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AUTHOR Smith, Clifton L.  
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ABSTRACT

A project was conducted to revalidate, revise, and adapt/modify the minimum core competencies for the Fundamentals of Marketing and Advanced Marketing courses in secondary marketing education in Missouri. To implement the project, these activities were conducted: (1) each marketing instructor completed a survey instrument for the assessment of each core competency in the current curriculum; (2) the data were tabulated and reviewed by the project advisory committee and revisions were made; (3) a review was conducted by selected business and industry personnel; (4) focus groups reviewed the revised core curriculum and suggested instructional resources; (5) revised core competencies were cross-referenced with selected textbooks and resource materials; and (6) a final review was conducted by the Missouri marketing education curriculum team. As a result of the project, revised core competencies for the Fundamentals of Marketing and Advanced Marketing courses in the marketing education curriculum were developed. The final product is a new competency listing for the two courses and a marketing education teacher's resource guide that details the cross-referencing of competencies to instructional materials. The project recommended that the core competencies be reviewed and revised at least every 5 years. (Appendices include the survey instrument, list of members of the curriculum team, and competency list and mean scores.) (KC)

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ED 325 689

FINAL REPORT

COMPETENCY PROFILE DEVELOPMENT FOR THE  
MARKETING EDUCATION CURRICULUM

Project Number: 90-133-110-7

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Clifton L. Smith  
Project Director  
Marketing Education  
University of Missouri-Columbia  
Columbia, Missouri 65211

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June 30, 1990

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Vocational Planning and Evaluation  
Jefferson City, Missouri 65102

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CF 056 270

**ABSTRACT**

**TITLE:** Competency Profile Development for the Marketing Education Curriculum

**PRINCIPAL INVESTIGATOR:** Clifton L. Smith  
University of Missouri-Columbia

**PROJECT GOAL:** To revalidate, revise, and adapt/modify the minimum core competencies for the Fundamentals of Marketing and Advanced Marketing courses in Marketing Education on the secondary level.

**OBJECTIVES:** (1) To develop a revalidation procedure that involves all secondary marketing instructors in Missouri. (2) To develop a revalidation procedure that involves selected business/industry personnel. (3) To collect and analyze the data from the revalidation procedures and make the necessary revisions and/or modifications in the minimum core curriculums. (4) to develop a procedure to cross-reference the core competencies with appropriate textbooks and resource materials for utilization by marketing instructors. (5) To establish and utilize a project advisory committee composed of the Missouri Marketing Education Curriculum Team.

**PROCEDURES:** To implement the project design, the following activities were conducted: (1) Each marketing instructor completed a survey instrument for the assessment of each core competency in the current curriculum; (2) The data was tabulated and reviewed by the project advisory committee and revisions and/or modifications were made; (3) a review was conducted by selected business/industry personnel; (4) focus groups were conducted to review the "revised" core curriculum and solicit information concerning instructional resources; (5) "revised" core competencies were cross-referenced with selected textbooks and resource materials; (6) A final review was conducted by the Missouri Marketing Education Curriculum Team.

**RESULTS AND FINDINGS:** The specific results and findings from this project were the development of "revised" core competencies for the Fundamentals of Marketing and Advanced Marketing courses in the Marketing Education curriculum.

**FINAL PRODUCT:** The final product from this project is a new competency listing for Fundamentals of Marketing and Advanced Marketing in addition to a Marketing Education Teacher's Resource Guide which details the cross-referencing of competencies to instructional materials.

**RECOMMENDATION FOR FURTHER ACTION:** The minimum core competencies in Fundamentals of Marketing and Advanced Marketing should be reviewed and revised a minimum of every five years in order to reflect current marketing practices and to cross-reference with the current instructional resources available.

## INTRODUCTION

The Marketing and Cooperative Education section of the Division of Vocational and Adult Education, through a funded project with the Marketing Education program at the University of Missouri-Columbia, developed a core curriculum for Fundamentals of Marketing and Advanced Marketing as part of the Vocational Instructional Management System implementation in 1983. These are the minimum core competencies that should be utilized in all Marketing Education programs on the secondary level. In order to ensure that the secondary programs of Marketing Education are providing up-to-date instruction in the discipline of marketing, these competencies needed to be revalidated.

## STATEMENT OF THE PROBLEM

The goal of this project was to conduct a revalidation of the core competencies for both the Fundamentals of Marketing and Advanced Marketing curricula and make the necessary revisions or modifications as deemed appropriate by the audiences who utilize them.

## OBJECTIVES AND FINDINGS

The specific objectives and findings of the project were:

Objective Number One: To develop a revalidation procedures that involves all secondary marketing instructors in the State of Missouri.

Findings: A survey instrument utilizing a likert scale for each core competency was developed (see Appendix A for a copy of the survey instrument). The likert scale had five points with descriptors ranging from "very critical" to "not critical" for the assessment of each core competency in the current curriculums. This survey instrument was administered to marketing instructors attending the 1989 Missouri Vocational Association summer conference during a specific curriculum session designed to collect this information. In addition to the survey instrument, each marketing instructor was asked to add any additional competencies

which they deemed "critical" to the curriculum. Marketing instructors were also asked to indicate the title of instructional resources that were utilized within the program.

Objective Number Two: To collect and analyze the data from the revalidation procedures and make the necessary revisions and/or modifications in the minimum core curriculums.

Findings: Upon completion of the data gathering from the survey, the data was tabulated and presented to the Missouri Marketing Education Curriculum Team, which served as the project advisory committee (see Appendix B for a listing of Missouri Marketing Education Curriculum Team members; see Appendix C for a listing of competencies and a mean score based on the survey instrument). Utilizing the data provided, members of the team made revisions and/or modification to the core competencies.

Following the revisions and/or modifications made by the Missouri Marketing Education Curriculum Team, the "revised" core curriculum was reviewed by a select group of business and industry representatives in marketing for their input and modification.

Upon completion of the review by business/industry, four focus groups were established around the state. The purpose of the focus groups were to review the "revised" core curriculum, solicit information concerning instructional resources for the purpose of cross-referencing, and to sort the competencies into topical headings under each major duty band.

