts and specifications; infers or locates the meaning of unknown or technical vocabulary; judges the accuracy, appropriateness, style and plausibility of reports, proposals or theories of other writers.

2   Writing—Communicates thoughts, ideas, information and messages in writing; records information completely and accurately; composes and creates documents such as letters, directions, manuals, reports, proposals, graphs, flow-charts; uses language, style, organization and format appropriate to the subject matter, purpose and audience; includes supporting documentation and attends to level of detail; and checks, edits and revises for correct information, appropriate emphasis, form, grammar, spelling and punctuation.

3   Arithmetic—Performs basic computations; uses basic numerical concepts such as whole numbers and percentages in practical situations; makes reasonable estimates of arithmetic results without a calculator; and uses tables, graphs, diagrams and charts to obtain or convey quantitative information.

4   Mathematics—Computational skills needed in maintaining records, estimating results, using spreadsheets or applying statistical process.

5   Listening—Receives, attends to, interprets and responds to verbal messages and other cues such as body language in ways that are appropriate to the purpose; for example, to comprehend, to learn, to critically evaluate, to appreciate or to support the speaker.

6   Speaking—Organizes ideas and communicates oral messages appropriate to listeners and situations; participates in conversation, discussion and group presentations; selects an appropriate medium for conveying a message; uses verbal language and other cues such as body language appropriate in style, tone and level of complexity to the audience and the occasion; speaks clearly and communicates a message; understands and responds to listener feedback; and asks questions when needed.

Thinking Skills

7   Creative Thinking—Uses imagination freely, combines ideas or information in new ways, makes connections between seemingly unrelated ideas and reshapes goals in ways that reveal new possibilities.

8   Decision Making—Specifies goals and constraints, generates alternatives, considers risks and evaluates and chooses best alternative.

9   Problem Solving—Recognizes that a problem exists (i.e., there is a discrepancy between what is and what should or could be); identifies possible reasons for the discrepancy; devises and implements a plan of action to resolve it; evaluates and monitors progress; and revises plan as indicated by findings.

10   Seeing Things in the Mind's Eye—Organizes and processes symbols, pictures, graphs, objects or other information; for example, sees a building from a blueprint; a system's operation from schematics; the flow of work activities from narrative descriptions; or the taste of food from reading a recipe.

11   Knowing How to Learn—Uses efficient learning techniques to acquire and apply new knowledge and skills.

12   Reasoning—Discovers a rule or principle underlying the relationship between two or more objects and applies it in solving a problem.

Personal Qualities

13   Responsibility—Exerts a high level of effort and perseverance toward goal attainment; works hard to become excellent at doing tasks by setting high standards, paying attention to details, working well and displaying a high level of concentration even when assigned an unpleasant task; and displays high standards of attendance, punctuality, enthusiasm, vitality and optimism in approaching and completing tasks.

14   Self-Esteem—Believes in own self-worth and maintains a positive view of self.

15   Social—Demonstrates understanding, friendliness, adaptability, empathy and politeness in new and on-going group settings; asserts self in familiar and unfamiliar social situations; relates well to others; responds appropriately as the situation requires; and takes an interest in what others say and do.

16   Self-Management—Assesses own knowledge, skills and abilities accurately; sets well-defined and realistic personal goals; monitors progress toward goal attainment and motivates self through goal achievement; exhibits self-control and responds to feedback unemotionally and non-defensively; and is a "self-starter."

17   Integrity/Honesty—Chooses ethical courses of action.

.	Resources				Information				Interpersonal						Systems			Technology		
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20
BL:003		x	x		x	x	x					x			x					
CM:001					x										x					
CM:003					x	x	x	x							x					
CM:004					x	x	x	x							x			x		
CO:057					x										x					
CO:084					x									x	x					
CO:061					x				x			x			x					
CO:114					x	x	x				x				x				x	
CO:053					x				x			x			x					
CO:085					x	x									x					
CO:086	x					x		x							x			x		
CO:087							x								x			x		
CR:004											x			x	x					
CR:029											x		x	x						
CR:005					x						x				x					
CR:006											x			x	x					
CR:019											x			x	x					
CR:007							x				x			x	x					
CR:009							x				x			x	x					
CR:010							x				x			x	x					
CR:001					x	x	x								x					
CR:002					x		x								x					
EC:008							x								x					
EC:013							x								x					
HR:360					x					x					x					
IM:012					x	x	x	x							x					

SCANs Competencies & Skills

	Resources				Information				Interpersonal						Systems			Technology		
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20
MK:001					x						x				x					
MK:002					x										x					
MP:001					x	x	x	x							x					
MP:003					x		x	x						x	x					
OP:004					x										x					
OP:005					x		x					x			x					
OP:006					x		x								x					
OP:007					x	x	x		x						x					
OP:008					x	x	x								x					
OP:009					x	x	x								x					
OP:010					x	x	x								x					
OP:013					x	x	x								x					
OP:152					x	x	x								x					
OP:153					x	x	x								x					
OP:441					x										x					
OP:064						x									x					
OP:015			x		x										x					
OP:016					x	x	x	x							x					
OP:031					x	x	x	x							x					
OP:017					x										x					
OP:442			x					x							x	x		x	x	x
OP:443					x										x					
PD:024					x										x					
PR:001					x	x	x	x							x					
PR:002					x	x	x	x							x					
SE:017					x	x	x	x							x					

	Resources				Information				Interpersonal						Systems			Technology		
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20
SE:076					X	X	X	X			X				X					
SE:932					X	X	X	X							X					
SE:062					X	X	X	X							X					
SE:019					X						X				X					
SE:048					X	X	X	X							X					
SE:110					X	X	X	X			X				X					
SE:111					X	X	X	X			X				X					
SE:114					X	X	X				X				X					

	Basic Skills						Thinking Skills						Personal Qualities				
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
BL:003	x	x			x	x		x				x	x				
CM:001	x	x			x	x						x					
CM:003	x	x			x	x						x					
CM:004	x	x			x	x						x					
CO:057	x																
CO:084					x	x									x		
CO:061					x	x									x	x	
CO:114	x	x			x	x						x			x		
CO:053					x	x						x			x		
CO:085	x	x			x	x					x						
CO:086	x					x						x					
CO:087	x		x									x					
CR:004					x	x						x		x	x		x
CR:029					x	x									x		x
CR:005	x	x			x	x						x			x		
CR:006					x	x						x			x		x
CR:019					x	x						x			x		x
CR:007	x	x			x	x		x				x		x	x		x
CR:009					x	x			x			x		x	x		x
CR:010					x	x			x			x		x	x		x
CR:001	x	x			x	x	x			x		x					
CR:002		x			x	x		x	x			x					
EC:008	x	x			x	x						x					
EC:013	x	x			x	x		x	x			x	x				
HR:360	x	x										x					
IM:012	x	x			x	x			x			x					

	Basic Skills						Thinking Skills						Personal Qualities				
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
MK:001												x			x		
MK:002												x					
MP:001	x	x			x	x		x	x			x					
MP:003	x	x			x	x		x	x			x					
OP:004	x				x	x						x					
OP:005	x	x			x	x			x								
OP:006	x	x			x	x						x					
OP:007	x	x			x	x			x			x	x				
OP:008					x	x						x	x				
OP:009	x	x			x	x			x			x	x				x
OP:010	x	x			x	x			x			x	x				
OP:013	x	x			x	x			x			x	x				
OP:152	x	x			x	x			x			x	x				
OP:153	x	x			x	x			x			x	x				
OP:441																	
OP:064																	
OP:015												x					
OP:016	x	x	x		x	x		x				x	x				
OP:031	x	x	x		x	x		x				x					
OP:017	x	x										x					
OP:442													x				
OP:443										x							
PD:024	x	x			x	x						x	x			x	
PR:001	x	x			x	x						x					
PR:002	x	x			x	x						x					
SE:017	x	x			x	x						x					

	Basic Skills						Thinking Skills						Personal Qualities				
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
SE:076	x	x			x	x						x					
SE:932	x	x			x	x						x					
SE:062	x	x			x	x						x					
SE:019	x											x					
SE:048	x	x			x	x						x					
SE:110	x	x			x	x	x					x			x		
SE:111	x	x			x	x	x					x			x		
SE:114	x	x			x	x	x					x			x		

21st Century Skills

Appendix C

21ˢᵗ Century Skills

Overview

While the No Child Left Behind Act of 2001 identifies the core subjects as the traditional academic areas, business and education leaders along with policymakers have identified several other significant content areas that they consider critical to educational success in the 21st century. This group known as The Partnership for 21st Century Skills leads the way for including these skills in education. To encourage school districts to address these skills, the group provides the necessary tools and resources schools need to add the skills to the curriculum.

The Partnership for 21st Century Skills conducted extensive initial research with thousands of key stakeholders and citizens across the country. The Partnership has identified six elements of 21st century learning:

- Core subjects
- 21st century themes
- Learning and innovation skills
- Information, media, and technology skills
- Life and career skills
- 21st century assessments

21st Century Content

The Partnership for 21st Century Skills has created the graphic below to summarize their work. The graphic represents both 21st century skills student outcomes (as represented by the arches of the rainbow) and 21st century skills support systems (as represented by the pools at the bottom). The text following the graphic describes the Partnership's perspective and then lists the student outcomes identified. To facilitate the crosswalk of 21st Century Skills with MBA Research performance indicators, numbers have been given to each skill.
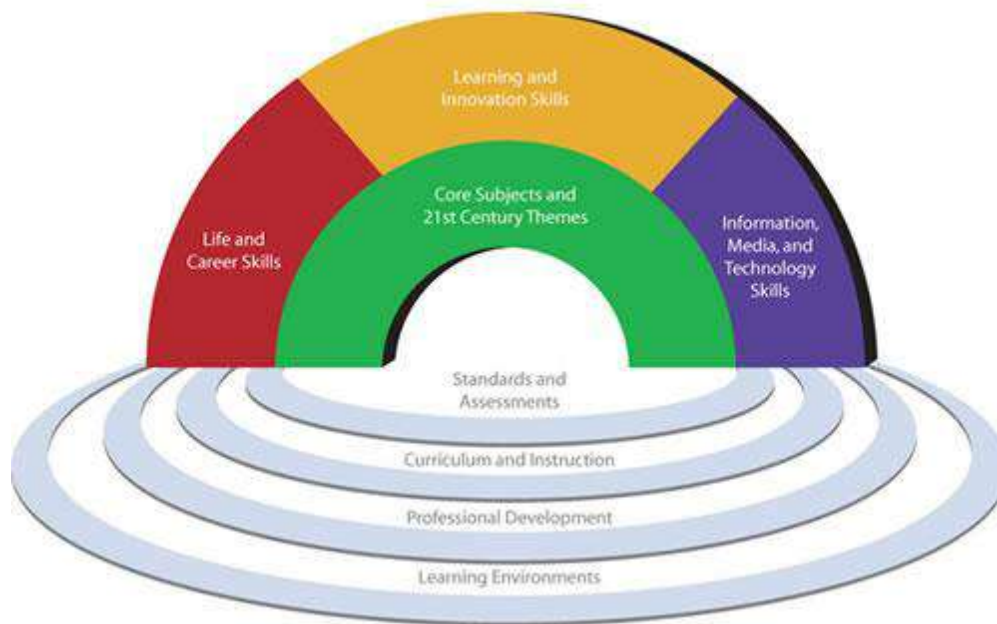
Mastery of core subjects and 21st century themes is essential for students in the 21st century. Core subjects include:

- English, reading or language arts
- World languages
- Arts
- Mathematics
- Economics
- Science
- Geography
- History
- Government and Civics

In addition to these subjects, we (The Partnership) believe schools must move beyond a focus on basic competency in core subjects to promoting understanding of academic content at much higher levels by weaving 21st century interdisciplinary themes into core subjects:

Global Awareness

1. Using 21st century skills to understand and address global issues
2. Learning from and working collaboratively with individuals representing diverse cultures, religions and lifestyles in a spirit of mutual respect and open dialogue in personal, work and community contexts
3. Understanding other nations and cultures, including the use of non-English languages

Financial, Economic, Business and Entrepreneurial Literacy

1. Knowing how to make appropriate personal economic choices
2. Understanding the role of the economy in society
3. Using entrepreneurial skills to enhance workplace productivity and career options

Civic Literacy

1. Participating effectively in civic life through knowing how to stay informed and understanding governmental processes
2. Exercising the rights and obligations of citizenship at local, state, national and global levels
3. Understanding the local and global implications of civic decisions

Health Literacy

1. Obtaining, interpreting and understanding basic health information and services and using such information and services in ways that are health enhancing
2. Understanding preventive physical and mental health measures, including proper diet, nutrition, exercise, risk avoidance and stress reduction
3. Using available information to make appropriate health-related decisions
4. Establishing and monitoring personal and family health goals
5. Understanding national and international public health and safety issues

Learning and Innovation Skills

Learning and innovation skills are increasingly being recognized as the skills that separate students who are prepared for increasingly complex life and work environments in the 21st century, and those who are not. A focus on creativity, critical thinking, communication and collaboration is essential to prepare students for the future.

Creativity & Innovation

1. Demonstrating originality and inventiveness in work
2. Developing, implementing and communicating new ideas to others
3. Being open and responsive to new and diverse perspectives
4. Acting on creative ideas to make a tangible and useful contribution to the domain in which the innovation occurs

Critical Thinking & Problem Solving

1. Exercising sound reasoning in understanding
2. Making complex choices and decisions
3. Understanding the interconnections among systems
4. Identifying and asking significant questions that clarify various points of view and lead to better solutions
5. Framing, analyzing and synthesizing information in order to solve problems and answer questions

Communication & Collaboration

1. Articulating thoughts and ideas clearly and effectively through speaking and writing
2. Demonstrating ability to work effectively with diverse teams
3. Exercising flexibility and willingness to be helpful in making necessary compromises to accomplish a common goal
4. Assuming shared responsibility for collaborative work

Information, Media and Technology Skills

People in the 21st century live in a technology and media-suffused environment, marked by access to an abundance of information, rapid changes in technology tools, and the ability to collaborate and make individual contributions on an unprecedented scale. To be effective in the 21st century, citizens and workers must be able to exhibit a range of functional and critical thinking skills related to information, media and technology.

Information Literacy

1. Accessing information efficiently and effectively, evaluating information critically and competently and using information accurately and creatively for the issue or problem at hand
2. Possessing a fundamental understanding of the ethical/legal issues surrounding the access and use of information

Media Literacy

1. Understanding how media messages are constructed, for what purposes and using which tools, characteristics and conventions.
2. Examining how individuals interpret messages differently, how values and points of view are included or excluded and how media can influence beliefs and behaviors.
3. Possessing a fundamental understanding of the ethical/legal issues surrounding the access and use of information

ICT (Information, Communications & Technology) Literacy

1. Using digital technology, communication tools and/or networks appropriately to access, manage, integrate, evaluate, and create information in order to function in a knowledge economy
2. Using technology as a tool to research, organize, evaluate and communicate information, and the possession of a fundamental understanding of the ethical/legal issues surrounding the access and use of information

Life & Career Skills

Today's life and work environments require far more than thinking skills and content knowledge. The ability to navigate the complex life and work environments in the globally competitive information age requires students to pay rigorous attention to developing adequate life and career skills.

Flexibility & Adaptability

1. Adapting to varied roles and responsibilities
2. Working effectively in a climate of ambiguity and changing priorities

Initiative & Self-Direction

1. Monitoring one's own understanding and learning needs
2. Going beyond basic mastery of skills and/or curriculum to explore and expand one's own learning and opportunities to gain expertise
3. Demonstrating initiative to advance skill levels towards a professional level
4. Defining, prioritizing and completing tasks without direct oversight
5. Utilizing time efficiently and managing workload
6. Demonstrating commitment to learning as a lifelong process

Social & Cross-Cultural Skills

1. Working appropriately and productively with others
2. Leveraging the collective intelligence of groups when appropriate
3. Bridging cultural differences and using differing perspectives to increase innovation and the quality of work

Productivity & Accountability

1. Setting and meeting high standards and goals for delivering quality work on time
2. Demonstrating diligence and a positive work ethic (e.g., being punctual and reliable)

Leadership & Responsibility

1. Using interpersonal and problem-solving skills to influence and guide others toward a goal
2. Leveraging strengths of others to accomplish a common goal
3. Demonstrating integrity and ethical behavior
4. Acting responsibly with the interests of the larger community in mind

For more information about 21st Century Skills, check out the Partnership for 21st Century Skills website at http://www.p21.org/.

