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## ABSTRACT

This document provides a framework for a broad-based secondary and postsecondary curriculum to prepare students for employment in marketing management and research (MMR). The first part of the technical competency profile (TCP) contains the following items: an explanation of the purpose and scope of Ohio's TCPs; college tech prep program standards; an overview of the scope and purpose of tech prep; a key to the profile codes; lists of the skills and sample occupations in the MMR field; a MMR overview chart; and a list of the MMR instructional units. The remainder of the TCP details the competencies and key indicators addressed in the Ohio MMR program's 21 units, which cover the following topics: professional development and networking; professional effectiveness; marketing basics; marketing and business management; marketing planning; marketing information management; project management; marketing research; pricing; promotion; product and service management; branding; selling; distribution and logistics; customer relationship management; finance; marketing and the new economy; business law and ethics affecting marketing; technology for marketing; writing for marketing; and knowledge management. The following items are appended: a list of review panel members; the college tech prep pathway template; a list of professional associations and certificates; and a map of Ohio tech prep consortia. (MN)

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# Ohio Marketing Management and Research

## Technical Competency Profile (TCP)

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# **Ohio Marketing Management and Research**

## **Technical Competency Profile (TCP)**

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# Introduction

Technical Competency Profiles (TCP) are collaboratively developed by the Ohio Board of Regents and the Ohio Department of Education, Career-Technical and Adult Education, and the Center on Education and Training for Employment at The Ohio State University. The profile provides a framework for a broad-based secondary and post-secondary curriculum.

The profile includes essential competencies for programs from secondary through post-secondary associate degree programs. Each area contains competencies common to each of the occupations within a career cluster and competencies specific to an occupation. This profile design reflects programming flexibility that represents many options for educational studies and career planning.

Representatives from a broad spectrum of Ohio professionals played a critical role in defining the vision and scope of the TCP and in defining the essential and recommended skills for current and future employees. Secondary and post-secondary educators representing Ohio schools and colleges leveled the competencies to create career pathways from secondary to associate degree programs. A list of business and industry representatives and educators participating in the development of the profile appears in Appendix A.

Technical Competency Profiles (TCP) are used as the basis for the development of an integrated delivery system that provides opportunities for new and challenging programs and courses. Career-Technical Education, College Tech Prep, and post-secondary degree programs will be enhanced and expanded through the use of the Technical Competency Profile (TCP).

The profiles are available on the Internet at [www.ohnpcs.org](http://www.ohnpcs.org). At this location users can download copies of the entire profile or conduct searches on a number of key variables.

For additional information contact:

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# College Tech Prep Program Standards

College Tech Prep programs are rigorous programs of study starting at the secondary school level and continuing through the associate degree and beyond. In accordance with the Carl D. Perkins Vocational Technical Education Enhancement Act of 1998, College Tech Prep programs are seamless, non-duplicative programs of study combining high-level academic and technical preparation in a variety of career fields.

The Carl D. Perkins Vocational and Technical Education Act of 1998 defines College Tech Prep as:

*A program that provides technical preparation in a career field such as engineering, applied science, a mechanical, industrial or practical arts or trade, agriculture, health occupations, business or applied economics and must do the following:*

- *Combines at least two years of secondary and two years of post-secondary education in a sequential course of study without duplication of coursework*
- *Integrates academic, vocational and technical education, and if appropriate and available, work-based learning*
- *Provides technical preparation for careers*
- *Leads to an associate or a baccalaureate degree or post-secondary certificate in a specific career field*
- *Leads to placement in appropriate employment or further education.*

**The Ohio College Tech Prep Advisory Council recommended to the Ohio Board of Regents and the Ohio Department of Education the following standards for all College Tech Prep programs:**

1. Academics are taught at a college-preparatory level and are aligned with state models and academic content standards.
2. In addition to Ohio graduation requirements specified in SB 55, required academic components for College Tech Prep programs include:
  - a. Mathematics taught at a minimum level of Algebra II by the completion of high school.
  - b. An integrated or stand alone senior-year math component
  - c. Three units of science including at least two lab-based science courses
3. College Tech Prep programs will use a state-developed Technical Competency Profile (TCP) as the basis for pathway development. The pathway document should reflect secondary and post-secondary course work and should be made available for stakeholders. All secondary and post-secondary TCP competencies must be clearly identified and addressed. The TCP is the framework used to develop all associated curricular documents; however, components from other competency profiles such as OCAP's (*Occupational Competency Analysis Profile*), ITAC's (*Integrated Technical and Academic Competencies*) and SCANS (*The Secretary's Commission on Achieving Necessary Skills—America 2000*) may be included and are not mutually excluded from a TCP.
4. Articulated pathways will be reviewed every two-years at the consortia level.
5. Pathways operate under an articulation agreement between/among partners in a consortium.
6. College Tech Prep programs at the secondary level will operate as state-approved, career-technical education programs.
7. Academic and technical instruction is integrated and delivered in a contextual approach where possible.
8. Programs have common representation from secondary education, higher education, business, and labor members.
9. Post-secondary programs contain advanced skills in the TCP document.
10. Programs must operate under either regionally accredited post-secondary institutions/degrees or approved apprenticeship programs meeting U.S. Department of Labor standards.
11. College Tech Prep programs, secondary and post-secondary, must comply with the state College Tech Prep Advisory Council's performance measures.

State College Tech Prep Advisory Council  
Revised and Approved: May 1, 2002

# College Tech Prep

College Tech Prep is a high school and college career path linked to business, industry, and labor that insures a specified seamless pathway from high school to college to careers, meeting Ohio's technological employment needs.

A College Tech Prep student is enrolled in a state-approved College Tech Prep education program. A College Tech Prep Program means a program of study that:

- Combines, at a minimum, two years of secondary education (as determined by Ohio definitions) with a minimum of two years of post-secondary education in a non-duplicative, sequential course of study.
- Integrates academic and technical instruction and utilizes work-based and work-site learning, where appropriate and available.
- Provides technical preparation in a career field such as engineering technology; applied science; mechanical; industrial or practical arts or trades; agriculture; health occupations; business; or applied economics.
- Builds student competencies in mathematics, science, reading, writing, communications, economics, and workplace skills through applied, contextual academics, and integrated instruction, in a coherent sequence of courses.
- Leads to an associate or baccalaureate degree, or a BAT (Bureau of Apprenticeship Training) apprenticeship requiring a minimum of two years in a specific career field.
- Leads to placement in related employment, or to further education.



# Key to Profile Codes

## Importance of Competencies

All of the competencies in this document represent the minimum requirements for a College Tech Prep program. It is the responsibility of the local consortia to further define and/or expand, as needed, the key indicators for each competency. Each competency must be taught at the Proficient level (P) by the completion of the College Tech Prep program, which is an Associate Degree (AD). A minimal number of competencies have been identified as Introduce (I) at the Associate Degree level. These may require further higher education.

**This document integrates college prep level academics with technical skill. Technical skills are a required component.**

**I = Introduce** (Learner will demonstrate knowledge and comprehension of the competency.)

**P = Proficient** (Learner will demonstrate ability to apply knowledge of and/or perform the competency.)

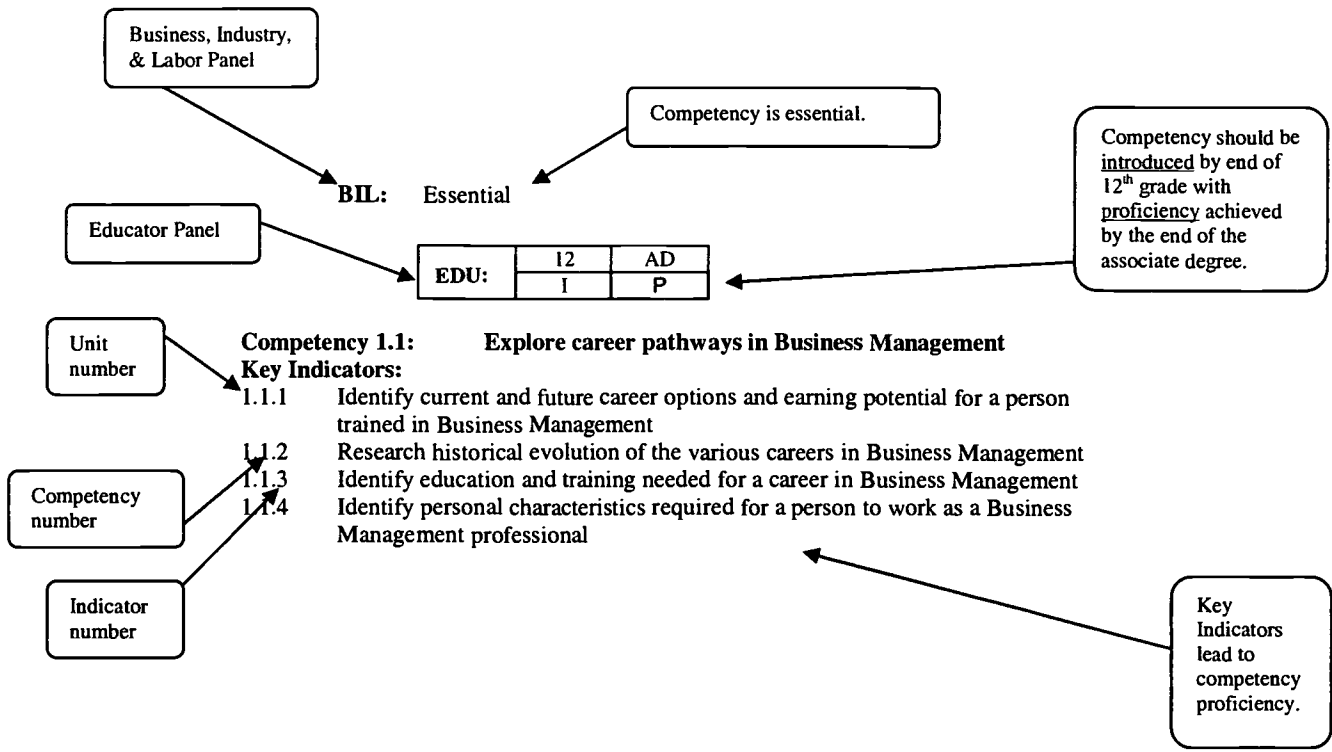
**R = Reinforced** (Competencies marked proficient at the secondary level are to be reinforced at the associate degree level.)

**Grade Level:** 12 = by the end of grade 12  
AD = by the end of the Associate Degree

### ACADEMIC CONNECTION

All College Tech Prep programs are responsible for meeting the academic content standards.

# EXAMPLE:



# Marketing Management & Research

The American Marketing Association (AMA) defines marketing as the process of planning and executing conception, pricing, promotion and distribution of ideas, goods, and services to create exchanges that satisfy individual and organizational objectives. Marketing is a process that involves a variety of activities designed to change behaviors or influence ideas. These activities include, but are not limited to advertising, logistics, marketing research, product design, and selling.

Marketing must be viewed as a multi-faceted, critical business function that is undergirded by such social sciences as economics, psychology, and sociology. Its successful performance depends on the application of communication skills, use of scientific problem solving, and application of technology to marketing situations and problems. In this century, economic survival in business will depend on the ability to understand and execute marketing skills.

## Sample Occupations

Market Researcher  
Product/Brand Manager  
Product Line Development Manager  
Testing Service Manager  
Market Development Director  
Marketing Coordinator  
Promotion Coordinator  
Industrial Designs Marketing Director  
Strategic Development Director  
Vice President – Relations Manager  
Project Coordinator  
Client Management Specialist  
Marketing Specialist  
Mystery Shopper  
Account Representative  
Buyer  
Community Outreach Specialist  
Interviewer  
Coder  
Focus Group Moderator  
Statistician  
Computer Assisted Telephone Interviewer (CATI)  
Customer Service Representative  
Sales Support  
Sales Representative  
Public Relations Specialist

**2003 MARKETING MANAGEMENT AND RESEARCH COMPETENCY CHART**

NOTE: Instruction in the Marketing Management and Research competency profile is coded: I = Introductory; P = Proficient; R = Reinforce.

INSTRUCTIONAL UNIT	COMPETENCY	PROFICIENT HS	PROFICIENT AD
<b>1</b>	<b>Professional Development and Networking</b>		
	1.1 Explore career pathways in marketing management and research	P	R
	1.2 Explore professional development opportunities for a marketing manager or research professional	I	P
	1.3 Utilize professional marketing/research resource materials	P	R
<b>2</b>	1.4 Prepare for career advancement in marketing and research	P	R
	<b>Professional Effectiveness</b>		
	2.1 Explain professional responsibilities in marketing	P	R
	2.2 Function as a self-managed marketing/research employee	P	R
	2.3 Apply appropriate work ethics as they apply to marketing and research	P	R
	2.4 Apply problem-solving techniques	P	R
	2.5 Manage stressful situations	P	R
	2.6 Build professional network	P	R
<b>3</b>	2.7 Achieve organizational goals	P	R
	2.8 Participate in the organization's community outreach involvement	P	R
	<b>Marketing Basics</b>		
	3.1 Analyze marketing and its role in business	P	R
<b>4</b>	3.2 Analyze the role of marketing	P	R
	3.3 Evaluate marketing mix components	P	R
	<b>Marketing and Business Management</b>		
	4.1 Characterize the nature of business	P	R
	4.2 Describe management concepts	P	R
	4.3 Develop interpersonal skills with individuals and teams	P	R
	4.4 Manage human resources	I	P
	4.5 Perform marketing personnel staffing functions	I	P
	4.6 Provide leadership to marketing employees	I	P



INSTRUCTIONAL UNIT	COMPETENCY	PROFICIENT HS	PROFICIENT AD
	4.7 Use controlling functions in managing marketing	I	P
	4.8 Establish criteria for purchasing products/services	I	P
	4.9 Analyze general business risk issues	P	R
	4.10 Manage business risks	P	R
	4.11 Analyze safety risks	P	R
	4.12 Follow business regulations	I	P
	4.13 Examine entrepreneurship	I	P
<b>5</b>	<b>Marketing Planning</b>		
	5.1 Explain the role of marketing management	P	R
	5.2 Explain nature of marketing plans	P	R
	5.3 Analyze influence of external factors on marketing planning	I	P
	5.4 Identify considerations in implementing international marketing strategies	P	R
	5.5 Describe concepts of market and market identification	P	R
	5.6 Select target market	P	R
	5.7 Explain role of SWOT (Strengths, Weaknesses, Opportunities, Threats) in marketing-planning process	P	R
	5.8 Conduct SWOT analysis for use in marketing planning process	I	P
	5.9 Align marketing objectives/strategies with the company's strategic plan	I	P
	5.10 Develop a marketing plan	P	R
	5.11 Use measures to control marketing planning	I	P
	5.12 Evaluate performance of marketing plan	I	P
	5.13 Conduct marketing audits	I	R
<b>6</b>	<b>Marketing Information Management</b>		
	6.1 Explain nature and scope of marketing information management function	P	R
	6.2 Demonstrate components of a marketing-information management system	P	R
	6.3 Explain use of databases in organizing marketing data	P	R
	6.4 Manipulate a database for retrieval of information	I	P
	6.5 Use database information analysis	P	P
	6.6 Write marketing reports	I	R
	6.7 Present report findings and recommendations	P	R
	6.8 Explain nature of forecasts	I	P

INSTRUCTIONAL UNIT	COMPETENCY	PROFICIENT HS	PROFICIENT AD
	6.9 Forecast sales	I	P
7	<b>Project Management</b>		
	7.1 Coordinate the diverse components of a project	I	P
	7.2 Manage a project	I	P
	7.3 Explain quality	P	R
	7.4 Manage quality project information	I	P
	7.5 Control project risk	I	I
8	<b>Marketing Research</b>		
	8.1 Describe marketing research activities	P	R
	8.2 Plan a research project	P	R
	8.3 Identify ethical issues in marketing research	P	R
	8.4 Design a marketing research study	I	P
	8.5 Use data collection methods	I	P
	8.6 Describe fundamentals of sampling	I	P
	8.7 Evaluate concepts of measurement and measurement scales	P	R
	8.8 Design measurement instruments	I	P
	8.9 Describe/conduct data collection	I	P
	8.10 Perform data analysis	I	P
	8.11 Evaluate hypothesis testing	I	P
	8.12 Use measures of association, regression analysis, and variance	I	I
	8.13 Evaluate strategic marketing studies	I	P
	8.14 Describe concept and product testing	I	P
	8.15 Describe characteristics of a name and package testing study	I	P
	8.16 Describe advertising research	I	P
	8.17 Interpret test market studies	I	I
	8.18 Use online market research tools	I	P
	8.19 Develop marketing research projects	I	P
	8.20 Present research to management	P	R
9	<b>Pricing</b>		
	9.1 Evaluate pricing fundamentals	P	R
	9.2 Describe pricing strategies	P	R