Objective Number Three: To develop a procedure to cross-reference the core competencies with appropriate textbooks and resource materials for utilization by marketing instructors.

Findings: Once the "revised" core competencies were determined, the competencies were cross-referenced with selected textbooks and resources materials identified by marketing instructors. In addition, expected student learning outcomes were developed for major subdivisions of the core curriculum.

**ATTACHMENTS****Procedures****References****Selected Bibliography****Instrument****Glossary**

## POPULATION

To gather data and information for this project, all secondary marketing instructors in Missouri were surveyed and selected marketing instructors were utilized in focus groups and on the project advisory committee. A secondary population affected by this project, are those students who will enroll in marketing education programs.

## CONCLUSIONS AND RECOMMENDATIONS

Conclusion Number One: A core curriculum, revalidated by both marketing instructors and business/industry representatives, and cross-referenced to instructional materials will ensure that marketing instructors are providing up-to-date instruction in the discipline of marketing.

Recommendation: The core curriculums developed should be distributed to local secondary marketing instructors. This will enable local secondary marketing instructors to continue implementing a vocational instructional management system within their programs.

Conclusion Number Two: The expected student learning outcomes and cross-referenced instructional materials by competencies will enable instructors to realign curriculums in marketing.

Recommendation: The Marketing Education Teacher's Resource Guide should be distributed to local secondary marketing instructors. This will enable local secondary marketing instructors to continue implementing a vocational instructional management system within their programs.

## PROCEDURES

To implement the project design and to attain the objectives set forth, the following activities were conducted:

1. The project director developed a survey instrument utilizing a likert scale for each core competency in the Fundamentals of Marketing and Advanced Marketing courses.

2. The survey was administered to all marketing instructors at the summer Missouri Vocational Association conference in July, 1989. This survey was conducted during a special curriculum session.

3. Upon completion of the data gathering from the survey, the data was tabulated and reported to the Missouri Marketing Education Curriculum Team (project advisory committee). Utilizing the data provided, members of the team made revisions and/or modifications to the core competencies.

4. Following the revisions and/or modifications made by the Missouri Marketing Education Curriculum Team, the "revised" core curriculum was reviewed by a select group of business and industry representatives in marketing for their input and modification.

5. Upon completion of the review by business/industry, four focus groups were established around the state. The purpose of the focus groups were to review the "revised" core curriculum, solicit information concerning instructional resources for the purpose of cross-referencing, and to sort the competencies into topical headings under each major duty band.

6. Once the "revised" core competencies were determined, the project staff "cross-referenced" the core competencies with selected textbooks and resource materials. In addition, expected student learning outcomes were developed for major subdivisions of the core curriculum.

7. The Missouri Marketing Education Curriculum Team conducted a final review of all materials for accuracy and useability and established the "revised" core curriculums.

## REFERENCES

Specific references utilized in this study included textbooks and materials as referenced in the competency cross-reference.

## SELECTED BIBLIOGRAPHY

No specific bibliography was utilized in the development of this project.



**INSTRUMENT**

The survey instrument utilized in this study is referenced in Appendix A of this report.

**GLOSSARY**

No specific glossary was utilized in this project.

**APPENDIX A**

**Survey Instrument**

**FUNDAMENTALS OF MARKETING**  
Revalidation Instrument

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**DIRECTIONS:** Please "bubble in" on the attached answer sheet, your rating of the importance of the competencies listed for the FUNDAMENTALS OF MARKETING core curriculum. On your answer sheet, make sure that the competency number on the master list corresponds to the number on the answer sheet.

USE THE RATING SCALE GIVEN BELOW TO INDICATE YOUR RESPONSE:

- |   |                      |  |
|---|----------------------|--|
| 1 | NOT IMPORTANT        | This competency SHOULD NOT be in the Fundamentals of Marketing core curriculum. It should be either dropped from the listing or realigned in the curriculum. (Please provide specific comments, if needed, on the attached comments page). |
| 2 | LOW IMPORTANCE       | This competency makes LITTLE DIFFERENCE in the Fundamentals of Marketing core curriculum and has limited value in being retained in the listing.   |
| 3 | MODERATE IMPORTANCE  | This competency ENHANCES the Fundamentals of Marketing core curriculum and has value in being retained in the listing.   |
| 4 | HIGH IMPORTANCE      | This competency makes a SPECIFIC CONTRIBUTION in the Fundamentals of Marketing core curriculum and definitely should be retained in the listing.   |
| 5 | VERY HIGH IMPORTANCE | This competency makes a SIGNIFICANT CONTRIBUTION in the Fundamentals of Marketing core curriculum and has critical value in being retained in the listing.   |

**Communications in Marketing**

1. Define feedback.
2. List types of feedback.
3. Explain feedback effect on human behavior.
4. Speak in a business-like manner.
5. Use proper listening skills.
6. Use the telephone in a business-like manner.
7. Use body language to help convey feelings in spoken communication.
8. Read and understand written communications.
9. Complete letters, forms, reports, and memorandums.
10. Describe the importance of reading current business news media.

**Economics and Marketing**

11. Identify statements that best describe marketing.
12. Explain the importance of marketing in our economy.
13. Recognize that economic goods are the products and services offered to meet consumer needs and wants.
14. Define economics as a process.
15. Identify economic activities.
16. Explain the importance of economics.

