

**Marketing Education
Cooperative/Internship
Education Manual**

**Classroom and Training Station
Connecting Activities**

September, 2004

Table of Contents

Introduction	3
Orientation to Business	4
Professional Development Unit	
Connecting Activity 1-Level 1.....	6
Competencies: Explain career planning	
Apply job seeking skills	
Business, Management and Entrepreneurship Unit	
Connecting Activity 1-Level 1.....	11
Competency: Explain business fundamentals	
Connecting Activity 2-Level 1.....	15
Competency: Explain general business risks	
Connecting Activity 3-Level 2.....	19
Competencies: Explain leadership functions	
Perform staffing functions	
Connecting Activity 4-Level 2.....	25
Competencies: Analyze purchasing function	
Explain merchandising-related discounts	
Connecting Activity 5-Level 2.....	31
Competency: Analyze accounting functions	
Economics Unit	
Connecting Activity 1-Level 1.....	35
Competency: Apply basic economic principles	
Selling and Communication and Interpersonal Skills Units	
Connecting Activity 1-Level 1.....	40
Competencies: Explain the nature and scope of selling	
Use selling process/techniques	
Develop customer relationships	
Promotion Unit	
Connecting Activity 1-Level 1.....	44
Competencies: Use advertising	
Develop sales promotion	
Use publicity/public relations	
Connecting Activity 2-Level 2.....	49
Competency: Manage promotion	
Distribution Unit	
Connecting Activity 1-Level 1.....	57
Competencies: Explain the nature and scope of distribution	
Explain warehousing/stock handling	

Product/Service Management Unit

Connecting Activity 1-Level 2.....61
Competencies: Explain the nature and scope of product/service management
Determine the product/service mix
Explain positioning and branding

Pricing Unit

Connecting Activity 1-Level 2.....66
Competency: Determine prices

Marketing Information Management Unit

Connecting Activity 1-Level 2.....70
Competencies: Conduct information gathering
Use marketing planning

Marketing Education

Cooperative Education Manual

Introduction

Cooperative Education is a teaching method which uses real life work experiences to teach and/or reinforce competencies from the Marketing Content Standards (ITAC, TCP, OCAP). Direct connections are made between classroom instruction and workplace activities. The activities in this manual can be used to reinforce and contextualize content taught in the classroom and to teach specific content standards through activities at the training station. While all cooperative placements should be with businesses willing to provide a student with a broad range of training experiences, no job can provide all the workplace experiences needed. The teacher will want to assign additional projects/activities, like the ones in this document, to make sure that all content standards are covered and classroom and training clearly connect and strengthen the student's learning. These projects and activities are documented and included in the work-based learning grade.

Work-based learning documentation provides critical evidence of **authentic learning** to parents, administrators and business partners. A training plan is a good start for this documentation. However, there are additional options that can provide a broad, descriptive picture of student learning. One of those options is a student portfolio. Using these activities and others that teachers develop, students can provide examples of quality work they have completed. Parents, business leaders, and administrators see why students receive release time and teachers need coordination time.

Ohio Marketing Education would like to thank the North Carolina Department of Education for the use of this manual. Competencies have been changed to reflect Ohio competencies from the Marketing Technology ITAC. All competencies in the ITAC are not covered. Teachers should look through the entire document. Some units have activities in Level 1 and Level 2. Generally, Level 1 includes activities that may best be related to associate-level work, and Level 2 includes activities related to management-level work.

For those competencies not covered in this document, teachers can certainly create additional activities for a student. Some teachers may want to use parts of the two documents. Others may want to upgrade the activities to provide additional challenges to students.

As new curriculum initiatives are finalized, Ohio Marketing Education will seek to add activities to this document. We hope that you will find this material to be a good start in your efforts to connect classroom and cooperative experiences and to document your work and that of your students.

Manual Organization

Each unit identified has at least one connecting activity at either Level 1 or Level 2. For each connecting activity, three things are provided: a student activity summary sheet, student worksheets, and an evaluation form (for teacher and student use).

ORIENTATION TO THE WORKPLACE

Student Activity Worksheet

Due Date: _____

To be successful in any job, you need to learn many basic facts about the company. You will prepare a job outline to assist you in organizing information about your place of employment and in analyzing the various duties and responsibilities of your job. The following information should be included:

POINTS

- I. Basic Facts About Your Training Station
 - A. General Information
 - 3 1. Name of business
 - 8 2. Address (including shopping center, zip code) and phone number
 - 6 3. Owner or manager's first and last name
 - 8 4. Immediate supervisor's first and last name (the person who will evaluate you)
 - 2 5. Name of your department
 - 5 6. Business hours of the training station
 - 5 7. Your general work schedule
 - 5 8. List the products and/or services offered for sale
 - B. Rules and Regulations of the Training Station
 - 3 1. Breaks: lunch, dinner, general (Do you get them and when?)
 - 3 2. Dress code (What are the guidelines for employees?)
 - 3 3. Absences and tardiness (What procedures are you to follow and what are the consequences if you fail to do so?)
 - 4 4. Employee Benefits (Do you receive discounts, bonuses, vacation time, etc.?)
 - 5. Conduct
 - 2 a. Visits by friends (Are they allowed?)
 - 2 b. Phone usage (Can you use the phone while at work?)
 - 2 c. Eating in work area (Are you allowed to eat on the job?)
 - 2 d. Other
 - 2 6. Employee meetings - Do you have regular meetings? How often?
 - 5 7. Shoplifting - What procedures do you follow if you suspect a customer of shoplifting?
- II. Duties and Responsibilities of Your Job
 - 10 A. List specific duties and responsibilities of your job - be as detailed as possible.
 - 5 B. Explain how and when you are evaluated.
 - 5 C. Describe the importance of your position to the operation of the business. Where do you fit in?
- 5 Correct Format Followed
- 5 Spelling/Neatness

The outline may be typed or written neatly in ink.

ORIENTATION TO THE WORKPLACE EVALUATION FORM

Name _____

- The outline may be typed or written **neatly** in ink.
- The outline should be in outline format as shown with sections and each topic clearly labeled.
- Your job outline will be evaluated based on the following criteria:
 - ⇒ Level of Completion
 - ⇒ Neatness

POINTS

3	_____	Name of business
8	_____	Correct address (including zip code) and phone number
6	_____	Owner or manager's name
8	_____	Immediate supervisor's name
2	_____	Name of your department
5	_____	Business hours of the training station
5	_____	Your work schedule
5	_____	Products and services
3	_____	Breaks
3	_____	Dress code
3	_____	Absences and tardiness
4	_____	Benefits
2	_____	Visits by others
2	_____	Phone usage
2	_____	Eating in work area
2	_____	Other conduct issues
2	_____	Employee meetings
5	_____	Shoplifting
10	_____	List specific duties and responsibilities of your job
5	_____	How and when you are evaluated
5	_____	The importance of your position to the operation of the business
5	_____	Correct format followed
5	_____	Spelling/Neatness
	_____	TOTAL POINTS EARNED
	_____	LESS: PENALTY FOR LATE WORK (10 points per day)
	_____	FINAL GRADE

**Professional Development Unit
Connecting Activity 1-Level 1
Student Activity Summary Sheet**

Due Date: _____

Marketing Competency	Assignment
Explain career planning	<ul style="list-style-type: none"> ◆ Conduct an interview with the top manager at your training station. Use the interview form provided and complete in your own handwriting.
Apply job-seeking skills	<p>Investigate the hiring policies and procedures used by your training station.</p> <ul style="list-style-type: none"> ◆ Explain any pre-employment testing required. ◆ Describe your interview with the company, giving examples of the questions asked. ◆ Enclose a blank copy of the current job application form used by your training station.