INSTRUCTIONAL UNIT	COMPETENCY	PROFICIENT HS	PROFICIENT AD
	9.3 Evaluate pricing techniques	I	P
	9.4 Determine prices	I	P
<b>10</b>	<b>Promotion</b>		
	10.1 Analyze promotion fundamentals	P	R
	10.2 Explain communication process used in promotion	P	R
	10.3 Describe promotion laws and regulations	P	R
	10.4 Analyze advertising	P	R
	10.5 Describe advertising outsourcing	I	P
	10.6 Determine cost of advertising media	P	R
	10.7 Evaluate Internet advertising	I	P
	10.8 Evaluate print advertising campaigns	I	P
	10.9 Design television advertising	I	P
	10.10 Design radio advertising	I	P
	10.11 Develop publicity and public relations activities	P	R
	10.12 Develop sales promotion activities	P	R
	10.13 Analyze affiliate marketing and co-branding strategies	I	P
	10.14 Coordinate activities in promotional mix	P	R
	10.15 Manage website	I	P
	10.16 Design frequency-marketing program	I	P
	10.17 Develop co-op advertising	I	P
	10.18 Develop a promotional plan	P	R
<b>11</b>	<b>Product and Service Management</b>		
	11.1 Describe factors involved in product/service operations	P	R
	11.2 Plan product/service management strategies	P	R
	11.3 Analyze service-planning issues	P	R
	11.4 Develop new products/services	I	P
	11.5 Evaluate positioning	P	R
	11.6 Explain packaging principles	P	R
<b>12</b>	<b>Branding</b>		
	12.1 Evaluate branding concepts	P	R
	12.2 Build brand identity	P	R

INSTRUCTIONAL UNIT	COMPETENCY	PROFICIENT HS	PROFICIENT AD
13	<b>Selling</b>		
	13.1 Manage the selling function	P	R
	13.2 Analyze organizational purchase processes	P	R
	13.3 Integrate website into traditional sales and customer service process	I	P
	13.4 Explain role of customer service as a component of selling relationships	P	R
	13.5 Analyze product information to identify product features, advantages, and benefits (FABs)	P	R
	13.6 Develop company-selling policies	P	R
	13.7 Describe nature of selling regulations	P	R
	13.8 Explain selling process	P	R
	13.9 Prepare sales presentation	P	R
	13.10 Establish relations with client/customer	P	R
	13.11 Determine customer needs	P	R
	13.12 Use selling process/techniques	P	R
	13.13 Use support activities	P	R
13.14 Manage selling activities	I	P	
14	<b>Distribution and Logistics</b>		
	14.1 Analyze physical distribution strategies	P	R
	14.2 Evaluate concept of Supply Chain Management (SCM)	I	P
	14.3 Evaluate shipping process	P	R
	14.4 Evaluate business inventory	P	R
	14.5 Explain legal considerations in distribution	P	R
	14.6 Describe ethical considerations in distribution	P	R
	14.7 Explain the relationship between customer service and distribution	P	R
	14.8 Prepare invoices	P	R
	14.9 Use an information system for order fulfillment	I	P
	14.10 Describe the receiving process	P	R
	14.11 Coordinate management of distribution	I	P
	14.12 Explain storage considerations	P	R
	14.13 Explain the nature of warehousing	I	P
14.14 Analyze channel-member relationships	I	P	



INSTRUCTIONAL UNIT	COMPETENCY	PROFICIENT HS	PROFICIENT AD
	14.15 Analyze channel strategies	P	R
	14.16 Evaluate channel members	P	R
<b>15</b>	<b>Customer Relationship Management</b>		
	15.1 Analyze basic customer relationship management (CRM) concepts	P	R
	15.2 Manage customer service	P	R
	15.3 Explain the benefits of customer support (including online)	P	R
	15.4 Analyze customer relationships	I	P
	15.5 Evaluate customer retention	I	P
<b>16</b>	<b>Finance</b>		
	16.1 Explain the nature and scope of financing	P	R
	16.2 Explain basic accounting concepts and principles	P	R
	16.3 Analyze financial performance	P	R
	16.4 Explain purpose and importance of obtaining business credit	P	R
	16.5 Identify risks associated with obtaining business credit	I	P
	16.6 Determine financing needed	I	P
	16.7 Use financial statements to make marketing management and research decisions	I	P
<b>17</b>	<b>Marketing and the New Economy</b>		
	17.1 Describe economic concepts	P	R
	17.2 Describe economic indicators and trends	P	R
	17.3 Explain international trade	P	P
<b>18</b>	<b>Business Law and Ethics Affecting Marketing</b>		
	18.1 Evaluate the relationship between law and business	I	P
	18.2 Evaluate issues related to leadership and marketing managerial ethics	P	R
	18.3 Demonstrate ethical business behavior in marketing	P	R
	18.4 Evaluate issues related to employee ethics	P	R
	18.5 Describe intellectual property rights and copyright laws	P	R
<b>19</b>	<b>Technology for Marketing</b>		
	19.1 Describe the impact of technology on society	P	R
	19.2 Describe types of business software	P	R
	19.3 Use technology applications	P	R

INSTRUCTIONAL UNIT	COMPETENCY	PROFICIENT HS	PROFICIENT AD
	19.4 Access the Internet	P	R
	19.5 Utilize Internet services	P	R
	19.6 Analyze e-commerce concepts	P	R
	19.7 Analyze information from technology sources	P	R
	19.8 Evaluate policies for managing privacy and ethical issues	P	R
	19.9 Assess/explain the technology components of major marketing functions and their interrelationships	P	R
	19.10 Explain impact of technology on marketing	P	R
<b>20</b>	<b>Writing for Marketing</b>		
	20.1 Assess report-writing requirements	P	R
	20.2 Write reports	P	R
	20.3 Perform writing to sell	P	R
<b>21</b>	<b>Knowledge-Management</b>		
	21.1 Explore knowledge-management	I	I
	21.2 Analyze importance of capture and transfer of strategic knowledge	I	I
	21.3 Analyze organizational culture and the role of knowledge management	I	I
	21.4 Determine barriers that affect knowledge-management implementation	I	I
	21.5 Evaluate various knowledge-management measurement approaches	I	I
	21.6 Measure intellectual capital	I	I

# **Marketing Management and Research TCP**

## **Marketing Management and Research Instructional Units**

- 1. Professional Development and Networking**
- 2. Professional Effectiveness**
- 3. Marketing Basics**
- 4. Marketing/Business Management**
- 5. Marketing Planning**
- 6. Marketing Information Management**
- 7. Project Management**
- 8. Marketing Research**
- 9. Pricing**
- 10. Promotion**
- 11. Product/Service Management**
- 12. Branding**
- 13. Selling**
- 14. Distribution/Logistics**
- 15. Customer Relationship Management**
- 16. Financing**
- 17. Marketing and the New Economy**
- 18. Business Law and Ethics Affecting Marketing**
- 19. Technology for Marketing**
- 20. Writing for Marketing**
- 21. Knowledge Management**

# Marketing Management and Research TCP

## Instructional Unit 1: Professional Development and Networking

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

### Competency 1.1: Explore career pathways in marketing management and research

#### Key Indicators:

- 1.1.1 Identify current and future career options for a person trained in marketing management and research
- 1.1.2 Research the historical evolution of the various careers in marketing management and research
- 1.1.3 Identify education and training needed for a career in marketing management and research
- 1.1.4 Identify personal characteristics required for a person to work as a marketing management professional or a marketing researcher

**BIL:** Essential

<b>EDU:</b>	12	AD
	I	P

### Competency 1.2: Explore professional development opportunities for a marketing manager or research professional

#### Key Indicators:

- 1.2.1 Research continuing education courses or programs available to enhance skills, to remain current in the profession, and for career advancement
- 1.2.2 Describe various certifications for marketing management and research professionals (e.g., Certified Marketing Executive, Certified Sales Executive, Certified Professional Manager)
- 1.2.3 Identify professional associations opportunities for marketing/research professionals (e.g., American Marketing Association [AMA], Marketing Research Association [MRA], Sales and Marketing Executives International [SMEI])
- 1.2.4 Identify professional journals for marketing/research professionals
- 1.2.5 Build internal/external marketing/research mentor relationships
- 1.2.6 Use websites for professional development

- 1.2.7 Identify marketing networking opportunities internally and externally
- 1.2.8 Interact with other marketing professionals
- 1.2.9 Establish professional marketing/research relationships

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

**Competency 1.3: Utilize professional marketing/research resource materials**

**Key Indicators:**

- 1.3.1 Determine resources to maintain professional marketing/research skills
- 1.3.2 Identify marketing/research publications (e.g., books, periodicals, newsletters)
- 1.3.3 Discriminate among types of information (e.g., essential, important, critical, nice to know)
- 1.3.4 Determine validity and reliability of marketing/research resources
- 1.3.5 Utilize reading skills according to information needs (e.g., skim, comprehend, analyze)
- 1.3.6 Maintain resource files

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

**Competency 1.4: Prepare for career advancement in marketing and research**

**Key Indicators**

- 1.4.1 Identify advancement opportunities in marketing/research (e.g., internally and externally)
- 1.4.2 Keep up-to-date on changes in the marketing/research profession
- 1.4.3 Identify skills needed for advancement
- 1.4.4 Develop plan for achieving needed skills
- 1.4.5 Enhance effective interview skills
- 1.4.6 Write employment-related correspondence and document
- 1.4.7 Maintain résumé
- 1.4.8 Complete job applications

## Instructional Unit 2: Professional Effectiveness

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

### Competency 2.1: Explain professional responsibilities in marketing

#### Key Indicators:

- 2.1.1 Explain the need for professional and ethical standards
- 2.1.2 Explain the responsibility of the individual to apply ethical standards
- 2.1.3 Explain consequences of unprofessional and/or unethical behavior
- 2.1.4 Explain importance of conflict resolution in the work environment
- 2.1.5 Explain legal ramifications of breaching rules and regulations
- 2.1.6 Explain effects of unethical and/or unlawful behavior

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

### Competency 2.2: Function as a self-managed marketing/research employee

#### Key Indicators:

- 2.2.1 Propose marketing project
- 2.2.2 Organize tasks
- 2.2.3 Manage time
- 2.2.4 Meet deadlines
- 2.2.5 Maintain business records
- 2.2.6 Make long-term and short-term plans
- 2.2.7 Evaluate progress
- 2.2.8 Report progress
- 2.2.9 Acquire appropriate licenses/registrations/credentials

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

**Competency 2.3: Apply appropriate work ethics as they apply to marketing and research**

**Key Indicators:**

- 2.3.1 Adhere to company and/or governmental policies, procedures, rules, and regulations
- 2.3.2 Exercise confidentiality
- 2.3.3 Adhere to rules of conduct
- 2.3.4 Accept constructive criticism
- 2.3.5 Offer constructive criticism
- 2.3.6 Exhibit pride in work
- 2.3.7 Resolve conflict
- 2.3.8 Avoid harassment
- 2.3.9 Adjust to changes in the work environment
- 2.3.10 Demonstrate punctuality
- 2.3.11 Assume responsibility for decisions and actions
- 2.3.12 Take responsibility for assignments
- 2.3.13 Follow chain-of-command
- 2.3.14 Identify factors that influence work ethic
- 2.3.15 Describe how personal values are reflected in work ethic
- 2.3.16 Describe how interactions in the workplace affect personal work ethic
- 2.3.17 Describe how life changes affect personal work ethic

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

**Competency 2.4: Apply problem-solving techniques**

**Key Indicators:**

- 2.4.1 Identify problem
- 2.4.2 Select appropriate problem solving tools/techniques
- 2.4.3 Identify causes of underlying problem
- 2.4.4 Identify appropriate solutions and consequences (e.g., long term, short term, crisis)
- 2.4.5 Use resources to explore possible solutions to problem
- 2.4.6 Contrast advantages and disadvantages of each solution
- 2.4.7 Identify appropriate action
- 2.4.8 Evaluate results
- 2.4.9 Identify post-preventive action

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

**Competency 2.5: Manage stressful situations****Key Indicators:**

- 2.5.1 Identify factors contributing to stress
- 2.5.2 Describe physical and emotional responses to stress
- 2.5.3 Evaluate positive and negative effects of stress on productivity
- 2.5.4 Identify strategies and/or methods to reduce/channel stress
- 2.5.5 Implement strategies to manage stress
- 2.5.6 Create strategies for developing and maintaining support systems

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

**Competency 2.6: Build professional network****Key Indicators:**

- 2.6.1 Identify networking opportunities internally and externally
- 2.6.2 Develop effective conversation and oral communication skills
- 2.6.3 Demonstrate self-esteem and self-confidence
- 2.6.4 Interact with other professionals
- 2.6.5 Establish relationships
- 2.6.6 Describe effective listening
- 2.6.7 Identify barriers to effective listening
- 2.6.8 Practice listening skills

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

**Competency 2.7: Achieve organizational goals****Key Indicators:**

- 2.7.1 Evaluate personal goals in relation to organizational/marketing department goals
- 2.7.2 Monitor progress by evaluating feedback
- 2.7.3 List responsibilities in relation to organizational/marketing department goals
- 2.7.4 Accomplish assigned tasks
- 2.7.5 Exercise responsibility in relation to organizational/marketing goals
- 2.7.6 Set appropriate performance standards



- 2.7.7 Communicate goals with supervisor/peers
- 2.7.8 Demonstrate knowledge of products and services
- 2.7.9 Promote organizational/marketing department image and mission

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

**Competency 2.8: Participate in an organization's community outreach involvement**

**Key Indicators:**

- 2.8.1 Propose educational, environmental, and community needs and social issues for organizational involvement
- 2.8.2 Select issues on which to focus organizational support
- 2.8.3 Participate in social and/or outreach activities
- 2.8.4 Encourage staff involvement
- 2.8.5 Recognize importance of an organization's social and community relationships and their effects on the organization

## Instructional Unit 3: Marketing Basics

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

### Competency 3.1: Analyze marketing and its role in business

#### Key Indicators:

- 3.1.1 Explain marketing concept and its role in business
- 3.1.2 Profile types of information used by marketing managers
- 3.1.3 Identify the ways in which organizational functions and marketing are interdependent
- 3.1.4 Identify types of communication channels (e.g., formal, informal)
- 3.1.5 Define marketing stakeholder relationships (e.g., customers, employees, shareholders, suppliers)
- 3.1.6 Explain importance of business/marketing partnerships and relationships
- 3.1.7 Describe current marketing trends

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

### Competency 3.2: Analyze the role of marketing

#### Key Indicators:

- 3.2.1 Identify primary functions of marketing
- 3.2.2 Describe differences between products and services
- 3.2.3 Quantify values that marketing adds to a product or service
- 3.2.4 Discuss applicability of marketing beyond products and services
- 3.2.5 Explain concept of market and market identification
- 3.2.6 Describe evolution of the marketing concept
- 3.2.7 Explain the importance of marketing in a global economy
- 3.2.8 Describe wide scope of marketing (e.g., business-to-customer, business-to-business, industrial, nonprofit, electronic)
- 3.2.9 Describe differences between transactional marketing and relationship marketing
- 3.2.10 Define the marketing departments' relationship to other departments
- 3.2.11 Compare various ways a marketing department can be organized

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

**Competency 3.3: Evaluate marketing mix components**

**Key Indicators:**

- 3.3.1 Define marketing mix
- 3.3.2 Evaluate the importance of product/service decisions in the marketing mix
- 3.3.3 Evaluate the importance of distribution and supply chain management
- 3.3.4 Evaluate the importance of promotion
- 3.3.5 Evaluate the importance of pricing

## Instructional Unit 4: Marketing and Business Management

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

### Competency 4.1: Characterize the nature of business

#### Key Indicators:

- 4.1.1 Identify types of business organizations and functions (e.g., outsourcing, partnerships, alliances)
- 4.1.2 Identify business reporting and information flow
- 4.1.3 Identify ways in which organizational functions are interdependent
- 4.1.4 Determine how business activities interface with data management functions
- 4.1.5 Define stakeholder relationships (e.g., customer, employee, shareholder, suppliers)
- 4.1.6 Identify generally accepted business ethics
- 4.1.7 Explain importance of business partnerships and relationships
- 4.1.8 Describe current business trends

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

### Competency 4.2: Describe management concepts

#### Key Indicators:

- 4.2.1 Identify the major functions and activities of management
- 4.2.2 Describe management styles
- 4.2.3 Explain the role of authority, accountability, and responsibility in task accomplishment
- 4.2.4 Describe current and emerging management trends
- 4.2.5 Explain importance of strategic planning
- 4.2.6 Identify the risks/rewards associated with on-line business
- 4.2.7 Describe methods to manage risks
- 4.2.8 Describe continuous improvement programs

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

**Competency 4.3: Develop interpersonal skills with individuals and teams****Key Indicators:**

- 4.3.1 Analyze interdependence of empathetic listening, synergy, and consensus building
- 4.3.2 Identify types of decision-making processes
- 4.3.3 Apply knowledge of group dynamics
- 4.3.4 Promote teamwork, leadership, and empowerment
- 4.3.5 Identify strategies for fostering creativity
- 4.3.6 Recognize effect of influence, power, culture and politics on communication
- 4.3.7 Use negotiation techniques
- 4.3.8 Identify phases of team building (e.g., forming, storming, norming, performing)

**BIL:** Essential

<b>EDU:</b>	12	AD
	I	P

**Competency 4.4: Manage human resources****Key Indicators:**

- 4.4.1 Describe ethics in personnel issues
- 4.4.2 Plan/organize the work efforts of others
- 4.4.3 Delegate responsibility
- 4.4.4 Explain job performance to an employee
- 4.4.5 Establish goals based on standards
- 4.4.6 Develop job descriptions
- 4.4.7 Follow personnel/human resource policies
- 4.4.8 Recognize chain of command
- 4.4.9 Manage an employee performance development/improvement plan

**BIL:** Essential

<b>EDU:</b>	12	AD
	I	P

**Competency 4.5: Perform marketing personnel staffing functions****Key Indicators:**

- 4.5.1 Determine hiring needs
- 4.5.2 Describe process of recruiting, selecting, and orienting new marketing employees
- 4.5.3 Conduct training class/program pertaining to the marketing function

