Career and Technical Education Partnership of New Jersey
Model Program of Study Curriculum Document for the career cluster of MARKETING

Career and Technical Education Partnership of New Jersey

Marketing Career Cluster

Course Sequence 1: Principles of Marketing

Curriculum Exemplar
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Unit I: Foundations of Marketing 4 weeks
Unit II: Marketing and Society 4 weeks
Unit III: Selling 4 weeks
Unit IV: Promotion 4 weeks
Unit V: Distribution 4 weeks
Unit VI: Pricing Strategies 4 weeks
Unit VII: Brand, Product, and Service Marketing 4 weeks
Unit VIII: Market Research 4 weeks
Unit IX: Careers in Marketing 3 weeks

Course Philosophy

Principles of Marketing is the 1st in a sequence of 3 classes designed as a Program of Study within the scope and guidelines of New Jersey Career and Technical Education. The course and program are consistent with a vision to prepare students to succeed as global citizens and for career opportunities of the 21st century and to support healthy economic growth within the State.

This class is focused on providing students with a foundation in basic marketing principles which will serve as a foundation for more advanced learning as the program builds towards culmination. The course curriculum inculcates UbD principles as well as Problem Based Learning assignments in each unit providing rigorous and relevant laboratory experiences designed to foment transferrable skills to real life situations. At completion of the course sequence students will have demonstrated mastery of an introductory University Course in marketing.
# Unit Overview

**Content Area:** Principles of Marketing  
**Unit Title:** I. Foundations of Marketing  

**Target Course/Grade Level:** Grades 9 - 12

**Unit Summary**  
The fundamental principles of marketing are summed up by the “Four P’s”: product, price, place, and promotion. These categories represent means of clarifying ways of providing utility to consumers in the effort to satisfy their needs and wants while pursuing a profit motive.

**Primary interdisciplinary connections:** Language arts: written communications. Psychology. Business Ethics.  
**21st century themes:** Financial, economic, business, and entrepreneurial literacy.

**Unit Rationale:** Students will benefit from understanding the importance of marketing in contemporary society

## Learning Targets

**New Jersey Core Content Standards: 9.4 Career and Technical Education**

**Content Statements**  
- **Communication Skills:** All clusters rely on effective oral and written communication strategies for creating, expressing, and interpreting information and ideas that incorporate technical terminology and information.

<table>
<thead>
<tr>
<th>CPI #</th>
<th>Cumulative Progress Indicator (CPI)</th>
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<tbody>
<tr>
<td>9.4.12.N.(1).1</td>
<td>Evaluate and summarize the concepts, strategies, and systems used to obtain and convey ideas and information in this pathway.</td>
</tr>
<tr>
<td>9.4.12.N.(1).2</td>
<td>Research the concepts and strategies marketers use to communicate information about products, services, images, and/or ideas to achieve desired outcomes.</td>
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**Standards 9.4 Career and Technical Education**  
All students who complete a career and technical education program will acquire academic and technical skills for careers in emerging and established professions that lead to technical skill proficiency, credentials, certificates, licenses, and/or degrees.

**Content Statements:**  
- **Problem-Solving and Critical Thinking:** Critical and creative thinking strategies facilitate innovation and problem-solving independently and in teams.
CPI # | Cumulative Progress Indicator (CPI)
--- | ---
9.4.12.N.(2).3 | Facilitate decision-making by evaluating and selecting tools, strategies, and systems used in this industry to access, process, maintain, evaluate, and disseminate information

Industry Standards
- Standard D: Practical Business Skills
- Standard E: Career Awareness and Acquisition
- Standard C: Computer/Technology Applications

Unit Essential Questions
- How can comprehension and implementation of marketing concepts provide success in the business world?

Unit Enduring Understandings
- Marketing is an art and a science. Marketing-related careers employ over 10% of American workers and can influence one's life in myriad ways.
- The 4 P’s of marketing, an essential industry standard, (product, price, place, promotion), are a fundamental underpinning of all marketing processes

Unit Learning Targets
*Students will understand that*...
- The 4 P’s of marketing are fundamental to effective practice in this discipline.
- Marketing is defined as the process of planning and executing the conception, pricing, promotion, and distribution of ideas, goods, and services to create exchanges that satisfy individual and organizational objectives.
- Marketing is an active process that requires developing, adapting, and applying a variety of skills and strategies to construct meaning from increasingly challenging and practical problems that deal with relevant issues that promote career development and intellectual growth.
- The marketing concept is a focus on customers' needs and wants while generating a profit.
- Consumers react differently to products perceived as needs versus wants.
- Three benefits of marketing are new and improved products, lower prices, and added value (utility).
- A marketing plan is a written document that directs the marketing activities of a company for a specific period of time.
- Marketing is a complex field of study aimed at assessing changing consumer needs and wants and profitably developing products and services that satisfy these needs and wants while adhering to environmental and ethical standards.
- Market segmentation classifies people in a given market into smaller groups. Four methods of segmenting a market are demographics, geographics, psychographics, and buying behavior.
A target market is identified by four factors: demographics, geographics, psychographics, and behavior.

### Evidence of Learning

- **Summative Assessment**: End of unit written exam. (See Appendix C for example)
- **PBL assignment**: Students will follow directions in a teacher-developed case regarding a new type of teen-oriented apparel (or comparable). Students will use the 4 P’s in developing a simple marketing plan.

### Equipment needed:
Computer, Smartboard or ELMO

### Teacher Resources:
Internet, Textbook, [www.deca.org](http://www.deca.org), [www.knowledge@wharton.org](http://www.knowledge@wharton.org), [www.marketingteacher.com](http://www.marketingteacher.com)

### Formative Assessments

- Daily “do now”/warm-up responses.
- Ability to demonstrate proficiency in key unit concepts in class discussions.
- Student Portfolio of key work products.
- Shared responses to Essential Questions.
- Interim quizzes.
- Written and reading-based homework.

### Lesson Plans

<table>
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<tr>
<th>Lesson Plan Example</th>
<th>Timeframe</th>
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<tr>
<td>Lesson 1: Marketing Mix Assignment (See appendix)</td>
<td>45 mins.</td>
</tr>
<tr>
<td>Lesson 2: Consumer Behavior (See appendix)</td>
<td>45 mins.</td>
</tr>
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### Teacher Notes:

○ **Special Populations**: This unit was developed with consideration of special needs students in mind. Some of the relevant accommodations that can be implemented in this unit include:

- Extended time intervals
- Graphic organizer and study guide provision
- Detailed rubrics
- Assistive technologies
- Seating/testing venue accommodation
- Individualized instruction per IEP

In this unit, an example of application of graphic organizers for special populations could be applied to “The 4 P’s of Marketing” by arranging the components into squares/domains.

### Curriculum Development Resources

- Textbook.
- Internet.
- Contributions from NJ CTE teachers and educational professionals.
- Standards from NJ post-secondary educators.
- Requirements from career and workplace related leaders (NJAMA).
Unit I - Lesson 1

Marketing Mix Project

Overview: The Marketing Mix is a vital concept in marketing and one that forms the core of any marketing plan. In this concluding project lesson, students integrate concepts from all the previous lessons in the module. Students will begin with analyzing the Marketing Mix for any of the products referenced in the Knowledge@Wharton article, and then design a marketing strategy for a related product. Though this lesson is designed as an in-class project, it can also be conducted as a take-home project.

NBEA Standard(s):

- Marketing, IV. The Marketing Mix

Common Core Standard(s):

1. CCR Standard for Reading: Read closely to determine what the text says explicitly and make logical inferences from it.
2. CCR Standards for Listening: Prepare for and participate effectively in a range of conversations and collaborations with diverse partners, building on each other’s ideas and expressing their own clearly and persuasively. Evaluate a speaker’s point of view, reasoning, and use of evidence and rhetoric.
3. CCR Standards for Speaking: Present information, findings and supporting evidence in such a way that listeners can follow the line of reasoning, and the organization, development and style are appropriate to the task, purpose and audience.

Objectives/Purposes: In this lesson, students will: 1) analyze the marketing mix of a product, and 2) design the marketing mix for a product.

Knowledge@Wharton Article: “The Crowded, Caffeinated Soft Drink Sector: Who Will Bubble Up to the Top?”

Other Resources/Materials: Internet access
Activity:

1. The class is randomly divided into small groups and all the students are given copies of the Knowledge@Wharton article. Each group is given a worksheet with the following directions:

   - Analyze the marketing mix of either Gatorade or Red Bull to answer the following question: How are the various elements of the marketing mix designed in order to market the product to its target customer segment(s)?

To help structure your analysis, you may use the help of the following prompt questions. These questions are indicatory and not exhaustive. Please generate additional questions to complete your analysis.

   - Who are the target customers?
   - What value do these customers perceive in this drink?
   - Where is this drink available?
   - How is this place of availability linked to customer convenience, and product image and positioning?
   - What is the price of the drink?
   - How does the price communicate product value and positioning?
   - What advertising and/or sponsorship (promotional) strategies are discussed in the article for this product?

To make this less of an exam and more of an activity, students may be allowed to present their analysis in the form of a concept map or in point form. Though they are not expected to turn in an essay, their analysis is expected to be coherent and self-explanatory. *(10 mins)*

2. As soon as the students finish their analysis, they are given instructions for the next phase of the project. They are asked to design the marketing mix for a product for the beverage market. You may use the information gathered from your analysis to guide your activity. Your presentation is expected to cover the following elements:

   - Target Customers: Who is your target customer?
   - Product: What value does your product provide your customer?
   - Price: How much will your product cost your customer?
   - Place: Where will your product be available?
   - Promotions: How does your customer know about your product?

You are expected to explain your rationale for your decisions clearly and persuasively. The presentation will be oral, and be prepared for questions from your peers! You will have 3 minutes of presentation time, and 15 minutes of preparation time. *(15 mins)*

3. On finishing their design, the groups are called one by one, to present their design. One or more individuals may present the design, and any member of the group may answer during the
Q&A session. Each group will present for 3 minutes and may be asked questions/given feedback for 3 minutes. (15-18 mins)

4. Wrap-up. Students are asked what they learned from this project. Their group processes and the structure of the assignment may also be critiqued.

**Tying It all together:** This lesson is intended to bring together concepts that the class looked at in fragments earlier. The Knowledge@Wharton article provides a fair amount of market data on which to build a new design.

**Practice Outside of the Classroom:** This lesson easily lends itself to an outside the class project. Students could be asked to research the beverage market in greater detail before they design a competing marketing mix. They could visit stores, tap in on their own consumption patterns, search the Internet, and talk to store owners as part of their market research.

**What Worked and What I Would Do Differently:** The teacher should not make this activity seem like a formal exam. It should seem like a fun project, but also one that is engaging and challenging. You may expect the usual tensions that go along with group work, but that is part of the learning this lesson facilitates. However, it is important to discuss these frictions and maybe even relate the final product to the group processes in your feedback to the groups.
Unit I - Lesson 2

Consumer Behavior Project

Overview: According to Hawkins and Mothersbaugh (2007), all marketing decisions are based on assumptions and knowledge of consumer behavior. Understanding the motivations and behaviors of the consumers is a vital aspect of any marketing plan or strategy. In this concluding lesson, students build on concepts from previous lessons to plan, execute and reflect on a project on consumer behavior. For this project, they are asked to prepare and survey their peers in the class for their perceptions and behaviors around a particular product. This is then compared to an analysis of the marketing strategies of this product to arrive at some general observations.

NBEA Standard(s):

- Marketing, I. Foundations of Marketing
- Marketing, II. Consumers and Their Behavior

Common Core Standard(s):

1. CCR Standard for Reading: Read closely to determine what the text says explicitly and make logical inferences from it.
2. CCR Standards for Listening: Prepare for and participate effectively in a range of conversations and collaborations with diverse partners, building on each other’s ideas and expressing their own clearly and persuasively. Evaluate a speaker’s point of view, reasoning, and use of evidence and rhetoric.
3. CCR Standards for Speaking: Present information, findings and supporting evidence in such a way that listeners can follow the line of reasoning, and the organization, development and style are appropriate to the task, purpose and audience.

Objectives/Purposes: Students will analyze the motivations and behaviors of their peers regarding a particular product and compare this analysis with the marketing strategy of the product/brand.

Knowledge@Wharton Articles: The teacher uses articles depending on the product or brand the students choose to analyze in this project. For example, if a group wants to analyze McDonald’s for their understanding of consumer behavior, and the consumer behavior of their peers, you could use the Knowledge@Wharton article: “Food Fight: Obesity Raises Difficult Marketing Questions.”
Activity:

Students are briefed about the project work. *(5 mins)*

Your task is to prepare and implement a survey in class around the following two questions:

I. What is the consumer behavior of my peers regarding a particular product?

II. How far is this understanding reflected in the marketing strategies of the company/brand that offers this product?

Ideally, you should choose a product that is popular with your peer group. You may choose to focus on any of the three aspects of consumer behavior discussed in previous lessons. You are expected to work in pairs and survey at least five students present in class today. You will need to organize and delegate your work in order to complete it within the stipulated time.

The basic concepts that we have discussed in previous lessons are recapitulated here:

**Factors affecting consumer behavior**

- Economic
- Social
- Cultural
- Demographic
- Personal/Psychological
- Marketing (product value, price, place of availability, and promotions including advertising, public relations, sponsorship, etc.)

**The Buying Process**

- Need Recognition
- Information Search
- Evaluation
- Purchase
- Post-Purchase Anxiety

**Customer Segmentation based on Maslow’s Hierarchy of Needs**

- Physiological Needs
- Safety Needs
- Belonging Needs
- Esteem Needs
- Self-Actualization Needs

Preparation *(10 mins)*
1. Choose any one aspect of consumer behavior you want to focus on.
2. Decide on a product/service.
3. Once the group decides on a product or service, the teacher and a member of the group identify articles from the Knowledge@Wharton or Knowledge@Wharton High School sites that can be useful resources.
4. Prepare the survey questions.
5. Analyze the marketing strategy of the company/brand in relation to your question and expected answers.

Hypothesize on your generalizations (e.g. A majority of students in my class purchase BigMac because it is the closest, cheapest and most filling meal available. Their perception of the Big Mac is based on these promotional strategies: … )

Sample survey questions:

I eat out:

Every day

Twice a week

Once a week

Rarely

My options when I eat out, in order of how often I frequent them, are:

1.

2.

3.

4.

I frequent option 1. because of

1. Its pricing

2. It is close by and therefore convenient

3. It is a fast food store

4. I like the food offered
5. Any other

Once you conduct the survey, analyze the answers for the questions you have set out to answer. For the sample questions this could be: a) What percentage of my class frequent McDonald’s, and why? b) How has McDonald’s designed every aspect of the marketing mix in a response to their understanding of consumer behavior?

(For example, the McDonald’s restaurant is very close to my school and is more convenient than any other option.)

- Execution *(10 mins)*
- Analysis *(10 mins)*

Analyze your information, and synthesize to validate or nullify your hypothesis, or to generate new generalizations. For example, 50% of the students surveyed purchase the Big Mac at least once a week. Of these, all report that the place of availability was the most significant factor that influenced their decision to buy the Big Mac. (In which case you have to consider the other options available in the same locality and explain why these are not convenient alternatives.)

- Presentation and Feedback *(10 mins)*

Present the most significant points from your analysis and conclusion. Submit the entire analysis and conclusion.

- Wrap-up

**Tying It All Together:** In this in-class project, students plan and execute an empirical investigation of the consumer behavior of their peers and match this data with their analysis of the marketing strategies of that product/brand.

**Practice Outside of the Classroom:** This project can be conducted more elaborately as a take-home assignment. The survey can be prepared over several days, and even piloted before it is presented to the entire class. This lesson can also be integrated with math lessons in statistics.

**What Worked and What I Would Do Differently:** Depending on the grade level, this project needs to be supported with sufficient resources. The teacher should aid the students as they prepare and execute their survey. Additionally, detailed feedback should be provided for the submissions.
Unit Overview

Content Area: Principles of Marketing

Unit Title: II. Marketing and Society

Target Course/Grade Level: Grades 9 - 12

Unit Summary: Marketing’s role in the economy is reviewed in the context of the general economic principles that affect consumer behavior and marketplaces. The factors of production, types of economy and the concept of entrepreneurship are introduced. Business ethics and the concept of social responsibility are examined in detail.


21st century themes: Financial, economic, business, and entrepreneurial literacy.

Unit Rationale: Students will receive grounding in basic elements of economics such as supply and demand theory and the interrelationship between price and quantity of a good sold that influence marketing decision making. Students will also learn the importance of ethical practices and social responsibility as members of a global community. All of these factors serve as a foundation for career development.