- 1 NOT IMPORTANT
- 2 LOW IMPORTANCE
- 3 MODERATE IMPORTANCE
- 4 HIGH IMPORTANCE
- 5 VERY HIGH IMPORTANCE

17. Identify three major types of economic resources.
18. Identify examples of economic resources according to major type.
19. Explain the meaning of private free enterprise.
20. Describe the different types of business ownership.
21. Compare and contrast the three major economic systems.
22. Identify the characteristics and values of capitalistic, socialistic, and communistic economic systems.
23. Define profit.
24. Identify elements that need to be accounted for before a profit can be made.
25. Explain why profit is an essential part of the private free enterprise system.
26. Define supply and demand.
27. Distinguish between buyer's and seller's markets.
28. Describe the influences and interactions of supply and demand.
29. Identify that the market price of a product is based on what a consumer is willing to give and what a seller is willing to take.
30. Identify the effects of competition on buyers and sellers.
31. Explain why competition is important to the successful functioning of a private free enterprise system.
32. Define marketing functions.
33. Explain the functions involved in marketing products and services.
34. Define the meaning of a market for a product.
35. Describe how a market for a product can be identified.
36. Identify demographic characteristics that would compose market segments for particular products.
37. Define channel of distribution.
38. Describe two basic types of distribution.
39. Describe the functions performed by channel intermediaries.
40. Explain the meaning of integrated distribution.
41. Define Gross National Product.
42. Identify components of GNP calculations.
43. Explain why the U.S. GNP has continued to grow.

#### **Employment and Advancement**

44. Identify personal occupational requirements.
45. Describe entry-level marketing jobs available in most communities.

- 1 NOT IMPORTANT
- 2 LOW IMPORTANCE
- 3 MODERATE IMPORTANCE
- 4 HIGH IMPORTANCE
- 5 VERY HIGH IMPORTANCE

46. Identify possible advancement patterns.
47. Identify a tentative marketing occupational interest.
48. Develop a confident attitude toward participating in an employment interview.
49. Meet the standards of appearance and behavior required for the interview.
50. Complete a personal resume.
51. Complete employment application forms for marketing employment.
52. Recognize the purposes and types of employment tests and general guidelines for taking them.
53. Complete a personal interview and follow-up.
54. Explain the importance of rules and regulations in a business.
55. Describe desirable work habits.
56. Explain gross pay and net pay.
57. Identify ways of tying school and work experiences together.

#### **Human Relations in Marketing**

58. Define human relations.
59. Identify the prominent human relationships in marketing businesses.
60. Identify the importance of self-understanding in establishing effective human relationships.
61. Analyze personal interests, aptitudes, traits, abilities, and attitudes.
62. Identify personal strengths and weaknesses.
63. Describe the importance of a positive self-image.
64. Identify resources for self-understanding.
65. Develop a plan of short and long-term goals.
66. Develop harmonious professional relationships with co-workers, supervisors, and managers.
67. Develop relationships with customers that will favorably represent a business.

#### **Marketing Operations**

68. Perform addition and subtraction applications in marketing.
69. Perform multiplication and division applications in marketing.
70. Perform fraction and percentage applications in marketing.
71. Calculate correct prices of products or services and total amounts of purchases.
72. Handle various types of payment for purchases.
73. Handle returns for exchange, cash refunds, or charge credit.

- 1 NOT IMPORTANT
- 2 LOW IMPORTANCE
- 3 MODERATE IMPORTANCE
- 4 HIGH IMPORTANCE
- 5 VERY HIGH IMPORTANCE

74. Handle COD and layaway sales transactions.
75. Explain importance of inventory control.
76. Explain the term perpetual inventory.
77. Explain the procedures of a physical inventory.
78. Explain the importance of pricing.
79. Define the terminology used in pricing.
80. Calculate mark-up and mark-downs.
81. Arrange currency and coin in cash drawer.
82. Maintain proper amount of cash in appropriate denominations in cash drawer.
83. Balance cash drawer against cash register reading.

### **Market Planning**

84. Explain the marketing concept.
85. Explain historical development in business that led to the adoption of the marketing concept.
86. Give examples of the marketing concept in action.
87. Explain the role that product/service planning activities play in a company's success in the marketplace.
88. Identify factors that influence product/service planning.
89. Identify the methods of gathering primary marketing data.
90. Apply one or more of the methods to gather primary data.
91. Explain the difference between the total market approach and the segmentation approach to product planning.
92. Cite examples of specific products/services and their target markets.
93. Identify the functions of packaging to meet the needs of specific marketing.
94. Define product line and product mix.
95. Identify the stages of the product life cycle.
96. Explain the steps in product planning.

### **Physical Distribution**

97. Accurately check shipment or items against an invoice.
98. Handle incorrect amounts of types of goods.
99. Mark prices on various types of goods.
100. Identify housekeeping duties in connection with proper stock care.
101. Exercise precautions with equipment to prevent accidents.

- 1 NOT IMPORTANT
- 2 LOW IMPORTANCE
- 3 MODERATE IMPORTANCE
- 4 HIGH IMPORTANCE
- 5 VERY HIGH IMPORTANCE

- 102. Exercise precautions with stock to prevent accidents.
- 103. Identify importance of preventing stock shrinkage.

#### **Sales Promotion**

- 104. Identify the major advertising media used to promote sales.
- 105. Identify the basic types of displays used to promote sales.
- 106. Identify the special promotion activities used to promote sales.
- 107. Identify how sales promotion benefits the marketing business, employee, and consumer.
- 108. Identify the major elements of a print or broadcast advertisement.
- 109. Read newspaper advertisements to keep informed of the advertising done by a business and its competition.
- 110. Recognize broadcast promotions by a business and its competition.
- 111. Read current promotion material sent out to consumers by a business, and its competitors (ex. catalogs, manufacturers' brochures, etc.).
- 112. Identify the costs of various advertising media.
- 113. Identify the importance of visual merchandising as it applies to a business' image.
- 114. Select appropriate, seasonal, and timely display merchandise.
- 115. Design displays considering the basic elements of display arrangement.
- 116. Plan location of displays.

#### **Selling**

- 117. Identify how to analyze customer needs and wants.
- 118. Identify how to determine the buying motives of customers and then appeal to them.
- 119. Approach the customer and begin the sale.
- 120. Present the features and benefits of a product or service.
- 121. Overcome customer's objections and excuses.
- 122. Close the sale.
- 123. Follow-up to service the sale.
- 124. Identify sources of product or service knowledge.
- 125. Use information on tags, labels, stamps, wrappers, etc. to help the customer buy intelligently.
- 126. Convert product or service knowledge into selling points.
- 127. Compare goods or services favorably with competing products or services.