- 4.5.4 Identify legal issues impacting marketing personnel  
 4.5.5 Describe employer documentation process

**BIL:** Essential

<b>EDU:</b>	12	AD
	I	P

**Competency 4.6: Provide leadership to marketing employees (4.6.1-4.6.6 Proficient at 12<sup>th</sup> grade)**

**Key Indicators:**

- 4.6.1 Compare/contrast different leadership styles  
 4.6.2 Identify factors that influence choice of leadership style in a given situation  
 4.6.3 Identify methods to build employee morale  
 4.6.4 Evaluate ways to motivate employees  
 4.6.5 Analyze the relationship between communication and employee attitude  
 4.6.6 Analyze the concept of employee participation in decision-making  
 4.6.7 Provide feedback regarding marketing work efforts  
 4.6.8 Encourage team building among marketing staff and with other stakeholders  
 4.6.9 Handle employee complaints and grievances  
 4.6.10 Ensure equitable opportunities for employees  
 4.6.11 Assess employee morale  
 4.6.12 Conduct staff meetings

**BIL:** Essential

<b>EDU:</b>	12	AD
	I	P

**Competency 4.7: Use controlling functions in managing marketing**

**Key Indicators:**

- 4.7.1 Explain employee's role in expense control  
 4.7.2 Describe nature of managerial control (e.g., control process, types of control, what is controlled)  
 4.7.3 Negotiate service and maintenance contracts for the marketing department  
 4.7.4 Differentiate between fixed and variable and long- and short-term expenses  
 4.7.5 Explain risk and rewards of expense control  
 4.7.6 Use budgets to control marketing operations  
 4.7.7 Explain marketing expense-control plans  
 4.7.8 Analyze operating results in relation to budget/industry  
 4.7.9 Develop a budget and control process for the marketing department

**BIL:** Essential

<b>EDU:</b>	12	AD
	I	P

**Competency 4.8: Establish criteria for purchasing products/services****Key Indicators:**

- 4.8.1 Explain nature and scope of purchasing
- 4.8.2 Develop buying/purchasing policies
- 4.8.3 Establish criteria for managing the buying process
- 4.8.4 Establish criteria for qualifying vendors
- 4.8.5 Develop cooperative relationships with vendors
- 4.8.6 Conduct bidding process
- 4.8.7 Choose vendors
- 4.8.8 Describe negotiation of contracts with vendors
- 4.8.9 Review performance of vendors

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

**Competency 4.9: Analyze general business risk issues****Key Indicators:**

- 4.9.1 Analyze types of business risk
- 4.9.2 Identify speculative business risks
- 4.9.3 Describe routine security precautions
- 4.9.4 Develop strategies to protect digital data
- 4.9.5 Explain nature of risk management
- 4.9.6 Analyze liability issues
- 4.9.7 Analyze marketing risks
- 4.9.8 Describe how business risks affect the marketing functions
- 4.9.9 Describe disaster preparedness and recovery plans

**BIL:** Recommended

<b>EDU:</b>	12	AD
	P	R

**Competency 4.10: Manage business risks****Key Indicators:**

- 4.10.1 Identify types of insurance coverage
- 4.10.2 Develop policies/procedures for preventing internal theft

- 4.10.3 Develop policies and procedures for preventing vendor theft
- 4.10.4 Develop procedures for preventing burglary
- 4.10.5 Manage a product/service contract

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

**Competency 4.11: Analyze safety risks**

**Key Indicators:**

- 4.11.1 Explain routine security precautions
- 4.11.2 Follow safety precautions
- 4.11.3 Implement procedures for handling accidents
- 4.11.4 Implement procedures for dealing with workplace threats
- 4.11.5 Follow procedures for correcting hazardous conditions
- 4.11.6 Describe fire-prevention program
- 4.11.7 Describe safety policies and procedures

**BIL:** Essential

<b>EDU:</b>	12	AD
	I	P

**Competency 4.12: Follow business regulations**

**Key Indicators:**

- 4.12.1 Identify legal issues affecting businesses
- 4.12.2 Interpret personnel regulations
- 4.12.3 Interpret workplace regulations
- 4.12.4 Identify trade regulations
- 4.12.5 Identify environmental regulations
- 4.12.6 Identify how tax regulations affect business
- 4.12.7 Identify tax regulations
- 4.12.8 Complete reporting requirements



**BIL:** Essential

<b>EDU:</b>	12	AD
	I	P

**Competency 4.13: Examine entrepreneurship**

**Key Indicators:**

- 4.13.1 Evaluate personal interests and skills
- 4.13.2 Compare personal interests and skills with those needed by an entrepreneur
- 4.13.3 Assess abilities and aptitudes to become a successful entrepreneur
- 4.13.4 Determine motives for becoming an entrepreneur
- 4.13.5 Examine characteristics of entrepreneurs
- 4.13.6 Compare business ownership to working for others
- 4.13.7 Explain components of a business plan
- 4.13.8 Explain the purpose of a business plan
- 4.13.9 Develop a business plan

## Instructional Unit 5: Marketing Planning

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

### Competency 5.1: Explain the role of marketing management

#### Key Indicators:

- 5.1.1 Describe the role of the marketing manager
- 5.1.2 Identify challenges faced by marketing management
- 5.1.3 Explain strategic marketing planning
- 5.1.4 Explain the nature of marketing audits
- 5.1.5 Explain the marketing planning process

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

### Competency 5.2: Explain nature of marketing plans

#### Key Indicators:

- 5.2.1 Define marketing plan and situational analysis
- 5.2.2 Explain benefits associated with having a marketing plan
- 5.2.3 Identify components of marketing plans
- 5.2.4 Describe purpose of each component of marketing plan
- 5.2.5 Identify the marketing decision/problem (e.g., recognize problem exists, search for underlying cause, define problem, refine problem, classify problem, define additional goals)
- 5.2.6 Develop alternative responses to decisions/problems
- 5.2.7 Establish criteria for evaluating alternative responses to decisions/problems
- 5.2.8 Demonstrate financial analysis techniques to make marketing decisions
- 5.2.9 Demonstrate non-financial analysis techniques to make marketing decisions

**BIL:** Essential

<b>EDU:</b>	12	AD
	I	P

### Competency 5.3: Analyze influence of external factors on marketing planning

#### Key Indicators:

- 5.3.1 Analyze legal and political factors that affect marketing strategies

- 5.3.2 Differentiate between ethical and unethical marketing practices
- 5.3.3 Identify differences in ethical standards in international markets
- 5.3.4 Compare/contrast legal and ethical marketing practices
- 5.3.5 Analyze impact of changing economic conditions on marketing strategies
- 5.3.6 Describe ways marketing strategies are altered to meet competition
- 5.3.7 Analyze ways in which marketers may respond to concerns of special groups
- 5.3.8 Analyze social environments that affect marketing (i.e., consumerism, product quality, activism)
- 5.3.9 Analyze ways in which changing cultural characteristics impact marketing
- 5.3.10 Determine new ways of marketing products using emerging and evolving technologies
- 5.3.11 Analyze cost/benefit of different technological approaches to marketing
- 5.3.12 Examine advantages and disadvantages of a heavy reliance on technological approaches to marketing
- 5.3.13 Analyze the impact of short-term versus long-term planning

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

**Competency 5.4: Identify considerations in implementing international marketing strategies**

**Key Indicators:**

- 5.4.1 Explain factors that affect implementation of product strategies in an international market
- 5.4.2 Describe factors that affect implementation of place strategies in an international market
- 5.4.3 Discuss factors that impact price strategies in an international market
- 5.4.4 Describe factors that impact promotion strategies in an international market

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

**Competency 5.5: Describe concepts of market and market identification**

**Key Indicators:**

- 5.5.1 Explain importance of target markets to business
- 5.5.2 Explain importance of target marketing
- 5.5.3 Describe advantages and disadvantages of mass marketing
- 5.5.4 Describe advantages and disadvantages of using market segments
- 5.5.5 Describe levels of segmentation
- 5.5.6 Identify descriptor variables for consumer marketing
- 5.5.7 Describe demographic, geographic, and psychographic characteristics that are analyzed by marketers

- 5.5.8 Explain technographics in segmentation (i.e., computer knowledge, Internet knowledge)
- 5.5.9 Describe types of behavioral segmentation
- 5.5.10 Explain segmentation schemes used for organizational buyers
- 5.5.11 Explain use of commerce statistics and data mining in segmentation
- 5.5.12 Explain how culture impacts consumer purchase behavior
- 5.5.13 Explain how lifestyle impacts consumer purchase behavior
- 5.5.14 Use information on beliefs and attitudes to develop strategies
- 5.5.15 Identify stages of the consumer buying process
- 5.5.16 Explain nature of organizational buying processes

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

**Competency 5.6: Select target market**

**Key Indicators:**

- 5.6.1 Distinguish between segment and individual marketing
- 5.6.2 Compare niche and differentiated marketing
- 5.6.3 Describe use of customer profiles in selecting target markets
- 5.6.4 Identify criteria used by marketers to select viable target markets
- 5.6.5 Estimate a segment's market potential
- 5.6.6 Explain components of a marketing segmentation analysis
- 5.6.7 Describe global issues in selecting international target markets
- 5.6.8 Develop procedures for selecting target markets

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

**Competency 5.7: Explain role of SWOT (Strengths, Weaknesses, Opportunities, Threats) in marketing-planning process**

**Key Indicators:**

- 5.7.1 Explain how environmental threats for one company can represent opportunities for another company
- 5.7.2 Discuss purpose of environmental scanning and monitoring in situational analysis
- 5.7.3 Explain why businesses should evaluate their internal environments in context of changes occurring in their external environments

**BIL:** Essential

<b>EDU:</b>	12	AD
	I	P

**Competency 5.8: Conduct SWOT analysis for use in marketing planning process****Key Indicators:**

- 5.8.1 Explain whom to involve in a SWOT analysis
- 5.8.2 Discuss when a SWOT analysis should be conducted
- 5.8.3 Describe benefits of conducting a SWOT analysis
- 5.8.4 Identify factors that should be considered in a SWOT analysis
- 5.8.5 Demonstrate procedures for conducting a SWOT analysis for use in marketing planning

**BIL:** Essential

<b>EDU:</b>	12	AD
	I	P

**Competency 5.9: Align marketing objectives/strategies with the company's strategic plan****Key Indicators:**

- 5.9.1 Develop marketing objectives based on a strategic business plan
- 5.9.2 Evaluate effects of external forces
- 5.9.3 Develop marketing strategies to achieve company goals/objectives
- 5.9.4 Explain external planning considerations

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

**Competency 5.10: Develop a marketing plan****Key Indicators:**

- 5.10.1 Identify organization's mission
- 5.10.2 Determine organizational resources
- 5.10.3 Complete a SWOT analysis
- 5.10.4 Identify overall marketing objectives
- 5.10.5 Select target markets
- 5.10.6 Use marketing research as needed
- 5.10.7 Develop objectives for each target market
- 5.10.8 Develop marketing mix strategies
- 5.10.9 Develop tactics (i.e., action plan)
- 5.10.10 Develop a budget

**BIL:** Essential

<b>EDU:</b>	12	AD
	I	P

**Competency 5.11: Use measures to control marketing planning****Key Indicators:**

- 5.11.1 Explain importance of controlling marketing planning activities
- 5.11.2 Discuss reasons that sales should be analyzed to control marketing planning
- 5.11.3 Describe how sales analysis is used as a control measure in marketing planning
- 5.11.4 Describe types of sales analysis measures used in marketing planning
- 5.11.5 Explain strengths/weaknesses of sales measurement techniques
- 5.11.6 Discuss how customer-satisfaction analysis is used as a control measure in marketing planning
- 5.11.7 Explain use of profitability analysis as a control measure in marketing planning
- 5.11.8 Discuss use of profit margins in adjusting marketing mixes
- 5.11.9 Explain purpose of activity-based costing in controlling marketing planning
- 5.11.10 Establish metrics for measuring success (i.e., return on investment [ROI])

**BIL:** Essential

<b>EDU:</b>	12	AD
	I	P

**Competency 5.12: Evaluate performance of marketing plan****Key Indicators:**

- 5.12.1 Explain use of standards in evaluating performance of a marketing plan
- 5.12.2 Discuss frequency with which marketing plan performance should be evaluated
- 5.12.3 Describe actions to take when performance and objectives differ
- 5.12.4 Demonstrate procedures for evaluating performance of a marketing plan
- 5.12.5 Assess ROI using established metrics

**BIL:** Recommended

<b>EDU:</b>	12	AD
	I	R

**Competency 5.13: Conduct marketing audits****Key Indicators:**

- 5.13.1 Explain purpose of marketing audits
- 5.13.2 Describe characteristics of an effective marketing audits

- 5.13.3 Explain process for conducting a marketing audit
- 5.13.4 Demonstrate procedures for conducting marketing audits

## Instructional Unit 6: Marketing Information Management

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

### Competency 6.1: Explain nature and scope of marketing information management function

#### Key Indicators:

- 6.1.1 Describe need for marketing information
- 6.1.2 Classify types of marketing information as primary or secondary
- 6.1.3 Describe types of information marketers should obtain
- 6.1.4 Categorize internal sources of marketing information
- 6.1.5 Discuss external sources of marketing information
- 6.1.6 Explain functions of a marketing-information management system
- 6.1.7 Contrast marketing research with a marketing information system
- 6.1.8 Describe use of a marketing information system
- 6.1.9 Explain benefits of a marketing information management system
- 6.1.10 Describe limitations of marketing information management systems

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

### Competency 6.2: Demonstrate components of a marketing-information management system

#### Key Indicators:

- 6.2.1 Describe issues associated with development of a marketing-information management system
- 6.2.2 Explain ways to equip a marketing-information management system
- 6.2.3 Describe ways to staff a marketing-information management system
- 6.2.4 Demonstrate procedures for developing a marketing-information management system
- 6.2.5 Assess marketing information needs
- 6.2.6 Explain role of ethics in marketing-information management
- 6.2.7 Describe use of technology in marketing-information management function
- 6.2.8 Describe sources of secondary data
- 6.2.9 Search Internet for marketing information
- 6.2.10 Examine internal records for marketing information (e.g., sales and expense reports, customer records, shipping information)
- 6.2.11 Collect marketing information from others (e.g., customers, staff, vendors)



**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

**Competency 6.3: Explain use of databases in organizing marketing data****Key Indicators:**

- 6.3.1 Compare way in which sequential database systems organize information with that of relational database systems
- 6.3.2 Discuss advantages and limitations of each database system
- 6.3.3 Describe importance of data base management and mining
- 6.3.4 Explain ways databases can be used to organize information about customers and their purchases
- 6.3.5 Describe ways that databases can be used to generate marketing reports

**BIL:** Essential

<b>EDU:</b>	12	AD
	I	P

**Competency 6.4: Manipulate a database for retrieval of information****Key Indicators:**

- 6.4.1 Identify questions that must be answered to design a database for retrieval of marketing information
- 6.4.2 Describe guidelines for designing a database for retrieval of marketing information
- 6.4.3 Describe procedures for designing a database for retrieval of marketing information

**BIL:** Essential

<b>EDU:</b>	12	AD
	I	P

**Competency 6.5: Use database information analysis****Key Indicators:**

- 6.5.1 Explain considerations in manipulating data to create reports
- 6.5.2 Describe procedures for manipulating data for information analysis
- 6.5.3 Demonstrate use of database for information analysis

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

**Competency 6.6: Write marketing reports****Key Indicators:**

- 6.6.1 Discuss characteristics of an effective marketing report
- 6.6.2 Identify elements of a marketing report
- 6.6.3 Describe types of visual aids that can be used effectively in marketing reports
- 6.6.4 Create tables and graphs for reports
- 6.6.5 Explain considerations in manipulating data to create reports
- 6.6.6 Prepare marketing reports using key elements and characteristics

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

**Competency 6.7: Present report findings and recommendations****Key Indicators:**

- 6.7.1 Compare/contrast presentation of marketing reports in oral versus written format
- 6.7.2 Identify elements of a marketing report that should be addressed in an oral presentation
- 6.7.3 Demonstrate procedures for presenting report findings and recommendations
- 6.7.4 Utilize presentation software to enhance presentation of marketing reports

**BIL:** Essential

<b>EDU:</b>	12	AD
	I	P

**Competency 6.8: Explain nature of forecasts****Key Indicators:**

- 6.8.1 Identify items/factors for which sales forecasts can be used
- 6.8.2 Discuss timeframe of sales forecasts
- 6.8.3 Explain factors affecting how far ahead a business should predict sales
- 6.8.4 Distinguish between qualitative and quantitative forecasting methods
- 6.8.5 Describe factors affecting sales forecast
- 6.8.6 Explain business activities in which sales forecast information is used as a planning tool
- 6.8.7 Explain reasons that not all businesses use sales forecasts
- 6.8.8 Define subsets and correlation

**BIL:** Essential

<b>EDU:</b>	12	AD
	I	P

**Competency 6.9: Forecast sales**

**Key Indicators:**

- 6.9.1 Describe approaches to forecasting sales
- 6.9.2 Discuss methods of forecasting sales
- 6.9.3 Describe advantages and disadvantages associated with each forecasting methods
- 6.9.4 Explain factors that should be considered in choosing a forecasting method
- 6.9.5 Describe external factors that affect sales forecasts
- 6.9.6 Explain internal factors that affect sales forecasts
- 6.9.7 Describe procedures for preparing a sales forecast
- 6.9.8 Demonstrate how to forecast sales