I. JOB INTERVIEW FORM

II. HIRING POLICIES/PROCEDURES

- A. Pre-employment testing required by the company
- B. Description of your interview
- C. Copy of job application

**Professional Development Unit
Connecting Activity 1-Level 1
Student Worksheets**

INTERVIEW FORM

Student: _____ Date of Interview: _____

Person Interviewed: _____

Job Title: _____

Company: _____

Address: _____

City: _____ State: _____ Zip: _____

Phone: _____

Signature of Interviewee: _____

How long have you worked for this company?

How long have you worked in this field?

How did you become involved in this field?

What are the major tasks involved in your job?

What is the most challenging aspect of your job and why?

What do you enjoy most about your job and why?

What do you enjoy least about your job and why?

What skills and qualities are absolutely essential for a person in this field?

What educational background, certification, training, licensing, or other qualifications are important for someone wishing to enter this field?

What is the typical career path for someone working their way up through the company?

What important challenges is the company facing now or in the near future?

What advice would you give to a high school student who wishes to pursue a career in this field?

Would you be interested in speaking to Marketing classes about careers in your industry? _____

Remember to thank the interviewee!

**Professional Development Unit
Connecting Activity 1-Level 1
Evaluation Form**

NAME _____

INTERVIEW

Points Possible	Points Earned	Activity
4	_____	Basic Information
4	_____	How long have you worked for this company?
4	_____	How long have you worked in this field?
6	_____	How did you become involved in this field?
6	_____	What are the major tasks involved in your job?
6	_____	What is the most challenging aspect of your job and why?
6	_____	What do you enjoy most about your job and why?
6	_____	What do you enjoy least about your job and why?
6	_____	What skills and qualities are essential for a person in this field?
6	_____	What educational backgrounds are important?
6	_____	What is the typical career path for someone?
6	_____	What important challenges is the company facing?
6	_____	What advice would you give to a high school student?
4	_____	Would you be interested in speaking to Marketing classes?

HIRING POLICIES/PROCEDURES

Points Possible	Points Earned	Activity
8	_____	Explain required pre-employment testing
8	_____	Describe your employment interview
8	_____	Copy of company's job application enclosed
100	_____	TOTAL POINTS EARNED
	_____	LESS: Penalty for late work (10 points per day) Date Submitted _____
	_____	FINAL GRADE

Business, Management and Entrepreneurship Unit
Connecting Activity 1-Level 1
Student Activity Summary Sheet

Due Date: _____

Marketing Competency	Assignment
Explain business fundamentals	<ul style="list-style-type: none"> ◆ Discuss with your employer how the 9 marketing functions are performed in your training station.
Explain business fundamentals	<ul style="list-style-type: none"> ◆ Describe the form of business ownership under which your business operates. ◆ In your opinion, is this the best form of ownership for the company? <ul style="list-style-type: none"> ☞ If yes, explain why and discuss the advantages it receives from operating under this type of ownership. ☞ If no, which form would you recommend; explain your reasons for choosing that form and discuss the advantages you think the company will receive.

- I. **MARKETING FUNCTIONS**
 - A. Distribution
 - B. Financing
 - C. Marketing Information Management
 - D. Pricing
 - E. Product/Service Planning
 - F. Promotion
 - G. Purchasing
 - H. Risk Management
 - I. Selling

- II. **BUSINESS OWNERSHIP**
 - A. Type of ownership
 - B. Analysis of ownership

Business, Management and Entrepreneurship Unit
Connecting Activity 1-Level 1
Student Worksheet

MARKETING FUNCTIONS

A. Distribution _____

B. Financing _____

C. Marketing Information Management _____

D. Pricing _____

E. Product/Service Planning _____

F. Promotion _____

G. Purchasing _____

H. Risk Management _____

I. Selling _____

BUSINESS OWNERSHIP

A. Type of Ownership _____

B. Analysis (Is this the best form of ownership for the company? Explain your answer and discuss advantages to the company.) _____

Business, Management and Entrepreneurship Unit Connecting Activity 1-Level 1 Evaluation Form

Points Possible	Points Earned	Activity
-----------------	---------------	----------

MARKETING FUNCTIONS

10	_____	Distribution
10	_____	Financing
10	_____	Marketing Information Management
10	_____	Pricing
10	_____	Product/Service Planning
10	_____	Promotion
10	_____	Purchasing
10	_____	Risk Management
10	_____	Selling

BUSINESS OWNERSHIP

5	_____	Type of ownership
5	_____	Analysis of ownership

100	_____	TOTAL POINTS EARNED
	_____	LESS: Penalty for late work (10 points per day) Date Submitted _____
	_____	FINAL GRADE

Business, Management and Entrepreneurship Unit
Connecting Activity 2-Level 1
Student Activity Summary Sheet

Due Date: _____

Marketing Competency	Assignment
Explain general business risk issues	<ul style="list-style-type: none"> ◆ Describe the methods used in your training station to prevent shoplifting/theft. ◆ Report on the accident procedures used in your training station. Be specific.
Explain general business risk issues	<ul style="list-style-type: none"> ◆ Describe the training that your company's employees receive on safety and security.

- I. SHOPLIFTING AND ACCIDENT PROCEDURES
 - A. Description of shoplifting prevention methods
 - B. Description of accident procedures

- II. TRAINING
 - A. Safety procedures
 - B. Security procedures

**Business, Management and Entrepreneurship Unit
 Connecting Activity 2-Level 1
 Evaluation Form**

NAME _____

Points will be earned based on the following:

- Thorough description of the issue at your training station*
- Accuracy of the information*
- Use and application of correct terminology relating to safety and security*
- Neatness*
- Correct grammar, punctuation, and spelling*

SHOPLIFTING and ACCIDENT PROCEDURES

Points Possible	Points Earned	Activity
-----------------	---------------	----------

25	_____	Describe your training station’s methods of preventing shoplifting.
----	-------	---

25	_____	Describe the procedures for handling accidents at your training station.
----	-------	--

TRAINING

Points Possible	Points Earned	Activity
-----------------	---------------	----------

25	_____	Describe the training that employees receive on safety procedures.
----	-------	--

25	_____	Describe the training that employees receive on security procedures.
----	-------	--

100	_____	TOTAL POINTS EARNED
	_____	LESS: Penalty for late work (10 points per day) Date Submitted _____
	_____	FINAL GRADE

Business, Management and Entrepreneurship Unit
Connecting Activity 3-Level 2
Student Activity Summary Sheet

Due Date: _____

Competency	Assignment
Explain leadership functions and perform staffing functions	◆ Conduct an interview with the top manager at your training station. Use the interview form provided and complete in your own handwriting.