	Global Awareness		Financial, Economic, Business & Entrepren. Literacy			Civic Literacy		Health Literacy				Creativity & Innovation	Critical Thinking & Problem Solving					Communication & Collaboration			
	1	2	1	2	3	1	3	1	2	3	4	2	1	2	3	4	5	1	2	3	4
BL:003				x									x					x			
CM:001													x		x			x			
CM:003															x			x			
CM:004	x			x									x		x			x			
CO:057													x					x			
CO:084												x						x	x		
CO:061													x					x			
CO:114																		x			
CO:053																		x	x	x	x
CO:085															x		x				
CO:086															x		x				
CO:087												x			x		x				
CR:004													x								
CR:029																		x			
CR:005																		x			
CR:006													x								
CR:019		x																x		x	
CR:007													x					x			
CR:009																		x		x	
CR:010													x					x			
CR:001													x								
CR:002													x		x						
EC:008				x		x	x						x		x						
EC:013													x	x				x			

	Global Awareness		Financial, Economic, Business & Entrepren. Literacy			Civic Literacy		Health Literacy				Creativity & Innovation	Critical Thinking & Problem Solving					Communication & Collaboration			
	1	2	1	2	3	1	3	1	2	3	5	2	1	2	3	4	5	1	2	3	4
HR:360																					
IM:012													x		x			x			
MK:001	x												x		x			x			
MK:002													x		x						
MP:001													x		x			x			
MP:003													x		x			x			
OP:004									x		x										
OP:005								x	x	x	x										
OP:006													x		x						
OP:007													x		x						
OP:008													x	x	x						
OP:009															x						
OP:010													x	x	x	x	x	x			
OP:013															x						
OP:152													x	x	x						
OP:153													x	x	x						
OP:441													x		x						
OP:064													x								
OP:015													x		x			x			
OP:016					x								x	x	x						
OP:031					x								x	x	x						
OP:017													x		x			x			
OP:442																					
OP:443															x						

	Global Awareness		Financial, Economic, Business & Entrepren. Literacy			Civic Literacy		Health Literacy				Creativity & Innovation	Critical Thinking & Problem Solving					Communication & Collaboration			
	1	2	1	2	3	1	3	1	2	3	4	2	1	2	3	4	5	1	2	3	4
PD:024			x										x					x			
PR:001													x		x			x			
PR:002													x								
SE:017				x									x					x			
SE:076													x								
SE:932													x								
SE:062																					
SE:019													x		x						
SE:048													x								
SE:110																		x			
SE:111																x		x			
SE:114													x		x						

	Info. Literacy		Media Literacy	ICT (Information, Communications &Technology) Literacy		Flexibility & Adaptability		Social & Cross-Cultural Skills			Productivity & Accountability		Leadership & Responsibility			
	1	2	3	1	2	1	2	1	2	3	1	2	1	2	3	4
BL:003																
CM:001																
CM:003																
CM:004																
CO:057																
CO:084						x										
CO:061																
CO:114								x								x
CO:053								x	x	x						
CO:085	x															
CO:086	x															
CO:087	x															
CR:004																
CR:029								x		x			x		x	
CR:005																
CR:006																
CR:019																
CR:007																
CR:009																
CR:010																
CR:001																
CR:002																
EC:008																

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	Info. Literacy		Media Literacy	ICT (Information, Communications &Technology) Literacy		Flexibility & Adaptability		Social & Cross-Cultural Skills			Productivity & Accountability		Leadership & Responsibility			
	1	2	3	1	2	1	2	1	2	3	1	2	1	2	3	4
EC:013																
HR:360														x		x
IM:012																
MK:001																
MK:002																
MP:001																
MP:003																
OP:004																
OP:005											x	x	x		x	x
OP:006	x										x	x			x	x
OP:007	x										x	x			x	x
OP:008											x	x	x	x	x	x
OP:009															x	x
OP:010						x	x								x	x
OP:013															x	x
OP:152												x			x	x
OP:153												x			x	x
OP:441		x			x											
OP:064		x	x		x											
OP:015																
OP:016	x															
OP:031	x															
OP:017																
OP:442				x	x											

	Info. Literacy		Media Literacy	ICT (Information, Communications &Technology) Literacy		Flexibility & Adaptability		Social & Cross-Cultural Skills			Productivity & Accountability		Leadership & Responsibility			
	1	2	3	1	2	1	2	1	2	3	1	2	1	2	3	4
OP:443																
PD:024	x															
PR:001																
PR:002																
SE:017																
SE:076																
SE:932																
SE:062	x	x		x	x											
SE:019																
SE:048																
SE:110								x								
SE:111	x									x						
SE:114																

Marketing Principles (Standard)
LAP List

Appendix D

Performance Indicator #	LAP #*	Level	LAP Title
BL:003	LAP-BL-001	CS	Own It Your Way (Types of Business Ownership)
CM:001	LAP-CM-002	CS	Chart Your Channels (Channel Management)
CM:003	LAP-CM-003	CS	Channel It (Channels of Distribution)
CO:114	CO:114 Just for You!^	CS	Handle telephone calls in a businesslike manner
CO:087	CO:087 Just for You!^	CS	Select and use appropriate graphic aids
CR:004	LAP-CR-004	CS	Set Your Mind to It (Customer-Service Mindset)
CR:006	CR:006 Just for You!^	CS	Respond to customer inquiries
CR:007	CR:007 Just for You!^	CS	Interpret business policies to customers/clients
CR:009	LAP-CR-009	CS	Making Mad Glad (Handling Difficult Customers)
CR:010	LAP-CR-010	CS	Righting Wrongs (Handling Customer Complaints)
CR:001	LAP-CR-006	CS	Share the Promise (Identifying Brand Promise)
EC:008	LAP-EC-016	CS	Regulate and Protect (Government and Business)
EC:013	LAP-EC-018	CS	Make the Most of It (Productivity)
HR:360	HR:360 Just for You!^	CS	Orient new employees
IM:012	LAP-IM-012	CS	Data Do It (Need for Marketing Data)
MK:001	LAP-MK-004	CS	Have It Your Way (Nature of Marketing)
MK:002	LAP-MK-001	CS	Work the Big Six (Marketing Functions)
MP:001	LAP-MP-002	CS	Pick the Mix (Nature of Marketing Strategies)
MP:003	LAP-MP-003	CS	Have We Met? (Market Identification)

* LAP #s subject to change

^ Just for You! Modules available exclusively through the MBA Learning Center

Performance Indicator #	LAP #*	Level	LAP Title
OP:007	OP:007 Just for You!^	PQ	Follow safety precautions
OP:009	OP:009 Just for You!^	CS	Explain procedures for handling accidents
OP:013	OP:013 Just for You!^	CS	Explain routine security precautions
OP:015	LAP-OP-002	CS	Buy Right (Purchasing)
OP:017	LAP-OP-017	CS	Can You Make It? (Nature of Production)
PD:024	LAP-PD-021	CS	Career Opportunities in Marketing
PR:001	LAP-PR-002	CS	Razzle Dazzle (Nature of Promotion)
PR:002	LAP-PR-004	CS	Know Your Options (Product and Institutional Promotion)
SE:017	LAP-SE-117	CS	Sell Away (Nature of Selling)
SE:076	LAP-SE-130	CS	Go Beyond the Sale (Customer Service in Selling)
SE:932	LAP-SE-121	CS	Sell Right (Selling Policies)
SE:062	LAP-SE-131	CS	Get Informed (Acquiring Product Information for Use in Selling)
SE:019	SE:019 Just for You!^	CS	Explain the use of brand names in selling
SE:048	LAP-SE-048	CS	Set Your Sales (The Selling Process)
SE:111	SE:111 Just for You!^	CS	Determine customer/client needs
SE:114	LAP-SE-111	CS	Get Specific (Recommending Specific Product)

* LAP #s subject to change
^ Just for You! Modules available exclusively through the MBA Learning Center

Accelerated and Honors-Ready Versions of *Marketing Principles*

Appendix E

Defining the Level of Rigor

Overview

To meet the needs of highly diverse school populations, MBA Research has developed multiple versions of *Marketing Principles* at varying levels or degrees of rigor: Standard, Accelerated, and Honors-Ready. Each of the three levels is progressively more advanced and varies based on the number of competencies or performance indicators addressed, the complexity of these performance indicators, and pedagogical methods used in each version of the course.

The **standard**-level *Marketing Principles* is targeted at students of typical ability as well as ESL students and other students with special needs. The standard-level version of the course contains 60 performance indicators.

The **accelerated**-level *Marketing Principles* is appropriate for students of above-average ability. This level increases both the breadth and depth of content and addresses 80 performance indicators. (Based on field experience, previous versions of *Marketing Principles* offered by MBA Research have been relabeled as Accelerated.)

The **honors-ready** *Marketing Principles* is designed for advanced students. At the honors-ready level, additional higher-level, complex content is addressed, and there is a greater focus on inquiry, problem solving, and project-based learning. The honors-ready version of this course contains 90 performance indicators.

Next Steps

As a result of feedback provided by educators in the field, this version of the *Marketing Principles* course guide was developed at the standard level of rigor for students of typical ability. However, some schools and/or states may desire a more rigorous version of the course, either at the accelerated or honors-ready level. To facilitate such efforts, the course descriptions, learning outcomes, and sequences of instruction for these more rigorous versions are included on the following pages.

Course Description

Marketing Principles (Accelerated) introduces students to the dynamic processes and activities in marketing. The course provides core content applicable to all aspects of marketing so that students acquire a deep understanding of all marketing activities. Students develop an understanding and skills in such areas as channel management, marketing-information management, market planning, pricing, product/service management, promotion, and selling. Current technology will be used to acquire information and to complete the projects. Throughout the course, students are presented ethical dilemmas and problem-solving situations for which they must apply academic and critical-thinking skills.

Instructional Area: Channel Management (CM)

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

Performance Indicator: CM:001 Explain the nature and scope of channel management (CS)
LAP-CM-002
Objectives:
a. Define the following terms: channel, channel intensity, channel length, distribution patterns, exclusive distribution, selective distribution, and intensive distribution.
b. Explain how channel members add value.
c. Discuss channel functions (e.g., information, promotion, contact, matching, negotiation, financing, and risk taking).
d. Explain key channel tasks (e.g., marketing, packaging, financing, storage, delivery, merchandising, and personal selling).
e. Describe when a channel will be most effective.
f. Distinguish between horizontal and vertical conflict.
g. Describe channel management decisions (i.e., selecting channel members, managing and motivating channel members, and evaluating channel members).
h. Explain channel design decisions (i.e., analyzing customer needs, setting channel objectives, identifying major alternatives—types of intermediaries, number of intermediaries, responsibilities of intermediaries).
i. Discuss the relationship between the product being distributed and the pattern of distribution it uses.

Performance Indicator: CM:003 Explain the nature of channels of distribution (CS) LAP-CM-003
Objectives:
a. Define the following terms: channels of distribution, producer, ultimate consumer, industrial user, middlemen, intermediaries, retailers, wholesalers, agents, direct channels, and indirect channels.
b. Identify types of channel members/intermediaries/middlemen.
c. Explain the importance of middlemen in the channel of distribution.
d. Describe types of channels for consumer goods and services.
e. Describe types of channels for industrial goods and services.

Instructional Area: Channel Management (CM) (cont'd)

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

Performance Indicator: CM:004 Describe the use of technology in the channel management function (CS)
Objectives:
a. Identify ways that the use of technology impacts the channel management function.
b. Explain specific applications of technology in channel management.
c. Discuss ways that the use of technology in channel management impacts relationships with channel members.
d. Explain ways that the use of technology in channel management facilitates global trade.
e. Describe benefits associated with the use of technology in channel management.
f. Explain barriers to the use of technology in channel management.

Performance Indicator: CM:005 Explain legal considerations in channel management (SP)
Objectives:
a. Define the following terms: exclusive dealing, tying agreements, full-line forcing, and closed territories.
b. Describe illegal channel management activities.
c. Identify laws that govern channel management activities.
d. Explain the impact of regulation on channel management activities.

Performance Indicator: CM:006 Describe ethical considerations in channel management (SP)
Objectives:
a. Define the following terms: exploitation, coercion, gray market, and slotting allowance.
b. Discuss reasons that marketers should not manipulate the availability of a product for the purpose of exploitation.
c. Describe ethical issues associated with serving markets with low profit potential.
d. Explain when ethical issues can arise in a distribution channel.
e. Explain the ethical implications of the gray market on U.S. businesses.
f. Describe how communication relates to channel management ethics.

Instructional Area: Communication Skills (CO)

Performance Element: Apply verbal skills to obtain and convey information.

Performance Indicator: CO:114 Handle telephone calls in a businesslike manner (CS)
Objectives:
a. Describe proper verbal skills needed to handle telephone calls.
b. Explain attitudes needed when handling telephone calls.
c. Explain standard procedures for taking messages.
d. Describe procedures for handling telephone calls in a businesslike manner.
e. Demonstrate procedures for handling telephone calls in a businesslike manner.

Instructional Area: Communication Skills (CO) (cont'd)

Performance Element: Apply verbal skills to obtain and convey information.

Performance Indicator: CO:053 Participate in group discussions (CS)
  Objectives:
  a. Explain why it is important to participate in group discussions.
  b. Identify effective group discussion techniques.
  c. Discuss the results of inappropriate group discussions.
  d. Explain ways to improve participation in group discussions.
  e. Demonstrate procedures for participating in group discussions.

Performance Element: Record information to maintain and present a report of business activity.

Performance Indicator: CO:085 Utilize note-taking strategies (CS)
  Objectives:
  a. Discuss the importance of taking good notes.
  b. Explain note-taking strategies (e.g., Cornell two-column note-taking, outlining, mapping, charting, etc.).
  c. Identify abbreviations commonly used when note-taking.
  d. Describe common errors in note-taking.
  e. Demonstrate note-taking strategies.

Performance Indicator: CO:086 Organize information (CS)
  Objectives:
  a. Discuss reasons to organize information after taking notes.
  b. Explain the impact that target audience has on the organization of information.
  c. Describe common approaches to organizing/ordering information (e.g., chronological order, problem/solution, most important to least important, deductive order, inductive order, etc.).
  d. Explain techniques that can be used to organize information on the computer.
  e. Demonstrate procedures for organizing information.

Performance Indicator: CO:087 Select and use appropriate graphic aids (CS)
  Objectives:
  a. Discuss reasons to use graphic aids.
  b. Explain commonly used graphic aids (e.g., tables, bar graphs, line graphs, pie charts).
  c. Explain methods utilized to select and use appropriate graphic aids.
  d. Demonstrate procedures for selecting and using appropriate graphic aids.

Instructional Area: Customer Relations (CR)

Performance Element: Foster positive relationships with customers to enhance company image.

Performance Indicator: CR:004 Demonstrate a customer-service mindset (CS) LAP-CR-004
    Objectives:
    a. Identify beliefs held by employees who have a customer-service mindset.
    b. Describe the importance of exhibiting a customer-service mindset.
    c. Identify occasions when employees can exhibit a customer-service mindset.
    d. Describe guidelines for exhibiting a customer-service mindset.
    e. Demonstrate a customer-service mindset.

Performance Indicator: CR:029 Develop rapport with customers (CS)
    Objectives:
    a. Define the following terms: rapport, reciprocity, mirroring, and affinity.
    b. Explain reasons for building rapport with customers (e.g., to create positive connections, to build good relationships, to break the ice).
    c. Explain the role of trust in building rapport.
    d. Describe ways to build rapport with customers (e.g., matching/mirroring customer's communication style, finding common ground, being empathetic, appreciating the customer's point of view).
    e. Explain the importance of nonverbal communication in building rapport with customers.
    f. Demonstrate techniques for developing rapport with customers.

Performance Indicator: CR:005 Reinforce service orientation through communication (CS)
    Objectives:
    a. Define the term service orientation.
    b. Explain the relationship between communication and service.
    c. Identify ways in which employees in business management can demonstrate a service orientation.
    d. Demonstrate procedures for reinforcing a service orientation through communication.

Performance Indicator: CR:006 Respond to customer inquiries (CS)
    Objectives:
    a. Explain the nature of customer inquiries.
    b. Identify the types of customer inquiries.
    c. Discuss the importance of possessing knowledge of the company (e.g., policies, history, capabilities, etc.).
    d. Discuss the importance of possessing adequate product knowledge.
    e. Describe guidelines for handling customer inquiries.
    f. Demonstrate use of proper procedure for solving a customer inquiry in a business situation.

Instructional Area: Customer Relations (CR) (cont'd)

Performance Element: Foster positive relationships with customers to enhance company image.

Performance Indicator: CR:019 Adapt communication to the cultural and social differences among clients (CS)

Objectives:

a. Discuss the purpose of adapting communication to a client's cultural or social community.

b. Explain the importance of context in communication.

c. Discuss reasons for adapting communication to the cultural or social differences among clients.

d. Explain skills associated with adapting communication (e.g., empathy, risk taking, problem solving, etc.).

e. Describe ways to adapt communication to the cultural or social environment of clients.

f. Demonstrate how to adapt communication to the cultural or social differences among clients.

Performance Indicator: CR:007 Interpret business policies to customers/clients (CS)

Objectives:

a. Define the term business policy.

b. Identify characteristics of effective business policies.

c. Describe reasons for having business policies.

d. Explain types of business policies that affect customers.

e. Discuss the role of employees in interpreting business policies.

f. Explain when business policies should be interpreted.

g. Explain guidelines for interpreting business policies to customers.

h. Demonstrate procedures for interpreting business policies to customers.

Performance Element: Resolve conflicts with/for customers to encourage repeat business.

Performance Indicator: CR:009 Handle difficult customers (CS) LAP-CR-009

Objectives:

a. Define the following terms: disagreeable customer, domineering/ superior customers, dishonest customers.

b. Identify types of difficult customers.

c. Describe categories of disagreeable customers.

d. Discuss categories of domineering/superior customers.

e. Describe ways in which customers are dishonest.

f. Identify situations in which customers become difficult.

g. Explain reasons for handling difficult customers.

h. Describe general guidelines for handling difficult customers.

i. Explain specific guidelines for handling types of difficult customers.

j. Demonstrate procedures for handling difficult customers.