## Instructional Unit 7: Project Management

**BIL:** Essential

<b>EDU:</b>	12	AD
	I	P

### Competency 7.1: Coordinate the diverse components of a project

#### Key Indicators:

- 7.1.1 Select a project that fits business and organizational needs
- 7.1.2 Create a project plan that takes into account all aspects of the project
- 7.1.3 Develop a written statement outlining the scope, extent, and limits of the project
- 7.1.4 Define a baseline plan for a project's scope, time, and cost
- 7.1.5 Develop a project charter to serve as a proposal or contract document which can be used to get project approval
- 7.1.6 Determine the type and quantity of resources needed to complete project activities (e.g., people, equipment, software)
- 7.1.7 Execute activities in the project plan

**BIL:** Essential

<b>EDU:</b>	12	AD
	I	P

### Competency 7.2: Manage a project

#### Key Indicators:

- 7.2.1 Manage/coordinate business, organizational, technological, and resource changes that affect an entire project
- 7.2.2 Redefine scope, time, and cost plan for a project when one factor must be traded off against the other
- 7.2.3 Determine usefulness of project management software tools
- 7.2.4 Use project management software tools to plan and control a project
- 7.2.5 Monitor project scope progress against the plan
- 7.2.6 Shut down a project at appropriate review points if problems are identified
- 7.2.7 Conclude a project when all requirements are met

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

**Competency 7.3: Explain quality****Key Indicators:**

- 7.3.1 Describe which quality control standards are relevant to the project (e.g., ISO 9000, ISO 9001)
- 7.3.2 Develop a quality management plan that quantifies and coordinates the activities and that assesses the effectiveness, efficiency, and quality of the system
- 7.3.3 Describe quality assurance activities regularly to ensure that the project will satisfy the quality standards
- 7.3.4 Identify negative results detected during quality control activities
- 7.3.5 Identify quality initiatives in various industries (e.g., Lean, Kaizen, Baldrige)

**BIL:** Essential

<b>EDU:</b>	12	AD
	I	P

**Competency 7.4: Manage quality project information****Key Indicators:**

- 7.4.1 Determine information and communication needs of stakeholders (e.g., what information is needed, when is it needed, and to whom will it be provided)
- 7.4.2 Develop a communications plan
- 7.4.3 Decide how information will be gathered and stored
- 7.4.4 Make necessary information available to project stakeholders in a concise and timely fashion (e.g., using verbal, textual, and graphical reporting tools)
- 7.4.5 Manage client and stakeholder relationships (e.g., to ensure commitment and involvement, to encourage effective collaboration)
- 7.4.6 Report on progress of project schedule, cost, and scope
- 7.4.7 Compare present status to the baseline to forecast future trends, using earned value analysis
- 7.4.8 Communicate how change will affect stakeholders
- 7.4.9 Generate/gather/disseminate information to formalize phase and project completion
- 7.4.10 Conduct a post-project audit to ensure that the actuals, risks, general findings, and “lessons learned” are documented and disseminated to support a continuous learning culture
- 7.4.11 Enter risk events information into the risk database and subsequent risk management process

**BIL:** Recommend

<b>EDU:</b>	12	AD
		I

**Competency 7.5: Control project risk**

**Key Indicators:**

- 7.5.1 Write a risk management plan to document the process, activities, milestones and responsibilities
- 7.5.2 Assign resources for managing risk
- 7.5.3 Identify internal risks (e.g., those under the control of the project: technology use, staff hired)
- 7.5.4 Identify external risks (e.g., those not under the control of the project: economy, political climate)
- 7.5.5 Evaluate risk interactions to assess the range of possible project outcomes
- 7.5.6 Use risk-management charts, spreadsheets, and other tools to evaluate and prioritize risks
- 7.5.7 Plan how to eliminate or mitigate risks by developing contingency plans
- 7.5.8 Use statistical methods to develop a project cost and time-estimate range quantified by risk probability and confidence level
- 7.5.9 Communicate risks and possible results to stakeholders
- 7.5.10 Monitor risk warnings and events
- 7.5.11 Track risks
- 7.5.12 Change the risk items over the course of the project according to the risk management plan
- 7.5.13 Document actual risk events

## Instructional Unit 8: Marketing Research

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

### Competency 8.1: Describe marketing research activities

#### Key Indicators:

- 8.1.1 Define marketing research
- 8.1.2 Analyze role of research in marketing strategy
- 8.1.3 Describe characteristics of marketing research environments
- 8.1.4 Explain relationship between members of marketing and research departments
- 8.1.5 Identify principle parties outside the organization that play a crucial role in defining marketing research activities

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

### Competency 8.2: Plan a research project

#### Key Indicators:

- 8.2.1 Explain the role of marketing research in addressing business problems
- 8.2.2 Explain how management objectives are related to research objectives
- 8.2.3 Explain the role of the researcher in merging and managing objectives
- 8.2.4 Differentiate cause from effect in addressing business problems
- 8.2.5 Develop working hypotheses about typical marketing problems
- 8.2.6 Determine the appropriate depth and level of information required
- 8.2.7 Explain how potential problems and opportunities are identified and defined
- 8.2.8 Set requirements for tracking research projects
- 8.2.9 Determine the value of information
- 8.2.10 Identify potential cost/time/value trade-offs
- 8.2.11 Determine the cost of marketing research studies
- 8.2.12 Create a research proposal
- 8.2.13 Identify major federal regulations that have an impact on the practice of marketing research
- 8.2.14 Identify the steps of marketing research
- 8.2.15 Prepare proposed research project plan
- 8.2.16 Present proposed research study plan to stakeholders

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

**Competency 8.3: Identify ethical issues in marketing research****Key Indicators:**

- 8.3.1 Discuss ethics in marketing research
- 8.3.2 Discuss ethical issues relating to respondents, clients, and general public
- 8.3.3 Present a behavioral decision model of ethical/unethical decisions
- 8.3.4 Present possible solutions to control current unethical marketing research practices

**BIL:** Essential

<b>EDU:</b>	12	AD
	I	P

**Competency 8.4: Design a marketing research study****Key Indicators:**

- 8.4.1 Describe the steps in the scientific method and its relationship to marketing research
- 8.4.2 Describe differences between laboratory and field environments
- 8.4.3 Introduce concepts of experimentation and causality
- 8.4.4 Explain necessary and sufficient conditions for inferring cause-and effect relationships and what is meant by spurious correlation
- 8.4.5 Define basic concepts of experimentation (e.g., experimental design, treatment, experimental effects, extraneous casual factors)
- 8.4.6 Evaluate various research designs
- 8.4.7 Explain the difference between exploratory and conclusive research designs
- 8.4.8 Describe advantages and disadvantages of qualitative and quantitative research
- 8.4.9 Explain appropriate use of primary and secondary research
- 8.4.10 Analyze sources of secondary market data
- 8.4.11 Use online databases
- 8.4.12 Identify sources for primary data
- 8.4.13 Describe methods for obtaining primary data
- 8.4.14 Explain possible sources of error in a research design
- 8.4.15 Address validity and reliability in design
- 8.4.16 Select appropriate research designs for various research objectives
- 8.4.17 Explain general characteristics and advantages of store audits
- 8.4.18 Explain general characteristics, advantages, disadvantages and uses of electronic scanner services, and single source information
- 8.4.19 Illustrate increasing importance of electronic scanner services
- 8.4.20 Prepare market research study design



**BIL:** Essential

<b>EDU:</b>	12	AD
	I	P

**Competency 8.5: Use data collection methods****Key Indicators:**

- 8.5.1 Describe pros and cons of commonly used qualitative research techniques
- 8.5.2 Describe pros and cons of direct questioning, observation, and in-market experiments
- 8.5.3 Explain major uses of focus groups and in-depth interviews, on-line panels, and wireless panels
- 8.5.4 Explain general characteristics, advantages, disadvantages, and uses of diary panels
- 8.5.5 Describe leading diary panel services covering purchase and media panels
- 8.5.6 Describe projective techniques
- 8.5.7 Identify impact of technology on qualitative designs
- 8.5.8 Demonstrate how to conduct an observational research study
- 8.5.9 Discuss pros and cons of using survey research
- 8.5.10 Demonstrate how to conduct direct questioning research (e.g., phone, electronic)
- 8.5.11 Use survey-interviewing methods
- 8.5.12 Describe distinctive nature of mail, telephone, personal in-home and mall-intercept interviews
- 8.5.13 Describe how sophisticated computer technology is used in survey research
- 8.5.14 Discuss problems and methods for handling bias in qualitative research
- 8.5.15 Collect data using appropriate method for research project
- 8.5.16 Document data collected in usable format
- 8.5.17 Design a focus group and in-depth interview discussion guide

**BIL:** Essential

<b>EDU:</b>	12	AD
	I	P

**Competency 8.6: Describe fundamentals of sampling****Key Indicators:**

- 8.6.1 Discuss key elements involved in devising a sampling plan
- 8.6.2 Illustrate distinctive features of probability and nonprobability samples
- 8.6.3 Describe major types and primary practical uses of both probability and nonprobability samples
- 8.6.4 Discuss primary approaches for determining sample size
- 8.6.5 Define concepts of sampling vs. nonsampling errors
- 8.6.6 Explain what factors contribute to non-response and response errors
- 8.6.7 Describe how response rates can be improved
- 8.6.8 Identify remedies for non-response error

- 8.6.9 Describe issues to consider when designing a sampling plan
- 8.6.10 Explain how to draw simple random samples, systematic samples, stratified samples, and cluster samples

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

**Competency 8.7: Evaluate concepts of measurement and measurement scales**

**Key Indicators:**

- 8.7.1 Define basic concepts of measurement and scaling
- 8.7.2 Distinguish among various types of measurement scales (e.g., Likert Scale, semantic differential scaling, ratings scales, ranking scales)
- 8.7.3 Discuss single-item versus multiple-item scales
- 8.7.4 Discuss concepts of validity and reliability

**BIL:** Essential

<b>EDU:</b>	12	AD
	I	P

**Competency 8.8: Design measurement instruments**

**Key Indicators:**

- 8.8.1 Explain importance of questionnaire design and field execution
- 8.8.2 Describe questionnaire design process
- 8.8.3 Explain guidelines that must be followed in questionnaire design
- 8.8.4 Identify differences between types of interview questionnaires (e.g., phone, mail, personal)
- 8.8.5 Design observational forms
- 8.8.6 Discuss the use of concept boards, videos, and other visual aids in surveys
- 8.8.7 Design survey forms
- 8.8.8 Describe the use of computerized data collection instruments

**BIL:** Essential

<b>EDU:</b>	12	AD
	I	P

**Competency 8.9: Describe/conduct data collection****Key Indicators:**

- 8.9.1 Develop a data collection plan
- 8.9.2 Describe when pre-coding a questionnaire is appropriate
- 8.9.3 Develop interviewing procedures and standards
- 8.9.4 Identify questioning and recording techniques for specific types of questions (e.g., open-ended, closed-ended, verbal and numerical scales)
- 8.9.5 Identify management control mechanisms needed in collecting data
- 8.9.6 Describe coding of various open-ended responses
- 8.9.7 Describe procedure for checking editing questionnaires
- 8.9.8 Describe data entry process quality controls

**BIL:** Essential

<b>EDU:</b>	12	AD
	I	P

**Competency 8.10: Perform data analysis****Key Indicators:**

- 8.10.1 Discuss data summary methods (e.g., measures of central tendency, measure of variability)
- 8.10.2 Use cross tabulations
- 8.10.3 Represent data graphically

**BIL:** Essential

<b>EDU:</b>	12	AD
	I	P

**Competency 8.11: Evaluate hypothesis testing****Key Indicators:**

- 8.11.1 Describe procedure for testing hypothesis
- 8.11.2 Describe ways to use hypotheses to test specific ideas concerning means and proportions
- 8.11.3 Evaluate differences between statistical significance and practical importance

**BIL:** Recommended

<b>EDU:</b>	12	AD
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**Competency 8.12: Use measures of association, regression analysis, and variance****Key Indicators:**

- 8.12.1 Present notion of conversation between two random variables
- 8.12.2 Demonstrate calculation of correlation coefficients for variables measured on interval, ordinal, or nominal scales
- 8.12.3 Use simple regression analysis to predict values of one variable, given a value for manor variable
- 8.12.4 Provide statistical tests for regression coefficients
- 8.12.5 Describe assumptions underlying regression analysis
- 8.12.6 Explain concept of co-variance and correlation

**BIL:** Essential

<b>EDU:</b>	12	AD
	I	P

**Competency 8.13: Evaluate strategic marketing studies****Key Indicators:**

- 8.13.1 Define philosophy and objectives behind strategic marketing studies
- 8.13.2 Describe role of strategic marketing studies
- 8.13.3 Discuss basic strategic marketing studies (e.g., positioning studies, market segmentation studies, market structure studies)
- 8.13.4 Describe various methods used in basic types of strategic marketing studies

**BIL:** Essential

<b>EDU:</b>	12	AD
	I	P

**Competency 8.14: Describe concept and product testing****Key Indicators:**

- 8.14.1 Describe importance of concept and product tests
- 8.14.2 Describe different types of concept tests
- 8.14.3 Define purpose of procedures used in concept screening tests
- 8.14.4 Define purpose of procedures used in concept evaluation tests
- 8.14.5 Describe role of product testing
- 8.14.6 Define various types of product tests
- 8.14.7 Describe when to use concept and product testing

**BIL:** Recommended

<b>EDU:</b>	12	AD
	I	P

**Competency 8.15: Describe characteristics of a name and package testing study**

**Key Indicators:**

- 8.15.1 Describe how new names are created
- 8.15.2 Describe primary approach to naming a product
- 8.15.3 Define information typically collected in name testing studies
- 8.15.4 Describe how name tests are implemented
- 8.15.5 Define basic functions that a package serves
- 8.15.6 Outline reasons for conducting a package test study
- 8.15.7 Describe how package tests are implemented

**BIL:** Essential

<b>EDU:</b>	12	AD
	I	P

**Competency 8.16: Describe advertising research**

**Key Indicators:**

- 8.16.1 Describe purposes advertising serves
- 8.16.2 Define what is meant by advertising effectiveness
- 8.16.3 Illustrate standard copy testing practices in print and television media
- 8.16.4 Discuss objectives of market tracking and market testing studies
- 8.16.5 Identify when to use advertising research

**BIL:** Recommended

<b>EDU:</b>	12	AD
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**Competency 8.17: Interpret test market studies**

**Key Indicators:**

- 8.17.1 Describe information provided by good test market programs
- 8.17.2 List basic steps in test market studies
- 8.17.3 Use procedures in standard test market audits and controlled test market audits
- 8.17.4 Interpret a comparative survey of simulated/pretest market services
- 8.17.5 Evaluate proposed design for test market study

**BIL:** Essential

<b>EDU:</b>	12	AD
	I	P

**Competency 8.18: Use online market research tools****Key Indicators:**

- 8.18.1. Identify electronic research tools (e.g., e-mail, web surveys, list serves)
- 8.18.2. Use online market research services
- 8.18.3. Use methods of conducting online research
- 8.18.4. Explain challenges of online surveys (e.g., demographics, psychographics)
- 8.18.5. Identify online random sampling methods
- 8.18.6. Explain the use of voluntary research panels
- 8.18.7. Explain the use of online customer registration in market research
- 8.18.8. Identify advantages and disadvantages of requiring online customer registration
- 8.18.9. Identify advantages and disadvantages of conducting online market research
- 8.18.10. Identify costs associated with online market research

**BIL:** Essential

<b>EDU:</b>	12	AD
	I	P

**Competency 8.19: Develop marketing research projects****Key Indicators:**

- 8.19.1 Identify staffing needs
- 8.19.2 Create a research budget
- 8.19.3 Develop controls for research projects
- 8.19.4 Identify trade-offs between conducting primary research and purchasing research from a firm
- 8.19.5 Describe considerations when outsourcing research

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

**Competency 8.20: Present research to management****Key Indicators:**

- 8.20.1 Explain issues involved in communicating research findings to management
- 8.20.2 Use general guidelines for writing research project
- 8.20.3 Explain organization of research project

- 8.20.4 Illustrate data effectively
- 8.20.5 Use general guidelines for an oral presentation
- 8.20.6 Use visual aids
- 8.20.7 Describe the differences between presenting facts and opinions, and how each is handled in a presentation
- 8.20.8 Use effective ways to present complex statistics to business people
- 8.20.9 Use graphics in business presentations
- 8.20.10 Provide management with written reports of research findings
- 8.20.11 Present oral report of research findings using media as needed
- 8.20.12 Create executive summaries

## Instructional Unit 9: Pricing

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

### Competency 9.1: Evaluate pricing fundamentals

#### Key Indicators:

- 9.1.1 Explain the nature and scope of the pricing function
- 9.1.2 Evaluate the role of business ethics in pricing
- 9.1.3 Evaluate the use of technology in pricing
- 9.1.4 Identify the basic considerations consumers and businesses weigh in accepting a price
- 9.1.5 Discuss/analyze price-setting process
- 9.1.6 Explain pricing objectives
- 9.1.7 Explain price sensitivity
- 9.1.8 Discuss/Analyze price elasticity
- 9.1.9 Explain price testing
- 9.1.10 Research competitors prices
- 9.1.11 Explain real-time pricing in the online environment
- 9.1.12 Identify how pricing is affected by stages of the product life cycle
- 9.1.13 Evaluate relationship between price and value