Business, Management and Entrepreneurship Unit
Connecting Activity 3-Level 2
Student Worksheets

INTERVIEW FORM

Student: _____ Date of Interview: _____

Person Interviewed: _____

Job Title: _____

Company: _____

Address: _____

City: _____ State: _____ Zip: _____

Phone: _____

Signature of Interviewee: _____

How long have you worked for this company?

How long have you worked in this field?

How did you become involved in this field?

What are the major tasks involved in your job?

What is the most challenging aspect of your job and why?

What characteristics are essential for an effective manager or supervisor?

What methods does your company use to attract part-time employees?

What methods does your company use to attract full-time employees?

Who in the company is responsible for interviewing and hiring new employees?

What training does the company require of new part-time employees?

What training does the company require of new full-time employees?

What does your company do to build or maintain high employee morale?

What trade journals or periodicals are available for managers wishing to stay current on trends or topics in this industry?

Do you have a copy of one that I could share with my marketing class? _____

What professional or trade organizations may someone in this industry join?

Does this company provide or require any continuing education courses, seminars, workshops, etc. for its full-time employees? If so, what are some examples? _____

Does this company have a published code of ethics? _____ Yes _____ No

In your opinion, what role do ethics play in the success of this business?

What important challenges is the company facing now or in the near future?

Would you be interested in speaking to Marketing classes about careers in your industry? _____

Remember to thank the interviewee!

**Business, Management and Entrepreneurship Unit
Connecting Activity 3-Level 2
Evaluation Form**

NAME _____

INTERVIEW

Points Possible	Points Earned	Activity
3	_____	Basic Information
3	_____	How long have you worked for this company?
3	_____	How long have you worked in this field?
3	_____	How did you become involved in this field?
6	_____	What are the major tasks involved in your job?
6	_____	What is the most challenging aspect of your job and why?
6	_____	What characteristics are essential for an effective manager or supervisor?
6	_____	What methods does your company use to attract part-time employees?
6	_____	What methods does your company use to attract full-time employees?
6	_____	Who in the company is responsible for interviewing and hiring new employees?
6	_____	What training does the company require of new part-time employees?
6	_____	What training does the company require of new full-time employees?
6	_____	What does your company do to build or maintain high employee morale?
6	_____	What trade journals or periodicals are available for managers in this industry?
6	_____	What professional or trade organizations may someone in this industry join?
6	_____	Does this company provide continuing education? Examples?
2	_____	Does this company have a published code of ethics?
6	_____	In your opinion, what role does ethics play in the success of this business?
6	_____	What important challenges is the company facing now or in the near future?
2	_____	Would you be interested in speaking to Marketing classes about your industry?
100	_____	TOTAL POINTS EARNED
	_____	BONUS: Trade journal or periodical included (5 points)
	_____	LESS: Penalty for late work (10 points per day) Date Submitted _____
	_____	FINAL GRADE

Business, Management and Entrepreneurship Unit
Connecting Activity 4-Level 2
Student Activity Summary Sheet

Due Date: _____

Competency	Assignment
Analyze purchasing functions	<ul style="list-style-type: none"> ◆ Identify title of person(s) responsible for making the purchasing decisions for your company. ◆ List 2 products that are considered a: <ul style="list-style-type: none"> ☞ New-task purchase (within the past 6 months) ☞ Modified re-buy purchase ☞ Straight re-buy purchase ◆ Identify two (2) items which would be found on each of the following basic buying plans: <ul style="list-style-type: none"> ☞ Basic stock list ☞ Model stock list ☞ Never out stock list ◆ Determine if stock turnover is calculated in your company. <ul style="list-style-type: none"> ☞ If yes, explain how the information is used in making purchasing and marketing decisions. ☞ If no, explain why not. ☺ EXTRA CREDIT: Bring in a copy of the following forms used in your company: <ul style="list-style-type: none"> ☞ Purchase order ☞ Invoice ☞ Packing slip ☞ Apron ☞ Basic stock list ☞ Model stock list ☞ Never out stock list
Explain merchandising-related discounts.	<ul style="list-style-type: none"> ◆ List the invoice (dating) terms that are commonly used in your company.

Business, Management and Entrepreneurship Unit
Connecting Activity 4-Level 2
Student Worksheets

Name: _____

Training Station: _____

Course: _____

Due Date: _____

COMPANY PURCHASING POLICIES & PROCEDURES

Identify the title of person(s) responsible for making the purchasing decisions for your company.

List 2 products that are considered a:

New-task purchase (within last 6 months)

1. Product: _____

Explanation: _____

2. Product: _____

Explanation: _____

Modified re-buy purchase

1. Product: _____

Explanation: _____

2. Product: _____

Explanation: _____

Straight re-buy purchase

1. Product: _____

Explanation: _____

2. Product: _____

Explanation: _____

Identify 2 items that would be found on each of the following basic buying plans and explain why the product is on that type of plan.

Basic stock list

1. Product: _____

Explanation: _____

2. Product: _____

Explanation: _____

Model stock list

1. Product: _____

Explanation: _____

2. Product: _____
Explanation: _____

Never out stock list

1. Product: _____
Explanation: _____

2. Product: _____
Explanation: _____

Is stock turnover calculated in your company? _____ Yes _____ No

Explanation: _____

MERCHANDISING-RELATED DISCOUNTS

List the invoice (dating) terms that are commonly used in your company.

☺ REMEMBER YOUR EXTRA CREDIT OPPORTUNITY!! Bring in a copy of the following forms used in your company:

- | | |
|----------------------|----------------------------|
| _____ Purchase Order | _____ Basic Stock List |
| _____ Invoice | _____ Model Stock List |
| _____ Packing Slip | _____ Never Out Stock List |
| _____ Apron | |

Business, Management and Entrepreneurship Unit Connecting Activity 4-Level 2 Evaluation Form

NAME _____

PURCHASING POLICIES & PROCEDURES

Points Possible	Points Earned	Activity	<u>TOTAL</u>
5	_____	Person responsible for purchasing decisions	_____

TYPES OF PURCHASE SITUATIONS

Points Possible	Points Earned	Activity	Points Possible	Points Earned	Activity
2	_____	New-task product #1	4	_____	Explanation
2	_____	New-task product #2	4	_____	Explanation
2	_____	Modified rebuy product #1	4	_____	Explanation
2	_____	Modified rebuy product #2	4	_____	Explanation
2	_____	Straight rebuy product #1	4	_____	Explanation
2	_____	Straight rebuy product #2	4	_____	Explanation

BASIC BUYING PLANS

Points Possible	Points Earned	Activity	Points Possible	Points Earned	Activity
2	_____	Basic stock list product #1	4	_____	Explanation
2	_____	Basic stock list product #2	4	_____	Explanation
2	_____	Model stock list product #1	4	_____	Explanation
2	_____	Model stock list product #2	4	_____	Explanation
2	_____	Never out stock list product #1	4	_____	Explanation
2	_____	Never out stock list product #2	4	_____	Explanation
Points Possible	Points Earned	Activity			
15	_____	Explain whether or not stock turnover is used and why			
8	_____	List dating terms used in your company			