Learning Targets

Standards

New Jersey Core Content Standards: 9.4 Career and Technical Education

Content Statements

- Ethical behaviors support human rights and dignity in all aspects of life.
- The nature of the 21st-century workplace has shifted, demanding greater individual accountability, productivity, and collaboration.
- Understanding the global context of 21st-century industries and careers impacts business operations.
- Communication with people from different cultural backgrounds is enhanced by the understanding of different cultural perspectives.

CPI # | Cumulative Progress Indicator (CPI)
--- | ---
9.1.12.F.2 | Demonstrate a positive work ethic in various settings, including the classroom and during structured learning experiences.
9.1.8.D.5 | Justify the need for greater cross-cultural understanding due to globalization.

Standards 9.4 Career and Technical Education All students who complete a career and technical education program will acquire academic and technical skills for careers in emerging and established professions that lead to technical skill proficiency, credentials, certificates, licenses, and/or degrees.

Industry Standards
## Standard A: Soft Skills

## Standard D: Practical Business Skills

## Standard C: Computer/Technology Applications

### Unit Essential Questions

- What responsibilities do marketers have to tell the truth, the whole truth, and nothing but the truth?
- What influence does marketing have on the US and International economies?
- How does the interaction of supply and demand affect marketing efforts?
- How does marketing uniquely unite the world?

### Unit Enduring Understandings

- Marketers are bound by an ethical code to treat consumers fairly.
- Marketing is influenced by fundamental economic laws and principles.

### Unit Learning Targets

*Students will understand that*...

- Economic principles and concepts affect marketing.
- Businesses satisfy economic needs by producing and marketing products and services.
- Marketing strategies should be adjusted to reflect current economic conditions.
- An economy is how a nation chooses to use its resources to produce and distribute goods and services to provide for the needs and wants of its people.
- The four factors of production are land, labor, capital, and entrepreneurship.
- The economic/political philosophies of capitalism, socialism, and communism tend to encourage different types of economic systems.
- The key phases of the business cycle are expansion, peak, recession, trough, and recovery. The business cycle affects businesses, consumers, and governments, and they in turn affect business cycles, both domestically and globally.
- Marketing is regulated by many federal laws and agencies.
- Global marketing strategy options include globalization, adaptation, and customization of products and promotions.
- International trade is the exchange of goods and services between nations.
- The government plays a critical role in enforcing the free enterprise system and providing for the health, safety, and welfare of its citizens.
- Business ethics are guidelines for good behavior. Ethical businesses are community-conscious.

### Evidence of Learning

#### Summative Assessment:

- End of unit written exam.
- PBL assignment: Students will develop a management recommendation including an analysis of a foreign country (political, cultural, and economic aspects) in the context of potential market expansion.

#### Equipment needed: Computer, Smartboard or ELMO
Formative Assessments

- Daily “do now”/warm-up responses.
- Ability to demonstrate proficiency in key unit concepts in class discussions.
- Student Portfolio of key work products.
- Shared responses to Essential Questions.
- Interim quizzes.
- Written and reading-based homework.

### Lesson Plans

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<td>Lesson 1: A kinder entrepreneur for global business.</td>
<td>45 mins.</td>
</tr>
<tr>
<td>(See appendix)</td>
<td></td>
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<tr>
<td>Lesson 2: Around the world in 80 seconds.</td>
<td>45 mins</td>
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**Teacher Notes:**

☺ Special Populations: This unit was developed with consideration of special needs students in mind. Some of the accommodations that can be implemented in this unit include;

- Extended time intervals
- Graphic organizer and study guide provision
- Detailed rubrics
- Assistive technologies
- Seating/testing venue accommodation
- Individualized instruction per IEP

☺ When presenting work ethic characteristics, a best practice is to provide specific examples of essential workplace characteristics.
Unit II - Lesson 1

A Kinder Entrepreneur for Global Business: Putting Yourself in the Shoes of Others

Overview: Students will begin this lesson by reading the article, “Why Global Business Needs Kinder, Gentler Entrepreneurs and Leaders.” After a short discussion on the article, students will watch brief travel videos on a select number of countries and then choose one of those countries around which to create a travel-related business.

NBEA Standard(s):

- Entrepreneurship, I. Entrepreneurs and Entrepreneurial Opportunities
- Entrepreneurship, VII. Global Markets
- International Business, II. The Global Business Environment
- Marketing, II. Consumers and Their Behavior

Common Core Standard(s): Technology and Digital Media, Comprehension and Collaboration, Integration of Knowledge and Ideas, Presentation of Knowledge and Ideas

Objectives/Purposes: Students will practice what it means to put themselves in the shoes of others.

Knowledge@Wharton Article: “Why Global Business Needs Kinder, Gentler Entrepreneurs and Leaders.”

Other Resources/Materials:

- [http://www.youtube.com/user/THEWORLDOFTRAVEL](http://www.youtube.com/user/THEWORLDOFTRAVEL) - Features hundreds of very short clips of video footage of countries and cities and other destinations all over the world.
Activity:

1. (15 mins) Have students read the article, “Why Global Business Needs Kinder, Gentler Entrepreneurs and Leaders.” Lead a brief discussion on the article takeaways and student’s reflections.

Takeaways

- In global business, building a strong network to turn to for help and advice, treating people with dignity, and serving your customers well is what matters.
- The first thing to do as an entrepreneur is to find a customer who might actually buy something from you.
  - Make sure you understand what they will pay for and what you can build.
- Every action you do as a leader circulates. How you fire people, how much dignity you give them.
- Entrepreneurs do burn the midnight oil.
- The most successful leaders are those who have actively worked for the success around them.
- In a global setting, leaders need to be humble. This attitude needs to extend to company operations abroad. You must be able to put yourself in the shoes of someone else.
- Companies that operate abroad must take the time to understand the unique conditions of each market and the desires of the consumers.
- You must have international experience, speak the local language and be culturally sensitive.

3. (10 mins) The article stresses the importance of leaders having the ability to put themselves in the shoes of others for global business pursuits. For the next activity, students are going to work in groups to create a travel-related business (selling a product or service) to citizens from their country to one of the countries featured in the videos they watch. To do this, they must first be introduced to other countries that they have not been to or are not likely to know very much about. Have students watch a few videos of either their or your choice from THE WORLD OF TRAVEL YouTube subscription page. Since the videos are relatively short, choose four videos from different continents.

4. (20 mins) Next, have students work in groups to develop a product, business or service that is related to the travel industry. Students are going to pick one of the countries they just watched on video and create their product or service based on something they saw in the video. For example, if they found a great hiking spot in one of the videos, maybe their business could be to rent hiking gear to tourists. Additionally, mention that the main customers of their business will be people traveling to that country from the same country of citizenship as the students in the group (example: U.S.). Encourage students to infuse elements of the reading into their business. For example, if the reading talked about walking in other’s shoes, see if students can think of ways to help visitors live as the locals would live and include elements of language acquisition and learning about the culture of that country. Have students present their business ideas to the class.
Tying It All Together: This lesson combines entrepreneurship and global leadership by encouraging students to understand that the products and services that they like and would desire in their own country may not be as equally desired in another. Furthermore, it is meant to encourage cultural sensitivity and awareness that not everyone lives the same way. The lesson is meant to be a very brief introduction to that concept.

Practice Outside of the Classroom: Think of what cool products from other countries are currently not being sold in your country and then think of how those products could penetrate the market. Is there a way for you to take the lead on this?

What Worked and What I Would Do Differently: Once you get through the reading, students seemed to really enjoy watching the videos and then coming up with a travel-related business based on one of the featured countries. I found it helpful to pull up the page of The World of Travel’s YouTube site and I had one video (Peru) ready to play. From there, I let students offer suggestions as to what countries they would like to watch. Make sure that if you do let students choose what countries they want to see, they should not all be on the same continent. Also, The World of Travel videos are not narrated, so students must go by what they see. You should be careful that students don’t make generalizations about the countries from what they see in the video. As students develop their businesses, make sure that they are thinking about logistics so that they produce ideas that are feasible business options.

Examples of businesses that my students came up with included:

- Language classes for short-term visitors, so they could learn basic phrases to get around in a non-English-speaking country.
- A tea room that allowed visitors to put on traditional kimonos and experience a traditional Japanese tea ceremony.
- A fishing trip package where tourists could catch fish and then make sushi with their fresh catch.
- A personal shopper for Parisian tourists.
Unit II - Lesson 2

Around the World in 80 Seconds

Overview: As more and more companies are faced with the question of going global, what does global marketing really mean? What are the challenges of going global? How have some companies excelled at tackling these challenges? This lesson explores these questions, and examines concepts like globalization and global marketing.

NBEA Standard(s):
- Marketing, III. External Factors

Common Core Standard(s):

1. CCR Standard for Reading: Read closely to determine what the text says explicitly and make logical inferences from it.
2. CCR Standards for Listening: Prepare for and participate effectively in a range of conversations and collaborations with diverse partners, building on each other’s ideas and expressing their own clearly and persuasively. Evaluate a speaker’s point of view, reasoning and use of evidence and rhetoric.
3. CCR Standards for Speaking: Present information, findings and supporting evidence in such a way that listeners can follow the line of reasoning, and the organization, development and style are appropriate to the task, purpose and audience.

Objectives/Purposes: In this lesson, students will (1) understand and define globalization and global marketing, and (2) analyze the global marketing strategies of brands/companies.

Knowledge@Wharton Article: “Managing Brands in Global Markets: One Size Doesn’t Fit All”

Other Resources/Materials: Internet access
Activity:

1. Around the world in 80 seconds (10 mins)

As students come in, the teacher orients them towards a global perspective by showing commercials of typical American brands available in different countries. For example, McDonald’s is as American a brand as it gets, but it operates in 122 countries. The teacher shows students McDonald’s commercials as they appear in other countries like France, India and Israel.

The French commercial subtitled in English can be viewed at [http://www.youtube.com/watch?v=SBuKuA9nHsw](http://www.youtube.com/watch?v=SBuKuA9nHsw). This commercial has a typical French flavor that is easy to understand. The Indian commercial I chose is the Dev An and commercial available at [http://www.youtube.com/watch?v=GaTUVwZ2ALE](http://www.youtube.com/watch?v=GaTUVwZ2ALE). This will need some cultural deciphering. It would probably be the equivalent of Elvis Presley going out today to find a meal at yesterday’s prices and finding it at McDonald’s. The Israeli ad can be accessed at [http://www.youtube.com/watch?v=TUjw6O0YDMI](http://www.youtube.com/watch?v=TUjw6O0YDMI). This is another easy commercial to decipher. Students could even be asked to name a country and the teacher could surf for a McDonald’s commercial from that country. For example, from Israel you could go to an Arab McDonald’s commercial like the “I will do anything for love but I won’t do that” at [http://www.youtube.com/watch?v=fYsLDhDRUeI](http://www.youtube.com/watch?v=fYsLDhDRUeI).

If any of the commercials are difficult to understand, you could point out the heavy cultural cues that make it difficult for a foreigner to understand them. This would be a good place to transition to a definition of global marketing and globalization.

2. Class Discussion (10 mins)

The teacher now asks students what they think global marketing is. I am sure some elements of the definition will come up, for example — marketing to people around the world or marketing to different cultures. The teacher now opens the definition of global marketing from the Knowledge@Wharton High School glossary: “Global marketing includes companies’ marketing strategies that look at the entire world as their arena of operations. And involves both the selection of all countries in the world in which the company decides to operate, and the decisions of how to operate in these countries.” The teacher asks students why global marketing has become more common in modern times than in earlier times. This leads to the term globalization itself.

According to the glossary, “Globalization is a worldwide process in which individuals have more and more interactions with people in other countries through trade, investment and culture.” Students can be asked for examples of cultural, trade and investment interactions within their own experiences. What interactions do people in other countries have with the US through trade, culture and investment? The examples we have viewed and discussed so far give students a background to answer this question. For example, that people in so many countries eat McDonald’s food products creates an awareness of the US among many people in many
countries. Alongside the many ways in which McDonald’s has to customize its products, it makes Americans who work with McDonald’s aware of local food preferences.

3. Work with Knowledge@Wharton article (10 mins)

Students are now asked to read the article individually and answer a question. Then they are asked to pair up with a neighbor and discuss the answer. The question I chose to ask is: *What marketing strategies do companies that go global employ? Give examples.*

Customization is the main strategy described in the article, with various examples like KFC, Unilever and MTV.

4. Discussion and Wrap-up (10 mins)

The teacher leads a group discussion based on the previous question. Students are asked to share their answers. Examples to illustrate their points can be accessed on the Internet. For example, Unilever’s strategy can be examined by looking at the websites of its three kinds of brands: international, regional and local. The differences are illustrated at the websites of Dove (http://www.dove.com/), Flora/Becel (http://www.unilever.com/brands/foodbrands/becel_flora/index.aspx), and Wish-bone (http://www.wish-bone.com/Home.aspx). Similarly, the MTV site at http://www.mtv.com/sites/ can be checked for MTV worldwide content.

In the wrap-up, students could be asked to recap what makes global marketing possible and what they learned about other countries from this lesson.

**Practice Outside of the Classroom:** What non-U.S. products do you like/use? How is the marketing of this product/service customized for you?

**What Worked and What I Would Do Differently:**

Before class, the teacher should ensure Internet access, and do a practice run to check for institutional blocks on Internet sites, and also make sure that any commercial that needs to be shown has not been pulled off YouTube. It might be prudent to do a practice run to eliminate trouble shooting during class time.

**Related Knowledge@Wharton Article:** “Globalization of Technology Ventures: Lessons from Israel.”

***************
# Unit Overview

**Content Area:** Principles of Marketing  
**Unit Title:** III. Selling

**Target Course/Grade Level:** Grades 9 - 12

**Unit Summary:** Students learn a structured process for presenting their ideas in a convincing manner in an effort to persuade others to accept a point of view and effect a “sale.” Students will learn how to highlight features and benefits in a systematic way.

**Primary interdisciplinary connections:**  
Language arts: oral and written communications.  

**21st century themes:** Financial, economic, business, and entrepreneurial literacy.

**Unit Rationale:** The ability to develop a cogent presentation to persuade others is an essential skill both in the business world and in everyday life. This unit provides practical methods that students will find useful in a myriad of applications.

## Learning Targets

### Standards

**New Jersey Core Content Standards: 9.4 Career and Technical Education**

<table>
<thead>
<tr>
<th>Content Statements</th>
<th>Cumulative Progress Indicator (CPI)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Communication Skills:</strong> All clusters rely on effective oral and written communication strategies for creating, expressing, and interpreting information and ideas that incorporate technical terminology and information.</td>
<td>9.4.12.N.(6).1 Gather, access, synthesize, evaluate, and disseminate information to aid in making sales.</td>
</tr>
<tr>
<td><strong>Employability and Career Development:</strong> Employability skills and career and entrepreneurship opportunities build the capacity for successful careers in a global economy.</td>
<td>9.4.12.N.(6).2 Employ concepts and actions used in this pathway to determine client needs and wants and to develop personalized communications intended to influence purchasing decisions and enhance future business opportunities.</td>
</tr>
<tr>
<td></td>
<td>9.4.12.N.(6).3 Understand concepts, tools, and strategies used in this pathway to explore, obtain, and develop sales careers.</td>
</tr>
</tbody>
</table>

**Standards 9.4 Career and Technical Education** All students who complete a career and technical education program will acquire academic and technical skills for careers in emerging and established professions that lead to technical skill proficiency, credentials, certificates, licenses, and/or degrees.

**Industry Standards**
<table>
<thead>
<tr>
<th>Standard B: Interpersonal Skills</th>
<th>Unit Enduring Understandings</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard C: Computer Technology</td>
<td>● Effective selling strategies respond to client needs and wants through planned, personalized communication that influences purchase decisions and ensures satisfaction.</td>
</tr>
<tr>
<td>Standard D: Practical Business Skills</td>
<td>● Professional selling is a systematic, scientific process that requires a commitment to a consultative attitude.</td>
</tr>
</tbody>
</table>

**Unit Essential Questions**
- What are effective sales strategies?
- How can you communicate a product’s benefits to a customer?
- How can one tailor sales strategies for various target audiences?
- What does effective customer service look like?

**Unit Enduring Understandings**
- Effective selling strategies respond to client needs and wants through planned, personalized communication that influences purchase decisions and ensures satisfaction.
- Professional selling is a systematic, scientific process that requires a commitment to a consultative attitude.

**Unit Learning Targets**
*Students will understand that….*

- The student will apply selling processes and techniques that can aid customers/clients in making buying decisions.
- Personal selling is any form of direct contact between a salesperson and a customer. The three types of selling situations are retail, business-to-business (B2B), and telemarketing.
- The purpose and goal of selling are to help customers make satisfying buying decisions in order to create ongoing, profitable relationships between buyer and seller.
- Sales communications must be terse and clear both verbally, graphically, and in writing.
- Body language and other non-verbal cues significantly affect the communication process.
- Excellence in customer service is integral to successful customer/client relationships.
- The ANPOCS method is a tried and true process for managing the selling process.