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

### Competency 9.2: Describe pricing strategies

#### Key Indicators:

- 9.2.1 Evaluate features, purposes, advantages, and disadvantages of cost-based pricing strategies
- 9.2.2 Evaluate characteristics, goals, advantages, and disadvantages of demand-based pricing strategies
- 9.2.3 Evaluate characteristics, goals, advantages, and disadvantages of competition-based pricing strategies
- 9.2.4 Evaluate characteristics, goals, advantages, and disadvantages of product mix pricing strategies
- 9.2.5 Evaluate characteristics, goals, advantages, and disadvantages of product change pricing strategies
- 9.2.6 Evaluate characteristics, goals, advantages, and disadvantages of segmented (e.g., customer segmented, location, time) pricing strategies
- 9.2.7 Evaluate impact of e-commerce on pricing strategies



**BIL:** Essential

<b>EDU:</b>	12	AD
	I	P

**Competency 9.3: Evaluate pricing techniques****Key Indicators:**

- 9.3.1 Evaluate psychological pricing
- 9.3.2 Describe geographic pricing
- 9.3.3 Evaluate discount pricing techniques
- 9.3.4 Describe promotional pricing techniques

**BIL:** Essential

<b>EDU:</b>	12	AD
	I	P

**Competency 9.4: Determine prices****Key Indicators:**

- 9.4.1 Determine pricing objective(s)
- 9.4.2 Calculate cost of product
- 9.4.3 Evaluate break-even point
- 9.4.4 Evaluate elasticity of demand
- 9.4.5 Analyze competitors' prices
- 9.4.6 Select a pricing strategy
- 9.4.7 Set prices
- 9.4.8 Adjust prices to maximize profitability
- 9.4.9 Evaluate difficulties in applying traditional pricing strategies to e-commerce
- 9.4.10 Identify impact of changing market conditions on prices
- 9.4.11 Identify key legal issues in setting prices

## Instructional Unit 10: Promotion

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

### Competency 10.1: Analyze promotion fundamentals

#### Key Indicators:

- 10.1.1 Describe the benefits of using promotion
- 10.1.2 Evaluate costs associated with the use of promotion
- 10.1.3 Describe types of promotional objectives
- 10.1.4 Explain types of promotion
- 10.1.5 Describe the importance of the promotional mix vs. single promotional element
- 10.1.6 Analyze factors affecting the promotional mix
- 10.1.7 Describe the use of business ethics in promotion
- 10.1.8 Evaluate the importance of coordinating promotional mix elements
- 10.1.9 Evaluate the Return On Investment (ROI) of promotion

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

### Competency 10.2: Explain communication process used in promotion

#### Key Indicators:

- 10.2.1 Distinguish between personal and nonpersonal communication processes
- 10.2.2 Explain importance of using an effective communication process in promotion
- 10.2.3 Describe barriers to effective communication in promotion
- 10.2.4 Explain techniques for overcoming barriers to effective communication in promotion

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

### Competency 10.3: Describe promotion laws and regulations

#### Key Indicators:

- 10.3.1 Explain need for truthfulness in promotional messages and claims
- 10.3.2 Discuss how use of misleading or inaccurate statements in promotion is regulated
- 10.3.3 Describe actions that can be taken by Federal Trade Commission to correct misleading advertising

- 10.3.4 Discuss reasons for regulation of products used in advertising
- 10.3.5 Explain how legality of products used in advertising can vary from country to country
- 10.3.6 Describe legal issues used in promotion
- 10.3.7 Identify state regulations related to promotion

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

#### **Competency 10.4: Analyze advertising**

##### **Key Indicators:**

- 10.4.1 Analyze the concepts of advertising media
- 10.4.2 Analyze the types, advantages and disadvantages of broadcast media
- 10.4.3 Analyze the types, advantages and disadvantages print media
- 10.4.4 Analyze the types, advantages and disadvantages of specialty advertising
- 10.4.5 Analyze the types, advantages and disadvantages of Internet advertising (e.g., interacting personally, wireless network)
- 10.4.6 Analyze the nature of direct advertising strategies (e.g., direct mail, e-mail, automated callers, faxes, catalogs)
- 10.4.7 Analyze frequency marketing strategies
- 10.4.8 Identify the difference between business-to-business and business-to-consumer advertising
- 10.4.9 Explain opt-in, opt-out, permission marketing as it relates to advertising
- 10.4.10 Identify niche advertising
- 10.4.11 Identify types of direct-mail promotions
- 10.4.12 Identify types of out-of-home media
- 10.4.13 Identify examples of "other media"

**BIL:** Recommended

<b>EDU:</b>	12	AD
	I	P

#### **Competency 10.5: Describe advertising outsourcing**

##### **Key Indicators:**

- 10.5.1 Describe services offered by each type of advertising agency
- 10.5.2 Identify factors that affect how advertising agencies are organized
- 10.5.3 Describe departments in advertising agencies
- 10.5.4 Discuss how advertising agencies are set up or structured
- 10.5.5 Explain how advertising agencies are paid for their services
- 10.5.6 Identify situations when outsource advertising might be used
- 10.5.7 Discuss advantages/disadvantages of outsource advertising

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

**Competency 10.6: Determine cost of advertising media****Key Indicators:**

- 10.6.1 Identify factors affecting the cost of various types of advertising (e.g., newspaper ads, magazine ads, radio ads, television ads, direct mail advertising, e-mail advertising, outdoor ads)
- 10.6.2 Identify factors affecting the cost of banner ads (e.g., click-through pricing, bartering, Internet Advertising Bureau rate cards, audience demographics)
- 10.6.3 Use rate cards
- 10.6.4 Explain use of discount strategies
- 10.6.5 Examine negotiation strategies
- 10.6.6 Calculate media costs
- 10.6.7 Compare media cost effectiveness in reaching target audience
- 10.6.8 Evaluate media selection
- 10.6.9 Identify factors affecting costs of affiliate advertising
- 10.6.10 Explain benefits of alliances and partnerships

**BIL:** Essential

<b>EDU:</b>	12	AD
	I	P

**Competency 10.7: Evaluate Internet advertising****Key Indicator**

- 10.7.1 Describe types of Internet ads
- 10.7.2 Determine objective of placement (e.g., generate customer leads, create traffic)
- 10.7.3 Evaluate locations for ad placement (e.g., search engines, directories, specialty websites, sponsorship websites)
- 10.7.4 Develop an ad placement strategy
- 10.7.5 Define goal of Internet ads (e.g., banners, buttons)
- 10.7.6 Identify standard sizes for Internet ads
- 10.7.7 Create a tagline
- 10.7.8 Use design features to gain attention
- 10.7.9 Evaluate software packages for Internet ads management
- 10.7.10 Evaluate Internet ad placement strategies
- 10.7.11 Evaluate results
- 10.7.12 Evaluate cost effectiveness
- 10.7.13 Determine types of tracking methods to be used
- 10.7.14 Discuss the role of online communities
- 10.7.15 Evaluate registration, ranking, and positioning of a website

**BIL:** Essential

<b>EDU:</b>	12	AD
	I	P

**Competency 10.8: Evaluate print advertising campaigns****Key Indicators:**

- 10.8.1 Compare the publishing lead time for newspaper display advertisements to that of magazine advertisements
- 10.8.2 Determine most suitable print media for a product or service considering the target market characteristics of the media and message
- 10.8.3 Determine ideal frequency and duration of print media advertisement campaign
- 10.8.4 Prepare a budget for print media advertising campaign
- 10.8.5 Describe procedures to place a display advertisement in a newspaper or magazine
- 10.8.6 Evaluate effectiveness of campaign
- 10.8.7 Select the most appropriate appeal for a print display advertisement (e.g., informational, emotional, variety, price, humor, persuasive)
- 10.8.8 Identify types of print media
- 10.8.9 Categorize types of newspapers
- 10.8.10 Explain the importance of advertisement location (e.g., column, section, page, location on page)
- 10.8.11 Explain the Gutenberg Diagonal and its international implications
- 10.8.12 Describe techniques to capture the attention of readers in print display advertisements
- 10.8.13 Analyze the selling power of existing commercial print display advertisement
- 10.8.14 Layout a display advertisement
- 10.8.15 Evaluate cost effectiveness
- 10.8.16 Evaluate results

**BIL:** Essential

<b>EDU:</b>	12	AD
	I	P

**Competency 10.9: Design television advertising****Key Indicators:**

- 10.9.1 Compare advantages and disadvantages of network, local, and cable advertising
- 10.9.2 Describe the target market for specific commercial television programs
- 10.9.3 Select the ideal placement of a television advertisement (e.g., network, local, cable, time of day, day of week, program)
- 10.9.4 Select the ideal frequency and duration for a television advertisement campaign
- 10.9.5 Describe the procedures for placing network, local, and cable television advertisements
- 10.9.6 Evaluate effectiveness of campaign
- 10.9.7 Describe the convergence of Internet and television media

- 10.9.8 Select the most appropriate appeal for a television advertisement (e.g., informational, emotional, variety, price, humor, persuasive)
- 10.9.9 Describe advantages and disadvantages of 10-second, 30-second, and 60-second television spots, and infomercials
- 10.9.10 Describe techniques used in television advertisements to capture the attention of viewers
- 10.9.11 Analyze selling power of existing television commercials
- 10.9.12 Develop a story board for a television advertisement
- 10.9.13 Design a television advertisement

**BIL:** Essential

<b>EDU:</b>	12	AD
	I	P

### Competency 10.10: Design radio advertising

#### Key Indicators:

- 10.10.1 Explain the difference between local and network radio programs
- 10.10.2 Cite several network radio programs
- 10.10.3 Compare advantages and disadvantages of network vs. local radio advertising
- 10.10.4 Describe the target market for specific radio programs
- 10.10.5 Select ideal placement of a radio advertisement (e.g., time of day, day of week, program)
- 10.10.6 Prepare a budget for a radio advertising campaign
- 10.10.7 Describe procedures for placing a network and local media advertisement
- 10.10.8 Evaluate effectiveness of campaign
- 10.10.9 Select the most appropriate appeal for a radio advertisement (e.g., informational, emotional, variety, price, humor, persuasive)
- 10.10.10 Describe advantages and disadvantages of 15-second, 30-second, and 60-second radio spots
- 10.10.11 Describe techniques used in radio advertisement to capture the attention of listeners
- 10.10.12 Analyze the selling power of existing radio advertisements
- 10.10.13 Write a script for a radio advertisement

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

### Competency 10.11: Develop publicity and public relations activities

#### Key Indicators:

- 10.11.1 Differentiate between publicity and public relations
- 10.11.2 Describe advantages and disadvantages of publicity and public relations

- 10.11.3 Describe steps for obtaining publicity
- 10.11.4 Identify ways to leverage negative publicity
- 10.11.5 Describe the impact of the Internet on publicity
- 10.11.6 Describe advantages of participating in community activities
- 10.11.7 Develop a publicity plan
- 10.11.8 Develop a public relations plan
- 10.11.9 Write a news release

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

**Competency 10.12: Develop sales promotion activities**

**Key Indicators:**

- 10.12.1 Identify types of sales promotion (e.g., coupons, premiums, sweepstakes)
- 10.12.2 Identify how sales promotion can be used
- 10.12.3 Calculate costs of sales promotion activities
- 10.12.4 Determine when sales promotion activities are the best promotional tool
- 10.12.5 Generate a sales promotion plan
- 10.12.6 Identify Return On Investment (ROI) of sales promotion activities
- 10.12.7 Evaluate sales promotion activities

**BIL:** Recommended

<b>EDU:</b>	12	AD
	I	P

**Competency 10.13: Analyze affiliate marketing and co-branding strategies**

**Key Indicators:**

- 10.13.1 Explain advantages and disadvantages of promotional partnering
- 10.13.2 Analyze goals for promotional partnering
- 10.13.3 Analyze affiliate and co-branding opportunities
- 10.13.4 Determine costs and benefits
- 10.13.5 Evaluate potential partner businesses using developed selection criteria
- 10.13.6 Evaluate effectiveness of affiliate marketing

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

**Competency 10.14: Coordinate activities in promotional mix****Key Indicators:**

- 10.14.1 Identify elements of promotional mix
- 10.14.2 Categorize examples of promotions according to elements of promotional mix
- 10.14.3 Describe importance of promotional mix
- 10.14.4 Identify factors affecting promotional mix
- 10.14.5 Describe how product being sold affects promotional mix
- 10.14.6 Explain how product's market affects promotional mix
- 10.14.7 Discuss how distribution system affects promotional mix
- 10.14.8 Explain how product's company affects promotional mix
- 10.14.9 Identify factors that should be coordinated for promotions
- 10.14.10 Identify types of promotional activities that should be coordinated
- 10.14.11 Describe ways to coordinate promotional efforts
- 10.14.12 Describe importance of coordinating promotional activities
- 10.14.13 Explain procedures for coordinating promotional activities
- 10.14.14 Use procedures to coordinate promotional activities

**BIL:** Essential

<b>EDU:</b>	12	AD
	I	P

**Competency 10.15: Manage website****Key Indicators:**

- 10.15.1 Identify sources of information about website creation
- 10.15.2 Explain necessity for clear communication when creating a website
- 10.15.3 Demonstrate procedures for creating a website
- 10.15.4 Develop a website design plan
- 10.15.5 Maintain website
- 10.15.6 Identify factors that contribute to effectiveness of websites
- 10.15.7 Discuss advantages/disadvantages of website components
- 10.15.8 Determine cost/benefit of website components
- 10.15.9 Demonstrate procedures for developing website design/components
- 10.15.10 Interact with technology staff in planning website
- 10.15.11 Select products to feature
- 10.15.12 Write sales copy for website



**BIL:** Essential

<b>EDU:</b>	12	AD
	I	P

**Competency 10.16: Design frequency-marketing program****Key Indicators:**

- 10.16.1 Identify situations in which businesses can effectively use frequency marketing programs
- 10.16.2 Explain why businesses implement frequency marketing programs
- 10.16.3 Analyze cost/benefits of implementing a frequency marketing program
- 10.16.4 Demonstrate procedures for designing a frequency marketing program

**BIL:** Recommended

<b>EDU:</b>	12	AD
	I	P

**Competency 10.17: Develop co-op advertising****Key Indicators:**

- 10.17.1 Identify types of promotional allowances available to businesses
- 10.17.2 Describe benefits of obtaining promotional allowances
- 10.17.3 Describe guidelines to follow when obtaining promotional allowances
- 10.17.4 Demonstrate procedures for managing promotional allowances

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

**Competency 10.18: Develop a promotional plan****Key Indicators:**

- 10.18.1 Identify the target market
- 10.18.2 Develop objectives
- 10.18.3 Choose a theme
- 10.18.4 Develop promotional mix strategies
- 10.18.5 Develop a media plan
- 10.18.6 Develop timeline and action plan
- 10.18.7 Coordinate promotional activities
- 10.18.8 Develop a budget
- 10.18.9 Evaluate plan using milestones and benchmarks
- 10.18.10 Describe advantages/disadvantages of using direct advertising

## Instructional Unit 11: Product and Service Management

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

### Competency 11.1: Describe factors involved in product/service operations

#### Key Indicators:

- 11.1.1 Identify organization objectives
- 11.1.2 Identify stages of product/service development
- 11.1.3 Identify elements of product positioning
- 11.1.4 Identify stages in a product life cycle
- 11.1.5 Identify the importance of product/service grades and standards
- 11.1.6 Describe the importance of warranties and guaranties
- 11.1.7 Describe product/service liability issues
- 11.1.8 Identify consumer protection provisions of appropriate agencies

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

### Competency 11.2: Plan product/service management strategies

#### Key Indicators:

- 11.2.1 Describe the role of product/service management in business success
- 11.2.2 Describe components of product/service management
- 11.2.3 Describe the product/service planning process
- 11.2.4 Describe characteristics of product/service bundling, product line diversification, and service extensions
- 11.2.5 Explain impact of business environment (e.g., online vs. “brick-and-mortar”) on product selection
- 11.2.6 Compare/contrast competition (e.g., their product/service mix, prices, sales, promotional techniques)
- 11.2.7 Develop a product/service portfolio
- 11.2.8 Identify strengths and weaknesses of product portfolio analysis
- 11.2.9 Plan product/service mix
- 11.2.10 Use customer feedback
- 11.2.11 Evaluate product/service management strategies
- 11.2.12 Evaluate factors used in adjusting product/service mix

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

**Competency 11.3: Analyze service-planning issues**

**Key Indicators**

- 11.3.1 Explain major characteristics of services
- 11.3.2 Identify service marketing issues
- 11.3.3 Contrast product and service marketing
- 11.3.4 Identify ways to differentiate services
- 11.3.5 Analyze gaps in service quality and their impact on profit
- 11.3.6 Describe management of service productivity

**BIL:** Essential

<b>EDU:</b>	12	AD
	I	P

**Competency 11.4: Develop new products/services**

**Key Indicators:**

- 11.4.1 Identify sources of ideas for new products/services
- 11.4.2 Identify whether products are most likely to succeed in a brick-and-mortar or e-commerce venture
- 11.4.3 Identify methods of screening ideas for new products/services
- 11.4.4 Identify preliminary sales estimate
- 11.4.5 Identify methods for evaluating a new product/service idea
- 11.4.6 Explain importance of pretesting a product/service prototype
- 11.4.7 Identify types of potential products
- 11.4.8 Generate ideas
- 11.4.9 Screen ideas
- 11.4.10 Test concept
- 11.4.11 Test market marketing mix decisions (e.g., distribution, price)
- 11.4.12 Test market
- 11.4.13 Forecast sales
- 11.4.14 Introduce product
- 11.4.15 Conduct breakeven analysis
- 11.4.16 Develop a product launch plan