TOTAL POINTS EARNED _____

EXTRA CREDIT (2 points each, maximum of 14 points) _____

LESS: Penalty for late work (10 points per day) Date Submitted _____

FINAL GRADE _____

Business, Management and Entrepreneurship Unit
Connecting Activity 5-Level 2
Student Activity Summary Sheet

Due Date: _____

Competency	Assignment
Analyze accounting functions	<ul style="list-style-type: none"> ◆ Determine three (3) budgets that are utilized in your training station. <ul style="list-style-type: none"> ☞ State the title of the person(s) responsible for determining the budget. ☞ State the title of the person(s) responsible for managing the budget. ☞ For each budget listed, explain how a budget cut would impact the operation of the business. Be specific and give examples. ◆ List 10 variable operating expenses used in your training station. ◆ List 4 fixed operating expenses used in your training station. ◆ Determine, on average, what percentage of gross sales are the company's returns and allowances. ◆ List the taxes that the company is responsible for paying. ☺ EXTRA CREDIT: Bring in a copy of the company's annual report and list the financial statements contained in the report.

Business, Management and Entrepreneurship Unit
Connecting Activity 5-Level 2
Student Worksheets

Name: _____

Training Station: _____

Course: _____

Due Date: _____

TYPE OF BUDGET	TITLE OF PERSON(S) RESPONSIBLE FOR DETERMINING BUDGET	TITLE OF PERSON(S) RESPONSIBLE FOR MANAGING BUDGET
1.		
2.		
3.		

Impact of budget cut on company.

BUDGET #1 _____

IMPACT _____

BUDGET #2 _____

IMPACT _____

BUDGET #3 _____

IMPACT _____

List 10 variable operating expenses in your training station.

- | | |
|----------|-----------|
| 1. _____ | 6. _____ |
| 2. _____ | 7. _____ |
| 3. _____ | 8. _____ |
| 4. _____ | 9. _____ |
| 5. _____ | 10. _____ |

List 4 fixed operating expenses in your training station.

- | | |
|----------|----------|
| 1. _____ | 3. _____ |
| 2. _____ | 4. _____ |

What percentage of gross sales are returns and allowances? _____

List the taxes that your company is responsible for paying. _____

☺ EXTRA CREDIT: Attach a copy of your company's annual report.

Which financial statements are contained in this report?

_____	_____
_____	_____

**Business, Management and Entrepreneurship Unit
Connecting Activity 5-Level 2
Evaluation Form**

NAME _____

Points Possible	Points Earned	Activity	Points Possible	Points Earned	Activity	Points Possible	Points Earned	Activity	<u>TOTAL</u>
3	_____	Budget #1	3	_____	Determining	3	_____	Managing	
3	_____	Budget #2	3	_____	Determining	3	_____	Managing	
3	_____	Budget #3	3	_____	Determining	3	_____	Managing	_____

Impact of budget cuts on business operations

Points Possible	Points Earned	Activity	
10	_____	Budget #1	
10	_____	Budget #2	
10	_____	Budget #3	_____

Points Possible	Points Earned	Activity	
20	_____	Variable Expenses (2 points each)	
8	_____	Fixed Expenses (2 points each)	
7	_____	Returns and allowances percentage	
8	_____	Taxes paid by company	_____

TOTAL POINTS EARNED _____

EXTRA CREDIT (Annual report – 4 points, List – 4 points) _____

LESS: Penalty for late work (10 points per day) Date Submitted _____

FINAL GRADE _____

Economics Unit
Connecting Activity 1-Level 1
Student Activity Summary Sheet

Due Date: _____

Marketing Competency	Assignment
Apply basic economic principles	Choose 5 products sold by your training station. <ul style="list-style-type: none"> ◆ Determine whether each product has relatively elastic or inelastic demand. ◆ Explain the factors (as discussed in class) that affect the elasticity of demand for each product.
Apply basic economic principles	<ul style="list-style-type: none"> ◆ Explain how your training station provides time utility, place utility, and possession utility for its customers. ◆ Give specific examples to justify your answers.
Apply basic economic principles	<ul style="list-style-type: none"> ◆ List your training station's 3 major competitors relative to its location. Be specific and explain why they are considered a major competitor. ◆ Describe the use of price and non-price competition by your training station. Give specific examples.
Apply basic economic principles	<ul style="list-style-type: none"> ◆ Make a list of at least 5 examples of government involvement at your place of business. ◆ Write an explanation beside each example explaining why the government might feel the need to be involved in this situation.

Economics Unit
Connecting Activity 1-Level 1
Student Worksheets

Name: _____

Training Station: _____

Course: _____

Due Date: _____

SUPPLY AND DEMAND

PRODUCT	ELASTIC / INELASTIC	FACTORS
1.		
2.		
3.		
4.		
5.		

UTILITY

TYPE	EXPLANATION	EXAMPLES
Time		
Place		
Possession		

MAJOR COMPETITORS

MAJOR COMPETITOR	EXPLANATION
1.	
2.	
3.	

PRICE COMPETITION

NON-PRICE COMPETITION

GOVERNMENT INVOLVEMENT

EXAMPLE	EXPLANATION
1.	
2.	
3.	
4.	
5.	

**Economics Unit
Connecting Activity 1-Level 1
Evaluation Form**

NAME _____

SUPPLY AND DEMAND

Product #	Elastic/Inelastic Classification		Factors Affecting Elasticity		TOTAL
	Points Possible	Points Earned	Points Possible	Points Earned	
1.	3	_____	2	_____	_____
2.	3	_____	2	_____	
3.	3	_____	2	_____	
4.	3	_____	2	_____	
5.	3	_____	2	_____	

UTILITY

Type	Explanation		Examples		TOTAL
	Points Possible	Points Earned	Points Possible	Points Earned	
Time	4	_____	2	_____	_____
Place	4	_____	2	_____	
Possession	4	_____	2	_____	

MAJOR COMPETITORS

Competitor #	Points Possible	Points Earned	Activity	TOTAL
1.	6	_____	Explanation	
2.	6	_____	Explanation	
3.	6	_____	Explanation	

PRICE COMPETITION

Points Possible: 4

NON-PRICE COMPETITION

Points Possible: 5

GOVERNMENT INVOLVEMENT

Example #	Points Possible	Points Earned	Activity	TOTAL
1.	6	_____	Explanation	
2.	6	_____	Explanation	
3.	6	_____	Explanation	
4.	6	_____	Explanation	
5.	6	_____	Explanation	

TOTAL POINTS EARNED

LESS: Penalty for late work (10 points per day) Date Submitted _____

FINAL GRADE

Selling Unit
Connecting Activity 1-Level 1
Student Activity Summary Sheet

Due Date: _____

All Selling connecting activities should be placed behind this page.