- 1 NOT IMPORTANT
- 2 LOW IMPORTANCE
- 3 MODERATE IMPORTANCE
- 4 HIGH IMPORTANCE
- 5 VERY HIGH IMPORTANCE

128. Suggest advertised product or services needed from one's own company that might satisfy customer's needs.
129. Coordinate products or services with related items in an attempt to increase the amount of sale.
130. Suggest larger quantities, higher priced goods, and additional goods in an effort to increase the average sale.
131. Identify the various types of selling, besides retailing, that takes place in marketing.



## COMMENTS SECTION

**DIRECTIONS:** Please provide any specific comments regarding the Fundamentals of Marketing curriculum that will assist in the revalidation of the competencies.

1. What, if any, specific units or competencies need to be added to the Fundamentals of Marketing core curriculum?
  
2. What, if any, specific units or competencies need to be dropped or realigned in the Fundamentals of Marketing core curriculum? (Refer to any competencies that you may have rated as a "1" in answering this question).
  
3. Are there specific comments that you wish to make in regard to the Fundamentals of Marketing core curriculum that need to be addressed by the Missouri Marketing Education Curriculum Team? (Please list below):
  
4. Are there any specific instructional resources (textbooks, reference books) that you would like to have specific competencies cross-referenced for purposes of teaching the Fundamentals of Marketing core curriculum?

**ADVANCED MARKETING**  
Revalidation Instrument

**DIRECTIONS:** Please "bubble in" on the attached answer sheet, your rating of the importance of the competencies listed for the **ADVANCED MARKETING** core curriculum. On your answer sheet, make sure that the competency number on the master list corresponds to the number on the answer sheet.

USE THE RATING SCALE GIVEN BELOW TO INDICATE YOUR RESPONSE:

- |   |                      |  |
|---|----------------------|--|
| 1 | NOT IMPORTANT        | This competency <b>SHOULD NOT</b> be in the Advanced Marketing core curriculum. It should be either dropped from the listing or realigned in the curriculum. (Please provide specific comments, if needed, on the attached comments page). |
| 2 | LOW IMPORTANCE       | This competency makes <b>LITTLE DIFFERENCE</b> in the Advanced Marketing core curriculum and has limited value in being retained in the listing.   |
| 3 | MODERATE IMPORTANCE  | This competency <b>ENHANCES</b> the Advanced Marketing core curriculum and has value in being retained in the listing.   |
| 4 | HIGH IMPORTANCE      | This competency makes a <b>SPECIFIC CONTRIBUTION</b> in the Advanced Marketing core curriculum and definitely should be retained in the listing.   |
| 5 | VERY HIGH IMPORTANCE | This competency makes a <b>SIGNIFICANT CONTRIBUTION</b> in the Advanced Marketing core curriculum and has critical value in being retained in the listing.   |

**Communications in Marketing**

1. Teach individual employees to perform job duties.
2. Give oral presentations to groups of marketing personnel.
3. Interpret management policies to employees.
4. Interpret employee problems to management.
5. Interpret progress of departments, systems, or functions within the business to management.
6. Compose business letters, reports, and memorandums.
7. Read a variety of business communications and determine the relevant information.
8. Communicate orally or in writing the important information gained from reading and research.
9. Interpret tables, graphs, and charts in order to gain marketing information relevant to a business.

**Economics and Marketing**

10. Define marketing strategy.
11. Identify factors that affect marketing strategies.
12. Describe a marketing strategy for a given situation.
13. Define promotional mix.
14. Describe the potential elements of a promotional mix.

- 1 NOT IMPORTANT
- 2 LOW IMPORTANCE
- 3 MODERATE IMPORTANCE
- 4 HIGH IMPORTANCE
- 5 VERY HIGH IMPORTANCE

- 15. Identify the major advantages and disadvantages of different forms of product promotion.
- 16. Describe the most important factors that management should consider when designing a promotional mix.
- 17. Identify reasons for government regulation of business activities.
- 18. Describe how government regulates business activities.
- 19. Describe the types and levels of union organization.
- 20. Identify the issues most commonly discussed during labor-management negotiations.
- 21. Explain the effects of unionism on labor and management.
- 22. Define international trade.
- 23. Explain why nations engage in international trade.
- 24. Describe how international trade affects the economic interdependence of nations.
- 25. Explain the meaning of business risks.
- 26. Identify types of risks that businesses encounter.
- 27. Explain how businesses deal with the various types of risks.

#### **Employment and Advancement**

- 28. Identify qualities necessary for management/entrepreneurship.
- 29. Compare personal qualities with those needed for management/entrepreneurship.
- 30. Identify resources available within the community which develop and strengthen management qualities.
- 31. Locate job prospects.
- 32. Describe the full-time employment process.
- 33. Prepare a resume.
- 34. Develop a strategy for job hunting.

#### **Human Relations in Marketing**

- 35. Explain theories of human motivation with employee.
- 36. Maintain a pleasant working environment.
- 37. Recognize the accomplishments of others.
- 38. Recognize the importance of professional organizations in the marketing field.
- 39. Recognize the importance of trade associations in the specific areas of marketing.
- 40. Recognize the importance of participation in community affairs.

- 1 NOT IMPORTANT
- 2 LOW IMPORTANCE
- 3 MODERATE IMPORTANCE
- 4 HIGH IMPORTANCE
- 5 VERY HIGH IMPORTANCE

- 41. Recognize the social obligations of marketing.
- 42. Recognize marketing problems involving ethics.

### Marketing Operations

- 43. Use sales sheets in reporting daily sales.
- 44. Maintain records of cash received and bank deposits.
- 45. Report local, state and federal sales taxes.
- 46. Authorize checks according to the business policy.
- 47. Figure stock turnover.
- 48. Maintain stock control records.
- 49. Determine relationships between stock and sales.
- 50. Complete purchase orders.
- 51. Complete invoices.
- 52. Interpret net income and loss.
- 53. Interpret net sales.
- 54. Interpret gross margin.
- 55. Interpret breakeven points.
- 56. Interpret stock turnover in relation to department or company operating profits.
- 57. Interpret profit and loss statements.