**Evidence of Learning**
- Summative Assessment: End of unit written exam.
- PBL assignment developing and executing a sales plan to support the introduction of a B2B product/service by creating a professional and systematic sales strategy and script.

**Equipment needed:** Computer, Smartboard or ELMO

**Teacher Resources:** Internet, Textbook, [www.deca.org](http://www.deca.org), [www.knowledge@wharton.org](http://www.knowledge@wharton.org), [www.marketingteacher.com](http://www.marketingteacher.com)

**Formative Assessments**
- Daily “do now”/warm-up responses.
- Ability to demonstrate proficiency in key unit concepts in class discussions.
- Student Portfolio of key work products.
- Shared responses to Essential Questions.
- Student Portfolio of key work products.
- Interim quizzes.
- Written and reading-based homework.
## Lesson Plans

<table>
<thead>
<tr>
<th>Lesson</th>
<th>Timeframe</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lesson 1: The Buying Process</td>
<td>45 mins.</td>
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<tr>
<td>(See appendix)</td>
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</tr>
<tr>
<td>Lesson 2: Personal Selling Scenario</td>
<td>45 mins.</td>
</tr>
<tr>
<td>(See appendix)</td>
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</tbody>
</table>

### Teacher Notes:

- Special Populations: This unit was developed with consideration of special needs students in mind. Some of the relevant accommodations that can be implemented in this unit include:
  - Extended time intervals
  - Assistive technologies
  - Graphic organizer and study guide provision
  - Seating/testing venue accommodation
- In this unit, use of a graphic organizer that outlines the sales process and clearly breaks down each component would be helpful. Role playing is recommended to clarify nonverbal and body language clues.
- An assignment eliciting student memories of situations where salespeople were helpful juxtaposed with an alternative situation where they were not, thus linking the learning to their personal experiences, may be quite valuable.
Unit III - Lesson 1

The Buying Process

Overview: Understanding the actual buying process of customers impacts marketing decisions significantly. The proliferation of guarantees for high-expense products is an excellent example of how knowledge about the buying process has crept into marketing strategies. While marketing textbooks talk about the classical buying process (beginning with a need, then proceeding to information search and evaluation of alternatives, finally leading to the purchase and post-purchase behavior), this lesson also explores the impact of marketing on the buying process and its ability to truncate the more classical process.

NBEA Standard(s):
- Marketing, I. Foundations of Marketing
- Marketing, II. Consumers and Their Behavior

Common Core Standard(s):

1. CCR Standard for Reading: Read closely to determine what the text says explicitly and make logical inferences from it.
2. CCR Standards for Listening: Prepare for and participate effectively in a range of conversations and collaborations with diverse partners, building on each other’s ideas and expressing their own clearly and persuasively. Evaluate a speaker’s point of view, reasoning and use of evidence and rhetoric.
3. CCR Standards for Speaking: Present information, findings and supporting evidence in such a way that listeners can follow the line of reasoning, and the organization, development and style are appropriate to the task, purpose and audience.

Objectives/Purposes:

In this lesson, students will analyze the buying process and design a marketing plan customized to this analysis. Analyzing the buying process will make them more conscious of their own buying process and potentially make them better consumers.

Students will also learn teamwork and develop critical, analytical and presentation skills throughout the lesson.

Knowledge@Wharton High School Article: “What Women Buy and Why”

Other Resources/Materials:

Internet access
Activity:

1. Introduction to concepts (10 mins)

The teacher begins the lesson by giving an anecdotal example that illustrates the buying process. I talked about how I had to buy an expensive sari for my brother’s wedding. As soon as the wedding date was set, I was most preoccupied with was buying my sari. As the groom’s sister, I had to be second best dressed to the bride. I went to all the big sari shops in Mumbai like Paneri, Kala Niketan and Nallis but could not find anything that I liked. I then checked malls like Shoppers Stop and Lifestyle who also stock designer saris like those of Ritu Kumar (a very sought after Indian designer) or Tarun Tahiliani. But the ones I liked here were too expensive.

Since the wedding was in Kerala and I still had time, I decided to wait and shop in Kerala or nearby Coimbatore — which is known to be a wedding sari shopping destination. Finally I found a Parsi embroidery sari in a light purple color that I liked. Along with the sari, I also had to buy bangles, shoes, color-coordinated make-up and a bag.

Within this experience, there are several marketing strategies that I found remarkable and very astute about my buying process. Apart from saris, stores like Shoppers’ Stop and Lifestyle also sell accessories and make-up. The stores are quite aware of my buying process and have tried to simplify it for me and make their business more profitable.

From a marketing perspective, the buying process follows a pattern:

1. Need/Want Recognition (Marketing can create needs)
2. Information Search (Marketing can eclipse the options and truncate this step)

Free samples, test drives and other means of “trial” work wonderfully to help guide the customer through the information search stage and onto the evaluation and purchase stages.

3. Evaluation

From the marketers’ point of view, they retain customer contact information in order to “gently” offer any additional details the buyer might need. (Nobody likes a hard sell, or to be pushed into buying.)

4. Purchase

5. Post Purchase (Anxiety)

While customers may have thought they chose the best solution when they purchased, many customers later experience buyers’ regret. Customers will have more confidence in their decision, even after it is made, if they know they aren’t “stuck” with their purchase. Having a guarantee to fall back on gives them the comfort of knowing that should something go wrong,
they won’t be left stranded. Generally speaking, a guarantee is a psychological support rather than a literal one. Most customers never take advantage of guarantees… they don’t think they need to. However, if a guarantee wasn’t offered, the anxiety of feeling “all alone” would overcome many buyers and persuade them into asking for a refund.

Additionally (if needed) different products will be discussed to draw out differences between:

a) Products/services that are new to the market/or are very expensive and require a longer period of consideration in each phase.

b) Products/services that are familiar/or that cost very little and require a shorter (even instantaneous) process.

The impact of marketing on shortening the buying process is also to be discussed.

2. Work with Knowledge@Wharton article (8 mins)

The teacher discusses sections from the article that talk about marketing financial services and automobiles to women.

3. Find marketing opportunities from your experiences (10 mins)

The teacher now asks students to pair up or form small groups. They are asked to identify an experience that illustrates the buying process and look for marketing possibilities within those examples. Any hindrance or challenge you face while shopping can be a potential marketing possibility.

4. Presentation, Discussion, Wrap-up (10 mins)
Unit III - Lesson 2

Personal Selling Scenarios

PERSONAL SELLING SCENARIOS
Using the selling skills you have acquired in this class, advance a selling “proposal” that meets the objective of three of the situations described below. Use a separate piece of paper for each scenario. Use the ANPOCS method as you hand write your script which should fill at least one full side of loose leaf.

ANPOCS

| A | Approach the customer |
| N | Needs (determine needs of customer) |
| P | Product presentation |
| O | Objections (handle) |
| C | Close the sale |
| S | Suggestive selling |

- The school budget election is this evening and your parent(s) hasn’t/haven’t voted. You would like them to.
- Your friend Sam has indicated an intention to quit school to take a full time job. You think this is a very bad idea.
- The older brother of one of your crew has offered to buy cocaine for you and your friends. You risk rejection and loss of popularity if you do not “go along.”
- A student you know (but are not “friends with”) would make a great addition to your favorite club/team.

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Unit Overview

Content Area: Principles of Marketing

Unit Title: IV. Promotion

Target Course/Grade Level: Grades 9 - 12

Unit Summary The remaining elements of the Promotion Mix: advertising, public relations, and sales promotion are explored. Students will learn strategies for developing effective communications designed to stimulate target awareness, interest, desire and action (AIDA). Various media and their cost will be examined for their efficacy in reaching consumers.


21st century themes: Financial, economic, business, and entrepreneurial literacy.

Unit Rationale: The ability to effectively convey a positive image and foster a positive reputation is integral to the success of individuals and business concerns (both for-profit and non-profit). This unit provides strategies and tactics that will promote successful implementation of promotional communication methodologies.

Learning Targets

Standards

New Jersey Core Content Standards: 9.4 Career and Technical Education

Content Statements

Communication Skills:
All clusters rely on effective oral and written communication strategies for creating, expressing, and interpreting information and ideas that incorporate technical terminology and information.

Information Technology Applications: Technology is used to access, manage, integrate, and disseminate information.

<table>
<thead>
<tr>
<th>CPI #</th>
<th>Cumulative Progress Indicator (CPI)</th>
</tr>
</thead>
<tbody>
<tr>
<td>9.4.12.N.(1).1</td>
<td>Evaluate and summarize the concepts, strategies, and systems used to obtain and convey ideas and information in this pathway.</td>
</tr>
<tr>
<td>9.4.12.N.(1).2</td>
<td>Research the concepts and strategies marketers use to communicate information about products, services, images, and/or ideas to achieve desired outcomes.</td>
</tr>
<tr>
<td>9.4.12.N.(1).3</td>
<td>Analyze the concepts and strategies marketers use to determine and target marketing communications strategies to specific audiences.</td>
</tr>
<tr>
<td>9.4.12.N.(1).4</td>
<td>Research the concepts, systems, and tools marketers use when making decisions to gather, access, synthesize, evaluate, and disseminate marketing information.</td>
</tr>
</tbody>
</table>
### Standards 9.4 Career and Technical Education

All students who complete a career and technical education program will acquire academic and technical skills for careers in emerging and established professions that lead to technical skill proficiency, credentials, certificates, licenses, and/or degrees.

#### Industry Standards

- **Standard A: Soft Skills**
- **Standard C: Computer/Technology Applications**
- **Standard D: Practical Business Skills**

#### Unit Essential Questions

- In what ways do communications and promotions achieve marketing goals?
- What are some examples of marketing communications and promotions?
- How can advertising shape the success of a business, institution, or cause?
- What are the ethical responsibilities when using advertising techniques?

#### Unit Enduring Understandings

- Marketing influences client behavior through effective and targeted communications and promotions.
- Advertising is a very effective medium for changing the behavior of individuals, and of societies.

#### Unit Learning Targets

*Students will understand that…*

- Sophisticated communication processes are used in promotion.
- A broad range of elements comprise the promotion mix.
- Effective promotional messages appeal to specific targeted markets.
- Businesses use promotion to inform people about products and services, enhance their public image and reputation, and persuade people their products are valuable. Nonprofit organizations use promotion to educate the public or advocate for change.
- Promotion is any form of communication a business uses to inform, persuade, or remind people about its products and its image. The five basic categories of promotion are personal selling, advertising, direct marketing, sales promotion, and public relations.
- Public relations fosters a favorable image about a business, its products, or its policies. Publicity tries to place positive information about a business in the media. It is not advertising because it is free.
- The promotional mix is a combination of strategies and the allocation of resources to reach promotional goals.
- It is important to select appropriate promotional media to communicate with consumers.
- Multiple sales promotions techniques may be employed in promoting a product.
- Advertising is a critical component of the promotional mix.
- There are many types of advertising and the costs of these media vary.
- Advertising is measured to understand cost-effectiveness.
Advertisers use budgeting techniques to ensure efficiency.

**Evidence of Learning**

- Summative Assessment: End of unit written exam.
- PBL: Develop a promotion plan to support a state wide anti-bullying campaign targeted toward high schools and middle schools (or similar).

**Equipment needed:** Computer, Smartboard or ELMO

**Teacher Resources:** Internet, Textbook, [www.deca.org](http://www.deca.org), [www.knowledge@wharton.org](http://www.knowledge@wharton.org), [www.marketingteacher.com](http://www.marketingteacher.com)

**Formative Assessments**

- Daily “do now”/warm-up responses.
- Ability to demonstrate proficiency in key unit concepts in class discussions.
- Student Portfolio of key work products.
- Shared responses to Essential Questions.
- Interim quizzes.

**Lesson Plans**

<table>
<thead>
<tr>
<th>Lesson</th>
<th>Timeframe</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lesson 1 Example: Brand Promotion (See Example)</td>
<td>45 mins.</td>
</tr>
<tr>
<td>Lesson 1 Example: Promotion Mix: Anti-HIB (See Example)</td>
<td>45 mins.</td>
</tr>
</tbody>
</table>

**Teacher Notes:**

- Special Populations: This unit was developed with consideration of special needs students in mind. Some of the relevant accommodations that can be implemented in this unit include:
  - Extended time intervals
  - Assistive technologies
  - Graphic organizer and study guide provision
  - Seating/testing venue accommodation
  - Detailed rubrics
  - Individualized instruction per IEP

- An assignment directing students to clip/print coupons and promotional offers from various media can help provide relevance to personal experience and drive home important consumer educational learning.
Unit IV - Lesson 1

Promotions

Overview: Marketing is often confused with some of its more visible elements like advertising or selling. In this lesson, we look at one such high-visibility element — Promotions.

In this lesson students are given an overview of promotional strategies, and introduced to the various elements of the promotional mix — both above the line and below the line.

Students will analyze the promotional strategies of products, compare it with brand promotional strategies, and finally design a promotional strategy for a product of their choice.

NBEA Standard(s):

- Marketing, I. Foundations of Marketing
- Marketing, IV. The Marketing Mix

Knowledge@Wharton High School Article:

- “Retail Visionary: Warby Parker’s Online Eyeglass Strategy Focuses on the Consumer”

Common Core Standard(s):

1. CCR Standard for Reading: Read closely to determine what the text says explicitly and to make logical inferences from it.
2. CCR Standards for Listening: Prepare for and participate effectively in a range of conversations and collaborations with diverse partners, building on each other’s ideas and expressing their own clearly and persuasively. Evaluate a speaker’s point of view, reasoning, and use of evidence and rhetoric.
3. CCR Standards for Speaking: Present information, findings and supporting evidence such that listeners can follow the line of reasoning, and the organization, development and style are appropriate to task, purpose, and audience.

Objectives/Purposes:

SWBAT analyze the promotional strategies of products, compare them with brand promotional strategies.

SWBAT design a promotional strategy for a product of their choice.

Other Resources/Materials: Internet access
Activity:

1. Group Activity and introduction to concepts. (10 mins)

Teacher begins the lesson by asking the class for a few products they are familiar with—these can be products they like, or dislike. Students may come up with brands but have to specify a particular product.

As students contribute examples, teacher asks further probing questions like:

- When did you first hear about this product?
- How did you hear about this product?
- How has your interest/awareness in this product been sustained?

Teacher now introduces the concept of Promotion as the methods of communicating about the product to the customer. You may design a brilliant product for your target customer, but how is the customer going to know about your product? This communication that you initiate with your customer is called “Promotions”, and it is an integral part of the Marketing Mix. Let’s imagine that you have decided to open a restaurant for college students. How can you reach out and make them aware of your restaurant?

Student answers are listed on the blackboard. Expected answers include flyers, coupons, etc.

Teacher now introduces the concept of above the line promotions and below the line promotions. Above the line promotions are any promotional strategies, which the customer can easily identify as a promotional strategy. For example, advertisements, including television commercials, newspaper advertisements, or flyers are above the line promotions. According to some marketing scholars, below the line promotions are even more effective. With advertisements, customers know that they are being solicited, so their defenses are up. However, with below the line promotions, customers often do not realize that they are being solicited; therefore there are no defensive mechanisms at play. For example, when a customer reads a newspaper article about the opening of a restaurant—that has actually been planned and executed by the Public Relations officer of the restaurant, the customer does not think that he or she is being advertised to. Such a promotional strategy is called below the line promotion. This can include sponsorships—of events, teams, awards, parks, etc; sales promotions like coupons, discounts, deals, etc. and the like.

2. Work with the Knowledge@Wharton High School article. (8-10 mins)

Teacher now gives handouts of the article “Retail Visionary: Warby Parker’s Online Eyeglass Strategy Focuses on the Consumer” and asks students to analyze the promotional strategies used by Warby Parker. Teacher also pulls up the website of the company to look at promotional strategies and web advertising. This example gives the additional dimension of the use of internet, customer service as promotion, and the possibilities of reduced expenditure on advertising by using other innovative promotional strategies.
3. Create a promotional strategy. (*10 mins*)

Teacher now asks students to work on their products (which they designed as part of Lesson 1 in this module) and design a promotional strategy for their product. They are asked to keep in mind costs of promotional strategies, target customer profile, possible profit margins, and their marketing budget.

4. Presentation, Feedback, Wrap-up. (*10 mins*)

Students present their ideas to the class. Others are encouraged to provide constructive feedback so that the ideas are rigorously examined and whetted out.

Particularly, tying in the idea from the article that the owners put themselves in the shoes of their customers, students are encouraged to respond to the ideas presented as if they were the customers.

Teacher wraps up.

**Tying It all together:** *Promotions* is an inherently interesting aspect of marketing because of its high visibility. Since this is an introductory lesson, basic concepts associated with promotion as a marketing tool tied to the other Ps are explored. The students, most probably, know much about promotion already; it is a matter of critically analyzing experiences to illuminate concepts as marketing concepts.