Marketing Competency	Assignment
Explain the nature and scope of selling	<ul style="list-style-type: none"> ◆ Identify the positions in your training station that require selling skills. ◆ Explain briefly how each position uses selling skills.
Use selling process/techniques	Choose 5 different products offered at your training station. <ul style="list-style-type: none"> ◆ For each product, identify the rational and emotional buying motives that may stimulate customers to buy that product.
Develop customer relationships (from Marketing Technology ITAC Unit 2)	<ul style="list-style-type: none"> ◆ Explain a situation in which you had to handle a difficult customer. ◆ Analyze your actions and whether you could have handled the situation in a more productive and positive manner. ◆ Explain the effects of your actions on the business.
Use selling process/techniques	Choose 3 products offered at your training station. <ul style="list-style-type: none"> ◆ For each product list 3 features and their related benefit(s) to the customer.
Use selling process/techniques	<ul style="list-style-type: none"> ◆ Determine which of the following special transactions are offered to customers at your training station: Layaway, Refunds/Exchanges, Coupons, and Gift Certificates. Explain the company's policy with regard to each type of transaction.

- I. POSITIONS REQUIRING SELLING SKILLS
- II. BUYING MOTIVES
- III. DIFFICULT CUSTOMER SITUATION
 - A. Description of situation
 - B. Analysis of situation
 - C. Effect on company
- IV. FEATURE/BENEFIT CHARTS
- V. SPECIAL TRANSACTIONS

Selling Unit
Connecting Activity 1-Level 1
Student Worksheet

Name: _____

Training Station: _____

Course: _____

Due Date: _____

POSITIONS REQUIRING SELLING SKILLS

Position/Explanation _____

Position/Explanation _____

Position/Explanation _____

BUYING MOTIVES

PRODUCT	RATIONAL MOTIVES	EMOTIONAL MOTIVES
1.		
2.		
3.		
4.		
5.		

DIFFICULT CUSTOMER SITUATION

Description of Situation _____

Analysis of Your Actions _____

Effect on Company _____

FEATURE/BENEFIT CHART

PRODUCT	FEATURE	BENEFIT
#1	1.	1.
	2.	2.
	3.	3.
#2	1.	1.
	2.	2.
	3.	3.
#3	1.	1.
	2.	2.
	3.	3.

SPECIAL TRANSACTIONS

TRANSACTION	YES	NO	EXPLANATION
Layaway			
Refunds/Exchanges			
Coupons			
Gift Certificates			

Selling Unit Connecting Activity 1-Level 1 Evaluation Form

NAME _____

TOTAL

POSITIONS REQUIRING SELLING SKILLS **Points Possible: 10** _____

BUYING MOTIVES

Product #	Rational Motives		Emotional Motives		<u>TOTAL</u>
	Points Possible	Points Earned	Points Possible	Points Earned	
1.	2	_____	2	_____	
2.	2	_____	2	_____	
3.	2	_____	2	_____	
4.	2	_____	2	_____	
5.	2	_____	2	_____	

DIFFICULT CUSTOMER SITUATION

Points Possible	Points Earned	Activity	<u>TOTAL</u>
8	_____	Description of situation	
8	_____	Analysis of situation	
8	_____	Effect of company	

FEATURE/BENEFIT CHART

Product #	Features		Benefits		<u>TOTAL</u>
	Points Possible	Points Earned	Points Possible	Points Earned	
1.	6	_____	6	_____	
2.	6	_____	6	_____	
3.	6	_____	6	_____	

SPECIAL TRANSACTIONS

Transaction Type	Points Possible	Points Earned	<u>TOTAL</u>
Layaway	2.5	_____	
Refunds/Exchanges	2.5	_____	
Coupons	2.5	_____	
Gift Certificates	2.5	_____	

100 **TOTAL POINTS EARNED** _____

LESS: Penalty for late work (10 points per day) Date Submitted _____

FINAL GRADE _____

Promotion Unit
Connecting Activity 1-Level 1
Student Activity Summary Sheet

Due Date: _____

Marketing Competency	Assignment
Use advertising	Explain how your company uses advertising. ♦ Collect 2 examples of print advertising by the company. ♦ In what publication did each ad appear? ♦ Who develops the print ads for your company? ♦ Does your company use broadcast advertising? What type? ☞ If so, complete the Broadcast Ad form.
Develop sales promotions	♦ Who plans and organizes the sales promotion activities? ♦ List the sales promotion activities used by your training station.
Use publicity/public relations	♦ Explain how your training station uses publicity. ♦ Bring in an example of a news release or article and explain whether the publicity was positive or negative.
Use publicity/public relations	♦ Explain the employee relations activities sponsored by your company. ♦ Explain the community relations activities in which your company is involved. ♦ Who determines in which community activities the company participates?

- I. **ADVERTISING**
 - A. 2 print ads
 - B. Developer of ads
 - C. Broadcast ad use – complete form if necessary

- II. **SALES PROMOTION**
 - A. Person responsible for sales promotion
 - B. List of sales promotion activities

- III. **PUBLICITY**
 - A. Explanation
 - B. Example of news release or article
 - C. Explanation of news release or article

- IV. **PUBLIC RELATIONS**
 - A. Employee relations activities
 - B. Community relations activities
 - C. Person responsible for community relations

You must obtain your supervisor's signature on this assignment.

Promotion Unit
Connecting Activity 1-Level 1
Student Worksheets

Name: _____

Training Station: _____

Course: _____

Due Date: _____

ADVERTISING

Attach two (2) print advertisements

In what publication did each ad appear?

Ad #1 _____

Ad #2 _____

Who develops the print advertising for your company? _____

Does your company use broadcast advertising?

No _____

Yes _____ What kind? _____ (Complete Broadcast Ad form)

SALES PROMOTION

Who develops the sales promotion activities for your company? _____

List sales promotion activities used by your training station.

1. _____

2. _____

3. _____

PUBLICITY

How does your training station use publicity? _____

Attach example of a news release or article.

Explain whether the news release or article was positive or negative. _____

PUBLIC RELATIONS

Explain the employee relations activities sponsored by your company. _____

Explain the community relations activities sponsored by your company. _____

Who determines the activities of the community in which the company sponsors/participates?

Company Representative Name (printed) _____

Company Representative Signature _____

Company Representative Title _____

Due Date: _____

CHOOSE ONE BROADCAST ADVERTISEMENT TO ANALYZE. COMPLETE THE FORM BASED ON THE CHOSEN AD.

GENERAL CONTENT OF AD _____

TYPE OF MEDIA _____ Radio _____ Television

STATION CALL LETTERS _____
(Include all applicable stations)

TARGET MARKET OF AD _____

FREQUENCY OF AD ON EACH STATION

STATION	FREQUENCY	TIME SLOTS

PURPOSE OF AD _____

Promotion Unit Connecting Activity 1-Level 1 Evaluation Form

NAME _____

93-100 The four types of promotion are addressed. The types of promotion used by the training station are described in detail. Examples are thoroughly described, categorized and several printed samples are attached when applicable. Employee relations activities are described in detail and examples are given. Information is accurate for the individual training station as evidenced by a manager’s signature. The details, analysis, and explanations provide evidence that the student possesses a complete understanding of the role of promotion in the training station’s marketing strategy. The assignment is neat and virtually free of errors in spelling, punctuation, and grammar.