### Market Planning

- 58. Identify a marketing research problem.
- 59. Plan the research.
- 60. Collect the secondary data.
- 61. Collect the primary data.
- 62. Apply sampling techniques to identify the sample population.
- 63. Prepare the research instrument.
- 64. Prepare the research report.
- 65. Present the research report.
- 66. Identify sources of ideas for new products.
- 67. Identify the methods of screening ideas for new products.
- 68. Identify the methods used for evaluating a new product idea.
- 69. Explain the importance of pre-testing a prototype of the new product.

- 1 NOT IMPORTANT
- 2 LOW IMPORTANCE
- 3 MODERATE IMPORTANCE
- 4 HIGH IMPORTANCE
- 5 VERY HIGH IMPORTANCE

70. Describe the forms of product testing.
71. Describe the introduction stage of product development.
72. Consider the factors that affect pricing.
73. Identify the most widely adopted pricing policies.
74. Set a pricing objective for a product/service.
75. Identify the most widely used pricing strategies.
76. Plan sales.
77. Plan stock.
78. Plan reductions.
79. Plan purchases.
80. Plan markup.

#### **Physical Distribution**

81. Identify the ways to ship merchandise.
82. Compare ways to ship merchandise in terms of cost and suitability.
83. Trace shipments of merchandise.
84. Return damaged merchandise to shipper.

#### **Sales Promotion**

85. Plan and develop seasonal and storewide themes.
86. Select products for promotion that are seasonal and timely.
87. Check advertising and displays for adherence to store promotional policies.
88. Obtain and use current product information necessary for effective and timely promotional activities.
89. Check advertising copy for omissions, additions, and corrections.
90. Check available quantities of advertised product before a promotion breaks.
91. Select the most effective locations within the business to place displays.
92. Plan display changes to maintain customer interest.
93. Allocate promotional space for an item based on its sales volume.
94. Determine when to dismantle and replace major displays.
95. Coordinate promotional activities with local activities or seasonal events.
96. Schedule displays of products at the same time they are being advertised.
97. Inform personnel of the schedule of company sales promotion activities.
98. Coordinate national or chain advertising with local business promotions.

- 1 NOT IMPORTANT
- 2 LOW IMPORTANCE
- 3 MODERATE IMPORTANCE
- 4 HIGH IMPORTANCE
- 5 VERY HIGH IMPORTANCE

### Selling

99. Determine the importance of making an appointment in advance and being on time.
100. Deal with the prospective customer's secretary or family member in a professional manner.
101. Announce the purpose for the call immediately to the prospective customer.
102. Determine the importance of planning in advance what section of sales territory will be covered in a given day.
103. Determine the importance of preparing and organizing sales aids.
104. Determine the importance of keeping customer records.
105. Plan daily activities to ensure that all duties are performed.
106. Maintain accurate, up-to-date customer, prospect, daily work and summary records.
107. Set sales goals or quotas.
108. Plan sales routes and transportation modes which keep traveling time to a minimum.
109. Make productive use of waiting time.
110. Use special techniques which increase the selling time.
111. Evaluate performance in terms of goals and customers' satisfaction.
112. Gain audience's attention with a strong opening remark.
113. Make a smooth, natural and interesting sales presentation.
114. Show how the product or service will satisfy the needs the group shares.
115. Plan for audience participation.
116. Provide expert information as to ways in which the product or service can benefit the prospective customer.
117. Provide full and complete information about a product line or company service.



**APPENDIX B****Members of Missouri Marketing Education Curriculum Team**



**MISSOURI MARKETING EDUCATION CURRICULUM TEAM****1989-1990**

Mr. Joe DePreist  
Three Rivers Community College  
Poplar Bluff, MO

Mr. Bob Kernell  
North Kansas City High School  
North Kansas City, MO

Mr. Jim Logan  
Lincoln University  
Jefferson City, MO

Mr. Paul Mackay  
East Central College  
Union, MO

Ms. Marcia Morley  
Clayton High School  
Clayton, MO

Ms. Susan Needles  
Van Horn High School  
Independence, MO

Ms. Jane Parker  
Mountain Grove AVTS  
Mountain Grove, MO

Mr. Jim Rhoades  
Neosho High School  
Neosho, MO

Mr. Todd Roddenberg  
Chillicothe AVTS  
Chillicothe, MO

Ms. Christine Varner  
California High School  
California, MO

Dr. Gene Reed, Director  
Marketing and Cooperative Education  
Department of Elementary and  
Secondary Education  
Jefferson City, MO

Ms. Linda Turner, Supervisor  
Marketing and Cooperative Education  
Department of Elementary and  
Secondary Education  
Jefferson City, MO

Dr. Cliff Smith, Professor  
Marketing Education  
University of Missouri-Columbia  
Columbia, MO

**APPENDIX C**

**Listing of Competencies and Mean Scores**

**FUNDAMENTALS OF MARKETING**  
 Revalidation Instrument

**DIRECTIONS:** Please "bubble in" on the attached answer sheet, your rating of the importance of the competencies listed for the FUNDAMENTALS OF MARKETING core curriculum. On your answer sheet, make sure that the competency number on the master list corresponds to the number on the answer sheet.