Instructional Area: **Customer Relations (CR)** (cont'd)

Performance Element: Resolve conflicts with/for customers to encourage repeat business.

Performance Indicator: CR:010 Handle customer/client complaints (CS) LAP-CR-010
    Objectives:
    a. Define the term complaint.
    b. Identify the costs associated with customer complaints.
    c. Identify reasons for customer complaints.
    d. Describe the benefits of customer complaints.
    e. Explain the importance of appropriately handling customer complaints.
    f. Explain procedures for handling customer complaints.
    g. Demonstrate procedures for handling customer complaints.

Performance Element: Reinforce company's image to exhibit the company's brand promise.

Performance Indicator: CR:001 Identify company's brand promise (CS) LAP-CR-006
    Objectives:
    a. Define the terms touch points, brand, and brand promise.
    b. Explain the importance of a company's brand promise.
    c. Describe factors impacting a company's brand promise.
    d. Demonstrate how to identify a company's brand promise.

Performance Indicator: CR:002 Determine ways of reinforcing the company's image through employee performance (CS)
    Objectives:
    a. Discuss types of company images.
    b. Describe factors that affect a company's image.
    c. Explain the importance of reinforcing the company's image.
    d. Describe ways that employees can reinforce the company's image through their performance.
    e. Demonstrate how to determine ways to reinforce the company's image through employee performance.

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

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

Performance Indicator: IM:012 Describe the need for marketing data (CS) LAP-IM-012
    Objectives:
    a. Define the following terms: facts, estimates, predictions, relationships, and marketing information.
    b. Identify types of information used in marketing decision-making.
    c. Identify types of marketing information useful to marketers.
    d. Describe ways that marketers use marketing information.
    e. Explain the impact of marketing information on marketers.

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

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

Performance Indicator: IM:184 Identify data monitored for marketing decision making (SP)
LAP-IM-184
Objectives:
a. Explain sources of sales data monitored for marketing decision-making (e.g., sales involves, call reports, sales reports, expense reports).
b. Discuss sources of customer data that are monitored for marketing decision-making (e.g., customer records, customer complaints, digital marketing analytics).
c. Explain sources of product data monitored for marketing decision-making (e.g., product returns, service calls, product reviews).
d. Describe financial data monitored for marketing decision-making.
e. Explain sources and types of competitor data that are monitored for marketing decision-making (e.g., competitors' websites, competitors' financial information, salespeople, suppliers and distributors, observable changes in marketing strategies, market share).
f. Discuss sources of data about the external business environment used in marketing decision-making (e.g., trade publications, vendors, economic indicators).

Performance Indicator: IM:001 Explain the nature and scope of the marketing-information management function (SP) LAP-IM-002
Objectives:
a. Define the following terms: marketing information, marketing-information management system, and marketing research.
b. Describe the need for marketing information.
c. Classify types of marketing information as primary or secondary.
d. Describe the types of information marketers should obtain.
e. Categorize internal sources of marketing information.
f. Discuss external sources of marketing information.
g. Explain why marketers should collect information.
h. Describe the characteristics of useful marketing information.
i. Describe reasons that marketers need to gather accurate information.
j. Explain the functions of a marketing-information management system.
k. Contrast marketing research with a marketing-information system.
l. Describe the use of a marketing-information system.
m. Explain the benefits of a marketing-information management system.
n. Discuss the requirements of a marketing-information management system.
o. Explain the role of marketing-information management in marketing.
p. Describe limitations of marketing-information management systems.

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

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

Performance Indicator: IM:025 Explain the role of ethics in marketing-information management (SP)
> **Objectives:**
> a. Describe the importance of credibility and objectivity in marketing-information management.
> b. Explain why the integrity of the marketing-information must be protected.
> c. Explain types of ethical conflicts in marketing-information management.
> d. Discuss ethical issues associated with obtaining information about competitors.
> e. Describe ethical issues created by the use of technology in data collection.

Performance Indicator: IM:183 Describe the use of technology in the marketing-information management function (SP)
> **Objectives:**
> a. Identify ways that the use of technology impacts the marketing-information management function.
> b. Describe how the use of the Internet for marketing-information management tracks and monitors customer website activities.
> c. Discuss how customer-to-business communications on the Internet can be used in marketing-information management (e.g., email reminders, popup notices, online focus groups, etc.)
> d. Explain how the Internet provides services for conducting research (e.g., search engines, tools for online surveys, database access, blogs, etc.)
> e. Discuss marketers' use of virtual realties and simulations in marketing-information management.
> f. Describe how the use of Global Positioning Systems (GPS) can facilitate marketing-information management.
> g. Explain the use of data analysis software in marketing-information management.

Performance Indicator: IM:419 Describe the regulation of marketing-information management (SP)
> **Objectives:**
> a. Define the following terms: self-regulation, SUGGING, FRUGGING, privacy
> b. Explain the role of self-regulation for marketing researchers.
> c. Discuss privacy concerns associated with the collection, storage, mining, and use of data.
> d. Describe the legalities associated with the collection of marketing data from children.
> e. Discuss legal issues associated with the collection and sharing of healthcare data.
> f. Explain legal issues associated with the protection of information held by financial institutions.
> g. Discuss why marketing researchers are excluded from governance under the CAN-SPAM Act.
> h. Explain how marketing researchers are protected from SUGGING and FRUGGING.
> i. Describe legal issues associated with callbacks.
> j. Discuss legal issues associated with the use of automatic dialers when collecting data.
> k. Ascertain the current status of privacy/data security legislation.
> l. Discuss reasons that marketing researchers must consider state, federal, and international laws when collecting data.

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

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

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

Objectives:

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

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

Objectives:

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

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

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

Performance Indicator: IM:284 Describe methods used to design marketing research studies (i.e., descriptive, exploratory, and causal) (SP) LAP-IM-014
   Objectives:
   a. Define the following terms: research design, descriptive design, exploratory design, causal design.
   b. Describe general purposes of marketing research (e.g., explain, predict, monitor, discover, test hypotheses).
   c. Explain the relationship between the research design and the purpose of the research.
   d. Discuss the purposes of using descriptive research.
   e. Explain the purposes of using exploratory research.
   f. Distinguish between descriptive and exploratory research.
   g. Describe the purposes of using causal research.

Performance Indicator: IM:281 Describe options businesses use to obtain marketing research data (i.e., primary and secondary research) (SP) LAP-IM-015
   Objectives:
   a. Distinguish between primary and secondary marketing research.
   b. Describe occasions for using primary sources of marketing research data.
   c. Discuss primary sources of marketing research data.
   d. Describe advantages/disadvantages of primary marketing research.
   e. Explain types of primary research (i.e., quantitative and qualitative).
   f. Explain occasions for using secondary sources of marketing research data.
   g. Describe secondary sources of marketing research data (i.e., internal and external).
   h. Describe advantages/disadvantages with using internal sources of secondary data.
   i. Explain reasons that businesses need to analyze external data.
   j. Explain advantages/disadvantages of secondary marketing research.
   k. Discuss reasons for outsourcing marketing research activities.

Performance Indicator: IM:285 Discuss the nature of sampling plans (i.e., who, how many, how chosen) (SP) LAP-IM-016
   Objectives:
   a. Define the terms population, sample, probability sampling, non-probability sampling, and sampling plan.
   b. Discuss the advantages of using a sample to represent the population.
   c. Explain when it is appropriate to use a sample of the population.
   d. Distinguish between probability and non-probability sample designs.
   e. Explain types of non-probability sample designs.
   f. Describe types of probability sample designs.
   g. Explain types of sampling bias/errors.
   h. Discuss the purpose of sampling plans.
   i. Explain the components of a sampling plan.

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

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

Performance Indicator: IM:289 Describe data-collection methods (e.g., observations, mail, diaries, telephone, Internet, discussion groups, interviews, scanners, tracking tools) (SP) LAP-IM-017
Objectives:
a. Explain reasons for having a variety of data-collection methods.
b. Describe forms of quantitative data collection (e.g., surveys, tracking, experiments).
c. Describe forms of qualitative data collection (e.g., personal interviews, focus groups, observational research).
d. Explain limitations associated with qualitative research.
e. Explain advantages/disadvantages with using observational techniques to collect marketing data.
f. Describe advantages/disadvantages associated with using mail techniques to collect marketing data.
g. Discuss advantages/disadvantages associated with using telephone data-collection methods.
h. Describe ways to use the Internet to collect data.
i. Explain advantages/disadvantages associated with using the Internet as a data-collection method.
j. Describe advantages/disadvantages of using discussion groups to collect data.
k. Discuss advantages/disadvantages associated with using interviews to collect data.
l. Explain advantages/disadvantages associated with using scanners to collect data.

Performance Indicator: IM:418 Explain characteristics of effective data-collection instruments (SP)
Objectives:
a. Explain why data-collection instruments must be carefully designed and administered.
b. Discuss challenges in developing effective data-collection instruments (e.g., cultural differences between researcher and source, resources required for the study, intangible nature of some types of information, difficulty accessing some sources of information).
c. Explain elements of surveys (i.e., a statement to respondents about how information will be used and why it is valuable; clear instructions, including for any skip patterns; appealing format; logical sequence of questions; consideration of how answers to previous items might affect later items).
d. Describe qualities of a good survey item (e.g., clear questions, single focus for each question, neutral questions, balanced questions, appropriate language for the intended respondent, appropriately broad or narrow in scope).
e. Explain how to ensure the quality of observations.
f. Discuss considerations for collecting data online.
g. Describe considerations in using a pre-existing data collection instrument.

Instructional Area: Marketing (MK)

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

Performance Indicator: MK:001 Explain marketing and its importance in a global economy (CS)
LAP-MK-004
Objectives:
a. Define the following terms: marketing and marketing concept.
b. Identify marketing activities.
c. Categorize items that are marketed.
d. Explain where marketing occurs.
e. Explain the elements of the marketing concept.
f. Explain the role of marketing in a private enterprise system.
g. Describe ways in which consumers and businesses would be affected if marketing did not exist.
h. Explain how marketing benefits our society.

Performance Indicator: MK:002 Describe marketing functions and related activities (CS) LAP-MK-001
Objectives:
a. Define the following terms: channel management, marketing-information management, pricing, product/service management, promotion, and selling.
b. Explain the purposes of each marketing function.
c. Describe the importance of each marketing function to marketing.
d. Explain the interrelationships among marketing functions.

Performance Element: Acquire foundational knowledge of customer/client/business behavior to understand what motivates decision-making.

Performance Indicator: MK:014 Explain factors that influence customer/client/business buying behavior (SP) LAP-MK-006
Objectives:
a. Define the following terms: behavior, perception, drive, cues, attitudes, beliefs, and expectations.
b. Discuss the role that needs and wants play in behavior.
c. Explain the selective processes that consumers use to respond to stimuli.
d. Distinguish between attitudes and beliefs.
e. Explain how cultural influences affect consumer behavior.
f. Describe how social influences impact consumer behavior.
g. Discuss how a person's individual differences impact consumer behavior.
h. Explain how psychological influences impact consumer behavior.
i. Discuss situational influences that impact consumer behavior.
j. Describe ways that final consumer behavior differs from that of business customers.
k. Explain how environmental influences affect business-customers' behavior.
l. Discuss how organizational influences affect business-customers' behavior.
m. Explain why business professionals attempt to satisfy both a company's needs and those of individuals when working with business customers.

Instructional Area: Market Planning (MP)

Performance Element: Develop marketing strategies to guide marketing tactics.

Performance Indicator: MP:001 Explain the concept of marketing strategies (CS) LAP-MP-002
   Objectives:
   a. Define the following terms: marketing mix, product, place, promotion, price, goals, strategies, and tactics.
   b. Identify the components of the marketing mix.
   c. Describe the importance of each of the components of the marketing mix.
   d. Explain the relationship of goals, strategies, and tactics.
   e. Describe the importance of marketing strategies.
   f. Explain the factors that may cause marketing strategies to change.
   g. Explain the importance of strategies in the marketing mix.

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

Performance Indicator: MP:003 Explain the concept of market and market identification (CS)
   LAP-MP-003
   Objectives:
   a. Define the following terms: market, target market, mass marketing, marketing segments, market segmentation, demographic segmentation, geographic segmentation, psychographic segmentation, and behavioral segmentation.
   b. Explain the importance of target markets to businesses.
   c. Describe advantages and disadvantages of mass marketing.
   d. Describe advantages and disadvantages of using market segments.
   e. Explain why the use of market segments is increasing.
   f. Describe demographic characteristics that are analyzed by marketers.
   g. Explain the value of geographic segmentation.
   h. Discuss the value of psychographic segmentation.
   i. Describe types of behavioral segmentation.

Instructional Area: Professional Development (PD)

Performance Element: Participate in career planning to enhance job-success potential.

Performance Indicator: PD:024 Explain employment opportunities in marketing (CS) LAP-PD-021
   Objectives:
   a. Identify types of businesses that offer careers in marketing.
   b. Contrast marketing careers with careers in medicine.
   c. Explain why jobs in marketing provide career potential.
   d. Describe the following marketing careers: (1) Marketing research; (2) Advertising; (3) Product management; (4) Channel management; (5) Sales; (6) Retailing; (7) Service marketing; (8) Customer service; (9) Public relations
   e. Describe well-recognized traits and skills needed for success in marketing careers.

Instructional Area: Pricing (PI)

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

Performance Indicator: PI:001 Explain the nature and scope of the pricing function (SP) LAP-PI-002
    Objectives:
    a. Describe the characteristics of effective pricing.
    b. Explain what is being priced when prices are set for products.
    c. List factors that affect a product's price.
    d. Describe how pricing affects product decisions.
    e. Explain how pricing affects place (distribution) decisions.
    f. Describe how pricing affects promotion decisions.
    g. Explain pricing objectives.

Performance Indicator: PI:015 Describe the role of business ethics in pricing (SP)
    Objectives:
    a. Define the following terms: price fixing, predatory pricing.
    b. Identify ethical considerations in setting prices.
    c. Explain ethical concerns associated with the use of complex prices that are confusing to consumers.
    d. Explain how pricing tactics can relate to social responsibility.

Performance Indicator: PI:016 Explain the use of technology in the pricing function (SP)
    Objectives:
    a. Identify ways that the use of technology impacts the pricing function.
    b. Explain specific applications of technology in pricing.
    c. Describe benefits of automating the pricing process.
    d. Discuss risks associated with automating the pricing process.
    e. Explain how automating pricing facilitates targeted pricing.

Performance Indicator: PI:017 Explain legal considerations for pricing (SP)
    Objectives:
    a. Define the following terms: bait-and-switch advertising, deceptive pricing, dumping, loss-leader pricing, predatory pricing, price discrimination, and price fixing.
    b. Describe laws affecting pricing.
    c. Explain positive effects of pricing laws.
    d. Discuss negative effects of pricing laws.
    e. Explain the impact of anti-dumping laws on consumers.

Instructional Area: Pricing (PI) (cont'd)

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

Performance Indicator: PI:002 Explain factors affecting pricing decisions (SP) LAP-PI-003
   Objectives:
   a. Define the term selling price.
   b. Distinguish between price and selling price.
   c. Describe the importance of selling price.
   d. Identify factors affecting selling price.
   e. Explain how consumers can affect selling price.
   f. Describe how government affects selling price.
   g. Discuss how competition can affect selling price.
   h. Explain how the nature of a business can affect selling price.
   i. Identify pricing objectives.
   j. Explain how pricing objectives affect selling price.

Instructional Area: Product/Service Management (PM)

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

Performance Indicator: PM:001 Explain the nature and scope of the product/service management function (SP) LAP-PM-017
   Objectives:
   a. Define the term product/service management.
   b. Explain who is responsible for managing products/services.
   c. Describe the benefits of product/service managing.
   d. Describe the phases of product/service managing.
   e. Describe factors affecting product/service managing.
   f. Explain the role product/service management plays in marketing.

Performance Indicator: PM:024 Identify the impact of product life cycles on marketing decisions (SP) LAP-PM-018
   Objectives:
   a. Define the following terms: product life cycle, introduction, growth, maturity, decline, pricing decisions, promotion decisions, place decisions, and product decisions.
   b. Identify stages of the product life cycle.
   c. Describe the characteristics of each stage of the product life cycle.
   d. Discuss the impact of each stage of the product life cycle on marketing decision-making.
   e. Explain how a company can extend a product''s life cycle.

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

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

Performance Indicator: PM:039 Describe the use of technology in the product/service management function (SP)
   Objectives:
   a. Identify ways that the use of technology impacts the product/service management function.
   b. Explain specific applications of technology in product/service management.
   c. Describe how technology is used to manage the product life cycle.
   d. Discuss how technology is used in market testing.
   e. Explain how technology is used in product labeling and packaging.

Performance Indicator: PM:040 Explain business ethics in product/service management (SP)
   Objectives:
   a. Describe ethical considerations in product packaging.
   b. Explain how planned obsolescence is an ethical issue for businesses.
   c. Explain ethical issues associated with product labeling.
   d. Discuss ethical issues associated with changing a product's quality.
   e. Describe ethical issues associated with failing to inform customers about product risks.

Performance Element: Generate product ideas to contribute to ongoing business success.