85-92 The four types of promotion are addressed. The types of promotion used by the training station are described in some detail. Examples are given, categorized, and some printed samples are attached when applicable. Employee relations activities are described; examples may or may not be given. The majority of the information is accurate for the individual training station, and someone from the business has signed the assignment. The details, analysis, and explanations provide evidence that the student possesses an adequate understanding of the role of promotion in the training station’s marketing strategy. The assignment is neat and contains few, if any, errors in spelling, punctuation, and grammar.

77-84 The four types of promotion may or may not be addressed. The types of promotion used by the training station are mentioned, though detail may be absent. Examples may be included, although they may or may not be categorized. At least one printed sample is attached when applicable. Employee relations activities are mentioned; examples may or may not be given. Most of the information is accurate for the individual training station, though it may contain some inconsistencies. Someone from the business has signed the assignment. The details, analysis, and explanations provide evidence that the student possesses some understanding of the role of promotion in the training station’s marketing strategy, though inconsistencies may be present. The assignment may lack neatness and contain errors in spelling, punctuation, and grammar.

70-76 The four types of promotion may or may not be addressed. The types of promotion used by the training station are mentioned, though detail is absent. Few, if any, examples are to be included, and may or may not be categorized. At least one printed sample is attached when applicable. Employee relations activities are mentioned; examples may or may not be given. Most of the information is accurate for the individual training station, though it may contain some inconsistencies. Someone from the business has signed the assignment. The details, analysis, and explanations provide evidence that the student possesses some understanding of the role of promotion in the training station’s marketing strategy, though inconsistencies may be present. The assignment may lack neatness and contain many errors in spelling, punctuation, and grammar.

Below 70 Assignment is unacceptable.

_____ **TOTAL POINTS EARNED**
 _____ **LESS: Penalty for late work (10 points per day) Date Submitted** _____
 _____ **FINAL GRADE**

COMMENTS _____

Promotion Unit
Connecting Activity 2-Level 2
Student Activity Summary Sheet

Due Date: _____

Competency	Assignment
Manage promotion	<ul style="list-style-type: none"> ◆ Interview your manager about your company's current promotion activities. Use the Promotion Interview form. ◆ Develop a two-week promotion plan for an upcoming event at your training station.
Manage promotion	<ul style="list-style-type: none"> ◆ Calculate the cost of your two-week promotion plan. ◆ List sources, date obtained, and contact's name and phone number.

You must obtain your supervisor's signature on this assignment.

Promotion Unit
Connecting Activity 2-Level 2
Student Worksheets

Name: _____

Training Station: _____

Course: _____

Due Date: _____

PROMOTION ACTIVITIES INTERVIEW FORM

Person Interviewed: _____

Title: _____

Signature of Interviewee: _____

Date of Interview: _____

Which of the following promotional tools does the company use?

Promotional Tool	Yes	No	Explanations and Examples
Brochures			
Contests			
Coupons			
Direct Mail			
Flyers			
Internet			
Magazines			
Newspapers			
Outdoor			
Public Relations			
Radio			
Specialty Advertising			
Telemarketing			
Television			
Transit			
Yellow Pages			
Other (specify)			
Other (specify)			

Which promotional activities do you think are most effective and why? _____

Who is responsible for planning and coordinating the promotional activities at this location? _____

Who develops the company's promotional tools, such as print ads and radio or TV spots? _____

What does the company promote on a regular basis, for example, image, quality, prices, sales, special events, etc.? _____

How does the company evaluate the effectiveness of its promotional activities? _____

Name: _____

Training Station: _____

Due Date: _____

DEVELOP A PROMOTIONAL PLAN FOR AN UPCOMING EVENT AT YOUR TRAINING STATION.

I. DESCRIPTION OF THE BUSINESS (Including location, image and target market) _____

II. OBJECTIVES OF PROMOTIONAL CAMPAIGN _____

**Promotion Unit
Connecting Activity 2-Level 2
Evaluation Form**

NAME _____

PROMOTION ACTIVITIES INTERVIEW

Use of promotional tools – 1 point each, 17 points possible

TOTAL

Promotional Tool	Points Earned	Promotional Tool	Points Earned	Promotional Tool	Points Earned
Brochure		Magazines		Telemarketing	
Contests		Newspapers		Television	
Coupons		Outdoor		Transit	
Direct Mail		Public Relations		Yellow Pages	
Flyers		Radio		Other	
Internet		Specialty Advertising			

Points Possible	Points Earned	Question
3	_____	Which activities are most effective and why?
2	_____	Who is responsible for planning and coordinating promotions?
2	_____	Who develops company's promotional tools?
3	_____	What does the company promote on a regular basis?
3	_____	How does the company evaluate effectiveness of promotions?

PROMOTION PLAN

Points Possible	Points Earned	Section of Plan	Points Possible	Points Earned	Section of Plan
5	_____	Description of business	6	_____	Display
8	_____	Objectives of campaign	4	_____	Publicity
6	_____	Special events	5	_____	Responsibilities
6	_____	Advertising	10	_____	Benefits

COMPARE COSTS OF VARIOUS PROMOTIONAL MEDIA

Points Possible	Points Earned	Section of Plan	Points Possible	Points Earned	Section of Plan
4	_____	All activities from plan are listed	4	_____	Sources identified
4	_____	Costs are calculated	4	_____	Date, name, phone number listed
4	_____	Costs are accurate			

Date Submitted _____

TOTAL POINTS EARNED _____

FINAL GRADE _____

LESS: Penalty for late work (10 points per day) _____

Distribution Unit Connecting Activity 1-Level 1 Student Activity Summary Sheet

Due Date: _____

Marketing Competency	Assignment
Explain the nature and scope of distribution	<ul style="list-style-type: none"> ◆ Describe the channel of distribution for your company. ◆ Draw the channel of distribution.
Explain warehousing/stock handling	<ul style="list-style-type: none"> ◆ Describe where products are stored prior to sale and explain why this method of storage is necessary. (Example: Private warehouse, distribution center, etc.)
Explain warehousing/stock handling	<ul style="list-style-type: none"> ◆ Describe how merchandise is received and checked at your work site.
Explain warehousing/stock handling	<ul style="list-style-type: none"> ◆ Describe how stock is marked at your training station.

I. CHANNEL OF DISTRIBUTION

- A. Describe
- B. Draw

II. STORING CONSIDERATIONS

- A. Location(s) of storage
- B. Justification of storage decisions

III. INVENTORY CONTROL PROCESS

- A. Description of receiving process
- B. Description of marking methods

Distribution Unit
Connecting Activity 1-Level 1
Student Worksheets

Name _____

Training Station _____

Course _____

Due Date _____

CHANNEL OF DISTRIBUTION

Describe the channel of distribution for your company _____

Draw your company's channel of distribution below.