**Practice Outside of the Classroom:** Identify a few *below the line* promotional strategies that target you.

**What Worked and What I Would Do Differently:** Depending on the promotional strategies that are culturally relevant, the emphasis of the lesson can be tweaked. Since the lesson builds off student experience and interest, it will be easy to identify such patterns. However, the teacher can also provide inputs that lead the students to consider promotional strategies they may not have thought about. For example, Bollywood films use extensive promotional strategies. A discussion surrounding the latest “hit” film and its promotional strategy can make for a very engaging lesson in several parts of India.
Unit IV - Lesson 2

The Promotion Mix

Objective: Demonstrate your ability to work collaboratively to develop a marketing campaign by integrating the elements of the Promotion Mix.

Scenario: The Superintendent of Schools has received a $500,000 grant from the state of New Jersey to promote student tolerance behaviors and specifically to diminish Harassment, Intimidation, and Bullying state wide. Being occupied with the many duties of running a school district, the Superintendent has wisely turned to you; this year’s marketing class, to develop a marketing campaign to meet his goal.

Methodology:

1. Work in your team to develop a Campaign Theme that supports the Superintendent’s goal.

2. You will assign roles to each team member as follows. Each member will be responsible for preparing his/her specific portion of this assignment.
   
   - Member 1: Director of Advertising
   - Member 2: Director of Promotions
   - Member 3: Director of Public Relations

3. You will jointly prepare a specific budget and a 3 month plan to execute your campaign. The program will run September through November, 20XX

4. Create an advertising poster using markers and poster board. (Sketch a draft design first)

5. Compile a minimum 10 page PowerPoint presentation that articulates your ideas and recommendations.

6. Prepare an oral presentation, backed by your PowerPoint and other visual aids and featuring each team member, to present your recommendations to the school board.
Grading Guide:

<p>| | |</p>
<table>
<thead>
<tr>
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</thead>
<tbody>
<tr>
<td>Effective use of Promo Mix</td>
<td>35%</td>
</tr>
<tr>
<td>Efficient financial allocation</td>
<td>20%</td>
</tr>
<tr>
<td>Oral Presentation</td>
<td>10%</td>
</tr>
<tr>
<td>Poster</td>
<td>10%</td>
</tr>
<tr>
<td>Creativity (Incorporating elements not described above or doing things in a new, exciting, and innovative way).</td>
<td>25%</td>
</tr>
<tr>
<td>Total</td>
<td>100%</td>
</tr>
</tbody>
</table>

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Unit Overview

Content Area: Introduction to Marketing

Unit Title: V. Distribution

Target Course/Grade Level: Grades 9 - 12

Unit Summary: This section focuses on two specific aspects of the “Place” component of the marketing mix. Physical distribution (the movement of goods from place to place) is examined to identify the various transportation elements available in conjunction with warehousing and inventory management methods. Channels of distribution, the venues where goods and services are made available to customers, are presented as essential elements of providing utility to purchasers/users.


21st century themes: Financial, economic, business, and entrepreneurial literacy.

Unit Rationale: The purpose of this study is to provide a basic background in the discipline of logistics, an area of study that touches nearly every aspect of commerce in the United States and throughout the world. In addition, an examination of the means of conveying goods and services to clients provides students with an understanding of the principle commercial outlets in business: retailing, e-tailing, wholesaling.

Learning Targets

Standards
New Jersey Core Content Standards: 9.4 Career and Technical Education

Content Statements

- Roles within teams, work units, departments, organizations, inter-organizational systems, and the larger environment impact business operations.
- Key organizational systems impact organizational performance and the quality of products and services.
- Understanding the global context of 21st-century industries and careers impacts business operations.

CPI # | Cumulative Progress Indicator (CPI)
--- | ---
9.4.12.P.(7).1 | - Demonstrate knowledge of transportation, logistics, and distribution-related sales and service operations on an ongoing basis.
9.4.12.P.(7).2 | - Demonstrate knowledge of transportation-related products and services in order to promote development of existing and future client bases.
### Standards 9.4 Career and Technical Education

All students who complete a career and technical education program will acquire academic and technical skills for careers in emerging and established professions that lead to technical skill proficiency, credentials, certificates, licenses, and/or degrees.

### Industry Standards

<table>
<thead>
<tr>
<th>Standard D: Practical Business Skills</th>
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</thead>
<tbody>
<tr>
<td>Standard C: Computer/Technology Applications</td>
</tr>
</tbody>
</table>

#### Unit Essential Questions
- How is distribution affected by new marketing trends?
- What factors are used to determine distribution methods?
- What effect does distribution have on marketing a product?
- How is efficiency related to product distribution?

#### Unit Enduring Understandings
- The purpose of a distribution plan is to specify the most efficient way to transport and merchandise a company’s products.
- Effective inventory management procedures can make or break a firm’s profitability.

#### Unit Learning Targets

*Students will understand that….*

- The nature and scope of transportation systems and logistical services is broad and complex.
- Distribution channels and/or businesses involved in transporting various goods provide efficient means of bringing products to consumers.
- A channel of distribution is the path a product takes from the producer or manufacturer to the final user.
- Channel members in the distribution of consumer products are manufacturers/producers, agents, wholesalers, retailers, and consumers.
- Distribution involves decisions about a product’s physical movement and transfer of ownership from producer to consumer.
- Physical distribution links a business and its customers.
- Physical distribution, also known as logistics, comprises all the activities that help to ensure that the right amount of a product is delivered to the right place at the right time.
Storage is the marketing function of holding goods until they are sold. Products are stored in warehouses until orders are received from customers.

Organizational buyers for industrial markets purchase goods and services to use in the operations of a business. These buyers may be called purchasing managers, industrial buyers, or procurement managers. Wholesale and retail buyers purchase goods for resale.

Inventory management is the process of buying and storing products for sale while controlling costs for ordering, shipping, handling, and storage.

Evidence of Learning

Summative Assessment:
- End of unit written exam.
- PBL: Students will be presented with a case scenario requiring research and interpretation of the most cost efficient and effective strategies for the physical distribution of a specific good throughout the 50 states. Students will additionally need to assess and recommend the most appropriate channels of distribution for the product.

Equipment needed: Computer, Smartboard or ELMO


Formative Assessments
- Daily “do now”/warm-up responses
- Ability to demonstrate proficiency in key unit concepts in class discussions.
- Student Portfolio of key work products.
- Shared responses to Essential Questions
- Interim quizzes.
- Written and reading-based homework.

Lesson Plans

<table>
<thead>
<tr>
<th>Lesson Plan Example</th>
<th>Timeframe</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lesson 1 Where should you sell? (See appendix)</td>
<td>45 mins.</td>
</tr>
<tr>
<td>Lesson 2: Polly’s Pajamas Distribution Plan (See appendix)</td>
<td>45 mins.</td>
</tr>
</tbody>
</table>

Teacher Notes:
- Special Populations: This unit was developed with consideration of special needs students in mind. Some of the relevant accommodations that can be implemented in this unit include:
  - Extended time intervals
  - Graphic organizer and study guide provision
  - Detailed rubrics
  - Assistive technologies
  - Seating/testing venue accommodation
  - Individualized instruction per IEP
Unit V - Lesson 1

Where Should You Sell?

Overview: The channel of distribution or the place where the product should be made available is an important and strategic marketing decision. Commonly referred to as Place — one of the four Ps of the Marketing Mix, it signifies and communicates the positioning of the product and its intended target market. This lesson focuses on some of the fundamental concepts related to placing strategies.

NBEA Standard(s):

- Marketing, I. Foundations of Marketing
- Marketing, IV. The Marketing Mix

Knowledge@Wharton High School Article:

- “Red Velvet Revolution: The Rise of the Cupcake Entrepreneur”

Common Core Standard(s):

1. CCR Standard for Reading: Read closely to determine what the text says explicitly and make logical inferences from it.
2. CCR Standards for Listening: Prepare for and participate effectively in a range of conversations and collaborations with diverse partners, building on each other’s ideas and expressing their own clearly and persuasively. Evaluate a speaker’s point of view, reasoning, and use of evidence and rhetoric.
3. CCR Standards for Speaking: Present information, findings and supporting evidence in such a way that listeners can follow the line of reasoning, and the organization, development and style are appropriate to the task, purpose and audience.

Objectives/Purposes: Students will analyze the distribution channels of various products/services. They will also design a distribution channel for a product/service of their choice.

Other Resources/Materials: Internet access
Activity:

1. The teacher begins class by explaining the third P of the marketing mix. *Place or placement refers to where your customer can actually buy your product. From the perspective of the customer, place answers: Where is it convenient for me to buy this article? Additionally place, like price, signifies a certain value to the customer. For example, if you want to signal exclusivity, you will not want to stock your product at every retail store. Look at Rolls Royce — they have one store for the whole state; it is a very exclusive product.*

2. The teacher now explains the various kinds of channels and distribution models that companies could use.

Kinds of Channels:

- Direct — Producer sells directly to customer.
- Direct/Internet — Producer sells directly to customer, online.
- Direct/catalog — Producer sells directly to customer, through a catalog.
- Wholesaler/distributor — Producer sells to wholesaler, who will sell to a distributor, or to a retailer.
- Value-added reseller (VAR) — VAR will customize the product for the buyer.
- Dealer — Sells on behalf of company, like a franchise.
- Retail — Retailers sell directly to end-users through a store, website or catalog.

Distribution models:

1. Intensive distribution – If the consumer does not get a brand, he/she buys another, so product has to be available everywhere.
2. Selective distribution – “Suitable” resellers stock the product, customers will search reasonably for your product/price.
3. Exclusive distribution – Specially selected resellers (typically only one per geographical area) sell the “product.”

You could provide examples or ask students to contribute examples for the various kinds of channels and distribution models. Some of the examples my students came up with were the “Hello Kitty Store” for exclusive distribution, and grocery items for intensive distribution.

3. The teacher now plays the video included in the article from the Knowledge@Wharton High School site. Students are asked to identify the “Place” used in this example, and then to work with a partner to come up with additional placement ideas.

4. Informal class presentations and discussions
Students present their ideas. Some of the ideas that came up were that the Cupcake Lady should move to New York, as this would be a better place to sell from a truck; sell through retail outlets like bakeries so that customers have easier access; collect birthday orders or part orders through Facebook marketing and deliver products (For example, simplymmmm cupcakes is a similar company that only markets through Facebook.)

5. Students are now asked to work on their products (from the previous lesson — this is a module on the marketing mix, so in each lesson, students work out the corresponding P of their marketing mix) to identify possible placements.

They are asked to keep in mind that all the Ps should form an integrated whole. Therefore, depending on the product, and the pricing strategies developed already, what would be the ideal placement for your product and target customer? For example, if you are planning a smoothie bar that is fully organic, would you want to place it next to a popular gym, or in a place that has a significant number of LOHAS (Lifestyles of Health and Sustainability) members, or both?

6. Presentations, Feedback and Wrap-up

Students present their ideas to the class. Others are encouraged to provide constructive feedback so that the ideas are rigorously examined and whetted out.

**Tying It All Together:** *Place* forms an integral part of any marketing strategy and students begin to engage critically with the knowledge that they already have about product placement. By now, the students will have a fairly sophisticated understanding of basic marketing concepts and will be able to design more detailed plans.

**Practice Outside of the Classroom:** When you next purchase a product, think of where else the product is available. Why does the company/producer use the particular distribution channel they do?

If possible, it would be great to conduct a *place* tour. This can be within the student locality or can also include some exclusive outlets outside of the student community. This tour can also be a way to analyze the social/affective impact of marketing on the individual. This tour could be charted in class with the students. For example, the teacher asks students where they all shop, or what kinds of stores exist in the neighborhood. In India, this could bring up “mandis,” street vendors, “bazaars,” “kirana shops,” day-based-markets, hereditary sellers who visit homes, speciality lanes that sell only particular wares (e.g. paratha gali), along with the modern supermarkets and malls.

**What Worked and What I Would Do Differently:** The teacher should be sensitive to social differences within the student group and encourage students to understand socially mediated class hierarchies.
Activity:

**DISTRIBUTION PLAN STRATEGY**

**POLLY’S PAJAMAS®**

**Case overview:**
Company founder Polly Pemberton has decided to retire. At age 72 she has built her pajama business to a $12 million company first by offering her line of premium quality, fleece-lined or silk-lined pajamas via mail order catalog and later via a web site. All *Polly’s Pajamas* are made in a factory outside of Bangkok, Thailand, and shipped via container ship to Polly’s warehouse in Sacramento, CA.

Polly’s granddaughter, Patsy Pemberton, who earned an MBA in marketing from Loyola University in Los Angeles, is poised to take over leadership of the firm. Before designating Patsy as the new CEO, Polly and the other members of the board (all Pemberton family members), wish to understand Patsy’s plan to market *Polly’s Pajamas* in the future. Patsy meets with the firm’s directors of logistics and marketing to discuss the future of their business. They decide that their products will continue to be made in Thailand, but that they need to reach a broader market in the US and to expand to Canada, Mexico, and the Caribbean as well.

**Task/deliverable:** PowerPoint Presentation, approximately 8 - 12 pages in length to be used in conjunction with a group presentation of your channel plans, physical distribution strategies, and any additional marketing approaches that will be needed to support your innovations.
Team grading guide:

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Comprehensive &amp; accurate development of a physical distribution plan:</td>
<td>35%</td>
</tr>
<tr>
<td>Presentation of a viable channel distribution plan:</td>
<td>35%</td>
</tr>
<tr>
<td>Infusion/compatibility of marketing elements:</td>
<td>20%</td>
</tr>
<tr>
<td>Professionalism and Creativity:</td>
<td>10%</td>
</tr>
<tr>
<td><strong>Total:</strong></td>
<td><strong>100%</strong></td>
</tr>
</tbody>
</table>

Due Date: _______________________________

***************
# Unit Overview

## Content Area: Principles of Marketing

## Unit Title: VI. Pricing

<table>
<thead>
<tr>
<th>Target Course/Grade Level: Grades 9 - 12</th>
</tr>
</thead>
</table>

**Unit Summary:** Elements of effective pricing policies and profitability assurance will be explored in detail. Specific pricing strategies such as *prestige*, *skimming*, *psychological*, *odd-even*, *penetration* and others will be learned. In addition, key metrics such as *gross profit margin* and *markup* will be introduced.


**21st century themes:** Financial, economic, business, and entrepreneurial literacy.

## Unit Rationale:

This section will provide students with an understanding of how pricing decisions affect many variables such as demand, profitability, and consumer perceptions. Analysis of varying pricing strategies and interpretation of customer demand are important tools available to marketers, retailers, and managers in many fields.

### Learning Targets

#### Standards

**New Jersey Core Content Standards: 9.4 Career and Technical Education**

**Content Statements**

This syllabus is established in conformance with the 2009 New Jersey Career Content standards for 21st Century Life and Careers.

**Standards 9.4 Career and Technical Education** All students who complete a career and technical education program will acquire academic and technical skills for careers in emerging and established professions that lead to technical skill proficiency, credentials, certificates, licenses, and/or degrees.

#### Industry Standards

**Standard D: Practical Business Applications**

**Standard C: Computer/Technology Applications**

#### Unit Essential Questions

- How does pricing effect marketing decisions?
- What factors affect price decisions?
- How is the cost of a product determined?
- What is the difference between price and value?

#### Unit Enduring Understandings

- Marketing involves setting and adjusting product and service prices to maximize profit and to ensure customer satisfaction.
- Profit optimization; identifying a price point that allows for the appropriate pricing in the target market.
Unit Learning Targets
Students will understand that....

- There are a variety of price-setting strategies available to marketers.

- Price is the value (in money or its equivalent) placed on a good or a service. There are many forms of price: fees, fares, tuition, rent, wages, commissions, etc.

- Pricing is a key factor in the success or failure of a product or service, and therefore of a business. It establishes an image, a competitive edge, and determines profits.

- Four market factors affect pricing: costs and expenses, supply and demand, consumer perceptions, and competition.

- In general, demand goes down when price goes up. Demand elasticity is the degree to which price affects demand.

- Establishing a base price for a product can be accomplished by using cost-oriented, demand-oriented, or competition-oriented pricing methods, or a combination of these methods.

- Different firms employ varying criteria to determine pricing objectives, policies and strategies.

- There are a myriad of environmental considerations in setting prices.

- Analyzing costs, market trends, and competition, can help to determine selling prices.

- There are many factors affecting pricing decisions.

- Gross profit is the difference between sales revenue and the cost of goods sold.

- Several different mathematical calculations assist marketers in achieving sales and profitability goals.

Evidence of Learning

- Summative Assessment: End of unit written exam.