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

**Competency 11.5: Evaluate positioning****Key Indicators:**

- 11.5.1 Describe factors used by marketers to position products/businesses/services
- 11.5.2 Explain logo ownership rights
- 11.5.3 Evaluate co-branding and its impact on positioning
- 11.5.4 Evaluate role of customer service in positioning/image

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

**Competency 11.6: Explain packaging principles****Key Indicators:**

- 11.6.1 Describe impact of packaging decisions on customer response and on marketing mix elements
- 11.6.2 Describe primary functions of packaging
- 11.6.3 Describe elements of package design (e.g., color, style, copy, form)
- 11.6.4 Explain the necessity of packaging decision tradeoffs
- 11.6.5 Describe typical criticisms of packaging
- 11.6.6 Identify the main function of a label on a package
- 11.6.7 Describe three basic kinds of labels
- 11.6.8 Explain how labeling decisions supplement packaging decisions
- 11.6.9 Explain packaging and labeling laws
- 11.6.10 Participate in packaging decisions
- 11.6.11 Explain costs associated with packaging
- 11.6.12 Explain how packaging impacts product shipment and returns

## Instructional Unit 12: Branding

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

### Competency 12.1: Evaluate branding concepts

#### Key Indicators:

- 12.1.1 Explain the concept of branding
- 12.1.2 Explain how the Internet affects branding
- 12.1.3 Explain importance of branding in buyer decision-making
- 12.1.4 Define trademark, brand name, brand mark, licensing, and brand equity
- 12.1.5 Explain halo effect
- 12.1.6 Evaluate reasons why customers are brand loyal
- 12.1.7 Describe brand strategies (e.g., family brand, individual brand, multiple-brand strategy) and advantages and disadvantages of each
- 12.1.8 Describe trademarks and trademark limitations
- 12.1.9 Explain differences between national brands, private brands, and generic brands and advantages and disadvantages of each
- 12.1.10 Analyze factors that influence the success of national vs. private, private vs. generic brands
- 12.1.11 Analyze the value of branding for businesses
- 12.1.12 Analyze pros and cons of branding for consumers
- 12.1.13 Describe URL (uniform resource locator) issues in branding
- 12.1.14 Identify mediums to communicate brand message
- 12.1.15 Analyze value of an individual brand in a competitive marketplace

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

### Competency 12.2: Build brand identity

#### Key Indicators:

- 12.2.1 Identify the key components of a brand strategy
- 12.2.2 Determine brand strategy
- 12.2.3 Determine brand name criteria
- 12.2.4 Create a list of potential brand names
- 12.2.5 Participate in selection of the names most appropriate for further testing
- 12.2.6 Obtain consumer reactions to selected brand names
- 12.2.7 Evaluate consumer reactions to selected brand names
- 12.2.8 Conduct basic trademark and patent copyright searches
- 12.2.9 Participate in final selection of brand name

- 12.2.10 Identify resources to conduct trademark and patent copyright searches
- 12.2.11 Describe the complexities and legal issues of trademarks, and patents copyrights
- 12.2.12 Identify business components that influence buyer perception of a brand (e.g., advertising, product presentation, customer service, packaging, shipping, public relations)
- 12.2.13 Integrate logos, slogans, URL, and other notations throughout offline and online publications and advertising
- 12.2.14 Integrate components into a consistent brand identity process

## Instructional Unit 13: Selling

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

### Competency 13.1: Manage the selling function

#### Key Indicators:

- 13.1.1 Explain the purpose and importance of selling
- 13.1.2 Describe circumstances when personal selling is most important in the marketing mix
- 13.1.3 Develop company selling policies
- 13.1.4 Identify key factors in building a clientele
- 13.1.5 Implement business ethics in selling
- 13.1.6 Use technology in the selling function
- 13.1.7 Follow selling regulations
- 13.1.8 Evaluate the follow-up function
- 13.1.9 Describe automated follow-up systems
- 13.1.10 Explain consumer buying process
- 13.1.11 Identify decision makers

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

### Competency 13.2: Analyze organizational purchase processes

#### Key Indicators:

- 13.2.1 Contrast types of business buying situations
- 13.2.2 Identify staff roles in buying centers
- 13.2.3 Analyze organizational buying process stages
- 13.2.4 Develop a sales plan for a buying center

**BIL:** Recommended

<b>EDU:</b>	12	AD
	I	P

### Competency 13.3: Integrate website into traditional sales and customer service process

#### Key Indicators:

- 13.3.1 Identify benefits of website
- 13.3.2 Create integrated sales presentation materials

- 13.3.3 Create an electronic sales presentation with an integrated Internet link
- 13.3.4 Identify incentives for sales staff
- 13.3.5 Evaluate effectiveness of integration
- 13.3.6 Provide employee training in integration of site
- 13.3.7 Identify customer service issues
- 13.3.8 Explain permission marketing

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

**Competency 13.4: Explain role of customer service as a component of selling relationships**

**Key Indicators:**

- 13.4.1 Distinguish between customer service as a process and customer service as a function
- 13.4.2 Explain how customer service facilitates sales relationships
- 13.4.3 Identify occasions when customer service can be used to facilitate sales relationships
- 13.4.4 Identify features and benefits of all inventory (e.g., individual, packages, sponsorships, licenses)

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

**Competency 13.5: Analyze product information to identify product features, advantages, and benefits (FABs)**

**Key Indicators:**

- 13.5.1 Identify obvious or apparent benefits
- 13.5.2 Identify unique or exclusive benefits
- 13.5.3 Identify hidden benefits
- 13.5.4 Prepare a FABs chart for a product
- 13.5.5 Identify value proposition of a product



**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

**Competency 13.6: Develop company-selling policies****Key Indicators:**

- 13.6.1 Explain importance of selling policies
- 13.6.2 Describe characteristics of selling policies
- 13.6.3 Explain why selling policies are needed
- 13.6.4 Describe external/internal factors that affect selling policies
- 13.6.5 Describe regulatory factors that affect selling policies
- 13.6.6 Explain problems encountered with use of selling policies
- 13.6.7 Develop selling-activity policies
- 13.6.8 Develop terms-of-sale policies
- 13.6.9 Develop service policies

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

**Competency 13.7: Describe nature of selling regulations****Key Indicators:**

- 13.7.1 Identify reasons that sales activities are regulated
- 13.7.2 Describe unfair or deceptive sales practices that are regulated
- 13.7.3 Explain state and federal regulations that affect sales activities

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

**Competency 13.8: Explain selling process****Key Indicators:**

- 13.8.1 Identify components of selling process
- 13.8.2 Describe importance of establishing relations with customers
- 13.8.3 Describe ways to discover customer needs
- 13.8.4 Describe components of prescribing solutions to customer needs
- 13.8.5 Explain importance of reaching closure in sales situations
- 13.8.6 Describe aspects of reaching closure in sales situations
- 13.8.7 Describe importance of reaffirming buyer-seller relationship
- 13.8.8 Describe ways to reaffirm buyer-seller relationship

13.8.9 Explain similarities/differences in ways businesses implement the selling process

13.8.10 Explain importance of using a selling process

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

### **Competency 13.9: Prepare sales presentation**

#### **Key Indicators:**

13.9.1 Identify reasons for preparing a sales presentation

13.9.2 Describe preparation needed for sales presentations

13.9.3 Identify factors that affect preparation for sales presentations

13.9.4 Describe ways to prepare for a sales presentation

13.9.5 Explain guidelines for preparing for a sales presentation

13.9.6 Demonstrate how to prepare for a sales presentation

13.9.7 Use presentation software to develop sales presentation and materials

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

### **Competency 13.10: Establish relations with client/customer**

#### **Key Indicators:**

13.10.1 Describe importance of establishing relationships with customers/clients during initial contact

13.10.2 Identify factors affecting choice of techniques to use in establishing relationships with customer/clients during initial contact

13.10.3 Describe characteristics of effective sales openings

13.10.4 Demonstrate how to establish relationships with customers/clients during initial contact

13.10.5 Identify types of customer personalities (e.g., decisive personality, impulsive personality, fact-finder personality, practical or frugal personality, informed personality, difficult personality)

13.10.6 Recognize types of customer personalities

13.10.7 Act appropriately for different customer personality types

13.10.8 Use action and appropriate guidelines for handling each type of customer personality

13.10.9 Handle difficult types of customer personalities

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

**Competency 13.11: Determine customer needs****Key Indicators:**

- 13.11.1 Identify examples of types of questions for sales situations (e.g., open-ended, assumptive, interpretive)
- 13.11.2 Research the customer to identify customer needs
- 13.11.3 Explain importance of questioning in selling
- 13.11.4 Explain timing of questions in selling
- 13.11.5 Describe relationship of customer type to questioning style
- 13.11.6 Explain guidelines for questioning customers
- 13.11.7 Question customers to obtain information that will help to satisfy customer's needs

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

**Competency 13.12: Use selling process/techniques****Key Indicators:**

- 13.12.1 Prospect for customers
- 13.12.2 Qualify customers
- 13.12.3 Establish relationship with client/customer
- 13.12.4 Describe factors that motivate customers
- 13.12.5 Facilitate customer-buying decisions
- 13.12.6 Recommend specific service
- 13.12.7 Describe service/product
- 13.12.8 Prescribe solution to customer needs
- 13.12.9 Convert customer/client objections into selling points
- 13.12.10 Demonstrate negotiation skills
- 13.12.11 Develop a sales proposal including legal terms and conditions
- 13.12.12 Set expectations of client
- 13.12.13 Demonstrate suggestion selling
- 13.12.14 Sell goods/services/ideas to individuals
- 13.12.15 Sell goods/services/ideas to groups
- 13.12.16 Use effective telephone sales techniques
- 13.12.17 Close sale
- 13.12.18 Plan follow-up strategies
- 13.12.19 Over deliver
- 13.12.20 Cultivate a continuous relationship

- 13.12.21 Maintain customer database  
 13.12.22 Plan strategies for meeting sales quota

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

**Competency 13.13: Use support activities**

**Key Indicators:**

- 13.13.1 Calculate miscellaneous charges  
 13.13.2 Process complimentary offers and coupons/discounts  
 13.13.3 Calculate service cost  
 13.13.4 Process special orders  
 13.13.5 Arrange special service for customers  
 13.13.6 Process telephone orders  
 13.13.7 Write sales letters  
 13.13.8 Use technology to sell products

**BIL:** Essential

<b>EDU:</b>	12	AD
	I	P

**Competency 13.14: Manage selling activities**

**Key Indicators:**

- 13.14.1 Explain nature of sales management  
 13.14.2 Explain nature of sales training  
 13.14.3 Analyze sales reports  
 13.14.4 Explain nature of sales forecasts  
 13.14.5 Forecast sales  
 13.14.6 Identify key business categories for sales  
 13.14.7 Analyze marketing dynamics that affect sales  
 13.14.8 Manage customer e-mail  
 13.14.9 Use technology in sales management  
 13.14.10 Develop a sales force compensation and incentive plan  
 13.14.11 Set quotas  
 13.14.12 Structure the sales force  
 13.14.13 Compute appropriate sales force size  
 13.14.14 Determine territories  
 13.14.15 Evaluate effectiveness of sales force  
 13.14.16 Communicate sales results

## Instructional Unit 14: Distribution and Logistics

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

### Competency 14.1: Analyze physical distribution strategies

#### Key Indicators:

- 14.1.1 Explain nature and scope of distribution
- 14.1.2 Explain nature of channels of distribution
- 14.1.3 Explain the role of technology in distribution
- 14.1.4 Analyze key factors in selecting a distribution system
- 14.1.5 Analyze different types of distribution channels for consumer goods
- 14.1.6 Analyze different types of distribution channels for industrial goods
- 14.1.7 Evaluate factors that influence channel length
- 14.1.8 Analyze channel widths (i.e., intensive distribution, exclusive distribution, selective distribution)
- 14.1.9 Explain how channel functions influence channel choice
- 14.1.10 Explain how channel flows influence channel choice
- 14.1.11 Explain the nature of channel member relationships
- 14.1.12 Explain the transfer principle
- 14.1.13 Explain the concepts of vertical marketing systems (VMS)
- 14.1.14 Explain alternatives to VMS
- 14.1.15 Analyze the relationship between customer service and distribution
- 14.1.16 Identify potential channel conflicts and possible solutions
- 14.1.17 Explain the interaction between logistics and other marketing activities
- 14.1.18 Explain the role of warehousing/stock handling in logistics

**BIL:** Essential

<b>EDU:</b>	12	AD
	I	P

### Competency 14.2: Evaluate concept of Supply Chain Management (SCM)

#### Key Indicators:

- 14.2.1 Identify components of the supply chain
- 14.2.2 Evaluate how supply chain management reduces order response times, reduces inventory requirements, reduces costs and increases revenues, and reduces cumulative cycle time
- 14.2.3 Evaluate key success factors
- 14.2.4 Evaluate role of Electronic Data Interchange (EDI) in supply chain management
- 14.2.5 Evaluate the role of intranets and extranets in supply chain management
- 14.2.6 Examine future trends in supply chain management

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

**Competency 14.3: Evaluate the shipping process**

**Key Indicators:**

- 14.3.1 Explain role of shipping
- 14.3.2 Evaluate ways to ship products
- 14.3.3 Identify common shipping providers
- 14.3.4 Compare shipping rates
- 14.3.5 Compare shipping methods based on size of product(s)
- 14.3.6 Select best shipping methods
- 14.3.7 Identify types of packing materials
- 14.3.8 Identify packing material vendors
- 14.3.9 Compare costs of packing materials
- 14.3.10 Identify an electronic information system to track orders

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

**Competency 14.4: Evaluate business inventory**

**Key Indicators:**

- 14.4.1 Evaluate role of inventory control in logistics
- 14.4.2 Explain concept of ABC analysis
- 14.4.3 Explain cost considerations in inventory management
- 14.4.4 Calculate economic order quantity (EOQ)
- 14.4.5 Calculate reorder point
- 14.4.6 Calculate average inventory
- 14.4.7 Explain concept of Just-In-Time (JIT) inventory
- 14.4.8 Use an online inventory control system to locate and determine the availability of goods within the business
- 14.4.9 Organize inventory counts
- 14.4.10 Explain unit inventory control systems
- 14.4.11 Explain dollar inventory control systems
- 14.4.12 Evaluate inventory

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

**Competency 14.5: Explain legal considerations in distribution****Key Indicators:**

- 14.5.1 Describe illegal distribution activities
- 14.5.2 Identify laws that govern distribution activities
- 14.5.3 Explain impact of regulation on distribution activities
- 14.5.4 Discuss nature of service intermediaries
- 14.5.5 Explain legal considerations in distribution

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

**Competency 14.6: Describe ethical considerations in distribution****Key Indicators:**

- 14.6.1 Discuss reasons that marketers should not manipulate the availability of a product for the purpose of exploitation
- 14.6.2 Describe ethical issues associated with serving markets with low profit potential
- 14.6.3 Explain when ethical issues can arise in a distribution channel
- 14.6.4 Explain ethical implications of the gray market on U. S. businesses
- 14.6.5 Describe how communication relates to distributions ethics

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

**Competency 14.7: Explain the relationship between customer service and distribution****Key Indicators:**

- 14.7.1 Explain how customer service facilitates order processing
- 14.7.2 Identify actions that customer service can take to facilitate order processing
- 14.7.3 Describe the role of customer service in following up on orders

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

**Competency 14.8: Prepare invoices****Key Indicators:**

- 14.8.1 Identify the components of an invoice
- 14.8.2 Calculate extensions on an invoice
- 14.8.3 File invoices

**BIL:** Essential

<b>EDU:</b>	12	AD
	I	P

**Competency 14.9: Use an information system for order fulfillment****Key Indicators:**

- 14.9.1 Explain the role of information systems in creating channel efficiency
- 14.9.2 Describe how information systems can be used to track lost/late orders
- 14.9.3 Demonstrate procedures for using an information system for order-fulfillment

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

**Competency 14.10: Describe the receiving process****Key Indicators:**

- 14.10.1 Identify the receiving process
- 14.10.2 Explain the importance of the receiving process to business operations
- 14.10.3 Explain purpose of the receiving process
- 14.10.4 Describe receiving activities
- 14.10.5 Discuss importance of accuracy in performing receiving activities



**BIL:** Essential

<b>EDU:</b>	12	AD
	I	P

**Competency 14.11: Coordinate management of distribution****Key Indicators:**

- 14.11.1 Coordinate distribution with marketing activities
- 14.11.2 Select channels of distribution
- 14.11.3 Evaluate channel members

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

**Competency 14.12: Explain storage considerations****Key Indicators:**

- 14.12.1 Identify what type of businesses use storage
- 14.12.2 Explain how storage adds utility to goods
- 14.12.3 Describe reasons for storing goods
- 14.12.4 Explain characteristics that are important to consider when deciding how to store goods

**BIL:** Essential

<b>EDU:</b>	12	AD
	I	P

**Competency 14.13: Explain the nature of warehousing****Key Indicators:**

- 14.13.1 Describe types of warehouses and storage facilities
- 14.13.2 Explain factors that affect the choice of warehouses

**BIL:** Essential

<b>EDU:</b>	12	AD
	I	P

**Competency 14.14: Analyze channel-member relationships****Key Indicators:**

- 14.14.1 Explain the difference between horizontal conflict and vertical conflict
- 14.14.2 Describe the bases of power within a distribution channel
- 14.14.3 Analyze channel leadership
- 14.14.4 Analyze channel conflict
- 14.14.5 Describe ways to achieve channel cooperation