STORING CONSIDERATIONS

Where are your company's products stored prior to sale? _____

Why is this an appropriate method of storage for your company? _____

INVENTORY CONTROL PROCESS

Who is responsible for verifying the quantity and condition of merchandise received by your company? _____

Which method is used by your company to check merchandise received?

Blind check _____ Direct check _____ Dummy invoice check _____

Spot check _____ Other (explain) _____

Which method(s) of marking stock does your company use?

UPCs _____ Source marking _____ Preretailing marking _____

Other (explain) _____

Distribution Unit Connecting Activity 1-Level 1 Evaluation Form
--

NAME _____

Points will be earned based on the following:

- Thorough description of the issue at your training station*
- Accuracy of the information*
- Use and application of correct terminology relating to distribution*
- Neatness*
- Correct grammar, punctuation, and spelling*

CHANNEL OF DISTRIBUTION

Points Possible	Points Earned	Activity
-----------------	---------------	----------

- | | | |
|----|-------|--|
| 20 | _____ | Describe your training station's channel of distribution. |
| 20 | _____ | Draw the channel(s) of distribution for your training station. |

STORING CONSIDERATIONS

Points Possible	Points Earned	Activity
-----------------	---------------	----------

- | | | |
|----|-------|--|
| 10 | _____ | Describe the location of your training station's storage facilities. |
| 20 | _____ | Justify the storage decisions made for your training station. |

INVENTORY CONTROL PROCESS

Points Possible	Points Earned	Activity
-----------------	---------------	----------

- | | | |
|----|-------|--|
| 15 | _____ | Describe your training station's receiving process. |
| 15 | _____ | Describe your training station's methods of marking stock. |

100	_____	TOTAL POINTS EARNED
	_____	LESS: Penalty for late work (10 points per day) Date Submitted _____
	_____	FINAL GRADE

Product/Service Management Unit
Connecting Activity 1-Level 2
Student Activity Summary Sheet

Due Date: _____

Competency	Assignment
Determine the product/service mix.	<ul style="list-style-type: none"> ◆ Determine the number of product lines carried by your training station. ◆ Identify five (5) of the product lines carried and analyze the depth of each line. <ul style="list-style-type: none"> ☞ List the products in each line. ☞ Explain why the company has chosen this type of product mix.
Explain the nature and scope of product/service management	<ul style="list-style-type: none"> ◆ Identify one (1) product sold by your training station that is in each of the product life cycle stages below. <ul style="list-style-type: none"> ☞ Introductory or growth stage ☞ Maturity stage ☞ Decline stage ◆ Explain why you classified each product in that stage.
Determine product/service mix and Explain positioning and branding	<ul style="list-style-type: none"> ◆ Choose one competitor with a product/service mix strategy that differs from that of your training station. ◆ Compare your training station with the competitor with regard to: <ul style="list-style-type: none"> ☞ Target market ☞ Business image ☞ Number of product lines ☞ Depth of product lines ◆ Explain how both companies can be successful with similar products and different product strategies.

**Product/Service Management Unit
Connecting Activity 1-Level 2
Student Worksheets**

Name: _____

Training Station: _____

Course: _____

Due Date: _____

DESCRIBE THE PRODUCT MIX

How many product lines are carried by your training station? 1 – 10 ____ 11 – 30 ____ 31+ ____

Identify five (5) product lines carried by your training station and list the products in each line.

PRODUCT LINE	PRODUCTS IN LINE
1.	
2.	
3.	
4.	
5.	

Why has the company chosen this product mix to offer to its customers? Address the issues of business image and target market. _____

IDENTIFY STAGES OF THE PRODUCT LIFE CYCLE

Product in Introductory or Growth stage: _____

Explanation: _____

Product in Maturity stage: _____

Explanation: _____

Product in Decline stage: _____

Explanation: _____

ANALYZE MANAGEMENT STRATEGIES FOR PRODUCTS/SERVICES

Competitor Name: _____

Comparisons between competitor and training station with regard to:

Target Market: _____

Business Image: _____

Number of Product Lines: _____

Depth of Product Lines: _____

Explanation of success: _____

**Product/Service Management Unit
Connecting Activity 1-Level 2
Evaluation Form**

NAME _____

Points Possible	Points Earned	Activity
<i>DESCRIBE THE PRODUCT MIX</i>		
4	_____	Number of product lines carried
10	_____	Five product lines identified
20	_____	Products in each line listed
8	_____	Explanation of product mix
<i>IDENTIFY STAGES OF THE PRODUCT LIFE CYCLE</i>		
3	_____	Product in introductory or growth stage
6	_____	Explanation of product in introductory or growth stage
3	_____	Product in maturity stage
6	_____	Explanation of product in maturity stage
3	_____	Product in decline stage
6	_____	Explanation of product in decline stage
<i>ANALYZE PRODUCT/SERVICE MANAGEMENT STRATEGIES</i>		
3	_____	Competitor identified
5	_____	Comparison of target market
5	_____	Comparison of business image
5	_____	Comparison of number of product lines
5	_____	Comparison of depth of product lines
8	_____	Explanation of success
100	_____	TOTAL POINTS EARNED
	_____	LESS: Penalty for late work (10 points per day) Date Submitted _____
	_____	FINAL GRADE

Pricing Unit
Connecting Activity 1-Level 2
Student Activity Summary Sheet

Due Date: _____

Competency	Assignment
Determine prices	<ul style="list-style-type: none"> ◆ Identify which of the following pricing techniques are used at your training station and give examples. <ul style="list-style-type: none"> ☞ Promotional Pricing ☞ Prestige Pricing ☞ Odd/Even Pricing ☞ Price Lining ☞ Loss Leaders ◆ Explain why your company's pricing is consistent with its target market and business image. ◆ Choose three (3) products/services offered by your company. <ul style="list-style-type: none"> ☞ Record the price of each product/service. ☞ Visit another location owned by your company and record the price of the three products at that location. (If another location is not available, then visit a competitor in its place.) ☞ Visit a competitor that offers the same three products/services and record their prices. ◆ Analyze the reasons for the price similarities and/or differences.