- PBL assignment: Pricing case requiring decisions relating to wholesale and retail price point selection, establishment of sales, profit, and market share goals for a chosen line of products (or comparable).

Equipment needed: Computer, Smartboard or ELMO

Formative Assessments
- Daily “do now”/warm-up responses.
- Ability to demonstrate proficiency in key unit concepts in class discussions.
- Student Portfolio of key work products.
- Shared responses to Essential Questions.
- Interim quizzes.
- Written and reading-based homework.

Lesson Plans

<table>
<thead>
<tr>
<th>Lesson Plan Example</th>
<th>Timeframe</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lesson 1: What’s the right price?</td>
<td>45 mins.</td>
</tr>
<tr>
<td>(See appendix)</td>
<td></td>
</tr>
<tr>
<td>Lesson 2: Sales/Pricing Proposal</td>
<td>45 mins.</td>
</tr>
<tr>
<td>(See appendix)</td>
<td></td>
</tr>
</tbody>
</table>

Teacher Notes:

☺ Special Populations: This unit was developed with consideration of special needs students in mind. The relevant accommodations that can be implemented in this unit include:

- Extended time intervals
- Graphic organizer and study guide provision
- Detailed rubrics

- Assistive technologies
- Seating/testing venue accommodation
- Individualized instruction per IEP

☺ A field trip to a local supermarket can highlight application of pricing approaches in a clear and highly relevant manner.
Unit VI - Lesson 1

What’s the Right Price?

Overview: At what price should I sell my product? What perception of value does my price communicate to my potential customer? These are questions that must be carefully considered in any marketing strategy. This lesson introduces concepts about pricing and analyzes commonly used pricing strategies in market situations. The lesson begins with a shopping activity that places students in the role of the customer and facilitates analysis of consumer behavior as a response to pricing strategies. Students also learn to critically examine their own “shopping” behavior.

NBEA Standard(s):

- Marketing, I. Foundations of Marketing
- Marketing, IV. The Marketing Mix

Common Core Standard(s):

1. CCR Standard for Reading: Read closely to determine what the text says explicitly and make logical inferences from it.
2. CCR Standards for Listening: Prepare for and participate effectively in a range of conversations and collaborations with diverse partners, building on each other’s ideas and expressing their own clearly and persuasively. Evaluate a speaker’s point of view, reasoning, and use of evidence and rhetoric.
3. CCR Standards for Speaking: Present information, findings and supporting evidence in such a way that listeners can follow the line of reasoning, and the organization, development and style are appropriate to the task, purpose and audience.

Objectives/Purposes:

Students will analyze pricing strategies, and design a pricing strategy for a product of their choice. Students will also develop the skills of teamwork, leadership and problem solving.

Knowledge@Wharton Article:

“Choosing the Wrong Pricing Strategy Can Be a Costly Mistake”

Other Resources/Materials: Internet access
Activity:

1. Let’s go shopping (5-8 mins)

The teacher begins the class by asking students what they would like to shop for. The item has to be something all the students in the class want to shop for. My class chose to shop for sneakers. The teacher now pulls up online shopping options like Amazon.com, Google Shopping, etc., where the item can be purchased.

Students are asked to compare the prices of the articles and make choices. They have to record the product they would like to purchase, and its price.

2. How did we shop? (10 mins)

The students are asked to share their purchase decisions, and the prices of their products. The teacher now distributes the handout on pricing strategies that are commonly used in the market and discusses the strategies with the class. You could explain a strategy with an example and ask students for additional examples.

The teacher then asks students to identify the pricing strategies they think were used in the product they chose to buy. Students deliberate over their purchase decisions, the prices, the prices of the competitors, and the pricing strategies for a couple of minutes before sharing their thoughts with the class.

3. Working with the Knowledge@Wharton article (10 mins)

The teacher distributes copies of the article and has the students read it out aloud, in turns. The article provides additional illustrations and the perspective of a company trying to price its product correctly. The teacher leads a class discussion on pricing strategies and market dynamics using the initial activity and other examples from the article and student experiences.

4. Group Activity (10 mins)

Students are divided into small groups. Since this is a module lesson, students are asked to design their pricing strategies for the product they designed in the previous lesson. They are asked to consider competition prices, perception of value they want to communicate to the customer, cost of production, and profit margins as they work out their strategies.

5. Presentation (10 mins)

The groups present their pricing strategies to the large group. This can be done in the next lesson depending on the number of groups and the time required for the presentation. Ideally, each group should get about 5 minutes to present and at least 3 minutes of feedback and suggestions from the class.
Tying It All Together: As the Knowledge@Wharton article points out, choosing the wrong pricing strategy can be a costly mistake. Companies make their pricing decisions based on market inputs and for strategic purposes. This lesson introduces students to some of the most fundamental elements of pricing. This lesson begins with student participation in the shopping activity. This will easily lend itself to an analysis of pricing strategies. These concepts are further clarified by the article, which provides an overview of pricing strategies along with a case study. The pricing task gives students the opportunity to apply, clarify, and internalize these concepts and strategies. The feedback evaluates the pricing strategies of the student groups and urges the groups to critically examine their assumptions and strategies.

Practice Outside of the Classroom: The next time you make a purchase, consider: What role did pricing play in your purchase decision? What value of the product was communicated by its price?

What Worked and What I Would Do Differently:

This lesson easily lends itself to a pricing project, where students can be asked to find out prices in a product category (e.g. soaps) and analyze the longitudinal pricing strategies employed by each market player. For example:

- What are the prices of the different soaps available in the market?
- What offers are available?
- When are these offers available?
- Are there any new players?
- What pricing strategies did older players use when a new player emerged on the market?
- What launch strategies were used by the new player?

The data can be analyzed for market segmentation and pricing strategies.

Other Related Knowledge@Wharton Articles:

- “The Price is Right, or Is It? Determining the Impact of Price on Sales” (Research Experiment)
- The Price is Right, but Maybe It’s Not, and How Do You Know?” (Case Study)
- “Companies Must Learn to Achieve the Price Advantage (or Pay the Price)” (Interview)
Unit VI - Lesson 2
Sales/Pricing Proposal

SALES PROPOSAL

Your deli – Grubway - has received a solicitation to bid on a contract with the recreation department of Mount Olive Township to feed approximately 200 employees. The RFP was sent to you by Ms. Valerie Velocity, 15 Runner Road, Flanders, NJ 07836. Ms. Velocity has requested a one page proposal for delivery of the following by 11 AM on May 11th to Turkey Brook Park:

<table>
<thead>
<tr>
<th>Item</th>
<th>Your cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>75 Turkey Subs</td>
<td>$1.50</td>
</tr>
<tr>
<td>50 Italian Subs</td>
<td>$1.75</td>
</tr>
<tr>
<td>35 Caesar Salads</td>
<td>$1.50</td>
</tr>
<tr>
<td>20 Veggie Salads</td>
<td>$1.25</td>
</tr>
<tr>
<td>20 Tuna Wraps</td>
<td>$1.50</td>
</tr>
<tr>
<td>200 Bags of Chips</td>
<td>$.50</td>
</tr>
<tr>
<td>200 20 oz. Bottled Water.</td>
<td>$.50</td>
</tr>
</tbody>
</table>

Develop a proposal for this potential client in the form of a letter. Email the letter to tkelly@mtoliveboe.org today.

Considerations: You have determined that you would not even consider bidding on this unless you can make a gross profit margin of 25%. While price is an important element of this RFP, this assignment calls upon you to suggest non-price oriented concepts that may enhance your chance to win this bid. But space is very brief on this page so be concise.

***********
**Unit Overview**

**Content Area:** Principles of Marketing  
**Unit Title:** VII. Brand, Product, and Service Management  
**Target Course/Grade Level:** Grades 9 - 12  
**Unit Summary:** This section will cover the fundamental principles underpinning the practices and strategies that support Brand Management, Product Management, and Service Management. In addition, this section will cover the concepts and laws governing trademarks, patents, and copyrights.  
**Primary interdisciplinary connections:** Language arts: written communications. Psychology. Business Ethics.  
**21st century themes:** Financial, economic, business, and entrepreneurial literacy.  
**Unit Rationale:** The ability to establish and develop brand identity is important to individuals and firms alike. Businesses including for-profit concerns, charities and causes need to effectively grow and develop their properties to ensure continued viability in a dynamic marketplace.

**Learning Targets**

**New Jersey Core Content Standards: 9.4 Career and Technical Education**

**Content Statements**

- **Communication Skills:** All clusters rely on effective oral and written communication strategies for creating, expressing, and interpreting information and ideas that incorporate technical terminology and information.
- **Problem-Solving and Critical Thinking:** Critical and creative thinking strategies facilitate innovation and problem-solving independently and in teams.

<table>
<thead>
<tr>
<th>CPI #</th>
<th>Cumulative Progress Indicator (CPI)</th>
</tr>
</thead>
<tbody>
<tr>
<td>9.4.12.N.(2).1</td>
<td>• Evaluate and select concepts and strategies used in this pathway to communicate information about products, services, images, and/or ideas to achieve desired outcomes.</td>
</tr>
<tr>
<td>9.4.12.N.(2).2</td>
<td>• Demonstrate understanding of personalized communications strategies marketers use to determine client needs and wants, and to develop responses intended to influence purchasing decisions and enhance future business opportunities.</td>
</tr>
<tr>
<td>9.4.12.N.(2).3</td>
<td>• Facilitate decision-making by evaluating and selecting tools, strategies, and systems used in this industry to access, process, maintain, evaluate, and disseminate information</td>
</tr>
</tbody>
</table>
Standards 9.4 Career and Technical Education: All students who complete a career and technical education program will acquire academic and technical skills for careers in emerging and established professions that lead to technical skill proficiency, credentials, certificates, licenses, and/or degrees.

Content Statements: This syllabus is established in conformance with the 2009 New Jersey Career Content standards for 21st Century Life and Careers.

Industry Standards:
Standard D: Practical Business Skills
Standard C: Computer/Technology Applications

<table>
<thead>
<tr>
<th>Unit Essential Questions</th>
<th>Unit Enduring Understandings</th>
</tr>
</thead>
<tbody>
<tr>
<td>● How does a business develop a product?</td>
<td>● Marketing meets customer needs and wants with products, services or ideas that customers can and will buy.</td>
</tr>
<tr>
<td>● Why is product planning important to a business?</td>
<td>● There are concepts and processes needed to develop, maintain and improve a product or service mix in response to market opportunities.</td>
</tr>
<tr>
<td>● How are packaging, branding, and labeling important in product planning?</td>
<td></td>
</tr>
<tr>
<td>● What are the effective elements of a successful product?</td>
<td></td>
</tr>
<tr>
<td>● How is the product life cycle used in marketing?</td>
<td></td>
</tr>
</tbody>
</table>

Unit Learning Targets: Students will understand that....

● Marketers have a wide range of tools available to manage the marketing of products and services.

● Product planning has seven steps: (1) generating ideas, (2) screening ideas, (3) developing a business proposal, (4) developing the product, (5) testing the product with consumers, (6) introducing the product (commercialization), and (7) evaluating customer acceptance.

● The product life cycle has four stages: introduction, growth, maturity, and decline.

● The goal of product positioning is to set the product apart from the competition.

● A brand is a name, term, design, or symbol (or a combination of these elements) that identifies a product or service. A brand is one of a company’s most important assets and a powerful tool in the marketing and selling process.

● Brands can include a trade name, brand name, brand mark, trade character, and trademark.

● The functions of packaging include promoting and selling the product, defining product
identity, providing information, expressing benefits and features to customers, ensuring safe use, and protecting the product.

- Cognizance of marketing practices can help an individual be a better informed consumer.
- Many product management skills are transferrable to marketing oneself.

### Evidence of Learning

- Summative Assessment: End of unit written exam.
- PBL assignment: Product management marketing recommendation. Key elements of product development, branding, product specifications, patenting, features, benefits will be included. (See Appendix C for example).

### Equipment needed: Computer, Smartboard or ELMO

### Teacher Resources:

- Internet, Textbook, [www.deca.org](http://www.deca.org), [www.knowledge@wharton.org](http://www.knowledge@wharton.org), [www.marketingteacher.com](http://www.marketingteacher.com)

### Formative Assessments

- Daily “do now”/warm-up responses.
- Ability to demonstrate proficiency in key unit concepts in class discussions.
- Student Portfolio of key work products.

### Lesson Plans

<table>
<thead>
<tr>
<th>Lesson</th>
<th>Timeframe</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lesson 1: Brand Equity (See appendix)</td>
<td>45 mins.</td>
</tr>
<tr>
<td>Lesson 2: Brand Promotion (See appendix)</td>
<td>45 mins.</td>
</tr>
</tbody>
</table>

### Teacher Notes:

- Special Populations: This unit was developed with consideration of special needs students in mind. The relevant accommodations that can be implemented in this unit include:
  - Extended time intervals
  - Graphic organizer and study guide provision
  - Detailed rubrics
  - Assistive technologies
  - Seating/testing venue accommodation
  - Individualized instruction per IEP

- “Hands-on” projects in this section can be useful as a kinesthetic tool. Development of packaging or product graphics may be beneficial.
Unit VII - Lesson 1

Brand Equity

Overview: This lesson continues the lesson on brands, branding and brand strategies to now highlight the concept of brand equity. Building on earlier concepts, students analyze the various elements that constitute brand equity. According to the Knowledge@Wharton High School glossary: Brand equity refers to the marketing of facts that are uniquely attributable to the brand. In particular, brand equity captures the outcomes, including how aware consumers are of the product, how much they like it, how committed they are to it, and how much they're willing to pay for it, that result from a product’s name. From the general concept of branding (ideas, emotions attached to a distinct identity, name, logo), we now move to specific expectations from branding — name recognition, market share, sales, etc. In today’s competitive world the leverage a brand offers a product is tangible and extremely valuable for marketing departments.

NBEA Standard(s):

- Marketing, I. Foundations of Marketing

Common Core Standard(s):

1. CCR Standard for Reading: Read closely to determine what the text says explicitly and make logical inferences from it.
2. CCR Standards for Listening: Prepare for and participate effectively in a range of conversations and collaborations with diverse partners, building on each other’s ideas and expressing their own clearly and persuasively. Evaluate a speaker’s point of view, reasoning and use of evidence and rhetoric.
3. CCR Standards for Speaking: Present information, findings and supporting evidence in such a way that listeners can follow the line of reasoning, and the organization, development and style are appropriate to the task, purpose and audience.

Objectives/Purposes: Students will analyze the brand equity of a brand of their choice.

Knowledge@Wharton Article: “The iPhone in China: Will Apple Connect with the World’s Biggest Mobile Market?”

Other Resources/Materials:

Handout of sample survey
Activity:

1. Introduction to concepts (10-15 mins)

The teacher begins the lesson by explaining the concept of brand equity. According to the Knowledge@WhartonHighSchool glossary: *In particular, brand equity captures the outcomes, including how aware consumers are of the product, how much they like it, how committed they are to it, and how much they’re willing to pay for it, that result from a product’s name – for example, Coca-Cola – that would not occur if the same product did not bear that name – example, a generic cola.*

To unpack this rather seemingly complicated definition I used an example — in the form of a survey created around the underlined points from the definition. The example is included as an attachment to the lesson. In the example of the Apple iphone, the four points from the definition are broken down into numerical points. A person ticking the “strongly aware” category of the survey fetches 4 points for iphone while the person ticking the “not aware” category gains a single point for Apple. Similarly, a person ticking “I loooove Apple” gains 4 points for Apple while “I’m not crazy about Apple fetches 2 points for Apple. In this way, the definition is broken down into a numerical 4-point scale for each part of the definition. This can then be compared to the brand equity of a competing Smartphone like that of Blackberry, to really unpack what brand equity means to a branded product.

2. Work with Knowledge@Wharton article (10 mins)

Students are now given copies of the article: “The iPhone in China: Will Apple Connect with the World’s Biggest Mobile Market?” to further analyze the brand equity of a product along different market segments or regions. The article talks about the differing perception of Apple in the US, China and India, and how marketing decisions in different countries can impact the global brand equity of Apple.

3. Student Surveys (15 mins)

Students are now asked to design their own surveys to analyze the brand equity of a brand of their choice. Once the students design the surveys, they can ask their classmates to respond to the survey. Once they have the sufficient number of respondents, they are guided through the math to arrive at a final percentage figure for the brand equity of the product they chose. Using the sample survey as a take off point, the numerical analysis is explained. The scores are to be
multiplied with the respondent tally and a final percentage value is arrived at for a comparable analysis.

Students can then be asked to present their analysis from the survey in the next lesson. It will be interesting if some students choose competing products or services for surveys. For example, if Apple’s brand equity turns out to be 73% and Blackberry’s is 68%, it can be analyzed whether — customers are more aware, or they like the product more, or it is a commitment, or it is the willingness to pay that gives Apple higher brand equity. Apple’s branding strategy can be analyzed along with Blackberry’s to understand how brand equity is created in tangible terms.