Performance Indicator: PM:134 Identify product opportunities (SP)
   Objectives:
   a. Define the following terms: innovation, market gap identification, needs analysis, product differentiation, product opportunity, and product opportunity gap.
   b. Distinguish between process and product innovation.
   c. Explain the role of social, economic, and technological trends in identify product opportunities.
   d. Describe research sources for identifying opportunities.
   e. Describe pitfalls to opportunity identification.
   f. Explain methods/techniques used to identify product opportunities.
   g. Demonstrate methods/techniques for identifying product opportunities.

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

Performance Element: Generate product ideas to contribute to ongoing business success.

Performance Indicator: PM:127 Identify methods/techniques to generate a product idea (SP)
> **LAP-PM-127**
> **Objectives:**
> a. Define the terms attribute listing, lateral thinking, analogies, associations, brainstorming, synectics, sketching and doodling, forced questioning, and morphological analysis.
> b. Explain the role of criticism in idea creation.
> c. Describe types of brainstorming techniques.
> d. Distinguish among free association techniques, forced relations techniques, and analytical techniques used to generate business/product ideas.
> e. Explain sources of business/product ideas.
> f. Discuss the importance of evaluating a business owner's strengths when generating business/product ideas.
> g. Describe pitfalls to idea identification.
> h. Discuss the importance of generating business/product ideas.
> i. Explain methods/techniques used to identify business/product ideas.

Performance Indicator: PM:128 Generate product ideas (SP)
> **Objectives:**
> a. Identify purposes of idea-generating methods/techniques.
> b. Discuss advantages/disadvantages of idea-generating methods/techniques.
> c. Explain the role of a facilitator in generating product/business ideas.
> d. List questions to ask to facilitate idea generation.
> e. Implement methods/techniques to generate product/business ideas.

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

Performance Indicator: PM:019 Describe the uses of grades and standards in marketing (CS)
> **LAP-PM-008**
> **Objectives:**
> a. Define the terms grades and standards.
> b. Explain the interrelationship of grades and standards.
> c. Describe what businesses do with products that fail to meet the lowest standards.
> d. Explain reasons for using grades and standards.
> e. Describe ways that grades and standards aid the buying and selling process.
> f. Explain the importance of grades and standards in global trade.
> g. Identify groups that develop grades and standards.
> h. Describe types of standards.
> i. Identify examples of graded products.

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

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

Performance Indicator: PM:020 Explain warranties and guarantees (CS) LAP-PM-004
Objectives:
a. Define the following terms: warranty, express warranty, implied warranty, full warranty, limited warranty, and guarantee.
b. Identify the provisions of a full warranty.
c. Distinguish between warranties and guarantees.
d. Identify the characteristics of an effective guarantee.
e. Describe the purposes of warranties and guarantees.
f. Explain the benefits of warranties and guarantees.
g. Describe government regulation of warranties and guarantees.

Performance Indicator: PM:017 Identify consumer protection provisions of appropriate agencies (SP)
LAP-PM-007
Objectives:
a. Describe forms of consumer protection associated with product/service management.
b. Describe the need for consumer protection in product/service management.
c. Discuss the role of governmental agencies in protecting consumers.
d. Explain laws that protect consumers.
e. Explain how consumer protection affects businesses.
f. Describe expenses that can be incurred by businesses as a result of consumer protection.

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

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

Performance Indicator: PM:003 Explain the concept of product mix (SP) LAP-PM-003
    Objectives:
    a. Define the following terms: product mix, product item, product line, width, depth, consistency, expansion, contraction, alteration, trading up, trading down, and positioning.
    b. Identify ways in which product lines can be organized.
    c. Describe product mix dimensions.
    d. Identify reasons that a business would offer a narrow product mix.
    e. Identify reasons that a business would offer a broad product mix.
    f. Identify reasons that a business would offer a deep product mix.
    g. Identify reasons that a business would offer a shallow product mix.
    h. Explain the importance of a business's product mix.
    i. Describe advantages of expansion product-mix strategies.
    j. Describe disadvantages of expansion product-mix strategies.
    k. Describe advantages of contraction product-mix strategies.
    l. Describe disadvantages of contraction product-mix strategies.
    m. Describe advantages of alteration product-mix strategies.
    n. Describe disadvantages of alteration product-mix strategies.
    o. Describe advantages of trading up product-mix strategies.
    p. Describe disadvantages of trading up product-mix strategies.
    q. Describe advantages of trading down product-mix strategies.
    r. Describe disadvantages of trading down product-mix strategies.
    s. Describe advantages of positioning product-mix strategies.
    t. Describe disadvantages of positioning product-mix strategies.

Performance Indicator: PM:041 Describe the nature of product bundling (SP)
    Objectives:
    a. Explain how product bundling works.
    b. Describe occasions when the use of product bundling makes good business sense.
    c. Discuss benefits associated with product bundling.
    d. Identify challenges with product bundling.
    e. Explain ways marketers bundle products (e.g., by product category, by customer, or by application).
    f. Discuss the impact of product bundling on pricing decisions.
    g. Describe considerations in developing a product bundling strategy.

Instructional Area: Promotion (PR)

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

Performance Indicator: PR:001 Explain the role of promotion as a marketing function (CS) LAP-PR-002
Objectives:
a. Define the term promotion.
b. List users of promotion.
c. Describe the benefits of using promotion.
d. Describe the costs associated with the use of promotion.
e. Describe types of promotional objectives.
f. Discuss the relationship of promotion and marketing.

Performance Indicator: PR:002 Explain the types of promotion (i.e., institutional, product) (CS) LAP-PR-004
Objectives:
a. Define the following terms: product promotion, primary product promotion, secondary product promotion, institutional promotion, public service, public relations, and patronage.
b. Identify types of product promotion.
c. Describe the uses of product promotion.
d. Identify types of institutional promotion.
e. Describe uses of institutional promotion.
f. Discuss the advantages of promotional activities.
g. Discuss the disadvantages of promotional activities.

Performance Indicator: PR:003 Identify the elements of the promotional mix (SP) LAP-PR-001
Objectives:
a. Define the following terms: promotional mix, advertising, personal selling, publicity and sales promotion.
b. Identify the elements of the promotional mix.
c. Categorize examples of promotions according to the elements of the promotional mix.
d. Describe the importance of the promotional mix.
e. Identify factors affecting the promotional mix.
f. Describe how the product being sold affects the promotional mix.
g. Explain how the product's market affects the promotional mix.
h. Discuss how the distribution system affects the promotional mix.
i. Explain how the product's company affects the promotional mix.

Instructional Area: Promotion (PR) (cont'd)

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

Performance Indicator: PR:099 Describe the use of business ethics in promotion (SP)
   Objectives:
   a. Explain ethical issues associated with fear-based advertising.
   b. Discuss sexism/stereotyping in advertising.
   c. Explain ethical issues associated with promotion to children.
   d. Discuss ethical issues associated with sales promotion sweepstakes, samples, rebates, and premiums.
   e. Explain the use of stealth marketing.
   f. Discuss ethical issues associated with use of customer information obtained on the Internet.
   g. Describe ways that businesses use socially responsible promotions.

Performance Indicator: PR:100 Describe the use of technology in the promotion function (SP)
   Objectives:
   a. Explain how the use of technology in promotion has changed the way marketers communicate with customers.
   b. Identify ways that the use of technology positively impacts the promotion function.
   c. Discuss ways that the use of technology negatively impacts the promotion function.
   d. Describe ways that businesses use the Internet as a promotional tool.
   e. Describe how technology has enhanced opportunities to contact customers with promotional messages.
   f. Discuss ways that technology has facilitated the use of sales promotions.
   g. Explain specific applications of technology in promotion.

Performance Indicator: PR:101 Describe the regulation of promotion (SP)
   Objectives:
   a. Explain the need for truthfulness in promotional messages and claims.
   b. Discuss how the use of misleading or inaccurate statements in promotion is regulated.
   c. Explain laws that protect customers from unwanted promotions.
   d. Discuss laws that protect children from promotional messages.
   e. Explain the regulation of telemarketing.
   f. Discuss the regulation of data privacy.
   g. Describe actions that can be taken by the Federal Trade Commission to correct misleading advertising.
   h. Discuss reasons for the regulation of products used in advertising.
   i. Explain how the legality of products used in advertising can vary from country to country.

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

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

Performance Indicator: PR:007 Explain types of advertising media (SP) LAP-PR-003
   Objectives:
   a. Define the term advertising media.
   b. Categorize advertising media.
   c. Identify types of publications.
   d. Describe factors on which newspapers vary.
   e. Categorize types of magazines.
   f. Describe the two categories of broadcast media.
   g. Categorize purchase options for television advertising.
   h. Discuss the difference between local and network advertising.
   i. Describe types of direct-mail advertising.
   j. Explain types of Web advertising.
   k. Identify types of out-of-home media.
   l. Describe specialty advertising.
   m. Discuss the use of directory advertising.
   n. Explain the use of movie theater advertising.
   o. Describe the use of product placement for advertising.
   p. Discuss the use of telemarketing for advertising.
   q. Explain the use of videotapes, DVDs, and CD-ROM advertising.
   r. Explain trends that are affecting advertising media.

Performance Indicator: PR:247 Describe word-of-mouth channels used to communicate with targeted audiences (SP)
   Objectives:
   a. Define the term word of mouth marketing, buzz marketing, viral marketing, community marketing, grassroots marketing, evangelist marketing, product seeding, influencer marketing, cause marketing, conversation creation, brand blogging, referral programs, social networks.
   b. Discuss the need for honesty and transparency in word of mouth marketing.
   c. Explain the philosophy of word of mouth marketing.
   d. Describe types of word of mouth marketing.
   e. Distinguish between organic and amplified word of mouth marketing.
   f. Discuss techniques businesses can use to foster organic word of mouth marketing.
   g. Explain techniques businesses can use to foster amplified word of mouth marketing.

Performance Indicator: PR:089 Explain the nature of direct marketing channels (SP)
   Objectives:
   a. Define the term direct marketing.
   b. Identify communication channels used for direct marketing.
   c. Describe advantages/disadvantages associated with direct marketing.
   d. Explain how the Internet has changed businesses' ability to communicate directly with customers.
   e. Describe the importance of databases to direct marketing.

Instructional Area: Promotion (PR) (cont'd)

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

Performance Indicator: PR:249 Identify communications channels used in sales promotion (SP)
Objectives:
a. Define the following terms: free-standing insert (FSI), coupons, rebates, push money, point-of-sale displays, trade allowances, dealer loaders, contests, sweepstakes, games, loyalty programs, demonstrations, personal appearances, advertising-support programs, co-op advertising, trade-in promotions, samples, premiums, free products, promotional products, trade shows, push strategies, pull strategies.
b. Discuss differences between advertising and sales promotion.
c. Explain reasons that businesses use sales promotions.
d. Describe types of consumer sales promotions.
e. Discuss types of trade sales promotions.
f. Explain types of business-to-business sales promotions.
g. Describe types of point-of-purchase (POP) displays that are used for sales promotion.
h. Compare the similarities and differences between coupons and rebates.
i. Distinguish between push and pull sales promotion strategies.
j. Explain how contests, sweepstakes, and games differ.
k. Describe trends in sales promotions.

Performance Indicator: PR:250 Explain communications channels used in public-relations activities (SP)
Objectives:
a. Define the following terms: press kits, audio/video releases, matte release, website press room, special events, sponsorships, community relations, philanthropy, crisis management.
b. Explain the role of public relations in business.
c. Discuss advantages/disadvantages associated with public relations.
d. Describe the main tools used in public relations to communicate with targeted audiences (i.e., media relations, media tours, newsletters, special events, speaking engagements, sponsorships, employee relations, and community relations and philanthropy).
e. Explain tools used to communicate public relations messages to the media (i.e., press kits, audio/video releases, matte releases, website press room).
f. Discuss reasons that public relations specialists monitor markets.
g. Describe the purpose of crisis management in public relations.
h. Explain trends in public relations.
i. Describe the use of blogs for public relations activities.
j. Discuss the use of web forums in public relations activities.
k. Explain how RSS feeds can be used for public relations activities.
l. Describe the use of podcasting for public relations activities.
m. Explain how search engine optimization (SEO) can be used for public relations activities.

Instructional Area: Selling (SE)

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

Performance Indicator: SE:017 Explain the nature and scope of the selling function (CS) LAP-SE-117
  Objectives:
  a. Define the term selling.
  b. Identify individuals, groups, or agencies that sell.
  c. Explain reasons that customers buy goods and services.
  d. Identify types of items that are sold.
  e. Explain where selling occurs.
  f. Describe how products are sold.
  g. Describe the role of selling in a market economy.
  h. Explain personal characteristics of salespeople that are essential to selling.

**Performance Indicator: SE:076 Explain the role of customer service as a component of selling
  relationships (CS) LAP-SE-130**
  Objectives:
  a. Distinguish between customer service as a process and customer service as a function.
  b. Describe how businesses can use customer service to beat their competition.
  c. Discuss factors that influence customer expectations of customer service.
  d. Explain how customer service facilitates sales relationships.
  e. Identify pre-sales opportunities for providing customer service that can facilitate sales
  relationships.
  f. Identify post-sales opportunities when customer service can be provided to facilitate sales
  relationships.
  g. Discuss actions a salesperson can take to make the most of her/his customer service activities.

Performance Indicator: SE:828 Explain key factors in building a clientele (SP) LAP-SE-115
  Objectives:
  a. Identify company benefits of building a clientele.
  b. Identify salesperson benefits from building a clientele.
  c. Cite examples of costs that can be incurred by businesses for failing to build a clientele.
  d. Identify attitudes of salespeople that help to build a clientele.
  e. Describe ways that salespeople exhibit a service attitude.
  f. Describe the activities of salespeople that can help to build a clientele.

Instructional Area: Selling (SE) (cont'd)

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

Performance Indicator: SE:932 Explain company selling policies (CS) LAP-SE-121
> **Objectives:**
> a. Define the following terms: selling policies, selling-activity policies, terms-of-sale policies and service policies.
> b. Identify types of selling-activity policies.
> c. Identify types of terms-of-sale policies.
> d. Identify types of service policies.
> e. Explain the importance of selling policies.
> f. Describe the characteristics of selling policies.
> g. Explain why selling policies are needed.
> h. Describe external factors that affect selling policies.
> i. Describe internal factors that affect selling policies.
> j. Describe regulatory factors that affect selling policies.
> k. Explain problems encountered with the use of selling policies.

Performance Indicator: SE:106 Explain legal and ethical considerations in selling (SP) LAP-SE-129
> **Objectives:**
> a. Explain the importance of business ethics in selling.
> b. Describe ethical concerns of salespeople that deal with the company.
> c. Explain ethical concerns of salespeople that deal with coworkers.
> d. Explain ethical concerns of salespeople that deal with customers/clients.
> e. Describe ethical concerns of salespeople that deal with the competition.
> f. Describe ethical concerns of employers in dealing with salespeople.
> g. Identify reasons that sales activites are regulated.
> h. Describe unfair or deceptive sales practices that are regulated.
> j. Explain state and federal regulations that affect sales activities.

Performance Indicator: SE:107 Describe the use of technology in the selling function (SP)
> **Objectives:**
> a. Describe capabilities that the use of technology provides salespeople.
> b. Explain how technology impacts a salesperson's planning skills.
> c. Describe how technology can impact a salesperson's targeting skills.
> d. Discuss how technology can impact a salesperson's presentation skills.
> e. Explain how technology can impact a salesperson's ability to adapt or tailor a sales presentation to a particular customer.
> f. Explain the use of Customer Relationship Management (CRM) software in selling.
> g. Discuss the use of tablet PCs in selling.
> h. Explain the use of web-based visits between customers and sales staff.
> i. Describe the use of the Internet in sales administration activities.

Instructional Area: Selling (SE) (cont'd)

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

Performance Indicator: SE:062 Acquire product information for use in selling (CS) LAP-SE-131
    Objectives:
    a. Identify sources of product information that provide information for use in selling.
    b. Identify types of product information that can be useful in selling.
    c. Cite occasions when product information can be used in sales presentations.
    d. Describe guidelines to follow when acquiring product information.
    e. Demonstrate procedures for acquiring product information for use in selling.

Performance Indicator: SE:109 Analyze product information to identify product features and benefits (SP) LAP-SE-113
    Objectives:
    a. Define the following terms: feature, benefit, obvious benefits, unique benefits, hidden benefits, feature-benefit selling, and feature-benefit chart.
    b. Identify sources of feature/benefit information.
    c. Identify an example of an obvious or apparent benefit.
    d. Identify an example of a unique or exclusive benefit.
    e. Identify an example of a hidden benefit.
    f. Describe how to prepare a feature-benefit chart for a product.
    g. Prepare a feature-benefit chart for a product.

Performance Indicator: SE:019 Explain the use of brand names in selling (CS)
    Objectives:
    a. Discuss the role of brand names in building an emotional connection with customers/clients.
    b. Describe the impact of brand names on customer loyalty and repeat business.
    c. Explain benefits of selling brand names vs. products.

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

Performance Indicator: SE:048 Explain the selling process (CS) LAP-SE-048
    Objectives:
    a. Identify the components of the selling process.
    b. Describe the importance of establishing relationships with customers.
    c. Describe ways to discover customer needs.
    d. Describe the components of prescribing solutions to customer needs.
    e. Explain the importance of reaching closure in sales situations.
    f. Describe aspects of reaching closure in sales situations.
    g. Describe the importance of reaffirming the buyer-seller relationship.
    h. Describe ways to reaffirm the buyer-seller relationship.
    i. Explain similarities/differences in the ways businesses implement the selling process.
    j. Explain the importance of using a selling process.