USE THE RATING SCALE GIVEN BELOW TO INDICATE YOUR RESPONSE:

- |   |                      |  |
|---|----------------------|--|
| 1 | NOT IMPORTANT        | This competency SHOULD NOT be in the Fundamentals of Marketing core curriculum. It should be either dropped from the listing or realigned in the curriculum. (Please provide specific comments, if needed, on the attached comments page). |
| 2 | LOW IMPORTANCE       | This competency makes LITTLE DIFFERENCE in the Fundamentals of Marketing core curriculum and has limited value in being retained in the listing.   |
| 3 | MODERATE IMPORTANCE  | This competency ENHANCES the Fundamentals of Marketing core curriculum and has value in being retained in the listing.   |
| 4 | HIGH IMPORTANCE      | This competency makes a SPECIFIC CONTRIBUTION in the Fundamentals of Marketing core curriculum and definitely should be retained in the listing.   |
| 5 | VERY HIGH IMPORTANCE | This competency makes a SIGNIFICANT CONTRIBUTION in the Fundamentals of Marketing core curriculum and has critical value in being retained in the listing.   |

**Communications in Marketing**

1. Define feedback. [3.98]
2. List types of feedback. [3.73]
3. Explain feedback effect on human behavior. [3.89]
4. Speak in a business-like manner. [4.38]
5. Use proper listening skills. [4.6]
6. Use the telephone in a business-like manner. [4.12]
7. Use body language to help convey feelings in spoken communication. [3.85]
8. Read and understand written communications. [4.43]
9. Complete letters, forms, reports, and memorandums. [3.93]
10. Describe the importance of reading current business news media. [3.76]

**Economics and Marketing**

11. Identify statements that best describe marketing. [4.26]
12. Explain the importance of marketing in our economy. [4.68]
13. Recognize that economic goods are the products and services offered to meet consumer needs and wants. [4.53]
14. Define economics as a process. [4.38]
15. Identify economic activities. [4.31]
16. Explain the importance of economics. [4.35]

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17. Identify three major types of economic resources. [4.13]
18. Identify examples of economic resources according to major type. [3.91]
19. Explain the meaning of private free enterprise. [4.74]
20. Describe the different types of business ownership. [4.58]
21. Compare and contrast the three major economic systems. [4.31]
22. Identify the characteristics and values of capitalistic, socialistic, and communistic economic systems. [4.21]
23. Define profit. [4.70]
24. Identify elements that need to be accounted for before a profit can be made. [4.60]
25. Explain why profit is an essential part of the private free enterprise system. [4.67]
26. Define supply and demand. [4.60]
27. Distinguish between buyer's and seller's markets. [4.21]
28. Describe the influences and interactions of supply and demand. [4.30]
29. Identify that the market price of a product is based on what a consumer is willing to give and what a seller is willing to take. [4.22]
30. Identify the effects of competition on buyers and sellers. [4.59]
31. Explain why competition is important to the successful functioning of a private free enterprise system. [4.63]
32. Define marketing functions. [4.61]
33. Explain the functions involved in marketing products and services. [4.42]
34. Define the meaning of a market for a product. [4.47]
35. Describe how a market for a product can be identified. [4.38]
36. Identify demographic characteristics that would compose market segments for particular products. [4.32]
37. Define channel of distribution. [4.45]
38. Describe two basic types of distribution. [4.14]
39. Describe the functions performed by channel intermediaries. [3.82]
40. Explain the meaning of integrated distribution. [3.68]
41. Define Gross National Product. [4.27]
42. Identify components of GNP calculations. [3.83]
43. Explain why the U.S. GNP has continued to grow. [3.85]

#### Employment and Advancement

44. Identify personal occupational requirements. [4.29]
45. Describe entry-level marketing jobs available in most communities. [4.01]

- 1 NOT IMPORTANT
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- 46. Identify possible advancement patterns. [3.87]
- 47. Identify a tentative marketing occupational interest. [3.77]
- 48. Develop a confident attitude toward participating in an employment interview. [4.59]
- 49. Meet the standards of appearance and behavior required for the interview. [4.85]
- 50. Complete a personal resume. [4.54]
- 51. Complete employment application forms for marketing employment. [4.59]
- 52. Recognize the purposes and types of employment tests and general guidelines for taking them. [3.99]
- 53. Complete a personal interview and follow-up. [4.38]
- 54. Explain the importance of rules and regulations in a business. [4.31]
- 55. Describe desirable work habits. [4.50]
- 56. Explain gross pay and net pay. [4.31]
- 57. Identify ways of tying school and work experiences together. [4.15]

#### Human Relations in Marketing

- 58. Define human relations. [4.35]
- 59. Identify the prominent human relationships in marketing businesses. [4.09]
- 60. Identify the importance of self-understanding in establishing effective human relationships. [4.12]
- 61. Analyze personal interests, aptitudes, traits, abilities, and attitudes. [4.30]
- 62. Identify personal strengths and weaknesses. [4.21]
- 63. Describe the importance of a positive self-image. [4.48]
- 64. Identify resources for self-understanding. [3.89]
- 65. Develop a plan of short and long-term goals. [4.12]
- 66. Develop harmonious professional relationships with co-workers, supervisors, and managers. [4.36]
- 67. Develop relationships with customers that will favorably represent a business. [4.44]

#### Marketing Operations

- 68. Perform addition and subtraction applications in marketing. [4.14]
- 69. Perform multiplication and division applications in marketing. [4.14]
- 70. Perform fraction and percentage applications in marketing. [4.29]
- 71. Calculate correct prices of products or services and total amounts of purchases. [4.36]
- 72. Handle various types of payment for purchases. [4.09]

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- 73. Handle returns for exchange, cash refunds, or charge credit. [3.19]
- 74. Handle COD and layaway sales transactions. [3.48]
- 75. Explain importance of inventory control. [4.30]
- 76. Explain the term perpetual inventory. [4.04]
- 77. Explain the procedures of a physical inventory. [3.95]
- 78. Explain the importance of pricing. [4.48]
- 79. Define the terminology used in pricing. [4.31]
- 80. Calculate mark-up and mark-downs. [4.34]
- 81. Arrange currency and coin in cash drawer. [3.43]
- 82. Maintain proper amount of cash in appropriate denominations in cash drawer. [3.30]
- 83. Balance cash drawer against cash register reading. [3.74]