**Tying It All Together:** Brand Equity sounds like a difficult concept since the name does not immediately conjure up a coherent meaning. Furthermore, equity may also refer to equality, which can be confusing. Students therefore build up the various blocks that together constitute brand equity, through the survey exercise.

**Practice Outside of the Classroom:** The survey can also be conducted outside the class in a more rigorous fashion, making sure that a representative sample is surveyed.

**What Worked and What I Would Do Differently:** The concept of brand equity can be explored at multiple levels. This lesson can therefore be extended into a multi-tier lesson looking at the same concept from a local, regional/national and global perspective. For example, a teacher in Maharashtra (India) could do a lesson exploring the brand equity of Maharashtra and the political/economic dimensions of this phenomenon. This lesson can, among others, be linked to lessons in Social Studies/History, and Civics/Citizenship/Human Rights (when a brand/nation becomes aggressive and delegitimizes other notions of identity).
Unit VII - Lesson 2

Brand Promotion

Overview: It is not just products or services that use promotional campaigns; brands, too, design and implement promotional campaigns. Building on the earlier lessons of branding, brand strategy and brand equity, brand promotions comes as a logical extension. If branding is a powerful tool to position, target and market an identity, it is only natural that this identity be promoted and leveraged to increase product sales. Additionally, this lesson orients students towards the subtle differences and overlaps between brand promotion and product promotions. In this lesson, students begin by watching the Dove evolution video. This commercial was part of the successful campaign for real beauty designed and implemented by Dove in response to the falling sales of Dove products. Using the video, components of a successful brand promotional campaign are analyzed.

NBEA Standard(s):

- Marketing, I. Foundations of Marketing

Common Core Standard(s):

1. CCR Standard for Reading: Read closely to determine what the text says explicitly and make logical inferences from it.
2. CCR Standards for Listening: Prepare for and participate effectively in a range of conversations and collaborations with diverse partners, building on each other’s ideas and expressing their own clearly and persuasively. Evaluate a speaker’s point of view, reasoning and use of evidence and rhetoric.
3. CCR Standards for Speaking: Present information, findings and supporting evidence in such a way that listeners can follow the line of reasoning, and the organization, development and style are appropriate to the task, purpose and audience.

Objectives/Purposes: Students will analyze the promotional strategies of a brand of their choice.

Knowledge@Wharton Article: “Unilever’s Michael Polk: It’s All about ‘Dislocating Ideas’”

Other Resources/Materials:

Internet access for commercials

Knowledge@WhartonHighSchool glossary
Activity:

1. Watch commercial *(1.15 mins)*

The teacher begins the class by screening the Dove Evolution viral video, available on YouTube at [http://www.youtube.com/watch?v=iYhCn0jf46U](http://www.youtube.com/watch?v=iYhCn0jf46U). This video shows, in time lapse, a pretty but ordinary woman being transformed into a striking billboard model through make-up, photography, and Photoshop. The advertisement promotes the Dove self-esteem fund and the idea of “real beauty.”

2. Group Discussion/Brainstorming *(10 - 15 mins)*

The teacher leads a class discussion based on the evolution video. This could begin with simple warm-up questions like “What do you think?” This encourages students to respond to the concept of “real beauty” at a personal level. This can later be used to understand the power of brand promotion.

After the students are provided with a platform to respond to the video personally, the teacher leads the discussion on to marketing concepts.

Alongside, the concept of viral marketing could also be clarified since the video is introduced as a “viral” video: *Viral, or word of mouth marketing, is a type of marketing when a company uses an existing social network, like friends, colleagues from work, and others, to meet a marketing objective such as an increase in brand awareness or increase in product sales.*

Other questions that could be asked include:

1. What is being advertised?

*Dove, the self-esteem fund, the brand?*

2. What products do you know of this brand?

*Soap, shampoo.*

3. How is the brand promoting itself?

*By attaching itself to an idea that will appeal to its target customer segment.*

4. Why does Dove need to promote the brand and not just a product, like Dove soap, or Dove shampoo, which it does too?
Dove products like Dove soap and shampoo have the same ideas and concepts associated with the brand. It’s easier to promote the brand and have that strong identity transferred to the individual products.

The teacher now looks up commercials for Dove soap and shampoo on the Internet. For example, you could show the Dove Shampoo commercial at [http://www.youtube.com/watch?v=3SLDmRjx7Og](http://www.youtube.com/watch?v=3SLDmRjx7Og). As this example illustrates, while promoting a particular product, the focus may remain on the product features. Customers will relate more strongly and personally to a brand or the story that a brand creates. Many product promotions use this formula by highlighting the branding rather than the product features.

To continue the discussion, other possible questions you could ask are:

1. How does product promotion differ from Brand promotion in the Dove examples we saw?

   *Product promotion may need to focus on the particular product, the features of product, and the supposed benefits of using the product. Dove uses brand promotion to go beyond product specifics to promote the idea/emotion/identification associated with its brand.*

2. What ideas/emotions do you associate with this brand?

   *Soft, comfortable, caring, not harsh, ethical.*

3. How does the logo/name/colors/font communicate the brand image?

   *Dove — soft feel of a bird, smooth contours, blue — cool, not harsh, font — cursive, soft gold or silver to accentuate feelings of specialness?*

4. What strategies do brands use for brand promotion?

   *Awards, advertising, sponsorship, testimonials, write-ups, celebrity endorsements, product/brand placements in movies, etc.*

3. Work with Knowledge@Wharton article (10 mins)

Students are given handouts of the article and asked to read the sections [Getting the Right Data](#) and the [Lipton Tea Party](#). The teacher then leads a group discussion on the examples of branding mentioned in the article — Starbucks, Dove, Lipton Tea and Country Crock. The promotional strategies of these brands are used to illustrate the concepts further.

4. Small Group Activity (10 mins)
The teacher now asks the class to break up into small groups, and instructs the groups to analyze the brand promotion strategies of a brand of their choice.

Students are asked to make sure that their presentation covers the following questions:

Name your brand.

What promotional strategies has the brand used?

- Advertising
- Publicity
- PR (talk shows, funds, awards, etc.)
- Sponsorship
- Any other

How does this appeal to its target segments?

How does the brand logo/font/color communicate the brand identity?

Groups are allowed to use the Internet, but advised to organize browsing around specific questions and to delegate browsing work.

4. Presentation, Feedback, Wrap-up (10 mins)

The groups are asked to present their analysis. Other groups are encouraged to provide constructive criticism — What was insightful about the design? Was there anything about the design which you felt was erroneous or misleading?

**Tying It All Together:** Brand promotion is an integral aspect of marketing a product. By tying the product to emotions and identities beyond its immediate benefits, marketing uses powerful psychological tools to leverage important aspects of our social identification.

**Practice Outside of the Classroom:** The next time you make a purchase, examine the role of brand promotion in your purchase.

**What Worked and What I Would Do Differently:** The specific example used in the lesson can be replaced with current/culturally relevant examples. The impact of brand promotion can be examined in greater detail. For example, in a girls school in an urban slum in Mumbai (India), I would love to do a comparative study of “Dove” and “Fair and Lovely.” This can even be extended into a project with actual surveys to be conducted in the neighborhood.

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## Unit Overview

### Content Area: Introduction to Marketing

### Unit Title: VIII. Market Research

### Target Course/Grade Level: Grades 9 – 12

### Unit Summary:
This section introduces students to various quantitative and qualitative methods that can be employed to identify the attitudes, opinions, beliefs, and perceptions of people. Students will learn the types and efficiency of varying survey methods and understand how to make projections based on their findings.

### Primary interdisciplinary connections:

### 21st century themes:
Financial, economic, business, and entrepreneurial literacy.

### Unit Rationale:
Decision making in virtually every business and social dilemma is increasingly required to be based on data-driven methods due to the risk and cost of relying on “seat of the pants” estimation. Marketing decision making in particular requires a fact-based data driven process. For example:

1. Define the problem
2. Obtain Data
3. Analyze Data
4. Recommend Solutions
5. Apply the results

### Background notes:
Market research is any organized effort to gather information about markets or customers. It is a very important component of business strategy. Market research provides important information to identify and analyze the market need, market size and competition.

## Learning Targets

### Standards

**New Jersey Core Content Standards: 9.4 Career and Technical Education**

This syllabus is established in conformance with the 2009 New Jersey Career Content standards for 21st Century Life and Careers.

### Content Statements

**Information Technology Applications:** Technology is used to access, manage, integrate, and disseminate information.

**Systems:**
- Key organizational systems impact organizational performance and the quality of products and services.
- Understanding the global context of 21st-century industries and careers impacts business operations.
<table>
<thead>
<tr>
<th>CPI #</th>
<th>Cumulative Progress Indicator (CPI)</th>
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<tbody>
<tr>
<td>9.4.12.N.(3).1</td>
<td>• Employ processes and systems used in this industry to monitor, plan, and control day-to-day marketing research activities in order to contribute to continued functioning.</td>
</tr>
<tr>
<td>9.4.12.N.(3).2</td>
<td>• Employ tools, techniques, and systems used in this industry to plan, control, and organize a marketing research organization or department.</td>
</tr>
<tr>
<td>9.4.12.N.(3).3</td>
<td>• Employ concepts, tools, strategies, and systems used in this pathway to access, process, maintain, evaluate, and disseminate information in order to assist business decision-making.</td>
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**Standards 9.4 Career and Technical Education** All students who complete a career and technical education program will acquire academic and technical skills for careers in emerging and established professions that lead to technical skill proficiency, credentials, certificates, licenses, and/or degrees.

**Content Statements**

**Systems:**

**Information Technology Applications:**

• Technology is used to access, manage, integrate, and disseminate information.

**Industry Standards**

Standard D: Practical Business Skills

Standard C: Computer/Technology Applications

**Unit Essential Questions**

• How do marketers acquire needed intelligence to foster effective business decision making?
• How do marketers determine the marketing mix?

**Unit Enduring Understandings**

• Comprehending the needs and wants of consumers is essential in the marketing realm.
• An understanding of business statistics can help clarify understanding of consumer intentions and behaviors and facilitate prediction.

**Unit Learning Targets**

*Students will understand that...*

• Accurate and efficient research gathering is a fundamental underpinning of marketing.

• A marketing information system is a set of procedures and methods that regularly generates, stores, analyzes, and distributes marketing information for use in making marketing decisions.

• Marketing research is usually divided into two broad types: quantitative and qualitative.

• Marketing research methods include attitude and opinion research, market intelligence, media research, and product intelligence.

• The five steps that a business follows when conducting marketing research are defining the
problem, obtaining data, analyzing the data, recommending solutions, and applying the results.

- A variety of analytic tools and processes may be used to process data into usable information.
- Both primary and secondary sources of data are useful to garner desired information.
- Marketing surveys may be structured in a variety of ways.

### Evidence of Learning

- **Summative Assessment:** End of unit written exam
- **PBL assignment:** students will develop and conduct a student survey on a contemporary/relevant topic of interest, interpret the results and present findings. Suggested topics include a HS prom or an election campaign.

**Equipment needed:** Computer, Smartboard or ELMO

**Teacher Resources:** Internet, Textbook, [www.deca.org](http://www.deca.org), [www.knowledge@wharton.org](http://www.knowledge@wharton.org), [www.marketingteacher.com](http://www.marketingteacher.com)

### Formative Assessments

**Daily “do now”/warm-up responses.**

- Ability to demonstrate proficiency in key unit concepts in class discussions.
- Student Portfolio of key work products.

- Shared responses to Essential Questions.
- Interim quizzes.
- Written and reading-based homework.

### Lesson Plans

<table>
<thead>
<tr>
<th>Lesson Plan Example</th>
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<tbody>
<tr>
<td>Lesson 1: Student Research Project</td>
<td>45 mins.</td>
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<tr>
<td>(See appendix)</td>
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<tr>
<td>Lesson 2: Prom survey</td>
<td>45 mins.</td>
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<td>(See appendix)</td>
<td></td>
</tr>
</tbody>
</table>

### Teacher Notes:

- **Special Populations:** This unit was developed with consideration of special needs students in mind. The relevant accommodations that can be implemented in this unit include:

  - Extended time intervals
  - Graphic organizer and study guide provision
  - Detailed rubrics
  - Assistive technologies
  - Seating/testing venue accommodation
  - Individualized instruction per IEP

- An assignment eliciting student memories of situations where market research solicitation was helpful to them, juxtaposed with an alternative situation where it was not, thus linking the learning to their personal experiences, may be quite valuable.
Unit VIII - Lesson 1
Marketing Research

Overview: Access to accurate information for making marketing decisions is essential. In this lesson, students are introduced to the basic concepts of marketing research. While marketing research can be an entire course by itself, the basic quality of curiosity and desire for accurate information drives the different methodologies. The Knowledge@Wharton articles present two interesting themes within this first lesson — the kinds of data marketing researchers have access to and use, and the problem of information overload. This lesson will be conducted in two parts.

NBEA Standard(s):

- Marketing, V. Marketing Research

Common Core Standard(s):

1. CCR Standard for Reading: Read closely to determine what the text says explicitly and make logical inferences from it.
2. CCR Standards for Listening: Prepare for and participate effectively in a range of conversations and collaborations with diverse partners, building on each other’s ideas and expressing their own clearly and persuasively. Evaluate a speaker’s point of view, reasoning, and use of evidence and rhetoric.
3. CCR Standards for Speaking: Present information, findings and supporting evidence in such a way that listeners can follow the line of reasoning, and the organization, development and style are appropriate to the task, purpose and audience.

Objectives/Purposes: In this module, students will develop questions from the stage of everyday curiosity to that of scientific curiosity. In this lesson, students will generate as many research areas/questions as possible, for a product of their choice.

Knowledge@Wharton Articles:

- “Mining Data for Nuggets of Knowledge”
- “Info Insight: Using Market Research to Your Competitive Advantage”

Other Resources/Materials: Internet access, Handouts
Activity:

1. Small group activity (10 mins)

The teacher pulls up, from the Internet, trends predicted for particular product segments. The example I used was from the UK market for which Mintel made predictions — [http://www.mintel.com/press-centre/press-releases/424/consumer-packaged-goods-trend-predictions-for-2010](http://www.mintel.com/press-centre/press-releases/424/consumer-packaged-goods-trend-predictions-for-2010). Students are asked to form small groups and pick any one trend-prediction. They are then asked to assume that they have a company that deals in the same market and they have to make decisions based on the information presented.

For example, one of the trends states, “Consumers are hungry for nutrition facts. However, people feel confused and skeptical about different companies’ nutrition symbols. Indeed, in the UK nearly half (45%) of consumers find nutritional labels too cluttered. In response, more manufacturers will opt for clean, clear facts on front-of-pack statements in 2010.” The students who choose this trend have to imagine that they have a food product in the market, and they will have to take any decisions based on this trend prediction. To help students structure the activity, you could use some prompt questions like:

- Is this information in line with what you currently know about your market?
- What else do you need to know to make decisions?
- Design a research plan for additional information required.
- How do you expect this information to impact your company’s marketing?

You could also ask students to break up marketing into its elements (Product, Price, Place, Promotions) to analyze the trends and to generate questions. The following are samples of decisions students are expected to generate:

Example 1:

Symbol overload: Consumers are hungry for nutrition facts. However, people feel confused and skeptical about different companies’ nutrition symbols. Indeed, in the UK nearly half (45%) of the consumers find nutritional labels too cluttered. In response, more manufacturers will opt for clean, clear facts on front-of-pack statements in 2010.

- Look for research studies on the topic.
- Identify if sample populations in the study matched my customer segments.
- Are any of my competitors doing anything along these lines?
- Conduct a small-scale study with my customer segments.
- Since this deals with packaging rather than product, check if there are any other factors that could be changed like color-coding.
- Are there new customer segments I can appeal to with differentiated packaging?
- Pre-test new packaging if we decide to go with new packaging.
- Market the new packaging.
- Evaluate impact/have sales increased? Is there greater brand retention?
Example 2:

Sodium reduction: Poised as the next major health movement, sodium reduction is finally ready to take hold. Indeed, 35% of UK consumers now consider low salt content when buying food. The key difference, says David Jago, is that “sodium reduction is being pushed by food companies and health organizations, not by consumers.” This could mean slow adoption of the “less salt” mantra by shoppers, even as the food industry moves ahead.

- Check with medical research about necessary sodium levels and the current sodium levels in your products.
- Research customer perception for my segments.
- Consider options with product development in a way that does not alienate positive perception of product.
- Pre-test product in a pilot program.
- Evaluate impact and change in perception.
- Implement product substitution in select outlets.
- Monitor sales, brand perception and customer satisfaction.
- Tweak product based on data.
- Market for larger markets.
- Implement plan.