Instructional Area: Selling (SE) (cont'd)

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

Performance Indicator: SE:110 Establish relationship with customer/client (CS)
Objectives:
a. Describe the importance of establishing relationships with customers/clients during the initial contact with them.
b. Explain techniques for establishing relationships with customers/clients during the initial contact with them.
c. Identify factors affecting the choice of techniques to use in establishing relationships with customers/clients during initial contact.
d. Describe characteristics of effective sales openings.
e. Explain procedures for establishing relationships with customers/clients during initial contacts.
f. Demonstrate how to establish relationships with customers/clients during the initial contact with them.

Performance Indicator: SE:111 Determine customer/client needs (CS)
Objectives:
a. Define the following terms: open-ended questions, assumptive questions, and interpretive questions.
b. Identify examples of the types of questions used in sales situations.
c. Explain the importance of questioning in selling.
d. Explain the timing of questions in selling.
e. Describe the relationship of customer type to questioning style.
f. Explain guidelines for questioning customers.
g. Question customers to obtain information that will help to satisfy their needs.

Performance Indicator: SE:114 Recommend specific product (CS) LAP-SE-111
Objectives:
a. Define the following terms: product substitution, trading-up, and trading down.
b. Explain the importance of meeting customers' needs when recommending specific products.
c. Explain guidelines for using buying motives when recommending specific products.
d. Identify occasions when product substitution should be used.
e. Explain guidelines for recommending a specific product to customers.
f. Demonstrate procedures for recommending specific products to customers.

Semester 1		
Marketing Basics		
What is marketing?	MK:001 Explain marketing and its importance in a global economy (CS) LAP-MK-004 MK:002 Describe marketing functions and related activities (CS) LAP-MK-001 PD:024 Explain employment opportunities in marketing (CS) LAP-PD-021	6 days
Market Planning		
What do marketers plan?	MP:001 Explain the concept of marketing strategies (CS) LAP-MP-002 MP:003 Explain the concept of market and market identification (CS) LAP-MP-003 CO:053 Participate in group discussions (CS)	6 days
Selling & Customer Service		
Why is customer service important in selling?	SE:017 Explain the nature and scope of the selling function (CS) LAP-SE-117 SE:076 Explain the role of customer service as a component of selling relationships (CS) LAP-SE-130 CR:004 Demonstrate a customer-service mindset (CS) LAP-CR-004 CR:005 Reinforce service orientation through communication (CS) CR:019 Adapt communication to the cultural and social differences among clients (CS) CR:006 Respond to customer inquiries (CS) CO:114 Handle telephone calls in a businesslike manner (CS)	14 days
What should you do when things go wrong for a customer?	SE:932 Explain company selling policies (CS) LAP-SE-121 CR:007 Interpret business policies to customers/clients (CS) CR:009 Handle difficult customers (CS) LAP-CR-009 CR:010 Handle customer/client complaints (CS) LAP-CR-010	8 days

How and why do you represent your employer?	CR:001 Identify company's brand promise (CS) LAP-CR-006	6 days
	CR:002 Determine ways of reinforcing the company's image through employee performance (CS)	
	SE:828 Explain key factors in building a clientele (SP) LAP-SE-115	
What do you need to know about products that you sell?	CO:085 Utilize note-taking strategies (CS)	12 days
	CO:086 Organize information (CS)	
	SE:062 Acquire product information for use in selling (CS) LAP-SE-131	
	SE:109 Analyze product information to identify product features and benefits (SP) LAP-SE-113	
	CO:087 Select and use appropriate graphic aids (CS)	
	SE:019 Explain the use of brand names in selling (CS)	
How do you sell goods and services to customers?	SE:048 Explain the selling process (CS) LAP-SE-048	16 days
	CR:029 Develop rapport with customers (CS)	
	SE:110 Establish relationship with customer/client (CS)	
	MK:014 Explain factors that influence customer/client/business buying behavior (SP) LAP-MK-006	
	SE:111 Determine customer/client needs (CS)	
	SE:114 Recommend specific product (CS) LAP-SE-111	
	SE:106 Explain legal and ethical considerations in selling (SP) LAP-SE-129	
	SE:107 Describe the use of technology in the selling function (SP)	
Channel Management		
What is channel management?	CM:001 Explain the nature and scope of channel management (CS) LAP-CM-002	10 days
	CM:003 Explain the nature of channels of distribution (CS) LAP-CM-003	
	CM:004 Describe the use of technology in the channel management function (CS)	
	CM:005 Explain legal considerations in channel management (SP)	
	CM:006 Describe ethical considerations in channel management (SP)	

Semester 2		
Promotion		
What do marketers promote?	PR:001 Explain the role of promotion as a marketing function (CS) LAP-PR-002	4 days
	PR:002 Explain the types of promotion (i.e., institutional, product) (CS) LAP-PR-004	
How do marketers promote their products?	PR:003 Identify the elements of the promotional mix (SP) LAP-PR-001	18 days
	PR:099 Describe the use of business ethics in promotion (SP)	
	PR:100 Describe the use of technology in the promotion function (SP)	
	PR:101 Describe the regulation of promotion (SP)	
	PR:007 Explain types of advertising media (SP) LAP-PR-003	
	PR:247 Describe word-of-mouth channels used to communicate with targeted audiences (SP)	
	PR:089 Explain the nature of direct marketing channels (SP)	
	PR:249 Identify communications channels used in sales promotion (SP)	
	PR:250 Explain communications channels used in public-relations activities (SP)	

Product/Service Management		
What is product/service management?	PM:001 Explain the nature and scope of the product/service management function (SP) LAP-PM-017	18 days
	PM:024 Identify the impact of product life cycles on marketing decisions (SP) LAP-PM-018	
	PM:039 Describe the use of technology in the product/service management function (SP)	
	PM:040 Explain business ethics in product/service management (SP)	
	PM:017 Identify consumer protection provisions of appropriate agencies (SP) LAP-PM-007	
	PM:019 Describe the uses of grades and standards in marketing (CS) LAP-PM-008	
	PM:020 Explain warranties and guarantees (CS) LAP-PM-004	
	PM:003 Explain the concept of product mix (SP) LAP-PM-003	
	PM:041 Describe the nature of product bundling (SP)	
How do marketers develop new product ideas?	PM:134 Identify product opportunities (SP)	6 days
	PM:127 Identify methods/techniques to generate a product idea (SP) LAP-PM-127	
	PM:128 Generate product ideas (SP)	
Pricing		
How do marketers decide how much to charge for their products?	PI:001 Explain the nature and scope of the pricing function (SP) LAP-PI-002	10 days
	PI:015 Describe the role of business ethics in pricing (SP)	
	PI:016 Explain the use of technology in the pricing function (SP)	
	PI:017 Explain legal considerations for pricing (SP)	
	PI:002 Explain factors affecting pricing decisions (SP) LAP-PI-003	

Marketing-Information Management		
Why do marketers need data?	IM:012 Describe the need for marketing data (CS) LAP-IM-012	4 days
	IM:184 Identify data monitored for marketing decision making (SP) LAP-IM-184	
What is marketing-information management?	IM:001 Explain the nature and scope of the marketing-information management function (SP) LAP-IM-002	8 days
	IM:025 Explain the role of ethics in marketing-information management (SP)	
	IM:183 Describe the use of technology in the marketing-information management function (SP)	
	IM:419 Describe the regulation of marketing-information management (SP)	
What is marketing research?	IM:010 Explain the nature of marketing research (SP) LAP-IM-010	14 days
	IM:282 Discuss the nature of marketing research problems/issues (SP) LAP-IM-282	
	IM:284 Describe methods used to design marketing research studies (i.e., descriptive, exploratory, and causal) (SP) LAP-IM-014	
	IM:281 Describe options businesses use to obtain marketing research data (i.e., primary and secondary research) (SP) LAP-IM-015	
	IM:285 Discuss the nature of sampling plans (i.e., who, how many, how chosen) (SP) LAP-IM-016	
	IM:289 Describe data-collection methods (e.g., observations, mail, diaries, telephone, Internet, discussion groups, interviews, scanners, tracking tools) (SP) LAP-IM-017	
	IM:418 Explain characteristics of effective data-collection instruments (SP)	

Course Description

Marketing Principles (Honors-Ready) introduces students to the dynamic processes and activities in marketing. The course provides core content applicable to all aspects of marketing so that students acquire a deep understanding of all marketing activities. This course develops student understanding and skills in such areas as channel management, marketing-information management, market planning, pricing, product/service management, promotion, and selling. Through the use of projects, students acquire an understanding and appreciation of marketing activities. Current technology will be used to acquire information and to complete the projects. Throughout the course, students are presented ethical dilemmas and problem-solving situations for which they must apply academic and critical-thinking skills.

Instructional Area: Channel Management (CM)

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

Performance Indicator: CM:001 Explain the nature and scope of channel management (CS)
LAP-CM-002
Objectives:
a. Define the following terms: channel, channel intensity, channel length, distribution patterns, exclusive distribution, selective distribution, and intensive distribution.
b. Explain how channel members add value.
c. Discuss channel functions (e.g., information, promotion, contact, matching, negotiation, financing, and risk taking).
d. Explain key channel tasks (e.g., marketing, packaging, financing, storage, delivery, merchandising, and personal selling).
e. Describe when a channel will be most effective.
f. Distinguish between horizontal and vertical conflict.
g. Describe channel management decisions (i.e., selecting channel members, managing and motivating channel members, and evaluating channel members).
h. Explain channel design decisions (i.e., analyzing customer needs, setting channel objectives, identifying major alternatives—types of intermediaries, number of intermediaries, responsibilities of intermediaries).
i. Discuss the relationship between the product being distributed and the pattern of distribution it uses.

Performance Indicator: CM:003 Explain the nature of channels of distribution (CS) LAP-CM-003
Objectives:
a. Define the following terms: channels of distribution, producer, ultimate consumer, industrial user, middlemen, intermediaries, retailers, wholesalers, agents, direct channels, and indirect channels.
b. Identify types of channel members/intermediaries/middlemen.
c. Explain the importance of middlemen in the channel of distribution.
d. Describe types of channels for consumer goods and services.
e. Describe types of channels for industrial goods and services.

Instructional Area: Channel Management (CM) (cont'd)

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

Performance Indicator: CM:004 Describe the use of technology in the channel management function (CS)

Objectives:

a. Identify ways that the use of technology impacts the channel management function.

b. Explain specific applications of technology in channel management.

c. Discuss ways that the use of technology in channel management impacts relationships with channel members.

d. Explain ways that the use of technology in channel management facilitates global trade.

e. Describe benefits associated with the use of technology in channel management.

f. Explain barriers to the use of technology in channel management.

Performance Indicator: CM:005 Explain legal considerations in channel management (SP)

Objectives:

a. Define the following terms: exclusive dealing, tying agreements, full-line forcing, and closed territories.

b. Describe illegal channel management activities.

c. Identify laws that govern channel management activities.

d. Explain the impact of regulation on channel management activities.

Performance Indicator: CM:006 Describe ethical considerations in channel management (SP)

Objectives:

a. Define the following terms: exploitation, coercion, gray market, and slotting allowance.

b. Discuss reasons that marketers should not manipulate the availability of a product for the purpose of exploitation.

c. Describe ethical issues associated with serving markets with low profit potential.

d. Explain when ethical issues can arise in a distribution channel.

e. Explain the ethical implications of the gray market on U.S. businesses.

f. Describe how communication relates to channel management ethics.

Instructional Area: Communication Skills (CO)

Performance Element: Apply verbal skills to obtain and convey information.

Performance Indicator: CO:201 Facilitate (lead) group discussions (SP)
> **Objectives:**
> a. Define the term facilitate.
> b. Discuss reasons to facilitate group discussions.
> c. Discuss characteristics of effective group facilitators (e.g., objectivity, strong communication skills, etc.).
> d. Explain the role of the group facilitator in creating a safe, inclusive environment for group discussion.
> e. Identify effective group facilitation techniques.
> f. Demonstrate procedures for facilitating group discussions.

Performance Element: Write internal and external business correspondence to convey and obtain information effectively.

Performance Indicator: CO:039 Write informational messages (CS)
> **Objectives:**
> a. Define the term informational messages.
> b. Identify examples of informational messages used by businesses.
> c. Explain the purposes of informational messages.
> d. Demonstrate procedures for writing informational messages.

Performance Indicator: CO:040 Write inquiries (CS)
> **Objectives:**
> a. Define the term inquiries.
> b. Identify occasions when inquiries are written by businesses.
> c. Describe the importance of writing inquiries.
> d. Demonstrate procedures for writing inquiries.

Instructional Area: Customer Relations (CR)

Performance Element: Foster positive relationships with customers to enhance company image.

Performance Indicator: CR:004 Demonstrate a customer-service mindset (CS) LAP-CR-004
> **Objectives:**
> a. Identify beliefs held by employees who have a customer-service mindset.
> b. Describe the importance of exhibiting a customer-service mindset.
> c. Identify occasions when employees can exhibit a customer-service mindset.
> d. Describe guidelines for exhibiting a customer-service mindset.
> e. Demonstrate a customer-service mindset.

Instructional Area: **Customer Relations (CR)** (cont'd)

Performance Element: Foster positive relationships with customers to enhance company image.

Performance Indicator: CR:029 Develop rapport with customers (CS)
   Objectives:
   a. Define the following terms: rapport, reciprocity, mirroring, and affinity.
   b. Explain reasons for building rapport with customers (e.g., to create positive connections, to build good relationships, to break the ice).
   c. Explain the role of trust in building rapport.
   d. Describe ways to build rapport with customers (e.g., matching/mirroring customer's communication style, finding common ground, being empathetic, appreciating the customer's point of view).
   e. Explain the importance of nonverbal communication in building rapport with customers.
   f. Demonstrate techniques for developing rapport with customers.

Performance Indicator: CR:005 Reinforce service orientation through communication (CS)
   Objectives:
   a. Define the term service orientation.
   b. Explain the relationship between communication and service.
   c. Identify ways in which employees in business management can demonstrate a service orientation.
   d. Demonstrate procedures for reinforcing a service orientation through communication.

Performance Indicator: CR:006 Respond to customer inquiries (CS)
   Objectives:
   a. Explain the nature of customer inquiries.
   b. Identify the types of customer inquiries.
   c. Discuss the importance of possessing knowledge of the company (e.g., policies, history, capabilities, etc.).
   d. Discuss the importance of possessing adequate product knowledge.
   e. Describe guidelines for handling customer inquiries.
   f. Demonstrate use of proper procedure for solving a customer inquiry in a business situation.

Performance Indicator: CR:019 Adapt communication to the cultural and social differences among clients (CS)
   Objectives:
   a. Discuss the purpose of adapting communication to a client's cultural or social community.
   b. Explain the importance of context in communication.
   c. Discuss reasons for adapting communication to the cultural or social differences among clients.
   d. Explain skills associated with adapting communication (e.g., empathy, risk taking, problem solving, etc.).
   e. Describe ways to adapt communication to the cultural or social environment of clients.
   f. Demonstrate how to adapt communication to the cultural or social differences among clients.

Instructional Area: Customer Relations (CR) (cont'd)

Performance Element: Foster positive relationships with customers to enhance company image.

Performance Indicator: CR:007 Interpret business policies to customers/clients (CS)
Objectives:
a. Define the term business policy.
b. Identify characteristics of effective business policies.
c. Describe reasons for having business policies.
d. Explain types of business policies that affect customers.
e. Discuss the role of employees in interpreting business policies.
f. Explain when business policies should be interpreted.
g. Explain guidelines for interpreting business policies to customers.
h. Demonstrate procedures for interpreting business policies to customers.

Performance Indicator: CR:030 Build and maintain relationships with customers (SP)
Objectives:
a. Explain reasons for building and maintaining relationships with customers.
b. Discuss the role of communication in building and maintaining relationships with customers.
c. Explain the importance of consistency in building and maintaining relationships with customers.
d. Discuss methods for building and maintaining relationships with customers.
e. Describe the use of technology in building and maintaining relationships with customers.
f. Demonstrate techniques for building and maintaining relationships with customers.

Performance Element: Resolve conflicts with/for customers to encourage repeat business.

Performance Indicator: CR:009 Handle difficult customers (CS) LAP-CR-009
Objectives:
a. Define the following terms: disagreeable customer, domineering/ superior customers, dishonest customers.
b. Identify types of difficult customers.
c. Describe categories of disagreeable customers.
d. Discuss categories of domineering/superior customers.
e. Describe ways in which customers are dishonest.
f. Identify situations in which customers become difficult.
g. Explain reasons for handling difficult customers.
h. Describe general guidelines for handling difficult customers.
i. Explain specific guidelines for handling types of difficult customers.
j. Demonstrate procedures for handling difficult customers.

Instructional Area: Customer Relations (CR) (cont'd)

Performance Element: Resolve conflicts with/for customers to encourage repeat business.

Performance Indicator: CR:010 Handle customer/client complaints (CS) LAP-CR-010
     Objectives:
     a. Define the term complaint.
     b. Identify the costs associated with customer complaints.
     c. Identify reasons for customer complaints.
     d. Describe the benefits of customer complaints.
     e. Explain the importance of appropriately handling customer complaints.
     f. Explain procedures for handling customer complaints.
     g. Demonstrate procedures for handling customer complaints.