#### Market Planning

- 84. Explain marketing concept. [4.81]
- 85. Explain historical development in business that led to the adoption of the marketing concept. [3.86]
- 86. Give examples of the marketing concept in action. [4.14]
- 87. Explain the role that product/service planning activities play in a company's success in the marketplace. [4.09]
- 88. Identify factors that influence product/service planning. [4.07]
- 89. Identify the methods of gathering primary marketing data. [4.11]
- 90. Apply one or more of the methods to gather primary data. [3.81]
- 91. Explain the difference between the total market approach and the segmentation approach to product planning. [3.97]
- 92. Cite examples of specific products/services and their target markets. [4.20]
- 93. Identify the functions of packaging to meet the needs of specific marketing. [4.05]
- 94. Define product line and product mix. [4.21]
- 95. Identify the stages of the product life cycle. [4.23]
- 96. Explain the steps in product planning. [4.03]

#### Physical Distribution

- 97. Accurately check shipment or items against an invoice. [3.86]
- 98. Handle incorrect amounts of types of goods. [3.61]
- 99. Mark prices on various types of goods. [3.50]

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- 100. Identify housekeeping duties in connection with proper stock care. [3.63]
- 101. Exercise precautions with equipment to prevent accidents. [3.77]
- 102. Exercise precautions with stock to prevent accidents. [3.70]
- 103. Identify importance of preventing stock shrinkage. [4.20]

#### Sales Promotion

- 104. Identify the major advertising media used to promote sales. [4.61]
- 105. Identify the basic types of displays used to promote sales. [4.30]
- 106. Identify the special promotion activities used to promote sales. [4.43]
- 107. Identify how sales promotion benefits the marketing business, employee, and consumer. [4.35]
- 108. Identify the major elements of a print or broadcast advertisement. [4.15]
- 109. Read newspaper advertisements to keep informed of the advertising done by a business and its competition. [3.77]
- 110. Recognize broadcast promotions by a business and its competition. [3.83]
- 111. Read current promotion material sent out to consumers by a business, and its competitors (ex. catalogs, manufacturers' brochures, etc.). [3.57]
- 112. Identify the costs of various advertising media. [3.99]
- 113. Identify the importance of visual merchandising as it applies to a business' image. [4.11]
- 114. Select appropriate, seasonal, and timely display merchandise. [3.85]
- 115. Design displays considering the basic elements of display arrangement. [3.62]
- 116. Plan location of displays. [3.60]

#### Selling

- 117. Identify how to analyze customer needs and wants. [4.58]
- 118. Identify how to determine the buying motives of customers and then appeal to them. [4.58]
- 119. Approach the customer and begin the sale. [4.58]
- 120. Present the features and benefits of a product or service. [4.60]
- 121. Overcome customer's objections and excuses. [4.58]
- 122. Close the sale. [4.70]
- 123. Follow-up to service the sale. [4.45]
- 124. Identify sources of product or service knowledge. [4.48]
- 125. Use information on tags, labels, stamps, wrappers, etc. to help the customer buy intelligently. [4.30]

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126. Convert product or service knowledge into selling points. [4.54]
127. Compare goods or services favorably with competing products or services. [4.33]
128. Suggest advertised product or services needed from one's own company that might satisfy customer's needs. [4.03]
129. Coordinate products or services with related items in an attempt to increase the amount of sale. [4.25]
130. Suggest larger quantities, higher priced goods, and additional goods in an effort to increase the average sale. [4.14]
131. Identify the various types of selling, besides retailing, that takes place in marketing. [4.31]



**ADVANCED MARKETING**  
Revalidation Instrument

**DIRECTIONS:** Please "bubble in" on the attached answer sheet, your rating of the importance of the competencies listed for the ADVANCED MARKETING core curriculum. On your answer sheet, make sure that the competency number on the master list corresponds to the number on the answer sheet.

USE THE RATING SCALE GIVEN BELOW TO INDICATE YOUR RESPONSE:

- |   |                      |   |
|---|----------------------|---|
| 1 | NOT IMPORTANT        | This competency SHOULD NOT be in the Advanced Marketing core curriculum. It should be either dropped from the listing or realigned in the curriculum. [Please provide specific comments, if needed, on the attached comments page]. |
| 2 | LOW IMPORTANCE       | This competency makes LITTLE DIFFERENCE in the Advanced Marketing core curriculum and has limited value in being retained in the listing.   |
| 3 | MODERATE IMPORTANCE  | This competency ENHANCES the Advanced Marketing core curriculum and has value in being retained in the listing.   |
| 4 | HIGH IMPORTANCE      | This competency makes a SPECIFIC CONTRIBUTION in the Advanced Marketing core curriculum and definitely should be retained in the listing.   |
| 5 | VERY HIGH IMPORTANCE | This competency makes a SIGNIFICANT CONTRIBUTION in the Advanced Marketing core curriculum and has critical value in being retained in the listing.   |

**Communications in Marketing**

1. Teach individual employees to perform job duties. [3.81]
2. Give oral presentations to groups of marketing personnel. [3.88]
3. Interpret management policies to employees. [4.01]
4. Interpret employee problems to management. [4.08]
5. Interpret progress of departments, systems, or functions within the business to management. [3.75]
6. Compose business letters, reports, and memorandums. [4.08]
7. Read a variety of business communications and determine the relevant information. [3.91]
8. Communicate orally or in writing the important information gained from reading and research. [4.03]
9. Interpret tables, graphs, and charts in order to gain marketing information relevant to a business. [4.27]

**Economics and Marketing**

10. Define marketing strategy. [4.63]
11. Identify factors that affect marketing strategies. [4.51]
12. Describe a marketing strategy for a given situation. [4.37]
13. Define promotional mix. [4.62]
14. Describe the potential elements of a promotional mix. [4.55]

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15. Identify the major advantages and disadvantages of different forms of product promotion. [4.45]
16. Describe the most important factors that management should consider when designing a promotional mix. [4.35]
17. Identify reasons for government regulation of business activities. [4.25]
18. Describe how government regulates business activities. [4.26]
19. Describe the types and levels of union organization. [3.72]
20. Identify the issues most commonly discussed during labor-management negotiations. [3.67]
21. Explain the effects of unionism on labor and management. [3.80]
22. Define international trade. [4.37]
23. Explain why nations engage in international trade. [4.32]
24. Describe how international trade affects the economic interdependence of nations. [4.35]
25. Explain the meaning of business risks. [4.80]
26. Identify types of risks that businesses encounter. [4.55]
27. Explain how businesses deal with the various types of risks. [4.29]