2. Present to large group (10-12 mins)

The groups are asked to present their designs. Other groups are encouraged to provide constructive criticism — What was insightful about the design? Was there anything about the design you felt was erroneous?

3. Discussion (10 mins)

The teacher leads a class discussion about marketing research. You could ask students what they understand by marketing research, and why it could be important for marketing. You could then synthesize the various elements in the following points:

- Information used to identify and define marketing opportunities and problems.
- Generate, refine and evaluate marketing actions.
- Monitor marketing performance.
- Improve understanding of marketing as a process.

*Marketing research specifies the information required to address these issues, designs the method for collecting information, manages and implements the data collection process, analyzes the results, and communicates the findings and their implications* (from Wikipedia).

Or you could break it down into questions like:

- What information do I require?
How do I collect this information?

You may also want to differentiate Marketing Research from Market Research which is any organized effort to gather information about markets or customers.

Once students have a clear picture of what marketing research is and what its objectives are, the teacher briefs students about the next activity, conducted over two lessons. In today’s class students will, in small groups, identify a product or service of their choice and begin to generate a sample plan for various research opportunities for the marketing research group of the product or service. The objective of today’s exercise is to generate as many options as possible. In the next class, they will choose one possible research area and design a research plan.

4. Small group activity (10-12 mins) Handout (Worksheet) Handout (Trend Prediction)

To help students with their activity, the teacher distributes handouts of the marketing process and of the definition and process of marketing research discussed earlier. The marketing process is summarized in the following manner:

- Analyze market opportunities
  - Target consumers
  - Competition

- Design marketing strategy
  - Differentiating/positioning/branding
  - Product life-cycle (development, launch, growth, maturity, decline)
  - Marketing Mix (product, price, place, promotion — advertising, PR, sales promotions, direct marketing)
  - Implementation — Pilot
  - Evaluation

5. Wrap-up

The teacher asks for feedback on the activity and reminds students to bring in their handouts and analysis from today’s class for tomorrow’s lesson.
Tying It All Together: This lesson orients students in moving their natural curiosity on to a more scientific plane. Science has been defined as “the observation, identification, description, experimental investigation and theoretical explanation of phenomena.” The objective of this module is to systematically organize natural curiosity, generate possible explanations, and develop a design with which to test the possible explanations.

Practice Outside of the Classroom: The next time you go shopping, identify elements of your experience that could be valuable for a marketing research team. Other than such a marketing focus, you could also urge and help students to develop a scientific attitude towards all disciplines.

What Worked and What I Would Do Differently: If students can be allowed to participate in actual marketing research experiments, such experiences could be valuable, and easily integrated into this lesson. For example, students could be asked to attend experiments at the Wharton Behavioral Lab, and those experiments could be analyzed in class.
Unit VIII - Lesson 2
Prom Survey

Prom Night Survey

Read the market research chapter in your text. Compose a survey that evaluates one of the following topics regarding Prom night:

- Safety Issues
- Cost/Value
- Entertainment/Fun
- Social Pressures
- After Prom Activities/Decisions

Your assignment is as follows:

1. Develop the survey in an approved format.
2. Have at least 15 qualified individuals complete the survey (respondents must be identified and must be MOHS students). A maximum of 5 students in your current MKT I class may participate.
3. Compile your results and comprehensively describe your findings and interpretations: key points must be presented in summarized percentages and AT LEAST 2 graphs must be presented.
4. Fully explain whether you believe the results are valid and your interpretation of the results.
5. Your finished report will be a minimum of 3 and maximum of 5 typed pages (12 pt., ds).

Grading: This assignment is a project grade for Unit 9. Scoring will be scored based on the quality of your survey and as well as how well you followed directions and applied the market research principles outlined in this chapter of the book.

Due Date: _______________

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Career and Technical Education Partnership of New Jersey
Model Program of Study Curriculum Document for the career cluster of
MARKETING

Unit Overview

Content Area: Introduction to Marketing
Unit Title: IX. Careers in Marketing

Target Course/Grade Level: Grades 9 - 12

Unit Summary: Students will learn the scope of marketing careers, the educational and training requirements necessary to achieve those positions, contemporary availability of these jobs in NJ and worldwide and best practices to enhance their chances to achieve these positions.


21st century themes: Financial, economic, business, and entrepreneurial literacy.

Unit Rationale
Students will be afforded the opportunity to develop college and career planning strategies.

Learning Targets

Standards
New Jersey Core Content Standards: 9.4 Career and Technical Education

Content Statements
- Career exploration includes investigation of the contemporary workplace and an understanding of the relationships among personal abilities, education, and knowledge and skills needed to pursue 21st-century occupations and careers.
- There is a relationship between personal behavior and employability.

CPI # Cumulative Progress Indicator (CPI)
9.3.12.C.2 Characterize education and skills needed to achieve career goals, and take steps to prepare for postsecondary options, including making course selections, preparing for and taking assessments, and participating in extracurricular activities.
9.3.12.C.3 Develop personal interests and activities that support declared career goals and plans.
9.3.12.C.4 Use online resources to examine licensing, certification, and credentialing requirements at the local, state, and national levels to maintain compliance with industry requirements in areas of career interest.
9.3.12.C.5 Identify transferable skills in career choices and design alternative career plans based on those skills.
9.2.12.A.2 Identify a career goal and develop a plan and timetable for achieving it, including educational/training requirements, costs, and possible debt.

Standards 9.4 Career and Technical Education All students who complete a career and technical education program will acquire academic and technical skills for careers in emerging and established professions that lead to technical skill proficiency, credentials, certificates, licenses, and/or degrees.
### Content Statements
This syllabus is established in conformance with the 2009 New Jersey Career Content standards for 21st Century Life and Careers.

### Industry Standards
<table>
<thead>
<tr>
<th>Standard E: Career Awareness and Acquisition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard A: Personal Soft Skills</td>
</tr>
<tr>
<td>Standard C: Computer/Technology Applications</td>
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</table>

### Unit Essential Questions
- What are the skills I need to pursue a career in marketing?
- How much money can I make as a marketer?
- How do my high school courses prepare me for a professional career?

### Unit Enduring Understandings
- Marketing is a broad discipline that provides a multitude of career opportunities.
- Marketers need to possess a broad array of academic and social skills in order to be successful.

### Unit Learning Targets
**Students will understand that...**
- There are many different types of jobs that offer opportunities for all personality types.
- There is a finite demand for many marketing positions.
- It is essential to present oneself in the very best light when seeking a career through effective oral and written communications.
- Marketing skills are transferrable to many career and life situations.
- A resume may be the most important document in a person’s professional life.
- Career preparation requires a diverse range of academic skills coupled with mastery of “soft skills.”

### Evidence of Learning
- Summative Assessment: End of unit written exam
- PBL assignment: Career research and development plan. Students will develop a vocational plan with a specific evaluation of one specific career choice. An assessment of educational and technical training, overview of responsibilities, plus a student resume will be included.
### Equipment needed:
Computer, Smartboard or ELMO

### Teacher Resources:
- Internet, [www.marketingteacher.com](http://www.marketingteacher.com), [www.deca.org](http://www.deca.org)
- [www.knowledge@Wharton.com](http://www.knowledge@Wharton.com),
- [http://www.careeronestop.org/ExploreCareers/ExploreCareers.aspx](http://www.careeronestop.org/ExploreCareers/ExploreCareers.aspx)

### Formative Assessments
- Daily “do now"/warm-up responses.
- Ability to demonstrate proficiency in key unit concepts in class discussions.
- Student Portfolio of key work products.
- Shared responses to Essential Questions.
- Interim quizzes.
- Written and reading-based homework.

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<thead>
<tr>
<th>Lesson Plan Example</th>
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<tbody>
<tr>
<td>Lesson 1: What is your brand?</td>
<td>45 mins.</td>
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<tr>
<td>(See appendix)</td>
<td></td>
</tr>
<tr>
<td>Lesson 2: Market yourself</td>
<td>45 mins.</td>
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### Lesson Plans

#### Teacher Notes:

○ Special Populations: This unit was developed with consideration of special needs students in mind. The relevant accommodations that can be implemented in this unit include:

- Extended time intervals
- Graphic organizer and study guide provision
- Detailed rubrics
- Assistive technologies
- Seating/testing venue accommodation
- Individualized instruction per IEP

○ Special needs population will particularly benefit from guest speakers and/or conducting personal interviews with relevant experts. Assistance with specifics of what to ask and pay particular attention to can be helpful.
Unit IX - Lesson 1

What Is Your Brand?

Overview: This lesson introduces the concept of “brand” as a distinctive identity that evokes certain thoughts and feelings. While this concept is particularly useful for marketing, brand or branding is not unique to marketing. Tiger Woods is a brand, so is President Obama, as is the United States of America. Each of these names signify distinct feelings, ideas and associations all over the world. For marketing, the importance of branding lies in the ability to streamline efforts to reach the customer and to increase profits. In this lesson, students begin by presenting a “personal brand.” Then they analyze their presentation for perception. Students then analyze their perception of the brand, and how that perception was created.

NBEA Standard(s):

- Marketing, I. Foundations of Marketing

Common Core Standard(s):

1. CCR Standard for Reading: Read closely to determine what the text says explicitly and make logical inferences from it.
2. CCR Standards for Listening: Prepare for and participate effectively in a range of conversations and collaborations with diverse partners, building on each other’s ideas and expressing their own clearly and persuasively. Evaluate a speaker’s point of view, reasoning and use of evidence and rhetoric.
3. CCR Standards for Speaking: Present information, findings and supporting evidence in such a way that listeners can follow the line of reasoning, and the organization, development and style are appropriate to the task, purpose and audience.

Objectives/Purposes: Students will understand the importance of branding, and will analyze their perception of various brands.

Knowledge@Wharton Article: “When a Black Tee Shirt Is More than a Black Tee Shirt: Why Brands Aren’t Losing Their Luster”

Other Resources/Material:

Internet access
Activity:

1. Present your brand (12 mins)

The teacher explains the initial activity and asks a few students to volunteer for it. In the activity, students are asked to choose and present one distinct identity in a real-life situation. For example, the student could be a contestant auditioning for the American Idol show facing the panel of judges, or an applicant for graduate studies before a panel of professors. The student has to present a personal brand that attempts to influence the choice of the selectors in his/her favor. The teacher explains that they have to differentiate themselves from the crowd (brand themselves).

The students now present their brand. They will first have to inform the class about their supposed physical description — what clothes, accessories, attitude, posture, etc. they will be presenting. Depending on the situation they present themselves, and are interviewed by the class or a select panel of students.

2. Class Discussion (10 mins)

The teacher leads the class in analyzing the meanings of each brand that was presented, and the branding strategies used by the volunteers. The teacher pulls up the glossary explanation of “brand”: The dictionary definition of a brand is a mark, a name or a logo indicating who made a product. However, brand means more than that. Brand is better-defined as a reputation, the meaning including all of the thoughts and feelings associated with that name or logo.

3. Work with Knowledge@Wharton article (8 mins)

The teacher now distributes copies of the article: “When a Black Tee Shirt Is More than a Black Tee Shirt: Why Brands Aren’t Losing Their Luster.” The sixth paragraph under the section Revitalize Rather than Replace gives a historical perspective of branding and how branding began to be used. This is followed by how branding is relevant today. After reading this section students are asked to read the earlier section titled, The Thin White Cord.

4. Class Discussion (10 mins)

The teacher leads a class discussion linking all the ideas to the marketing concept of branding. Even for a student applying for graduate studies, it is important to be able to differentiate himself or herself from the crowd. From a marketing perspective, with the range of products available, it is important to build a brand for your product — and to design your branding strategy in conjunction with market segmentation and customer value. It is important to give your product a name, associate it with quality, and build up a brand to make customers want to buy your product and keep buying. Brands may compete against each other, but to be unbranded is a huge risk — then nothing differentiates your product, nobody knows your product for itself.
Wrap-up

**Tying It All Together:** Branding is a central concept in marketing, but it is also a concept that is found across disciplines and regions. The marketing concept of branding, in this lesson, is arrived at from a more general concept that every individual having a distinct personality is essentially a brand. Thus branding is a strategy used to differentiate oneself. This concept is then examined from the marketing perspective. The Knowledge@Wharton article also provides a historical perspective that explains the importance of branding and its relevance to marketing in today’s world.

**Practice Outside of the Classroom:** The next time you purchase a branded product/service, list the attributes you associate with the brand.

**What Worked and What I Would Do Differently:** Branding is a concept that is not limited to marketing. Individuals branding themselves, countries branding themselves, concepts and ideas that become branded, can all be incorporated depending on student interest and cultural relevance. For example, if the school itself has a brand image, that too can be discussed. Or, if the country itself is going through a brand makeover, like India during the Shining India campaign, this lesson can be integrated with a social science or economics lesson.
Unit IX - Lesson 2:
Market Yourself!

Scenario: The prestigious university you desire to attend requires all prospective marketing majors to submit a PowerPoint presentation that markets the candidate. You are to develop a presentation that effectively promotes you.

Deliverable: A PowerPoint presentation that includes the following:
- A captivating cover page
- A theme that promotes the candidate
- A Mission Statement
- Candidate objectives
- A positioning statement
- A feature/benefit chart (focus on elements that set you apart from others)
- Audio elements
- A 30 – 60 second commercial promoting the candidate (may be storyboard or video)
- A one page “print ad” style sheet that “sells” the candidate
- A press release announcing the student’s intent to seek admission to the university
- A slide depicting the candidate’s commitment to social responsibility
- Summary of key accomplishments
- Summary of long term strategic plan/timeline
- Any other relevant slides

***************
APPENDICES

Appendix A: CTEP Industry Standards For Marketing Students*

<table>
<thead>
<tr>
<th>Standard</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>Personal “Soft Skills”: Includes personal traits such as trustworthiness, honesty, commitment, enthusiasm, listening skills, punctuality, appearance, telephone skills, writing skills, effective communication.</td>
</tr>
<tr>
<td>B</td>
<td>Interpersonal Skills: Stress management, conflict management, time management, problem solving, teamwork, persuasiveness, reconcile differences of opinion, leading/following.</td>
</tr>
<tr>
<td>C</td>
<td>Computer/Technology Applications: includes proficiency in MS Word, Excel, PowerPoint, social media, and Graphic Design Software.</td>
</tr>
<tr>
<td>D</td>
<td>Practical Business Skills: demonstrate a sense of urgency, create professional reports, perform online research, analyze data, seek efficiencies, work within a budget, creativity, solution orientation.</td>
</tr>
<tr>
<td>E</td>
<td>Career Awareness and Acquisition: resume development, self-promotion, marketing experience enhancement, career preparation awareness, workplace exposure.</td>
</tr>
</tbody>
</table>

*Developed in cooperation with the New Jersey chapter of the American Marketing Association.
Appendix B – Acknowledgement for Sample Lesson Plans

The CTEP Marketing Project would like to acknowledge, in a special way, its appreciation for all the help and support received as part of the development of this curriculum and the lesson plans it contains. Specifically we would like to recognize and thank the New Jersey Department of Education’s Office of Career and Technical Education, Mercer County Community College, New Jersey DECA, New Jersey Chapter of the American Marketing Association, New Jersey Chapter of the Association for Supervision and Curriculum Development, Middlesex County College, University of Pennsylvania Wharton School of Business, the Knowledge@Wharton High School web site and the many Marketing Educators who continue to participate in enhancing and building lesson plans.
Appendix C

Problem Based Learning Example

PBL: Product Management

Marketing Recommendation

Assignment
You and your colleagues have been charged, as a team, with developing a new product recommendation to the senior executives of your company.

Team
- Product Manager
- Research Associate
- Advertising/Promotion Associate

Options

<table>
<thead>
<tr>
<th><strong>Food Industry</strong>: A new line of food or beverage products that includes at least 7 different products for a major company.</th>
<th><strong>Apparel Industry</strong>: A new line of clothing and/or accessories that includes at least 7 different products for a major company.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Entertainment Industry</strong>: An indoor recreation facility that takes advantage of the latest technological advancements being developed for Six Flags and includes at least 5 different attractions.</td>
<td><strong>Hardware Industry</strong>: A new line of household tools oriented for handicapped folks and the burgeoning elderly population includes at least 7 different products for the Sears Craftsman brand.</td>
</tr>
</tbody>
</table>

Considerations
- Your pricing plans must be well explained and justified. Specific pricing strategies discussed in class should be identified.
- Promotion plans must be pertinent and reflect knowledge of a broad spectrum of marketing concepts.
- Research methodology must be relevant and findings support recommendations to justify the need for this new opportunity as well as to clarify the relevance of the target market for this strategy.
A clear demonstration of the elements of the Introduction to Marketing Class should be evident throughout this work.

**Deliverable**

1. A typed business proposal that includes the key elements in a standard business format must be submitted. It is anticipated that the proposal will be 5 – 8 single-spaced pages. Proposal to be emailed to <instructor email> by 7 AM on due date.