Performance Element: Reinforce company's image to exhibit the company's brand promise.

Performance Indicator: CR:001 Identify company's brand promise (CS) LAP-CR-006
     Objectives:
     a. Define the terms touch points, brand, and brand promise.
     b. Explain the importance of a company's brand promise.
     c. Describe factors impacting a company's brand promise.
     d. Demonstrate how to identify a company's brand promise.

Performance Indicator: CR:002 Determine ways of reinforcing the company's image through employee performance (CS)
     Objectives:
     a. Discuss types of company images.
     b. Describe factors that affect a company's image.
     c. Explain the importance of reinforcing the company's image.
     d. Describe ways that employees can reinforce the company's image through their performance.
     e. Demonstrate how to determine ways to reinforce the company's image through employee performance.

Instructional Area: **Customer Relations (CR)** (cont'd)

Performance Element: Understand the nature of customer relationship management to show its contributions to a company.

Performance Indicator: CR:016 Discuss the nature of customer relationship management (SP)
    LAP-CR-016
    Objectives:
    a. Define the following terms: customer relationship management (CRM), customer experience management (CEM), customer-centric strategy, touch points, continuous improvement, and business process management (BPM).
    b. Discuss the nature of customer relationships in today's society.
    c. Explain goals of customer relationship management (CRM).
    d. Discuss the importance of formulating a CRM strategy prior to implementing CRM processes and tools.
    e. Describe common CRM processes.
    f. Describe the role of customer experience management (CEM) in customer relationship management (CRM).
    g Discuss the use of customer information in customer relationship management.
    h. Discuss the role of corporate culture in customer relationship management.
    i. Explain the impact of organizational structure on customer relationship management.
    j. Describe the relationship of customer relationship management and continuous improvement.
    k. Discuss the relationship of customer relationship management and business process management.
    l. Explain ways in which customer relationship management can benefit a business.

Performance Indicator: CR:017 Explain the role of ethics in customer relationship management (SP)
    LAP-CR-017
    Objectives:
    a. Define the terms informed consent and integrity.
    b. Describe the importance of trust in customer/business relationships.
    c. Discuss loyalty issues in customer/business relationships.
    d. Describe ethical issues related to the collection of customer information.
    e. Explain situations in which employees/departments involved in customer relationship management may be reluctant to share customer information with each other.
    f. Discuss ethical issues related to the sale of customer information to third parties.
    g. Discuss the impact of poor/unethical privacy practices on customer relationships.

Instructional Area: **Customer Relations (CR)** (cont'd)

Performance Element: Understand the nature of customer relationship management to show its contributions to a company.

Performance Indicator: CR:018 Describe the use of technology in customer relationship management (SP)
Objectives:
a. Define the following terms: client intelligence, cross-selling, up-selling, relationship mapping, personalization, segmentation, and clustering.
b. Explain the difference between customer relationship management technology and customer relationship management.
c. Describe types of customer relationship management tools (e.g., CRM applications, databases, data warehouses, etc.).
d. Discuss customer relationship management software approaches (e.g., operational, analytical, collaborative, sales force automation, etc.).
e. Explain types of data commonly stored in a CRM system (e.g., contact data, demographic data, transactional data, relationship data, etc.).
f. Discuss the benefits and drawbacks associated with CRM technology.
g. Explain how CRM technology can be used to create a "single view" of a customer.
h. Explain the importance of cleansing, standardizing, and updating data in a CRM data warehouse.

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

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

Performance Indicator: IM:012 Describe the need for marketing data (CS) LAP-IM-012
Objectives:
a. Define the following terms: facts, estimates, predictions, relationships, and marketing information.
b. Identify types of information used in marketing decision-making.
c. Identify types of marketing information useful to marketers.
d. Describe ways that marketers use marketing information.
e. Explain the impact of marketing information on marketers.

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

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

Performance Indicator: IM:184 Identify data monitored for marketing decision making (SP)
     LAP-IM-184
     Objectives:
     a. Explain sources of sales data monitored for marketing decision-making (e.g., sales involves, call reports, sales reports, expense reports).
     b. Discuss sources of customer data that are monitored for marketing decision-making (e.g., customer records, customer complaints, digital marketing analytics).
     c. Explain sources of product data monitored for marketing decision-making (e.g., product returns, service calls, product reviews).
     d. Describe financial data monitored for marketing decision-making.
     e. Explain sources and types of competitor data that are monitored for marketing decision-making (e.g., competitors' websites, competitors' financial information, salespeople, suppliers and distributors, observable changes in marketing strategies, market share).
     f. Discuss sources of data about the external business environment used in marketing decision-making (e.g., trade publications, vendors, economic indicators).

Performance Indicator: IM:001 Explain the nature and scope of the marketing-information management function (SP) LAP-IM-002
     Objectives:
     a. Define the following terms: marketing information, marketing-information management system, and marketing research.
     b. Describe the need for marketing information.
     c. Classify types of marketing information as primary or secondary.
     d. Describe the types of information marketers should obtain.
     e. Categorize internal sources of marketing information.
     f. Discuss external sources of marketing information.
     g. Explain why marketers should collect information.
     h. Describe the characteristics of useful marketing information.
     i. Describe reasons that marketers need to gather accurate information.
     j. Explain the functions of a marketing-information management system.
     k. Contrast marketing research with a marketing-information system.
     l. Describe the use of a marketing-information system.
     m. Explain the benefits of a marketing-information management system.
     n. Discuss the requirements of a marketing-information management system.
     o. Explain the role of marketing-information management in marketing.
     p. Describe limitations of marketing-information management systems.

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

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

Performance Indicator: IM:025 Explain the role of ethics in marketing-information management (SP)
Objectives:
a. Describe the importance of credibility and objectivity in marketing-information management.
b. Explain why the integrity of the marketing-information must be protected.
c. Explain types of ethical conflicts in marketing-information management.
d. Discuss ethical issues associated with obtaining information about competitors.
e. Describe ethical issues created by the use of technology in data collection.

Performance Indicator: IM:183 Describe the use of technology in the marketing-information management function (SP)
Objectives:
a. Identify ways that the use of technology impacts the marketing-information management function.
b. Describe how the use of the Internet for marketing-information management tracks and monitors customer website activities.
c. Discuss how customer-to-business communications on the Internet can be used in marketing-information management (e.g., email reminders, popup notices, online focus groups, etc.)
d. Explain how the Internet provides services for conducting research (e.g., search engines, tools for online surveys, database access, blogs, etc.)
e. Discuss marketers' use of virtual realties and simulations in marketing-information management.
f. Describe how the use of Global Positioning Systems (GPS) can facilitate marketing-information management.
g. Explain the use of data analysis software in marketing-information management.

Performance Indicator: IM:419 Describe the regulation of marketing-information management (SP)
Objectives:
a. Define the following terms: self-regulation, SUGGING, FRUGGING, privacy
b. Explain the role of self-regulation for marketing researchers.
c. Discuss privacy concerns associated with the collection, storage, mining, and use of data.
d. Describe the legalities associated with the collection of marketing data from children.
e. Discuss legal issues associated with the collection and sharing of healthcare data.
f. Explain legal issues associated with the protection of information held by financial institutions.
g. Discuss why marketing researchers are excluded from governance under the CAN-SPAM Act.
h. Explain how marketing researchers are protected from SUGGING and FRUGGING.
i. Describe legal issues associated with callbacks.
j. Discuss legal issues associated with the use of automatic dialers when collecting data.
k. Ascertain the current status of privacy/data security legislation.
l. Discuss reasons that marketing researchers must consider state, federal, and international laws when collecting data.

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

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

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

Objectives:

a. Define the following terms: marketing research, secondary research, primary research, personal interview, mail interview, telephone interview, questionnaire, and focus group.

b. Identify characteristics of effective marketing research.

c. Describe the importance of marketing research.

d. Explain how marketing research is carried out.

e. Explain the uses of marketing research.

f. Describe shortcomings of marketing research.

g. Describe types of marketing research objectives.

h. Describe the contents of a research plan or design.

i. Classify types of marketing research data.

j. Distinguish between internal and external sources of data.

k. Describe types of data collection methods.

l. Explain how data can be analyzed.

m. Describe steps in the marketing research process.

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

Objectives:

a. Define the term marketing research problem, decision problem, variables, unit of analysis, research objectives.

b. Explain the importance of determining the actual marketing research problem/issue.

c. Discuss the need to determine the "real" issue/problem rather than its symptoms.

d. Describe the steps involved in determining the marketing research problem/issue (e.g., clarifying and identifying the information needs, redefining the decision problem as a research problem, and setting research objectives.

e. Discuss activities involved in identifying the information needs (e.g., determining the purpose of the research, understanding the complete problem, identifying measurable symptoms, determining the unit of analysis, and determining relevant variables).

f. Explain why researchers need to adjust the decision problem into a research problem.

g. Describe the purposes of setting marketing research objectives.

h. Explain the relationship between the research problem/issue and the marketing research objectives.

i. Discuss how determining the marketing research problem/issue aids in determining whether to conduct the study.

j. Describe situations in which conducting a marketing research study would be inappropriate.

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

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

Performance Indicator: IM:284 Describe methods used to design marketing research studies (i.e., descriptive, exploratory, and causal) (SP) LAP-IM-014
   Objectives:
   a. Define the following terms: research design, descriptive design, exploratory design, causal design.
   b. Describe general purposes of marketing research (e.g., explain, predict, monitor, discover, test hypotheses).
   c. Explain the relationship between the research design and the purpose of the research.
   d. Discuss the purposes of using descriptive research.
   e. Explain the purposes of using exploratory research.
   f. Distinguish between descriptive and exploratory research.
   g. Describe the purposes of using causal research.

Performance Indicator: IM:281 Describe options businesses use to obtain marketing research data (i.e., primary and secondary research) (SP) LAP-IM-015
   Objectives:
   a. Distinguish between primary and secondary marketing research.
   b. Describe occasions for using primary sources of marketing research data.
   c. Discuss primary sources of marketing research data.
   d. Describe advantages/disadvantages of primary marketing research.
   e. Explain types of primary research (i.e., quantitative and qualitative).
   f. Explain occasions for using secondary sources of marketing research data.
   g. Describe secondary sources of marketing research data (i.e., internal and external).
   h. Describe advantages/disadvantages with using internal sources of secondary data.
   i. Explain reasons that businesses need to analyze external data.
   j. Explain advantages/disadvantages of secondary marketing research.
   k. Discuss reasons for outsourcing marketing research activities.

Performance Indicator: IM:285 Discuss the nature of sampling plans (i.e., who, how many, how chosen) (SP) LAP-IM-016
   Objectives:
   a. Define the terms population, sample, probability sampling, non-probability sampling, and sampling plan.
   b. Discuss the advantages of using a sample to represent the population.
   c. Explain when it is appropriate to use a sample of the population.
   d. Distinguish between probability and non-probability sample designs.
   e. Explain types of non-probability sample designs.
   f. Describe types of probability sample designs.
   g. Explain types of sampling bias/errors.
   h. Discuss the purpose of sampling plans.
   i. Explain the components of a sampling plan.

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

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

Performance Indicator: IM:289 Describe data-collection methods (e.g., observations, mail, diaries, telephone, Internet, discussion groups, interviews, scanners, tracking tools) (SP) LAP-IM-017
Objectives:
a. Explain reasons for having a variety of data-collection methods.
b. Describe forms of quantitative data collection (e.g., surveys, tracking, experiments).
c. Describe forms of qualitative data collection (e.g., personal interviews, focus groups, observational research).
d. Explain limitations associated with qualitative research.
e. Explain advantages/disadvantages with using observational techniques to collect marketing data.
f. Describe advantages/disadvantages associated with using mail techniques to collect marketing data.
g. Discuss advantages/disadvantages associated with using telephone data-collection methods.
h. Describe ways to use the Internet to collect data.
i. Explain advantages/disadvantages associated with using the Internet as a data-collection method.
j. Describe advantages/disadvantages of using discussion groups to collect data.
k. Discuss advantages/disadvantages associated with using interviews to collect data.
l. Explain advantages/disadvantages associated with using scanners to collect data.

Performance Indicator: IM:418 Explain characteristics of effective data-collection instruments (SP)
Objectives:
a. Explain why data-collection instruments must be carefully designed and administered.
b. Discuss challenges in developing effective data-collection instruments (e.g., cultural differences between researcher and source, resources required for the study, intangible nature of some types of information, difficulty accessing some sources of information).
c. Explain elements of surveys (i.e., a statement to respondents about how information will be used and why it is valuable; clear instructions, including for any skip patterns; appealing format; logical sequence of questions; consideration of how answers to previous items might affect later items).
d. Describe qualities of a good survey item (e.g., clear questions, single focus for each question, neutral questions, balanced questions, appropriate language for the intended respondent, appropriately broad or narrow in scope).
e. Explain how to ensure the quality of observations.
f. Discuss considerations for collecting data online.
g. Describe considerations in using a pre-existing data collection instrument.

Instructional Area: Marketing (MK)

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

Performance Indicator: MK:001 Explain marketing and its importance in a global economy (CS) LAP-MK-004
Objectives:
a. Define the following terms: marketing and marketing concept.
b. Identify marketing activities.
c. Categorize items that are marketed.
d. Explain where marketing occurs.
e. Explain the elements of the marketing concept.
f. Explain the role of marketing in a private enterprise system.
g. Describe ways in which consumers and businesses would be affected if marketing did not exist.
h. Explain how marketing benefits our society.

Performance Indicator: MK:002 Describe marketing functions and related activities (CS) LAP-MK-001
Objectives:
a. Define the following terms: channel management, marketing-information management, pricing, product/service management, promotion, and selling.
b. Explain the purposes of each marketing function.
c. Describe the importance of each marketing function to marketing.
d. Explain the interrelationships among marketing functions.

Performance Element: Acquire foundational knowledge of customer/client/business behavior to understand what motivates decision-making.

Performance Indicator: MK:014 Explain factors that influence customer/client/business buying behavior (SP) LAP-MK-006
Objectives:
a. Define the following terms: behavior, perception, drive, cues, attitudes, beliefs, and expectations.
b. Discuss the role that needs and wants play in behavior.
c. Explain the selective processes that consumers use to respond to stimuli.
d. Distinguish between attitudes and beliefs.
e. Explain how cultural influences affect consumer behavior.
f. Describe how social influences impact consumer behavior.
g. Discuss how a person's individual differences impact consumer behavior.
h. Explain how psychological influences impact consumer behavior.
i. Discuss situational influences that impact consumer behavior.
j. Describe ways that final consumer behavior differs from that of business customers.
k. Explain how environmental influences affect business-customers' behavior.
l. Discuss how organizational influences affect business-customers' behavior.
m. Explain why business professionals attempt to satisfy both a company's needs and those of individuals when working with business customers.

Instructional Area: Market Planning (MP)

Performance Element: Develop marketing strategies to guide marketing tactics.

Performance Indicator: MP:001 Explain the concept of marketing strategies (CS) LAP-MP-002
Objectives:
a. Define the following terms: marketing mix, product, place, promotion, price, goals, strategies, and tactics.
b. Identify the components of the marketing mix.
c. Describe the importance of each of the components of the marketing mix.
d. Explain the relationship of goals, strategies, and tactics.
e. Describe the importance of marketing strategies.
f. Explain the factors that may cause marketing strategies to change.
g. Explain the importance of strategies in the marketing mix.

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

Performance Indicator: MP:003 Explain the concept of market and market identification (CS) LAP-MP-003
Objectives:
a. Define the following terms: market, target market, mass marketing, marketing segments, market segmentation, demographic segmentation, geographic segmentation, psychographic segmentation, and behavioral segmentation.
b. Explain the importance of target markets to businesses.
c. Describe advantages and disadvantages of mass marketing.
d. Describe advantages and disadvantages of using market segments.
e. Explain why the use of market segments is increasing.
f. Describe demographic characteristics that are analyzed by marketers.
g. Explain the value of geographic segmentation.
h. Discuss the value of psychographic segmentation.
i. Describe types of behavioral segmentation.

Instructional Area: Professional Development (PD)

Performance Element: Participate in career planning to enhance job-success potential.

Performance Indicator: PD:024 Explain employment opportunities in marketing (CS) LAP-PD-021
Objectives:
a. Identify types of businesses that offer careers in marketing.
b. Contrast marketing careers with careers in medicine.
c. Explain why jobs in marketing provide career potential.
d. Describe the following marketing careers: (1) Marketing research; (2) Advertising; (3) Product management; (4) Channel management; (5) Sales; (6) Retailing; (7) Service marketing; (8) Customer service; (9) Public relations
e. Describe well-recognized traits and skills needed for success in marketing careers.

Instructional Area: Pricing (PI)

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

Performance Indicator: PI:001 Explain the nature and scope of the pricing function (SP) LAP-PI-002
   Objectives:
   a. Describe the characteristics of effective pricing.
   b. Explain what is being priced when prices are set for products.
   c. List factors that affect a product's price.
   d. Describe how pricing affects product decisions.
   e. Explain how pricing affects place (distribution) decisions.
   f. Describe how pricing affects promotion decisions.
   g. Explain pricing objectives.

Performance Indicator: PI:015 Describe the role of business ethics in pricing (SP)
   Objectives:
   a. Define the following terms: price fixing, predatory pricing.
   b. Identify ethical considerations in setting prices.
   c. Explain ethical concerns associated with the use of complex prices that are confusing to consumers.
   d. Explain how pricing tactics can relate to social responsibility.