#### Employment and Advancement

28. Identify qualities necessary for management/entrepreneurship. [4.43]
29. Compare personal qualities with those needed for management/entrepreneurship. [4.18]
30. Identify resources available within the community which develop and strengthen management qualities. [3.85]
31. Locate job prospects. [4.08]
32. Describe the full-time employment process. [3.94]
33. Prepare a resume. [4.41]
34. Develop a strategy for job hunting. [4.28]

#### Human Relations in Marketing

35. Explain theories of human motivation with employee. [4.10]
36. Maintain a pleasant working environment. [3.91]
37. Recognize the accomplishments of others. [4.01]
38. Recognize the importance of professional organizations in the marketing field. [3.87]
39. Recognize the importance of trade associations in the specific areas of marketing. [3.88]

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- 40. Recognize the importance of participation in community affairs. [4.18]
- 41. Recognize the social obligations of marketing. [3.99]
- 42. Recognize marketing problems involving ethics. [4.33]

#### Marketing Operations

- 43. Use sales sheets in reporting daily sales. [3.72]
- 44. Maintain records of cash received and bank deposits. [3.88]
- 45. Report local, state and federal sales taxes. [3.86]
- 46. Authorize checks according to the business policy. [3.90]
- 47. Figure stock turnover. [4.28]
- 48. Maintain stock control records. [4.15]
- 49. Determine relationships between stock and sales. [4.28]
- 50. Complete purchase orders. [3.94]
- 51. Complete invoices. [3.95]
- 52. Interpret net income and loss. [4.46]
- 53. Interpret net sales. [4.46]
- 54. Interpret gross margin. [4.40]
- 55. Interpret breakeven points. [4.38]
- 56. Interpret stock turnover in relation to department or company operating profits. [4.21]
- 57. Interpret profit and loss statements. [4.39]

#### Market Planning

- 58. Identify a marketing research problem. [4.19]
- 59. Plan the research. [4.12]
- 60. Collect the secondary data. [4.04]
- 61. Collect the primary data. [4.09]
- 62. Apply sampling techniques to identify the sample population. [3.87]
- 63. Prepare the research instrument. [3.89]
- 64. Prepare the research report. [3.90]
- 65. Present the research report. [3.86]
- 66. Identify sources of ideas for new products. [4.14]
- 67. Identify the methods of screening ideas for new products. [4.03]
- 68. Identify the methods used for evaluating a new product idea. [3.99]

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- 69. Explain the importance of pre-testing a prototype of the new product. [4.03]
- 70. Describe the forms of product testing. [3.93]
- 71. Describe the introduction stage of product development. [4.12]
- 72. Consider the factors that effect pricing. [4.42]
- 73. Identify the most widely adopted pricing policies. [4.22]
- 74. Set a pricing objective for a product/service. [4.02]
- 75. Identify the most widely used pricing strategies. [4.19]
- 76. Plan sales. [4.13]
- 77. Plan stock. [4.10]
- 78. Plan reductions. [4.08]
- 79. Plan purchases. [4.12]
- 80. Plan markup. [4.10]

#### Physical Distribution

- 81. Identify the ways to ship merchandise. [3.99]
- 82. Compare ways to ship merchandise in terms of cost and suitability. [4.01]
- 83. Trace shipments of merchandise. [3.48]
- 84. Return damaged merchandise to shipper. [3.48]

#### Sales Promotion

- 85. Plan and develop seasonal and storewide themes. [4.16]
- 86. Select products for promotion that are seasonal and timely. [4.14]
- 87. Check advertising and displays for adherence to store promotional policies. [3.93]
- 88. Obtain and use current product information necessary for effective and timely promotional activities. [3.93]
- 89. Check advertising copy for omissions, additions, and corrections. [3.93]
- 90. Check available quantities of advertised product before a promotion breaks. [3.79]
- 91. Select the most effective locations within the business to place displays. [4.03]
- 92. Plan display changes to maintain customer interest. [3.94]
- 93. Allocate promotional space for an item based on its sales volume. [3.89]
- 94. Determine when to dismantle and replace major displays. [3.83]
- 95. Coordinate promotional activities with local activities or seasonal events. [4.04]

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- 96. Schedule displays of products at the same time they are being advertised. [4.11]
- 97. Inform personnel of the schedule of company sales promotion activities. [3.86]
- 98. Coordinate national or chain advertising with local business promotions. [3.86]

#### Selling

- 99. Determine the importance of making an appointment in advance and being on time. [4.34]
- 100. Deal with the prospective customer's secretary or family member in a professional manner. [4.17]
- 101. Announce the purpose for the call immediately to the prospective customer. [4.04]
- 102. Determine the importance of planning in advance what section of sales territory will be covered in a given day. [3.93]
- 103. Determine the importance of preparing and organizing sales aids. [4.20]
- 104. Determine the importance of keeping customer records. [4.26]
- 105. Plan daily activities to ensure that all duties are performed. [4.11]
- 106. Maintain accurate, up-to-date customer, prospect, daily work and summary records. [4.03]
- 107. Set sales goals or quotes. [4.24]
- 108. Plan sales routes and transportation modes which keep traveling time to a minimum. [3.87]
- 109. Make productive use of waiting time. [3.95]
- 110. Use special techniques which increase the selling time. [3.96]
- 111. Evaluate performance in terms of goals and customers' satisfaction. [4.08]
- 112. Gain audience's attention with a strong opening remark. [4.14]
- 113. Make a smooth, natural and interesting sales presentation. [4.32]
- 114. Show how the product or service will satisfy the needs the group shares. [4.18]
- 115. Plan for audience participation. [3.99]
- 116. Provide expert information as to ways in which the product or service can benefit the prospective customer. [4.26]
- 117. Provide full and complete information about a product line or company service. [4.20]

END

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