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

**Competency 14.15: Analyze channel strategies****Key Indicators:**

- 14.15.1 Explain types of distribution (e.g., exclusive distribution, intensive distribution, selective distribution)
- 14.15.2 Identify major channel strategy decisions (e.g., channel selection, level of intensity, use of vertical marketing systems)
- 14.15.3 Describe factors that indicate a need to change channel strategies
- 14.15.4 Explain relationship between channel strategy and distribution costs
- 14.15.5 Discuss distribution intensity as a channel strategy
- 14.15.6 Explain the use of vertical marketing systems as a channel strategy
- 14.15.7 Identify factors that affect the choice of channel of distribution
- 14.15.8 Describe factors that affect selection of distribution channels (e.g., nature of product, market size and location, access to channel members)
- 14.15.9 Explain procedures for selecting channels of distribution

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

**Competency 14.16: Evaluate channel members****Key Indicators:**

- 14.16.1 Describe criteria for evaluating channel members
- 14.16.2 Explain importance of channel member evaluation
- 14.16.3 Demonstrate procedures for evaluating channel members

## Instructional Unit 15: Customer Relationship Management

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

### Competency 15.1: Analyze basic customer relationship management (CRM) concepts

#### Key Indicators:

- 15.1.1 Analyze the reasons and methods to determine what customers want
- 15.1.2 Explain the role of quality in customer satisfaction
- 15.1.3 Explain the role of warranties and guarantees in customer satisfaction
- 15.1.4 Explain the role of website usability in customer satisfaction
- 15.1.5 Explain the use of CRM software
- 15.1.6 Explain the link between customer relationships and supply chain management
- 15.1.7 Explain the importance of all customers to the business
- 15.1.8 Analyze the relationship between customer satisfaction, loyalty, and value
- 15.1.9 Describe the link between customer satisfaction, loyalty, retention, profit, market-perceived value, and customer lifetime value
- 15.1.10 Explain the relationship between service and sales
- 15.1.11 Explain the concept of a customer relationship focus and its importance to an organization
- 15.1.12 Describe the concept of a value chain
- 15.1.13 Explain the importance of using strategic alliances to maximize the value chain

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

### Competency 15.2: Manage customer service

#### Key Indicators:

- 15.2.1 Encourage employees to project a professional image (e.g., appearance, voice, grammar, word usage, enunciation, nonverbal communication)
- 15.2.2 Encourage employees to interact with customers and colleagues in a professional manner (e.g., prompt, friendly, courteous, respectful, helpful, knowledgeable, clear)
- 15.2.3 Establish business protocols and company policies
- 15.2.4 Communicate company policies to customers
- 15.2.5 Develop merchandise returns policies
- 15.2.6 Resolve customer complaints in accordance with customer service policy
- 15.2.7 Facilitate customer service through the maintenance of key information systems
- 15.2.8 Monitor follow-through on commitments made to customers (e.g., special orders, delivery specifications, new items)
- 15.2.9 Monitor follow up on order problems

- 15.2.10 Explain current enabling technologies in CRM  
 15.2.11 Compare CRM software packages

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

**Competency 15.3: Explain the benefits of customer support (including online)**

**Key Indicators:**

- 15.3.1 Explain the impact of customer support on customer loyalty  
 15.3.2 Explain the impact of customer support on returns  
 15.3.3 Explain how customer support reduces negative word-of-mouth  
 15.3.4 Explain how customer support systems can increase convenience  
 15.3.5 Explain how customer support can reduce support costs  
 15.3.6 Explain ways to use customer support inquiries as part of market research  
 15.3.7 Explain the 80/20 rule of customer support  
 15.3.8 Explain the correlation between customer retention and acquisition costs  
 15.3.9 Create an online information forum

**BIL:** Essential

<b>EDU:</b>	12	AD
	I	P

**Competency 15.4: Analyze customer relationships**

**Key Indicators:**

- 15.4.1 Explain connection between customer and employee satisfaction  
 15.4.2 Describe a customer-focused environment  
 15.4.3 Create a customer communication plan  
 15.4.4 Develop a customer information system (e.g., tracking systems, databases, registration)  
 15.4.5 Determine organization readiness to meet customer expectations  
 15.4.6 Explain advantages and disadvantages of different services based on customer value  
 15.4.7 Complete a customer focus audit  
 15.4.8 Explain customer mix and customer pyramids

**BIL:** Essential

<b>EDU:</b>	12	AD
	I	P

**Competency 15.5: Evaluate customer retention****Key Indicators:**

- 15.5.1 Identify customer loyalty segments
- 15.5.2 Identify customer satisfaction measures
- 15.5.3 Explain advantages of working with existing customers
- 15.5.4 Assess customer satisfaction
- 15.5.5 Assess customer value, lifetime value, and net present value
- 15.5.6 Assess business share of customers
- 15.5.7 Use customer-based metrics (e.g., profitability analysis, value analysis, satisfaction analysis, loyalty indicators, revenue per customer)
- 15.5.8 Analyze customer behavior (e.g., habits, purchasing patterns, needs)
- 15.5.9 Identify problems and opportunities
- 15.5.10 Develop loyalty programs
- 15.5.11 Develop frequency marketing programs
- 15.5.12 Create a customer management plan
- 15.5.13 Describe ways companies strive to eliminate gaps in customer satisfaction and expectations, and business performance
- 15.5.14 Assess company performance relative to customer priorities and competitor performance
- 15.5.15 Analyze tracking results
- 15.5.16 Use benchmarking and performance measures to support improvement
- 15.5.17 Create customer process controls
- 15.5.18 Compute the cost of a lost customer

## Instructional Unit 16: Finance

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

### Competency 16.1: Explain the nature and scope of financing

#### Key Indicators:

- 16.1.1 Describe the importance of financing to a business
- 16.1.2 Describe the relationship between financing and marketing
- 16.1.3 Explain the critical nature of banking relationships
- 16.1.4 Explain the purposes and importance of obtaining business financing
- 16.1.5 Describe sources of financing for businesses
- 16.1.6 Describe electronic financial services
- 16.1.7 Describe the use of technology in finance

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

### Competency 16.2: Explain basic accounting concepts and principles

#### Key Indicators:

- 16.2.1 Demonstrate knowledge of basic accounting principles and applications
- 16.2.2 Explain accounting terminology
- 16.2.3 Explain financial control procedures
- 16.2.4 Describe record-keeping procedures for marketing management and research functions/applications
- 16.2.5 Explain periodic reporting procedures

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

### Competency 16.3: Analyze financial performance

#### Key Indicators:

- 16.3.1 Interpret balance sheets
- 16.3.2 Interpret income statements
- 16.3.3 Perform cash-flow analyses
- 16.3.4 Prepare break-even analyses

- 16.3.5 Prepare budgets
- 16.3.6 Prepare comparative financial statements
- 16.3.7 Prepare cost and revenue analyses
- 16.3.8 Prepare forecasts
- 16.3.9 Interpret change-in-equity statement

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

**Competency 16.4: Explain purpose and importance of obtaining business credit**

**Key Indicators:**

- 16.4.1 Explain reasons that businesses need to obtain credit
- 16.4.2 Define equity sources and debt sources
- 16.4.3 Identify sources of credit for businesses
- 16.4.4 Describe advantages and disadvantages of obtaining credit from each source

**BIL:** Recommended

<b>EDU:</b>	12	AD
	I	P

**Competency 16.5: Identify risks associated with obtaining business credit**

**Key Indicators:**

- 16.5.1 Identify direct financial costs associated with obtaining credit
- 16.5.2 Discuss periodic reporting requirements required by lenders
- 16.5.3 Explain financial covenants and restrictions included in loan agreements by lenders
- 16.5.4 Discuss the use of subordination agreements in financial covenants
- 16.5.5 Explain the use of personal guarantees in lending policies
- 16.5.6 Identify factors that can be negotiated to replace the use of personal guarantees

**BIL:** Essential

<b>EDU:</b>	12	AD
	I	P

**Competency 16.6: Determine financing needed**

**Key Indicators:**

- 16.6.1 Explain the need for ongoing financing for business operations
- 16.6.2 Explain how a business is affected by insufficient financing
- 16.6.3 Describe factors affecting ongoing financing

- 16.6.4 Identify reasons that additional capital is needed  
16.6.5 Determine monies needed for ongoing financing

**BIL:** Essential

<b>EDU:</b>	12	AD
	I	P

**Competency 16.7: Use financial statements to make marketing management and research decisions**

**Key Indicators:**

- 16.7.1 Calculate profitability ratios from financial statements  
16.7.2 Interpret cash-flow analysis statements  
16.7.3 Document impact of financial analysis on the strategic planning process  
16.7.4 Revise short-term and long-term strategic plans based on financial analyses  
16.7.5 Interpret break-even analyses  
16.7.6 Evaluate expense accounts  
16.7.7 Evaluate accounts receivable  
16.7.8 Manage sales accounts



## Instructional Unit 17: Marketing and the New Economy

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

### Competency 17.1: Describe economic concepts

#### Key Indicators:

- 17.1.1 Explain how supply, demand, and price are related
- 17.1.2 Explain the concept of private enterprise and business ownership
- 17.1.3 Explain the relationship among risk, competition, and profit
- 17.1.4 Identify the characteristics of a free enterprise system
- 17.1.5 Compare/contrast various forms of competition (e.g., pure, monopoly, oligopoly)
- 17.1.6 Describe the cyclical nature of the economy (e.g., unemployment, recession, inflation, depression, recovery)
- 17.1.7 Identify the effects of public and private economic activity on the business sector
- 17.1.8 Describe the relationship between business and government
- 17.1.9 Describe productivity measures
- 17.1.10 Describe the impact of global economic changes on the U.S. economy
- 17.1.11 Discuss the impact of economic change on marketing mix strategies
- 17.1.12 Explain the impact of global competition
- 17.1.13 Describe the impact of technology on our economic system

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

### Competency 17.2: Describe economic indicators and trends

#### Key Indicators:

- 17.2.1 Explain gross national product and gross domestic product
- 17.2.2 Describe the impact of the national debt
- 17.2.3 Describe the impact of interest rates
- 17.2.4 Define the impact of spending (e.g., government, business capital, individual)
- 17.2.5 Describe the impact of business cycles
- 17.2.6 Describe the impact of inflation, growth, recession, and unemployment
- 17.2.7 Describe the impact of the consumer price index
- 17.2.8 Explain how business practices impact the economy
- 17.2.9 Explain how to adapt marketing to the new economy (e.g., digitalization, disintermediation, reintermediation, customization, customerization, industry convergence)
- 17.2.10 Explain how marketing practices impact the economy (e.g., websites, online ads and promotions)

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

**Competency 17.3: Explain international trade**

**Key Indicators:**

- 17.3.1 Describe the nature and importance of international trade
- 17.3.2 Describe the growth of international trade
- 17.3.3 Explain the impact of the Internet on international trade
- 17.3.4 Describe legal issues related to international e-commerce
- 17.3.5 Explain balance of trade concepts
- 17.3.6 Describe the effect of currency exchange rates on international trade
- 17.3.7 Describe the impact of a nation's government policies on international trade
- 17.3.8 Describe the impact of a nation's political situation on international trade
- 17.3.9 Describe geographical factors that affect international trade
- 17.3.10 Explain the impact of a nation's economic condition on international trade
- 17.3.11 Explain the impact of tariffs
- 17.3.12 Explain the impact of culture on business practices
- 17.3.13 Explain the different types of trade agreements
- 17.3.14 Explain how globalization has affected marketing

## Instructional Unit 18: Business Law and Ethics Affecting Marketing

**BIL:** Essential

<b>EDU:</b>	12	AD
	I	P

### Competency 18.1: Evaluate the relationship between law and business

#### Key Indicators:

- 18.1.1 Explain the relationship between ethics and the law
- 18.1.2 Identify the impact civil and criminal laws may have on marketing management and research
- 18.1.3 Identify the impact laws of various jurisdictions may have on marketing management and research
- 18.1.4 Demonstrate knowledge of contract law
- 18.1.5 Describe the components of a legally binding contract

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

### Competency 18.2: Evaluate issues related to leadership and marketing managerial ethics

#### Key Indicators:

- 18.2.1 Investigate the nature of leadership and marketing managerial ethics
- 18.2.2 Research the history of leadership and management theory
- 18.2.3 Analyze current issues in leadership and marketing management ethics
- 18.2.4 Identify the impact that various employment and social laws may have on leading, managing, and marketing

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

### Competency 18.3: Demonstrate ethical business behavior in marketing

#### Key Indicators:

- 18.3.1 Discuss current trends in ethics related to technology
- 18.3.2 Identify various types of ethical and unethical business/marketing practices
- 18.3.3 Interpret codes of ethics for given businesses
- 18.3.4 Identify potential consequences of unethical business/marketing practices

18.3.5 Use ethical behavior in dealing with internal/external customers

18.3.6 Explain the relationship between ethics in marketing and the company culture

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

**Competency 18.4: Evaluate issues related to employee ethics**

**Key Indicators:**

18.4.1 Discuss current issues in employee ethics

18.4.2 Identify types of ethical/unethical employee behaviors

18.4.3 Identify ethics established by business for marketing management

18.4.4 Identify unethical marketing management behaviors and their consequences

18.4.5 Analyze critical issues related to employment contracts (e.g., confidentiality, non-disclosure, non-competitive)

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

**Competency 18.5: Describe intellectual property rights and copyright laws**

**Key Indicators:**

18.5.1 Explain purpose of patent

18.5.2 Explain purpose of copyright

18.5.3 Explain purpose of licenses

18.5.4 Explain rights of the originator

18.5.5 Explain rights of the public

18.5.6 Define confidentiality

18.5.7 Explain legal ownership of proprietary material

18.5.8 Describe stock image/text usage rights

18.5.9 Explain reproduction licensing and residual usage

## Instructional Unit 19: Technology for Marketing

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

### Competency 19.1: Describe the impact of technology on society

#### Key Indicators:

- 19.1.1 Describe how technology (e.g., PCs [personal computers], larger computer systems, infrastructure) impacts people and organizations
- 19.1.2 Describe the impact of computers on career pathways in business/industry (e.g., elimination and creation of jobs)
- 19.1.3 Identify security risks and associated safeguards
- 19.1.4 Describe the impact of computers on access to information and information exchange worldwide
- 19.1.5 Identify issues and trends affecting computers and information privacy
- 19.1.6 Identify markets that are most and least impacted by technology

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

### Competency 19.2: Describe types of business software

#### Key Indicators:

- 19.2.1 Identify key functions of systems software used in marketing applications
- 19.2.2 Explain widely used software applications (e.g., browsers, word processing, database management, spreadsheet development, Customer Relations Management (CRM) applications, web content development, Interview Management, Statistical Analysis, Business Planning, Marketing Planning)
- 19.2.3 Identify new and emerging classes of software

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

### Competency 19.3: Use technology applications

#### Key Indicators:

- 19.3.1 Use word-processing software to create and revise documents
- 19.3.2 Use database software to create and maintain an electronic database

- 19.3.3 Use spreadsheet software to create and maintain an electronic spreadsheet
- 19.3.4 Use basic functions of desktop publishing software to create and revise documents
- 19.3.5 Use presentation graphics software to prepare, modify, and deliver electronic presentations
- 19.3.6 Integrate software computer applications
- 19.3.7 Use e-mail
- 19.3.8 Use scheduling applications to maintain an electronic schedule
- 19.3.9 Use teleconferencing to facilitate electronic meetings
- 19.3.10 Describe business intranet systems and how they can be used to communicate
- 19.3.11 Use Personal Digital Assistant (PDA) to maintain schedules, read e-mail, and access customer information

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

#### **Competency 19.4: Access the Internet**

##### **Key Indicators:**

- 19.4.1 Identify the key characteristics of the Internet
- 19.4.2 Describe the ownership/administration of the Internet
- 19.4.3 Explain the relationship between the Internet and the World Wide Web (WWW)
- 19.4.4 Identify current issues related to the Internet
- 19.4.5 Identify services and tools offered on the Internet (e.g., file transfer protocol, news lists, e-mail)
- 19.4.6 Use accepted Internet etiquette (i.e., netiquette)
- 19.4.7 Identify current uses and applications of the Internet
- 19.4.8 Abide by company Internet security issues
- 19.4.9 Identify the components of Internet software
- 19.4.10 Use browser features
- 19.4.11 Unpack files using compression software
- 19.4.12 Apply virus protection techniques

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

#### **Competency 19.5: Utilize Internet services**

##### **Key Indicators:**

- 19.5.1 Access business and technical information using the Internet
- 19.5.2 Identify the specific strengths, weaknesses, and special features of available search engines and portals

- 19.5.3 Select search engine(s) to use
- 19.5.4 Select appropriate search procedures and approaches
- 19.5.5 Locate information using search engine(s) and Boolean logic
- 19.5.6 Navigate websites using software functions (e.g., forward, back, go to, bookmarks)
- 19.5.7 Evaluate Internet resources (e.g., accuracy of information)
- 19.5.8 Access library catalogs on the Internet
- 19.5.9 Access commercial, government, and education resources
- 19.5.10 Bookmark web addresses (URLs)
- 19.5.11 Subscribe to mailing lists
- 19.5.12 Participate in newsgroups
- 19.5.13 Retrieve online tools
- 19.5.14 Explore the multimedia capabilities of the World Wide Web
- 19.5.15 Use collaboration tools
- 19.5.16 Participate in online audio and video conferencing
- 19.5.17 Archive files
- 19.5.18 Compile a collection of business sites (e.g., finance, investment)
- 19.5.19 Describe company policies related to Internet usage
- 19.5.20 Explain firewalls and encryption and their impact on Internet usage
- 19.5.21 Identify ways to protect privacy online