Performance Indicator: PI:016 Explain the use of technology in the pricing function (SP)
   Objectives:
   a. Identify ways that the use of technology impacts the pricing function.
   b. Explain specific applications of technology in pricing.
   c. Describe benefits of automating the pricing process.
   d. Discuss risks associated with automating the pricing process.
   e. Explain how automating pricing facilitates targeted pricing.

Performance Indicator: PI:017 Explain legal considerations for pricing (SP)
   Objectives:
   a. Define the following terms: bait-and-switch advertising, deceptive pricing, dumping, loss-leader pricing, predatory pricing, price discrimination, and price fixing.
   b. Describe laws affecting pricing.
   c. Explain positive effects of pricing laws.
   d. Discuss negative effects of pricing laws.
   e. Explain the impact of anti-dumping laws on consumers.

Instructional Area: **Pricing (PI)** (cont'd)

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

Performance Indicator: PI:002 Explain factors affecting pricing decisions (SP) LAP-PI-003
    Objectives:
    a. Define the term selling price.
    b. Distinguish between price and selling price.
    c. Describe the importance of selling price.
    d. Identify factors affecting selling price.
    e. Explain how consumers can affect selling price.
    f. Describe how government affects selling price.
    g. Discuss how competition can affect selling price.
    h. Explain how the nature of a business can affect selling price.
    i. Identify pricing objectives.
    j. Explain how pricing objectives affect selling price.

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

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

**Performance Indicator: PM:001 Explain the nature and scope of the product/service management
    function (SP) LAP-PM-017**
    Objectives:
    a. Define the term product/service management.
    b. Explain who is responsible for managing products/services.
    c. Describe the benefits of product/service managing.
    d. Describe the phases of product/service managing.
    e. Describe factors affecting product/service managing.
    f. Explain the role product/service management plays in marketing.

**Performance Indicator: PM:024 Identify the impact of product life cycles on marketing decisions (SP)
    LAP-PM-018**
    Objectives:
    a. Define the following terms: product life cycle, introduction, growth, maturity, decline, pricing
    decisions, promotion decisions, place decisions, and product decisions.
    b. Identify stages of the product life cycle.
    c. Describe the characteristics of each stage of the product life cycle.
    d. Discuss the impact of each stage of the product life cycle on marketing decision-making.
    e. Explain how a company can extend a product''s life cycle.

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

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

Performance Indicator: PM:039 Describe the use of technology in the product/service management function (SP)
Objectives:
a. Identify ways that the use of technology impacts the product/service management function.
b. Explain specific applications of technology in product/service management.
c. Describe how technology is used to manage the product life cycle.
d. Discuss how technology is used in market testing.
e. Explain how technology is used in product labeling and packaging.

Performance Indicator: PM:040 Explain business ethics in product/service management (SP)
Objectives:
a. Describe ethical considerations in product packaging.
b. Explain how planned obsolescence is an ethical issue for businesses.
c. Explain ethical issues associated with product labeling.
d. Discuss ethical issues associated with changing a product's quality.
e. Describe ethical issues associated with failing to inform customers about product risks.

Performance Element: Generate product ideas to contribute to ongoing business success.

Performance Indicator: PM:134 Identify product opportunities (SP)
Objectives:
a. Define the following terms: innovation, market gap identification, needs analysis, product differentiation, product opportunity, and product opportunity gap.
b. Distinguish between process and product innovation.
c. Explain the role of social, economic, and technological trends in identify product opportunities.
d. Describe research sources for identifying opportunities.
e. Describe pitfalls to opportunity identification.
f. Explain methods/techniques used to identify product opportunities.
g. Demonstrate methods/techniques for identifying product opportunities.

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

Performance Element: Generate product ideas to contribute to ongoing business success.

Performance Indicator: PM:127 Identify methods/techniques to generate a product idea (SP)
> **LAP-PM-127**
> **Objectives:**
> a. Define the terms attribute listing, lateral thinking, analogies, associations, brainstorming, synectics, sketching and doodling, forced questioning, and morphological analysis.
> b. Explain the role of criticism in idea creation.
> c. Describe types of brainstorming techniques.
> d. Distinguish among free association techniques, forced relations techniques, and analytical techniques used to generate business/product ideas.
> e. Explain sources of business/product ideas.
> f. Discuss the importance of evaluating a business owner's strengths when generating business/product ideas.
> g. Describe pitfalls to idea identification.
> h. Discuss the importance of generating business/product ideas.
> i. Explain methods/techniques used to identify business/product ideas.

Performance Indicator: PM:128 Generate product ideas (SP)
> **Objectives:**
> a. Identify purposes of idea-generating methods/techniques.
> b. Discuss advantages/disadvantages of idea-generating methods/techniques.
> c. Explain the role of a facilitator in generating product/business ideas.
> d. List questions to ask to facilitate idea generation.
> e. Implement methods/techniques to generate product/business ideas.

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

Performance Indicator: PM:019 Describe the uses of grades and standards in marketing (CS)
> **LAP-PM-008**
> **Objectives:**
> a. Define the terms grades and standards.
> b. Explain the interrelationship of grades and standards.
> c. Describe what businesses do with products that fail to meet the lowest standards.
> d. Explain reasons for using grades and standards.
> e. Describe ways that grades and standards aid the buying and selling process.
> f. Explain the importance of grades and standards in global trade.
> g. Identify groups that develop grades and standards.
> h. Describe types of standards.
> i. Identify examples of graded products.

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

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

Performance Indicator: PM:020 Explain warranties and guarantees (CS) LAP-PM-004
> **Objectives:**
> a. Define the following terms: warranty, express warranty, implied warranty, full warranty, limited warranty, and guarantee.
> b. Identify the provisions of a full warranty.
> c. Distinguish between warranties and guarantees.
> d. Identify the characteristics of an effective guarantee.
> e. Describe the purposes of warranties and guarantees.
> f. Explain the benefits of warranties and guarantees.
> g. Describe government regulation of warranties and guarantees.

Performance Indicator: PM:017 Identify consumer protection provisions of appropriate agencies (SP) LAP-PM-007
> **Objectives:**
> a. Describe forms of consumer protection associated with product/service management.
> b. Describe the need for consumer protection in product/service management.
> c. Discuss the role of governmental agencies in protecting consumers.
> d. Explain laws that protect consumers.
> e. Explain how consumer protection affects businesses.
> f. Describe expenses that can be incurred by businesses as a result of consumer protection.

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

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

Performance Indicator: PM:003 Explain the concept of product mix (SP) LAP-PM-003
Objectives:
a. Define the following terms: product mix, product item, product line, width, depth, consistency, expansion, contraction, alteration, trading up, trading down, and positioning.
b. Identify ways in which product lines can be organized.
c. Describe product mix dimensions.
d. Identify reasons that a business would offer a narrow product mix.
e. Identify reasons that a business would offer a broad product mix.
f. Identify reasons that a business would offer a deep product mix.
g. Identify reasons that a business would offer a shallow product mix.
h. Explain the importance of a business's product mix.
i. Describe advantages of expansion product-mix strategies.
j. Describe disadvantages of expansion product-mix strategies.
k. Describe advantages of contraction product-mix strategies.
l. Describe disadvantages of contraction product-mix strategies.
m. Describe advantages of alteration product-mix strategies.
n. Describe disadvantages of alteration product-mix strategies.
o. Describe advantages of trading up product-mix strategies.
p. Describe disadvantages of trading up product-mix strategies.
q. Describe advantages of trading down product-mix strategies.
r. Describe disadvantages of trading down product-mix strategies.
s. Describe advantages of positioning product-mix strategies.
t. Describe disadvantages of positioning product-mix strategies.

Performance Indicator: PM:041 Describe the nature of product bundling (SP)
Objectives:
a. Explain how product bundling works.
b. Describe occasions when the use of product bundling makes good business sense.
c. Discuss benefits associated with product bundling.
d. Identify challenges with product bundling.
e. Explain ways marketers bundle products (e.g., by product category, by customer, or by application).
f. Discuss the impact of product bundling on pricing decisions.
g. Describe considerations in developing a product bundling strategy.

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

Performance Element: Position company to acquire desired business image.

Performance Indicator: PM:206 Explain the nature of corporate branding (SP) LAP-PM-020
    Objectives:
    a. Define the following terms: brand identity, values, brand cues, brand personality, touch points, brand promise, and corporate brands.
    b. Describe the elements that make up a corporate brand's identity.
    c. Explain the use of values in corporate brand development.
    d. Discuss the significance of a corporate brand's personality.
    e. Describe the use of corporate brand touch points.
    f. Distinguish between corporate and distributor brands.

Performance Indicator: PM:207 Describe factors used by businesses to position corporate brands (SP)
    Objectives:
    a. Discuss reasons for positioning corporate brands.
    b. Describe the relationship between the target market and positioning of a corporate brand.
    c. Discuss the importance of determining the company's competitive advantage when positioning a corporate brand.
    d. Explain strategies for positioning corporate brands (e.g., quality, value/price, benefits/attributes, problem and solution, competitor-based, celebrity-driven, distribution, emotion, etc.).

Performance Indicator: PM:277 Identify customer touch points (SP)
    Objectives:
    a. Define the term touch point.
    b. Describe types of touch points.
    c. Discuss reasons for identifying customer touch points.
    d. Describe methods for identifying customer touch points.
    e. Demonstrate techniques for identifying customer touch points.

Instructional Area: Promotion (PR)

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

Performance Indicator: PR:001 Explain the role of promotion as a marketing function (CS) LAP-PR-002
    Objectives:
    a. Define the term promotion.
    b. List users of promotion.
    c. Describe the benefits of using promotion.
    d. Describe the costs associated with the use of promotion.
    e. Describe types of promotional objectives.
    f. Discuss the relationship of promotion and marketing.

Instructional Area: Promotion (PR) (cont'd)

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

Performance Indicator: PR:002 Explain the types of promotion (i.e., institutional, product) (CS)
LAP-PR-004
Objectives:
a. Define the following terms: product promotion, primary product promotion, secondary product promotion, institutional promotion, public service, public relations, and patronage.
b. Identify types of product promotion.
c. Describe the uses of product promotion.
d. Identify types of institutional promotion.
e. Describe uses of institutional promotion.
f. Discuss the advantages of promotional activities.
g. Discuss the disadvantages of promotional activities.

Performance Indicator: PR:003 Identify the elements of the promotional mix (SP) LAP-PR-001
Objectives:
a. Define the following terms: promotional mix, advertising, personal selling, publicity and sales promotion.
b. Identify the elements of the promotional mix.
c. Categorize examples of promotions according to the elements of the promotional mix.
d. Describe the importance of the promotional mix.
e. Identify factors affecting the promotional mix.
f. Describe how the product being sold affects the promotional mix.
g. Explain how the product's market affects the promotional mix.
h. Discuss how the distribution system affects the promotional mix.
i. Explain how the product's company affects the promotional mix.

Performance Indicator: PR:099 Describe the use of business ethics in promotion (SP)
Objectives:
a. Explain ethical issues associated with fear-based advertising.
b. Discuss sexism/stereotyping in advertising.
c. Explain ethical issues associated with promotion to children.
d. Discuss ethical issues associated with sales promotion sweepstakes, samples, rebates, and premiums.
e. Explain the use of stealth marketing.
f. Discuss ethical issues associated with use of customer information obtained on the Internet.
g. Describe ways that businesses use socially responsible promotions.

Instructional Area: Promotion (PR) (cont'd)

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

Performance Indicator: PR:100 Describe the use of technology in the promotion function (SP)
   Objectives:
   a. Explain how the use of technology in promotion has changed the way marketers communicate with customers.
   b. Identify ways that the use of technology positively impacts the promotion function.
   c. Discuss ways that the use of technology negatively impacts the promotion function.
   d. Describe ways that businesses use the Internet as a promotional tool.
   e. Describe how technology has enhanced opportunities to contact customers with promotional messages.
   f. Discuss ways that technology has facilitated the use of sales promotions.
   g. Explain specific applications of technology in promotion.

Performance Indicator: PR:101 Describe the regulation of promotion (SP)
   Objectives:
   a. Explain the need for truthfulness in promotional messages and claims.
   b. Discuss how the use of misleading or inaccurate statements in promotion is regulated.
   c. Explain laws that protect customers from unwanted promotions.
   d. Discuss laws that protect children from promotional messages.
   e. Explain the regulation of telemarketing.
   f. Discuss the regulation of data privacy.
   g. Describe actions that can be taken by the Federal Trade Commission to correct misleading advertising.
   h. Discuss reasons for the regulation of products used in advertising.
   i. Explain how the legality of products used in advertising can vary from country to country.

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

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

Performance Indicator: PR:007 Explain types of advertising media (SP) LAP-PR-003
> **Objectives:**
> a. Define the term advertising media.
> b. Categorize advertising media.
> c. Identify types of publications.
> d. Describe factors on which newspapers vary.
> e. Categorize types of magazines.
> f. Describe the two categories of broadcast media.
> g. Categorize purchase options for television advertising.
> h. Discuss the difference between local and network advertising.
> i. Describe types of direct-mail advertising.
> j. Explain types of Web advertising.
> k. Identify types of out-of-home media.
> l. Describe specialty advertising.
> m. Discuss the use of directory advertising.
> n. Explain the use of movie theater advertising.
> o. Describe the use of product placement for advertising.
> p. Discuss the use of telemarketing for advertising.
> q. Explain the use of videotapes, DVDs, and CD-ROM advertising.
> r. Explain trends that are affecting advertising media.

Performance Indicator: PR:247 Describe word-of-mouth channels used to communicate with targeted audiences (SP)
> **Objectives:**
> a. Define the term word of mouth marketing, buzz marketing, viral marketing, community marketing, grassroots marketing, evangelist marketing, product seeding, influencer marketing, cause marketing, conversation creation, brand blogging, referral programs, social networks.
> b. Discuss the need for honesty and transparency in word of mouth marketing.
> c. Explain the philosophy of word of mouth marketing.
> d. Describe types of word of mouth marketing.
> e. Distinguish between organic and amplified word of mouth marketing.
> f. Discuss techniques businesses can use to foster organic word of mouth marketing.
> g. Explain techniques businesses can use to foster amplified word of mouth marketing.

Performance Indicator: PR:089 Explain the nature of direct marketing channels (SP)
> **Objectives:**
> a. Define the term direct marketing.
> b. Identify communication channels used for direct marketing.
> c. Describe advantages/disadvantages associated with direct marketing.
> d. Explain how the Internet has changed businesses' ability to communicate directly with customers.
> e. Describe the importance of databases to direct marketing.

Instructional Area: Promotion (PR) (cont'd)

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

Performance Indicator: PR:249 Identify communications channels used in sales promotion (SP)
   Objectives:
   a. Define the following terms: free-standing insert (FSI), coupons, rebates, push money, point-of-sale displays, trade allowances, dealer loaders, contests, sweepstakes, games, loyalty programs, demonstrations, personal appearances, advertising-support programs, co-op advertising, trade-in promotions, samples, premiums, free products, promotional products, trade shows, push strategies, pull strategies.
   b. Discuss differences between advertising and sales promotion.
   c. Explain reasons that businesses use sales promotions.
   d. Describe types of consumer sales promotions.
   e. Discuss types of trade sales promotions.
   f. Explain types of business-to-business sales promotions.
   g. Describe types of point-of-purchase (POP) displays that are used for sales promotion.
   h. Compare the similarities and differences between coupons and rebates.
   i. Distinguish between push and pull sales promotion strategies.
   j. Explain how contests, sweepstakes, and games differ.
   k. Describe trends in sales promotions.

Performance Indicator: PR:250 Explain communications channels used in public-relations activities (SP)
   Objectives:
   a. Define the following terms: press kits, audio/video releases, matte release, website press room, special events, sponsorships, community relations, philanthropy, crisis management.
   b. Explain the role of public relations in business.
   c. Discuss advantages/disadvantages associated with public relations.
   d. Describe the main tools used in public relations to communicate with targeted audiences (i.e., media relations, media tours, newsletters, special events, speaking engagements, sponsorships, employee relations, and community relations and philanthropy).
   e. Explain tools used to communicate public relations messages to the media (i.e., press kits, audio/video releases, matte releases, website press room).
   f. Discuss reasons that public relations specialists monitor markets.
   g. Describe the purpose of crisis management in public relations.
   h. Explain trends in public relations.
   i. Describe the use of blogs for public relations activities.
   j. Discuss the use of web forums in public relations activities.
   k. Explain how RSS feeds can be used for public relations activities.
   l. Describe the use of podcasting for public relations activities.
   m. Explain how search engine optimization (SEO) can be used for public relations activities.

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

Performance Element: Understand the use of an advertisement's components to communicate with targeted audiences.

Performance Indicator: PR:014 Explain the components of advertisements (SP)
Objectives:
a. Define the following terms: headline, illustration, identification, copy, layout, and white space.
b. Explain the purpose of each element in an advertisement.
c. Describe the purpose of an ad's layout.
d. Identify approaches businesses can use with headlines to achieve the ad's objectives.
e. Explain ways businesses can use illustrations in advertisements to focus reader's attention on the product.
f. Describe copy techniques that businesses can use to create desire for a product in a print advertisement.
g. Identify types of information contained in the identification element of advertisements.