**Pricing Unit
Connecting Activity 1-Level 2
Student Worksheets**

Name: _____

Training Station: _____

Course: _____

Due Date: _____

PRICING TECHNIQUES

TECHNIQUE	YES	NO	EXAMPLES
Promotional Pricing			
Prestige Pricing			
Odd/Even Pricing			
Price Lining			
Loss Leaders			

Explain why your company's pricing is consistent with its target market and business image. _____

**Pricing Unit
Connecting Activity 1-Level 2
Evaluation Form**

NAME _____

PRICING TECHNIQUES

Technique	Points Possible	Points Earned	<u>TOTAL</u>
Promotional Pricing	6	_____	
Prestige Pricing	6	_____	
Odd/Even Pricing	6	_____	
Price Lining	6	_____	
Loss Leaders	6	_____	_____

Points Possible	Points Earned	Activity	<u>TOTAL</u>
15	_____	Explanation of consistency	_____

PRICE COMPARISON and ANALYSIS

Product #	Company #1 Price		Company #2 Price		Company #3 Price		<u>TOTAL</u>
	Points Possible	Points Earned	Points Possible	Points Earned	Points Possible	Points Earned	
1	3	_____	3	_____	3	_____	
2	3	_____	3	_____	3	_____	
3	3	_____	3	_____	3	_____	_____

Points Possible	Points Earned	Activity	<u>TOTAL</u>
28	_____	Analysis of reasons for similarities/differences	_____

100	TOTAL POINTS EARNED	_____
	LESS: Penalty for late work (10 points per day) Date Submitted ,	_____
	FINAL GRADE	_____

Marketing Information Management Unit
Connecting Activity 1-Level 2
Student Activity Summary Sheet

Due Date: _____

Competency	Assignment
Conduct information gathering	<ul style="list-style-type: none"> ◆ Identify the internal records generated by the company that may be used in making marketing decisions. ◆ Identify the person in your company responsible for managing the information for making decisions.
Conduct information gathering	<ul style="list-style-type: none"> ◆ Develop a research plan which addresses an issue, problem, or potential improvement at your training station. ◆ Present your plan to your manager for feedback on the appropriate form.
Use marketing planning	<p>Investigate marketing techniques used by your training station.</p> <ul style="list-style-type: none"> ◆ Summarize the demographic, psychographic, geographic, and behavioral characteristics of its typical customer. ◆ Summarize how product, price, promotion, and place are used to attract that market.

Marketing Information Management Unit
Connecting Activity 1-Level 2
Student Worksheets

Name: _____

Training Station: _____

Course: _____

Due Date: _____

TYPES OF INFORMATION

Identify the internal records generated by your company that may be used in making marketing decisions. _____

Who in your company is responsible for managing the information obtained and for making marketing decisions?

Give some examples of how the company uses the data gathered through its marketing information system. _____

MARKETING RESEARCH PLAN

NAME _____

Directions: You are to decide on an issue, problem, or potential improvement that is of interest to your training station. Then, develop a research plan for gathering and reporting information relative to the issue chosen. Complete the following form and have it evaluated by your manager using the Manager Feedback form.

Introductory Information

Name of the business is [2 points] _____

Brief description of business [3 points] _____

Description and justification of research topic [10 points] _____

Sources of Research Information

List appropriate primary sources of information [2 points]

List appropriate secondary/internal sources of information [2 points]

Plan for Gathering Information

Method(s) for gathering information from primary sources [3 points]

Method(s) for gathering information from secondary sources [3 points]

Questions, research instrument, or questionnaire to be used in gathering information (attach to this form) [35 points total]

- Sufficient number of questions [5 points]
- Relevant questions [5 points]
- Questions specific and not open to various interpretations [5 points]
- Questions not leading or biased [5 points]
- Questions in logical order [5 points]
- Correct grammar/spelling [5 points]
- Appropriate demographic information requested [5 points]

EMPLOYER FEEDBACK FORM

Employer Feedback Form

PLEASE EVALUATE YOUR EMPLOYEE'S RESEARCH PLAN USING THE SCALE BELOW.

ITEM	RATING			
-------------	---------------	--	--	--

- | | | | | |
|--|-----------|------|------|------|
| <input checked="" type="checkbox"/> The issue or topic chosen is relevant for the business | Excellent | Good | Fair | Poor |
| <input checked="" type="checkbox"/> The research plan is workable in the business | Excellent | Good | Fair | Poor |

Please evaluate the questions asked

- | | | | | |
|---|-----------|------|------|------|
| <input checked="" type="checkbox"/> Questions are relevant to the topic and business | Excellent | Good | Fair | Poor |
| <input checked="" type="checkbox"/> Questions are specific and not open to interpretation | Excellent | Good | Fair | Poor |
| <input checked="" type="checkbox"/> Questions are in a logical order | Excellent | Good | Fair | Poor |
| <input checked="" type="checkbox"/> Appropriate demographic information is requested | Excellent | Good | Fair | Poor |

Please make comments below. Thank you for your time!

Name _____
Please Print

Signature _____

Title _____

Date _____

Customer Research

Name: _____

Training Station: _____

Course: _____

Due Date: _____

I. CUSTOMER CHARACTERISTICS

A. Demographic Characteristics _____

B. Psychographic Characteristics _____

C. Geographic Characteristics _____

D. Behavioral Characteristics _____

II. MARKETING STRATEGIES USED

A. Product Decisions _____

B. Price Decisions _____

C. Promotion Decisions _____

D. Place Decisions _____

**Marketing Information Management Unit
Connecting Activity 1-Level 2
Evaluation Form #1**

NAME _____

TYPES OF INFORMATION USED TO MAKE MARKETING DECISIONS

Points Possible	Points Earned	Activity	<u>TOTAL</u>
5	_____	Identify internal records used	
5	_____	Identify person responsible for managing information	

MARKETING RESEARCH PLAN

ACTIVITY	POINT VALUE	POINTS EARNED	COMMENTS
Name of Business	2		
Description of Business	3		
Description of Research Topic	5		
Primary Sources Described	2		
Secondary Sources Described	2		
Method(s) of Gathering Information from Primary Sources	3		
Method(s) of Gathering Information from Secondary Sources	3		
Questions for Survey	(35)		
• Sufficient # of Questions	5		
• Relevant Questions	5		
• Specific & Not Open to Interpretation	5		
• Questions Not Leading or Biased	5		
• Questions in Logical Order	5		
• Correct Grammar/Spelling	5		
• Appropriate Demographic Information	5		
Plan for Gathering Information	10		
Plan for Reporting Information	10		
Employer Feedback Form	15		
TOTAL POINTS EARNED	90		

TOTAL POINTS EARNED _____

LESS: Penalty for late work (10 points per day) Date Submitted _____

FINAL GRADE _____

**Marketing Information Management Unit
Connecting Activity 1-Level 1
Evaluation Form #2**

NAME _____

Points Possible	Points Earned	Activity

CUSTOMER CHARACTERISTICS

10	_____	Demographic Characteristics
10	_____	Psychographic Characteristics
10	_____	Geographic Characteristics
10	_____	Behavioral Characteristics

MARKETING STRATEGIES USED

15	_____	Product Strategies
15	_____	Price Strategies
15	_____	Promotion Strategies
15	_____	Place Strategies

100 Total Points _____

RESOURCES

Everard, Kenneth E. and Burrow, James L., Business Principles and Management, Southwestern Educational Publishing, Cincinnati, OH, 1996.

Farese, Lois S., Kimbrell, Grady, and Woloszyk, Carl A., Marketing Essentials, Glencoe/McGraw-Hill Publishing Company, Lake Forest, IL., 1997.

Kotler, Philip and Armstrong, Gary, Marketing: An Introduction, Prentice Hall, Inc., Upper Saddle River, NJ, 1997.

Meyer, Earl C. and Allen, Kathleen R., Entrepreneurship and Small Business Management, Glencoe/McGraw-Hill Publishing Company, Lake Forest, IL.. 1994.

If you would like a Microsoft Word copy of this document, please e-mail dee.sturgill@ode.state.oh.us.