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

### **Competency 19.6: Analyze e-commerce concepts**

#### **Key Indicators:**

- 19.6.1 Describe the components of e-commerce (e.g., front-end, back-end)
- 19.6.2 Analyze how e-commerce is similar to, and different from traditional commerce
- 19.6.3 Discuss the global impact of e-commerce
- 19.6.4 Analyze the scope and impact of e-commerce and how it relates to business practices
- 19.6.5 Explain how e-commerce relates to e-business and e-marketing
- 19.6.6 Describe the impact of wireless e-commerce
- 19.6.7 Describe the impact of emerging technologies
- 19.6.8 Explain business-to-business e-commerce
- 19.6.9 Explain business-to-consumer e-commerce
- 19.6.10 Explain consumer-to-consumer e-commerce
- 19.6.11 Analyze the impact of e-commerce on business

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

**Competency 19.7: Analyze information from technology sources****Key Indicators:**

- 19.7.1 Use a variety of technology resources to retrieve information
- 19.7.2 Evaluate the credibility and bias of information sources
- 19.7.3 Interpret information for use in decision-making
- 19.7.4 Find/classify retrieved information
- 19.7.5 Cite sources of all types of data
- 19.7.6 Use search procedures appropriate to type of information, nature of source, and nature of query
- 19.7.7 Evaluate the accuracy, relevance, and comprehensiveness of retrieved information
- 19.7.8 Draw conclusions and make generalizations based on information gathered
- 19.7.9 Analyze/synthesize information
- 19.7.10 Analyze the effectiveness of online information resources to support collaborative tasks, research, publications, communications, and increased productivity

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

**Competency 19.8: Evaluate policies for managing privacy and ethical issues****Key Indicators:**

- 19.8.1 Identify privacy issues with an organization
- 19.8.2 Apply appropriate federal and state laws pertaining to privacy
- 19.8.3 Identify personal information that should not be shared
- 19.8.4 Explain the risks and dangers of sharing personal information
- 19.8.5 Discuss basic issues related to responsible use of technology and describe personal consequences of inappropriate use
- 19.8.6 Explain organization policies for privacy and intellectual property
- 19.8.7 Demonstrate legal and ethical behaviors when using information technology
- 19.8.8 Identify/explain property, privacy, access, and accuracy issues pertaining to technology (e.g., impact of these issues on individuals and organizations)
- 19.8.9 Analyze various technologies to distinguish privacy and ethical issues and problems
- 19.8.10 Develop organization policy for the legal and ethical use of information



**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

**Competency 19.9: Assess/explain the technology components of major marketing functions and their interrelationships**

**Key Indicators:**

- 19.9.1 Identify and explain the major components of marketing technology
- 19.9.2 Identify ways that evolving technologies affect marketing strategy (e.g., e-commerce and wireless technologies)
- 19.9.3 Explain the importance of having a technological edge over the competition (e.g., faster to market with new products)
- 19.9.4 Determine new ways of marketing products using emerging and evolving technologies
- 19.9.5 Analyze the cost benefit of different technological approaches to marketing (e.g., electronic versus print media)
- 19.9.6 Examine the advantages and disadvantages of a heavy reliance on technological approaches to marketing

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

**Competency 19.10: Explain impact of technology on marketing**

**Key Indicators:**

- 19.10.1 Describe how technology has made it possible to promote products and sales to greater geographic areas
- 19.10.2 Describe how technology has allowed marketing departments to collect fuller and richer information about markets, customers, prospects, and competitors
- 19.10.3 Describe how technology has allowed companies to facilitate and speed up internal communications among their employees.
- 19.10.4 Explain how technology has allowed better two-way communication with customers and prospects and more efficient transactions
- 19.10.5 Describe how companies now use technology to advertise (e.g., ads, coupons, samples, information)
- 19.10.6 Explain why companies monitor their websites for visits (e.g., develop a database, customize ads to the type of visitors to their site)
- 19.10.7 Explain how the Internet can improve purchasing, recruiting, training and internal and external communications
- 19.10.8 Explain how technology can improve logistics and operations for substantial cost savings (e.g., more accurate and faster way to send and receive information, orders, transactions, payments)

## Instructional Unit 20: Writing for Marketing

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

### Competency 20.1: Assess report-writing requirements

#### Key Indicators:

- 20.1.1 Define/prioritize communication needs
- 20.1.2 Resolve conflicting requirements
- 20.1.3 Specify project objectives
- 20.1.4 Determine the size and specifics of the work to be completed
- 20.1.5 Estimate time, materials, and capabilities needed to complete assignment
- 20.1.6 Identify criteria for successful completion of project
- 20.1.7 Evaluate strengths, weaknesses, opportunities, and threats (SWOT) of completed project

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

### Competency 20.2: Write reports

#### Key Indicators:

- 20.2.1 Determine audience
- 20.2.2 Access needed information using standard references and sources
- 20.2.3 Identify type of report needed
- 20.2.4 Compile relevant data
- 20.2.5 Organize data into charts and graphs
- 20.2.6 Analyze data
- 20.2.7 Draw conclusions from data analysis
- 20.2.8 Outline report
- 20.2.9 Draft report
- 20.2.10 Edit report (e.g., check spelling, grammar, punctuation, sentence structure, accuracy of content)
- 20.2.11 Review report with peers
- 20.2.12 Revise report as needed based on peer feedback
- 20.2.13 Proofread revised report
- 20.2.14 Present reports

**BIL:** Essential

<b>EDU:</b>	12	AD
	P	R

**Competency 20.3: Perform writing to sell**

**Key Indicators:**

- 20.3.1 Identify key sales words
- 20.3.2 Demonstrate effective writing for the Internet
- 20.3.3 Identify writing strategies for direct marketing
- 20.3.4 Write a sales letter
- 20.3.5 Respond to customer inquiries
- 20.3.6 Demonstrate effective copywriting techniques with words that sell
- 20.3.7 Write articles for an e-zine
- 20.3.8 Write product descriptions
- 20.3.9 Identify features and benefits of a product or service

## Instructional Unit 21: Knowledge-Management

**BIL:** Recommended

<b>EDU:</b>	12	AD
	I	I

### Competency 21.1: Explore knowledge-management

#### Key Indicators:

- 21.1.1 Explain why knowledge is considered most important asset for organizations
- 21.1.2 Determine the difference between explicit and tacit knowledge and why distinction is important in knowledge-management
- 21.1.3 Identify drivers for organizations to effectively manage knowledge
- 21.1.4 State reasons to implement knowledge-management
- 21.1.5 Recognize barriers to knowledge-management
- 21.1.6 Examine the financial potential of knowledge-management for businesses
- 21.1.7 Explain the role knowledge workers and the relationship to knowledge-management
- 21.1.8 Examine the core concepts of learning organization

**BIL:** Recommended

<b>EDU:</b>	12	AD
	I	I

### Competency 21.2: Analyze importance of capture and transfer of strategic knowledge

#### Key Indicators:

- 21.2.1 Identify factors that lead to loss of organizational knowledge
- 21.2.2 Identify ways of preventing loss of knowledge
- 21.2.3 Identify what knowledge is being lost in organization
- 21.2.4 Determine the consequences of knowledge loss
- 21.2.5 Find solutions to knowledge loss
- 21.2.6 Choose various approaches in transferring strategic knowledge

**BIL:** Recommended

<b>EDU:</b>	12	AD
	I	I

**Competency 21.3: Analyze organizational culture and the role of knowledge-management****Key Indicators:**

21.3.1 Determine how organization acquires culture

21.3.2 Explain culture as tactic knowledge

21.3.3 Demonstrate importance of organization culture and its role in implementing knowledge-management

**BIL:** Recommended

<b>EDU:</b>	12	AD
	I	I

**Competency 21.4: Determine barriers that affect knowledge-management implementation****Key Indicators:**

21.4.1 Identify cultural assumptions that derail knowledge-management approach

21.4.2 Identify conditions that create favorable acceptance to knowledge-management approach

21.4.3 Create new values (rewards/recognition) that support knowledge sharing

21.4.4 Use the skills of change agent in implementing knowledge-management

**BIL:** Recommended

<b>EDU:</b>	12	AD
	I	I

**Competency 21.5: Evaluate various knowledge-management measurement approaches****Key Indicators:**

21.5.1 Create balanced scorecard performance measurement system

21.5.2 Determine the four perspectives of balanced scorecard measurement system

21.5.3 Evaluate strengths and weaknesses of each perspective of balanced scorecard measurement system

21.5.4 Survey employees' opinions as a knowledge-management measure

**BIL:** Recommended

<b>EDU:</b>	12	AD
	I	I

**Competency 21.6: Measure intellectual capital**

**Key Indicators:**

- 21.6.1 Explain intellectual capital
- 21.6.2 Analyze various approaches for measuring intellectual capital
- 21.6.3 Use the intangible assets monitor method for measuring intellectual assets (human competence, external structure, internal structure)

# **Appendix A**

## **Review Panels**

## Ohio Business TCP Futuring Panel Participants

**Nichole Nares**, Human Resource Consultant, Nationwide Mutual Insurance Company, Columbus

**Roger Campbell**, Training Manager, Worthington Industries, Columbus

**Jane Cape**, Dean, Business Technologies, Clark State Community College, Springfield

**Julie Danner**, Manager, Training and Development, Ross Products Division, Columbus

**Chris Hamm**, Financial Consultant, First Merit Securities, Medina

**Christina Hutchings**, Manager, Financial Reporting, Lane Bryant, Reynoldsburg

**Jeff Hutchins**, Founder, VITAC (retired), Canonsburg, PA

**John Martin**, President, Optimum System Products, Inc., Columbus

**James Nemcek**, CEO, Alearna, Columbus

**Karen Nemcek**, E-Learning Consultant, Alearna, Columbus

**Linda Shimp**, Human Resources Manager, YSK Corporation, Chillicothe

**Roy Smoot**, President & CEO, Columbus Speech and Hearing, Columbus

**Cheryl Sparks**, Human Resources Director; Vorys, Sater, Seymour and Pease LLP; Columbus

**Julie Talks**, Accounting/Office Manager, Optimum Systems, Columbus

**Robert Thomas**, Case Manager, Supervisor, Franklin County Board of MR/DD—Case Management, Columbus

**Judith Wright**, Corporate Secretary, Karlsberger Companies, Columbus

**Kym Yahn**, Workforce Development Manager, Dayton Area Chamber of Commerce, Dayton

**Joseph Zielinski**, Certified Business Consultant, EISC, Inc., Toledo



## **Ohio Marketing Management and Research TCP Futuring Panel Participants**

**Mike Anderson**, Manager, Marketing Research, The Longaberger Company, Newark

**Norman Blanchard**, Economic Development Director, Cambridge Guernsey County  
Community Improvement Corporation, Cambridge

**Jim Gleason**, President, MarkEd Resource Center, Columbus

**John Riester**, President/Owner, Discovery Works, Inc., Cincinnati

## **Ohio Marketing Management and Research TCP Business and Professional Panel Participants**

**Mike Anderson**, Manager, Marketing Research, The Longaberger Company, Newark

**Kevin M. Feldt**, Marketing Director/Consultant, Arco Sheet Metal Manufacturing, Bedford Heights

**Mary Beth Harper**, President, Harper & Co. Communications, Kent

**Andy Irick**, Vice President, Retail Services, Security National Bank, Springfield

**Beth Osteen**, Vice President, Research and Development, Marketing Education Resource Center, Inc., Columbus

**Curtis Pratt**, Lead Marketing Analyst, GatesMcDonald, Hilliard

**Carolyn Rice**, Marketing Consultant, Rice & Associates, Dayton

**John Riester**, Owner/President, Discovery Works, Inc., Cincinnati

## Ohio Marketing Management and Research TCP Educators Panel Participants

**Teresa R. Campbell**, Instructor, Clark State Community College, Springfield

**Susan Everhart**, Marketing Instructor, GlenOak High School / Plain Local Schools, Canton

**Jean Getz**, Marketing Instructor, Beachwood City Schools, Beachwood

**Nancy Henz**, Marketing Instructor, Warren County Career Center, Lebanon

**Mike Kolacz**, Chair, Marketing & Management Technologies, Owens Community College,  
Perrysburg

**Kathleen Lower**, E-Commerce Marketing Teacher, GlenOak High School / Plain Local  
Schools, Canton

**Gregg Marino**, Marketing Instructor, W. E. Stebbins High School, Riverside

**John Marino**, Associate Professor, Kent State University – Trumbull Campus, Warren

**Paula Saunders**, Chair, Department of Marketing, Raj Soin College of Business, Wright State  
University, Dayton

**Julie Woeste**, Marketing Instructor, Butler Technology and Career Development Schools,  
Edgewood High School, Trenton

**Jim Wood**, Business Management / Marketing Program Chair, Cincinnati State Technical &  
Community College, Cincinnati

## **Ohio Marketing Management and Research TCP Stakeholders Panel Participants**

**Mike Anderson**, Marketing Research, The Longaberger Company, Newark

**Teresa Campbell**, Instructor, Clark State Community College, Springfield

**Carolyn Rice**, Marketing Consultant, Rice and Associates, Dayton

**Julie Woeste**, Marketing Instructor, Butler Technology and Career Development Schools,  
Edgewood High School, Trenton

**Jim Wood**, Business Management/Marketing Program Chair, Cincinnati Technical and  
Community College, Cincinnati

# **Appendix B**

## **College Tech Prep Pathway Template**

(High School)

(Career Center)

(School Year)

**College Tech Prep Program**

(Community College)

9 <sup>th</sup> GRADE	CREDIT	10 <sup>th</sup> GRADE	CREDIT	11 <sup>th</sup> GRADE	CREDIT	12 <sup>th</sup> GRADE	CREDIT
<b>Recommended Prerequisites for Grade 11 of Tech Prep</b>				<b>Recommended for College Portion of Tech Prep</b>			
<b>Junior Year Tech Center/College Technical Courses</b>				<b>Senior Year Tech Center/College Technical Courses</b>			
<b>*Technical Subjects</b>		<b>On-transcript</b>		<b>*Technical Subjects</b>		<b>College Credits</b>	
<b>Articulated Credits: -</b>				<b>Community College</b>			

This template is used to facilitate Ohio College Tech Prep Pathways and is submitted by the Ohio College Tech Prep Consortium with the application.  
Revised 6/20/03

- College Tech Prep

(Career Center)

(Name of College Tech Prep Program)

Term Taken	First Term	Pre-requisite	Co-requisite	Quarter Credit Hours	University Pathway Equivalent	Completed as Tech Prep Component
Term Taken	Second Term	Pre-requisite	Co-requisite			
Term Taken	Third Term	Pre-requisite	Co-requisite			

College Tech Prep

(Career Center)

(Name of College Tech Prep Program)

<b>Term Taken</b>	<b>Fourth Term</b>	<b>Pre-requisite</b>	<b>Co-requisite</b>	<b>Quarter Credit Hours</b>	<b>University Pathway Equivalent</b>	<b>Completed as Tech Prep Component</b>
<b>Term Taken</b>	<b>Fifth Term</b>	<b>Pre-requisite</b>	<b>Co-requisite</b>			
<b>Term Taken</b>	<b>Sixth Term</b>	<b>Pre-requisite</b>	<b>Co-requisite</b>	<b>Quarter Credit Hours</b>	<b>University Pathway Equivalent</b>	<b>Completed as Tech Prep Component</b>



# **Appendix C**

## **Professional Associations and Certifications**

# Marketing Management and Research

## Professional Associations and Certifications

### Associations

- Advertising Research Foundation
- American Marketing Association
- Business Marketing Association
- Direct Marketing Association
- eMarketing Association
- Marketing Research Association
- Public Relations Society of America
- Qualitative Research Consultants Association
- Sales and Marketing Executives International
- Society for Marketing Professional Services
- The Institute of Certified Professional Managers

### Certifications

- Certified Associate Manager
- Certified Competitive Intelligence Analyst
- Certified eMarketing Associate
- Certified Marketing Executive
- Certified Professional Manager
- Certified Sales Executive
- Customer Service Certification

# **Appendix D**

## **Ohio Tech Prep Consortia**

# Ohio Tech Prep Consortia

Website: [www.regents.state.oh.us/techprep](http://www.regents.state.oh.us/techprep)



**PHASE I (formed 1992)**

- 1. Heart of Ohio
- 2. Miami Valley
- 3. North Central
- 4. North Coast
- 5. Partners of Marion
- 6. Washington-Morgan-Meigs

**PHASE II (formed 1993)**

- 7. Akron Area
- 8. Columbiana County
- 9. Kent
- 10. Lake and Ohio South
- 11. Ohio South
- 12. Stark County
- 13. Upper Miami Valley

**PHASE III (formed 1994)**

- 14. Clark State
- 15. Greater Cincinnati and Eastern Ohio Valley

- 17. Lorain County
- 18. Mid-East Ohio
- 19. West Central
- 20. Workforce Development Council

**PHASE IV (formed 1995)**

- 21. Ohio State - Agricultural Technical Institute (with programs at locations throughout Ohio)
- 22. Mahoning Area
- 23. Northwest Ohio
- 24. Tuscarawas Valley

**PHASE V (formed 1996)**

- 25. East Central Ohio
- 26. Ohio Valley
- 27. Maumee Valley
- 28. Southeast

Note: Consortia 8, 9 and 24 merged with headquarters at 09

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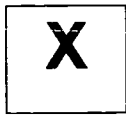


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