Performance Indicator: PR:251 Explain the importance of coordinating elements in advertisements (SP)
Objectives:
a. Discuss the impact of color on an advertisement's message.
b. Explain how the image/art used in an advertisement can support or detract from an ad's message/product being sold.
c. Discuss how the copy should coordinate with the headline.
d. Describe how white space affects the elements of advertisements.
e. Explain how the consistent use of design across media helps to promote brand identity.
f. Discuss the role of typography in creating brand identity.
g. Describe the impact of layout in creating brand identity.
h. Explain the importance of coordinating an ad's style with its other elements.

Performance Element: Understand the use of public-relations activities to communicate with targeted audiences.

Performance Indicator: PR:252 Identify types of public-relations activities (SP)
Objectives:
a. Discuss types of interactive public-relations activities (e.g., press conferences, speaking engagements, special events, sponsorships, blogs, web forums, chat rooms, social media, media tours, email).
b. Explain types of one-way public-relations activities (e.g., search-engine optimization, newsletters, web sites, RSS feeds, podcasts, press releases, press kits, audio/video releases, matte releases, direct mail).
c. Describe ways that interactive tools can be used to develop positive public relations.
d. Discuss ways that one-way tools can be used to develop positive public relations.
e. Explain the use of public relations for crisis management.
f. Describe trends in public relations activities.

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

Performance Element: Understand the use of public-relations activities to communicate with targeted audiences.

Performance Indicator: PR:253 Discuss internal and external audiences for public-relations activities (SP)
Objectives:
a. Discuss reasons that public-relations specialists appeal to their company's employees.
b. Explain why public-relations specialists target communications to their customers.
c. Describe reasons that public-relations specialists target their communications activities at their community.
d. Discuss reasons that public-relations specialists target their communications activities at the company's vendors.
e. Explain why public-relations specialists target their investors with communications activities.
f. Describe reasons that public-relations specialists target the larger business community or industry members with their communications activities.
g. Identify topics appropriate for each of a company's audiences.

Instructional Area: **Selling (SE)**

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

Performance Indicator: SE:017 Explain the nature and scope of the selling function (CS) LAP-SE-117
Objectives:
a. Define the term selling.
b. Identify individuals, groups, or agencies that sell.
c. Explain reasons that customers buy goods and services.
d. Identify types of items that are sold.
e. Explain where selling occurs.
f. Describe how products are sold.
g. Describe the role of selling in a market economy.
h. Explain personal characteristics of salespeople that are essential to selling.

Performance Indicator: SE:076 Explain the role of customer service as a component of selling relationships (CS) LAP-SE-130
Objectives:
a. Distinguish between customer service as a process and customer service as a function.
b. Describe how businesses can use customer service to beat their competition.
c. Discuss factors that influence customer expectations of customer service.
d. Explain how customer service facilitates sales relationships.
e. Identify pre-sales opportunities for providing customer service that can facilitate sales relationships.
f. Identify post-sales opportunities when customer service can be provided to facilitate sales relationships.
g. Discuss actions a salesperson can take to make the most of her/his customer service activities.

Instructional Area: Selling (SE) (cont'd)

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

Performance Indicator: SE:828 Explain key factors in building a clientele (SP) LAP-SE-115
Objectives:
a. Identify company benefits of building a clientele.
b. Identify salesperson benefits from building a clientele.
c. Cite examples of costs that can be incurred by businesses for failing to build a clientele.
d. Identify attitudes of salespeople that help to build a clientele.
e. Describe ways that salespeople exhibit a service attitude.
f. Describe the activities of salespeople that can help to build a clientele.

Performance Indicator: SE:932 Explain company selling policies (CS) LAP-SE-121
Objectives:
a. Define the following terms: selling policies, selling-activity policies, terms-of-sale policies and service policies.
b. Identify types of selling-activity policies.
c. Identify types of terms-of-sale policies.
d. Identify types of service policies.
e. Explain the importance of selling policies.
f. Describe the characteristics of selling policies.
g. Explain why selling policies are needed.
h. Describe external factors that affect selling policies.
i. Describe internal factors that affect selling policies.
j. Describe regulatory factors that affect selling policies.
k. Explain problems encountered with the use of selling policies.

Performance Indicator: SE:106 Explain legal and ethical considerations in selling (SP) LAP-SE-129
Objectives:
a. Explain the importance of business ethics in selling.
b. Describe ethical concerns of salespeople that deal with the company.
c. Explain ethical concerns of salespeople that deal with coworkers.
d. Explain ethical concerns of salespeople that deal with customers/clients.
e. Describe ethical concerns of salespeople that deal with the competition.
f. Describe ethical concerns of employers in dealing with salespeople.
g. Identify reasons that sales activites are regulated.
h. Describe unfair or deceptive sales practices that are regulated.
j. Explain state and federal regulations that affect sales activities.

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

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

Performance Indicator: SE:107 Describe the use of technology in the selling function (SP)
  Objectives:
  a. Describe capabilities that the use of technology provides salespeople.
  b. Explain how technology impacts a salesperson's planning skills.
  c. Describe how technology can impact a salesperson's targeting skills.
  d. Discuss how technology can impact a salesperson's presentation skills.
  e. Explain how technology can impact a salesperson's ability to adapt or tailor a sales presentation to a particular customer.
  f. Explain the use of Customer Relationship Management (CRM) software in selling.
  g. Discuss the use of tablet PCs in selling.
  h. Explain the use of web-based visits between customers and sales staff.
  i. Describe the use of the Internet in sales administration activities.

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

Performance Indicator: SE:062 Acquire product information for use in selling (CS) LAP-SE-131
  Objectives:
  a. Identify sources of product information that provide information for use in selling.
  b. Identify types of product information that can be useful in selling.
  c. Cite occasions when product information can be used in sales presentations.
  d. Describe guidelines to follow when acquiring product information.
  e. Demonstrate procedures for acquiring product information for use in selling.

Performance Indicator: SE:109 Analyze product information to identify product features and benefits (SP) LAP-SE-113
  Objectives:
  a. Define the following terms: feature, benefit, obvious benefits, unique benefits, hidden benefits, feature-benefit selling, and feature-benefit chart.
  b. Identify sources of feature/benefit information.
  c. Identify an example of an obvious or apparent benefit.
  d. Identify an example of a unique or exclusive benefit.
  e. Identify an example of a hidden benefit.
  f. Describe how to prepare a feature-benefit chart for a product.
  g. Prepare a feature-benefit chart for a product.

Performance Indicator: SE:019 Explain the use of brand names in selling (CS)
  Objectives:
  a. Discuss the role of brand names in building an emotional connection with customers/clients.
  b. Describe the impact of brand names on customer loyalty and repeat business.
  c. Explain benefits of selling brand names vs. products.

Instructional Area: Selling (SE) (cont'd)

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

Performance Indicator: SE:048 Explain the selling process (CS) LAP-SE-048
Objectives:
a. Identify the components of the selling process.
b. Describe the importance of establishing relationships with customers.
c. Describe ways to discover customer needs.
d. Describe the components of prescribing solutions to customer needs.
e. Explain the importance of reaching closure in sales situations.
f. Describe aspects of reaching closure in sales situations.
g. Describe the importance of reaffirming the buyer-seller relationship.
h. Describe ways to reaffirm the buyer-seller relationship.
i. Explain similarities/differences in the ways businesses implement the selling process.
j. Explain the importance of using a selling process.

Performance Indicator: SE:359 Discuss motivational theories that impact buying behavior (SP)
Objectives:
a. Define the terms motivation, valence, perceived probability
b. Explain reward-measurement theory (i.e., motivation equals the benefits of buying).
c. Describe types of internal and external rewards that motivate buyers.
d. Explain why the two dimensions of valence (the importance or value) of the reward and perceived probability need to be considered in risk measurement theory.
e. Describe how salespeople can apply the reward-measurement theory to motivate customers.
f. Discuss behavior choice theory (i.e., the motivation is the situation).
g. Explain the choice process customers use to decide how they will buy (i.e., identify situation [self-orientation or company-orientation], evaluate personal relevance, evaluate alternative actions and requirements, and choose behavior strategy).
h. Distinguish between offensive and defensive behavior strategies (i.e., offensive strategies maximize gain, while defensive strategies minimize loss).
i. Describe role theory (i.e., the motivation is the norms or expectations).
j. Explain buying determinant theory (i.e., variety of factors motivate customers—individual factors, organizational factors, market factors, and environmental factors).
k. Discuss how Maslow's hierarchy of needs can be used to understand customer motivation when buying.

Instructional Area: Selling (SE) (cont'd)

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

Performance Indicator: SE:110 Establish relationship with customer/client (CS)

Objectives:

a. Describe the importance of establishing relationships with customers/clients during the initial contact with them.

b. Explain techniques for establishing relationships with customers/clients during the initial contact with them.

c. Identify factors affecting the choice of techniques to use in establishing relationships with customers/clients during initial contact.

d. Describe characteristics of effective sales openings.

e. Explain procedures for establishing relationships with customers/clients during initial contacts.

f. Demonstrate how to establish relationships with customers/clients during the initial contact with them.

Performance Indicator: SE:111 Determine customer/client needs (CS)

Objectives:

a. Define the following terms: open-ended questions, assumptive questions, and interpretive questions.

b. Identify examples of the types of questions used in sales situations.

c. Explain the importance of questioning in selling.

d. Explain the timing of questions in selling.

e. Describe the relationship of customer type to questioning style.

f. Explain guidelines for questioning customers.

g. Question customers to obtain information that will help to satisfy their needs.

Performance Indicator: SE:114 Recommend specific product (CS) LAP-SE-111

Objectives:

a. Define the following terms: product substitution, trading-up, and trading down.

b. Explain the importance of meeting customers' needs when recommending specific products.

c. Explain guidelines for using buying motives when recommending specific products.

d. Identify occasions when product substitution should be used.

e. Explain guidelines for recommending a specific product to customers.

f. Demonstrate procedures for recommending specific products to customers.

Semester 1		
Marketing Basics		
What is marketing?	MK:001 Explain marketing and its importance in a global economy (CS) LAP-MK-004	6 days
	MK:002 Describe marketing functions and related activities (CS) LAP-MK-001	
	PD:024 Explain employment opportunities in marketing (CS) LAP-PD-021	
Market Planning		
What do marketers plan?	MP:001 Explain the concept of marketing strategies (CS) LAP-MP-002	4 days
	MP:003 Explain the concept of market and market identification (CS) LAP-MP-003	
Selling & Customer Service		
Why is customer service important in selling?	SE:017 Explain the nature and scope of the selling function (CS) LAP-SE-117	10 days
	SE:076 Explain the role of customer service as a component of selling relationships (CS) LAP-SE-130	
	CR:004 Demonstrate a customer-service mindset (CS) LAP-CR-004	
	CR:005 Reinforce service orientation through communication (CS)	
	CR:019 Adapt communication to the cultural and social differences among clients (CS)	
	CR:006 Respond to customer inquiries (CS)	
What should you do when things go wrong for a customer?	SE:932 Explain company selling policies (CS) LAP-SE-121	10 days
	CR:007 Interpret business policies to customers/clients (CS)	
	CR:009 Handle difficult customers (CS) LAP-CR-009	
	CR:010 Handle customer/client complaints (CS) LAP-CR-010	
	CR:030 Build and maintain relationships with customers (SP)	

How and why do you represent your employer?	CR:001 Identify company's brand promise (CS) LAP-CR-006	4 days
	CR:002 Determine ways of reinforcing the company's image through employee performance (CS)	
What is customer relationship management?	SE:828 Explain key factors in building a clientele (SP) LAP-SE-115	8 days
	CR:016 Discuss the nature of customer relationship management (SP) LAP-CR-016	
	CR:017 Explain the role of ethics in customer relationship management (SP) LAP-CR-017	
	CR:018 Describe the use of technology in customer relationship management (SP)	
What do you need to know about products that you sell?	SE:062 Acquire product information for use in selling (CS) LAP-SE-131	6 days
	SE:109 Analyze product information to identify product features and benefits (SP) LAP-SE-113	
	SE:019 Explain the use of brand names in selling (CS)	
How do you sell goods and services to customers?	SE:048 Explain the selling process (CS) LAP-SE-048	15 days
	CR:029 Develop rapport with customers (CS)	
	SE:110 Establish relationship with customer/client (CS)	
	MK:014 Explain factors that influence customer/client/business buying behavior (SP) LAP-MK-006	
	SE:359 Discuss motivational theories that impact buying behavior (SP)	
	SE:111 Determine customer/client needs (CS)	
	SE:114 Recommend specific product (CS) LAP-SE-111	
	SE:106 Explain legal and ethical considerations in selling (SP) LAP-SE-129	
	SE:107 Describe the use of technology in the selling function (SP)	

Pricing		
How do marketers decide how much to charge for their products?	PI:001 Explain the nature and scope of the pricing function (SP) LAP-PI-002 PI:015 Describe the role of business ethics in pricing (SP) PI:016 Explain the use of technology in the pricing function (SP) PI:017 Explain legal considerations for pricing (SP) PI:002 Explain factors affecting pricing decisions (SP) LAP-PI-003	10 days
Channel Management		
What is channel management?	CM:001 Explain the nature and scope of channel management (CS) LAP-CM-002 CM:003 Explain the nature of channels of distribution (CS) LAP-CM-003 CM:004 Describe the use of technology in the channel management function (CS) CM:005 Explain legal considerations in channel management (SP) CM:006 Describe ethical considerations in channel management (SP)	10 days

Semester 2		
Promotion		
What do marketers promote?	PR:001 Explain the role of promotion as a marketing function (CS) LAP-PR-002 PR:002 Explain the types of promotion (i.e., institutional, product) (CS) LAP-PR-004	4 days
How do marketers promote their products?	PR:003 Identify the elements of the promotional mix (SP) LAP-PR-001 PR:099 Describe the use of business ethics in promotion (SP) PR:100 Describe the use of technology in the promotion function (SP) PR:101 Describe the regulation of promotion (SP)	8 days
What is advertising?	PR:007 Explain types of advertising media (SP) LAP-PR-003 PR:014 Explain the components of advertisements (SP) PR:251 Explain the importance of coordinating elements in advertisements (SP)	6 days
What word-of-mouth channels are used to promote products?	PR:247 Describe word-of-mouth channels used to communicate with targeted audiences (SP)	2 days
What is direct marketing?	PR:089 Explain the nature of direct marketing channels (SP)	2 days
What is sales promotion?	PR:249 Identify communications channels used in sales promotion (SP)	2 days
What are publicity and public-relations?	PR:250 Explain communications channels used in public-relations activities (SP) PR:252 Identify types of public-relations activities (SP) PR:253 Discuss internal and external audiences for public-relations activities (SP) CO:039 Write informational messages (CS)	8 days

Product/Service Management		
What is product/service management?	PM:001 Explain the nature and scope of the product/service management function (SP) LAP-PM-017	16 days
	PM:024 Identify the impact of product life cycles on marketing decisions (SP) LAP-PM-018	
	PM:039 Describe the use of technology in the product/service management function (SP)	
	PM:040 Explain business ethics in product/service management (SP)	
	PM:017 Identify consumer protection provisions of appropriate agencies (SP) LAP-PM-007	
	PM:019 Describe the uses of grades and standards in marketing (CS) LAP-PM-008	
	PM:020 Explain warranties and guarantees (CS) LAP-PM-004	
	PM:003 Explain the concept of product mix (SP) LAP-PM-003	
	PM:041 Describe the nature of product bundling (SP)	
What is corporate branding?	PM:206 Explain the nature of corporate branding (SP) LAP-PM-020	6 days
	PM:207 Describe factors used by businesses to position corporate brands (SP)	
	PM:277 Identify customer touch points (SP)	
How do marketers develop new product ideas?	PM:134 Identify product opportunities (SP)	8 days
	PM:127 Identify methods/techniques to generate a product idea (SP) LAP-PM-127	
	CO:040 Write inquiries (CS)	
	CO:201 Facilitate (lead) group discussions (SP)	
	PM:128 Generate product ideas (SP)	

Marketing-Information Management		
Why do marketers need data?	IM:012 Describe the need for marketing data (CS) LAP-IM-012	4 days
	IM:184 Identify data monitored for marketing decision making (SP) LAP-IM-184	
What is marketing-information management?	IM:001 Explain the nature and scope of the marketing-information management function (SP) LAP-IM-002	8 days
	IM:025 Explain the role of ethics in marketing-information management (SP)	
	IM:183 Describe the use of technology in the marketing-information management function (SP)	
	IM:419 Describe the regulation of marketing-information management (SP)	
What is marketing research?	IM:010 Explain the nature of marketing research (SP) LAP-IM-010	13 days
	IM:282 Discuss the nature of marketing research problems/issues (SP) LAP-IM-282	
	IM:284 Describe methods used to design marketing research studies (i.e., descriptive, exploratory, and causal) (SP) LAP-IM-014	
	IM:281 Describe options businesses use to obtain marketing research data (i.e., primary and secondary research) (SP) LAP-IM-015	
	IM:285 Discuss the nature of sampling plans (i.e., who, how many, how chosen) (SP) LAP-IM-016	
	IM:289 Describe data-collection methods (e.g., observations, mail, diaries, telephone, Internet, discussion groups, interviews, scanners, tracking tools) (SP) LAP-IM-017	
	IM:418 Explain characteristics of effective data-collection instruments (SP)	