2. A PowerPoint presentation of 10 – 15 pages must be developed to support an oral presentation of your recommendation. Slide show to be emailed to <instructor email> by 7 AM on due date.

3. A draft of your proposal must be submitted to each team member’s parent/guardian at least one week in advance of the due date of the assignment. Parent/guardian must review and approve the proposal and note edits and recommendations in pen and ink. The signed, proof-read drafts must be submitted to the instructor at least 3 days in advance of the due date.

**Grading**

A team grade will be assigned based on the following scale. Student grades will be assigned according to individual contributions to the final work product.
## Scoring Rubric

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Unacceptable</th>
<th>Novice</th>
<th>Proficient</th>
<th>Advanced</th>
</tr>
</thead>
<tbody>
<tr>
<td>Product Proposal</td>
<td>Idea is not realistic, is not well planned, and each part of the business plan is NOT developed.</td>
<td>Idea is somewhat realistic, partially well planned, and most sections of the business plan are NOT fully developed.</td>
<td>Idea is realistic, well planned, and most sections of the business plan are fully developed.</td>
<td>Idea is realistic, well planned, and each part of the business plan fully developed.</td>
</tr>
<tr>
<td>Pricing Strategies</td>
<td>Does not identify and summarize a pricing strategy, is confused or identifies a different or inappropriate strategy.</td>
<td>Strategies are presented but inappropriate and/or incomplete.</td>
<td>Strategies are presented and mostly appropriate and complete.</td>
<td>Strategies are presented, highly appropriate, complete, and clever.</td>
</tr>
<tr>
<td>Promotion Planning</td>
<td>Does not identify and summarize the corporate strategy, is confused or identifies a different or inappropriate strategy.</td>
<td>Identification of the main promotional strategy(ies) is incoherent and/or inappropriate strategies are suggested.</td>
<td>Identifies the main promotional strategy(ies) and subsidiary, embedded, or implicit aspects of the strategy.</td>
<td>Identifies not only the basics of the promotional strategy, but recognizes nuances and suggests creative applications of the strategy.</td>
</tr>
<tr>
<td>Research Elements</td>
<td>Data is not presented or has little or nothing to do with the main topic.</td>
<td>Data sometimes relates to the main topic and/or methodology is not clear or is inapplicable.</td>
<td>Data usually relates to the main topic. Methodology is generally applicable to task.</td>
<td>Data always relates to the main topic. Methodology is applicable to task.</td>
</tr>
<tr>
<td>Written Plan</td>
<td>Information has little or nothing to do with the main topic.</td>
<td>Information clearly relates to the main topic. No details and/or examples are given.</td>
<td>Information clearly relates to the main topic. It provides 1-2 supporting details and/or examples.</td>
<td>Information clearly relates to the main topic. It includes several supporting details and/or examples.</td>
</tr>
<tr>
<td>Mechanics</td>
<td>7 or more grammatical, spelling, or punctuation errors.</td>
<td>4-6 grammatical, spelling, or punctuation errors.</td>
<td>1-3 grammatical, spelling or punctuation errors.</td>
<td>No grammatical, spelling or punctuation errors.</td>
</tr>
<tr>
<td>Oral/AV-backed Pres.</td>
<td>Not submitted</td>
<td>Is poorly formatted, ignores established rules and/or is poorly presented.</td>
<td>Follows 4x4 layout rule, is mostly well constructed and competently presented.</td>
<td>Follows 4x4 layout rules, is completely well constructed and commendably well presented.</td>
</tr>
<tr>
<td>Creativity</td>
<td>Demonstrates no independent thought or effort.</td>
<td>Some evidence of creative thought in presentation of content.</td>
<td>Significant evidence of creative thought and execution of content.</td>
<td>Noteworthy in unique and creative application of content.</td>
</tr>
</tbody>
</table>
Due Date (Firm)

7 AM June _______. Late assignments will be liable for a 20% deduction per day.

It’s time to show what you know – Good Luck!
Appendix D

**Sample Exams**

Principles of Marketing

Test 1 Unit I

Name: ____________________________

SAMPLE EXEMPLAR: customize according to specific time constraints and student population.

Part I True or False (30 Points)

1. A “market” is comprised of everyone who purchases a given item. T F
2. Target marketing involves focusing efforts on the broadest group possible. T F
3. A typical physiological need is a cell phone. T F
4. A fad is characterized by permanent or enduring consumer interest. T F
5. Some marketing related careers include sales, public relations, and consumer research. T F
6. Profit is the money earned from conducting business after all costs and expenses have been paid. T F
7. The fastest growing minority group population in the US is African Americans. T F
8. A person’s attitudes and opinions would be considered as a part of psychographic segmentation. T F
9. Plumbers, dentists and landscapers all provide services. T F
10. The definition of marketing ignores the need to satisfy consumer needs and wants. T F
11. Over 10% of Americans earn their livings in marketing related careers. T F
12. The term utility refers to the usefulness of something as represented by “added value.” T F
13. Marketing is primarily concerned with the satisfaction of consumer needs and wants. T F
14. A new car is an example of a marketing service. T F
15. Lawn care is an example of a marketing good.  T   F
16. Form utility refers to the amount of time a good or service can save you.  T   F
17. A company that finds a way to make acquisition of something easier for you is attempting to promote possession utility.  T   F
18. Interactive and communication skills are not very important to most marketing jobs.  T   F
19. The field of marketing careers is very narrow – i.e. limited in the scope of available careers.  T   F
20. The terms “customer” and “consumer” are essentially synonymous.  T   F

Part II Match the following (15 Points):

21. A vending machine sells Gatorade at the tennis courts.  a. form utility
22. Sawdust is made into mulch.  b. place utility
23. Apple cider is featured in a supermarket in October.  c. time utility
24. The skin of a dead cow is made into a leather belt.  d. possession utility
25. A gas station has a convenience store and a Dunkin Donuts.  e. information utility
26. Menorahs are made available 8 weeks before Chanukah.
27. A business provides a layaway plan.
28. The Lipton Onion Soup Mix box includes a recipe for dip.
29. Petroleum is refined into gasoline.
30. ShopRite accepts credit cards.

Part III. Match the following (15 pts.)

31. A press release.  a. product
32. An item sells for 99 cents.  b. price
33. A Wal-Mart Store.  c. place
34. A marketed “good.”  d. promotion
35. A UPS truck.  e. none of these
36. A salesperson.
37. A marketing budget.
38. A billboard.
39. A marketed “service.”
40. A dealer pays the wholesale cost for a sweater.

Part IV Match the following (15 pts.)

41. An environmentalist.  a. geographic
42. A hair cut.  b. demographic
43. An annual salary of $45,000.  c. psychographic
44. The southern United States.  d. a marketing good
45. A bottle of Pepsi.  e. a marketing service

46. A conservative viewpoint.
47. Blue eyes.
48. A senior citizen.
49. Beverly Hills, CA 90210
50. A restaurant meal.

Part V Essay: Formulate your response in an essay of a minimum of 150 words written in two paragraphs. Use loose leaf and neatly write your essay using good grammar, spelling, etc. (30 Points)

A. Explain the “marketing concept.” Specifically address how marketers develop this concept on a personal level to achieve success in a marketing career.

B. Differentiate the five marketing utilities and design an example of how each can “add value” to a new sports drink that has just been launched by the Coca-Cola Company.

C. Assess the advantages of using target marketing strategies. How broadly should a marketer target consumers and should marketers sometimes exclude potential consumers when they are developing their marketing strategies? Describe how these strategies can be synthesized to maximize consumer impact.
**Principles of Marketing**  
**Test 2 Unit II**  
**Name_____________________________**

**Part I True or False (20 Points)**

1. In order to prevent prices from going up too fast, the Federal Reserve might increase interest rates.  
   **T**  
   **F**

2. The U.S. embodies a socialistic economic system.  
   **T**  
   **F**

3. Profit is the money earned from conducting business after all costs and expenses have been paid.  
   **T**  
   **F**

4. The U.S. federal government does not enact regulatory laws that affect marketing.  
   **T**  
   **F**

5. The point where supply and demand intersect is known as the economic point.  
   **T**  
   **F**

6. When demand is high and supply is low, prices will tend to be high.  
   **T**  
   **F**

7. When demand is low and supply is plentiful, prices will tend to be low.  
   **T**  
   **F**

8. The U.S. provides a significant amount of freedom of business ownership.  
   **T**  
   **F**

9. One negative aspect of business ownership is that risk is part of operating a business.  
   **T**  
   **F**

10. Economic policies of the U.S. government tend to support competition.  
    **T**  
    **F**

11. One role of the consumer is to determine the demand of a product, which will help determine its price.  
    **T**  
    **F**

12. When the supply of a vital resource cannot meet the demand of the consumer, a scarcity will exist.  
    **T**  
    **F**

13. Ethics is defined as activities that are legal in the US.  
    **T**  
    **F**

14. The EEOC is an agency that regulates health and safety throughout manufacturing and business environments.  
    **T**  
    **F**

15. The SBA is a government agency that can provide educational support.  
    **T**  
    **F**
materials and counseling to new business owners.

16. Roads and bridges are categorized as a land resource. T F

17. The term “laissez faire” can be used to describe a command economy. T F

18. A SWOT analysis considers internal business factors only. T F

19. One way a business can increase productivity is by investing in new technology. T F

20. Competition is the driving factor behind a market economy. T F

Part II Short Answers (40 Points)

21. Differentiate four roles of the US Government in our free enterprise system.

22. How do marketing strategies of customization and globalization differ?

23. Describe examples of cultural factors that can make doing business abroad more difficult?
24. Develop a SWOT analysis for yourself with respect to your potential for attending college.

25. Explain the individual and collective roles of the 4 resources that comprise factors of production.

26-28. Compare and contrast the characteristics of Capitalism, Socialism, and Communism, identify 2 countries that use each system. (5 pts. each).
Part 3 Essay: Complete both questions and formulate your response in an essay of a minimum of 150 words written in two paragraphs. You will receive no credit unless you write at least 100 words for each essay. Use loose leaf and neatly write your essay using good grammar, spelling, etc. (40 Points)

D. Clarify the similarities and differences between business ethics and social responsibility. Provide a rationale for why marketers should be attentive to these concepts.

E. Sketch and label the four phases of the business cycle, then explain what this represents and the factors that affect it.
Principles of Marketing

Test 4 – Unit IV
MAKE NO MARKS ON THIS PAPER: USE SCANTRON
All answers worth 1 point.

Part I True or False

1. Pull Policies are designed to create consumer interest. T F
2. A press conference is a meeting given by newspaper editors to promote their advertising policies. T F
3. Premiums are low-cost items given to consumers at a discount or for free. T F
4. Distribution is a component of the promotion mix. T F
5. POP advertising refers to promotional materials at the point of purchase. T F
6. Community Relations refers to the activities that a business uses to acquire or maintain the respect of the community. T F
7. Promotion is any form of communication a business or organization uses to inform, persuade, or remind people about its products. T F
8. A grand opening celebration is an example of a public relations event. T F
9. The symbols ### denotes the end of a press release. T F
10. The visibility of a product to consumers significantly affects sales of that item. T F
11. Trade promotions involve bartering one good for another. T F
12. Transit advertising is most common in rural areas. T F
13. GRP’s are calculated by multiplying the percentage of consumers reached by the average number of times they are exposed to the ad. T F
14. Advertising is the most expensive form of promotion when measured on the basis of reaching individual customers. T F
15. Slotting allowances and sales incentives are forms of trade promotions.  T  F
16. Push strategies are tactics used by aggressive salespeople.  T  F
17. Retailers like Macy’s use a great deal of visual merchandising.  T  F
18. Advertisers generally wish to have their product viewed by the largest possible audience.  T  F
19. Institutional advertising generally does not apply to consumers.  T  F
20. The internet has become one of the largest print media forms.  T  F

Part II: The Promotion Mix: Indicate whether the following are examples of (A) advertising, (B) Sales Promotion, (C) Public Relations, (D) Personal Selling, or (E) none of these.

21. A press conference  ____  
22. A telemarketing campaign  ____  
23. Free samples  ____  
24. Billboards  ____  
25. An internet “pop-up” for a dating service  ____  
26. Marketing utilities  ____  
27. A news release  ____  
28. A 30 second radio commercial  ____  
29. McDonald’s Monopoly game  ____  
30. A 50 cent off coupon for Cheerios  ____  
31. Gross profit  ____  
32. A student persuades you to buy a ticket for Marauder Fest  ____  
33. A BOGO offer  ____  
34. A short-term incentive to buy something  ____  
35. A charitable event that is used to enhance a company’s image  ____  
36. A point-of-purchase display of Lay’s Potato Chips  ____  
37. Loyalty incentives such as frequent-flyer programs  ____  
38. Coca Cola Sign at Yankee Stadium  ____  
39. A refund  ____  
40. A publicity stunt  ____  

Part III Multiple Choice

41. What are the main components of a print ad?
   a) Signature, copy, and illustration  
   b) Headline and signature  
   c) Headline, signature, copy, illustration  
   d) Headline, signature, copy, illustration, slogan
42. What is visual merchandising?
   a) The use of physical elements to project an image to customers
   b) TV advertising
   c) Media advertising
   d) Billboards and transit ads
   e) None of the above

43. What is CPM?
   a) A form of direct mail
   b) The cost of exposing 1,000 customers to an ad
   c) The calculated purchase of media
   d) A print media format
   e) None of the above

44. The headline of a print ad should
   a) Take the place of a slogan
   b) Provide specific details about a product
   c) Provide distraction
   d) Attract attention
   e) None of the above

45. The goals of advertising may be expressed by AIDA, which stands for:
   a) Acquire, Invest, Demonstrate, Achieve
   b) Awareness, Illustration, Design, Action
   c) Awareness, Interest, Desire, Action
   d) Advertising, Illustration, Design, Accuracy
   e) None of the above

46. What is an advertising proof?
   a) Verification of the number of viewers of the ad
   b) Use of the color wheel
   c) A draft layout of the ad for the advertiser’s approval
   d) A small black and white ad
   e) The final copy of the ad layout

47. Why is a focal point important in displays?
   a) It helps keep the eye moving up and over the merchandise
   b) It helps keep the display from being too “busy”
   c) It helps establish viewer focus
   d) It helps direct viewer attention in an intended manner
   e) All of the above

48. Factors that affect print media rates are
   a) When the ad will appear
b) Where the ad will appear

49. How are specialty media used in advertising?
   a) To reach a distinct niche market
   b) To do online advertising
   c) To supply giveaway items
   d) To support POP
   e) To take advantage of the power of color

50. What is a product display that is close to the cashier’s desk called?
   a) A focal point
   b) A kiosk
   c) A POP display
   d) A mobile fixture
   e) None of the above

Short Answers Questions

What is the difference between trade and consumer promotions?

What is the most expensive form of promotion? Why?

What are the general goals of advertising?

What are some of the goals of effective merchandising?

Compare the key components of a print ad? Why is each important?

Crest Toothpaste will advertise on American Idol this month: 35% of Americans will be reached an avg. of 3 times each. How many GRP’s does this represent?

Explain the advantages of direct mail advertising over TV ads.

Compare the various forms of consumer promotion citing advantages and disadvantages for each.

Explain the principle cost-drivers of advertising.

Differentiate advertising from public relations.
Principles of Marketing: Test 5 - Unit V Distribution Channels and Physical Distribution

**Do not write on this paper!**

<table>
<thead>
<tr>
<th>Part I True or False (40 Points – 2 point each)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Exclusive Distribution means that a limited number of outlets in a given geographical area are used to sell the product.</td>
</tr>
<tr>
<td>2. Direct Distribution involves one or more intermediaries.</td>
</tr>
<tr>
<td>3. Brick and mortar retailers sell goods to the customer from their own physical stores.</td>
</tr>
<tr>
<td>4. The supply chain is a device used to connect rail cars.</td>
</tr>
<tr>
<td>5. E-tailing involves retailers selling products over the internet to the consumer.</td>
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<tr>
<td>6. Home Depot is an example of an intermediary.</td>
</tr>
<tr>
<td>7. As the control of a distribution channel increases, the cost decreases.</td>
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<tr>
<td>8. Multiple channels are used if the product fits the needs of both industrial and consumer markets.</td>
</tr>
<tr>
<td>9. Retail is a not a commonly used method of purchasing a product in America.</td>
</tr>
<tr>
<td>10. Wholesalers are stores such as Wal-Mart, A&amp;P, and PetSmart.</td>
</tr>
<tr>
<td>11. Physical Distribution is also known as Logistics.</td>
</tr>
<tr>
<td>12. A ton mile is moving one thousand pounds of freight one mile.</td>
</tr>
<tr>
<td>13. Air is the most commonly used method of transportation.</td>
</tr>
<tr>
<td>14. Rack Jobbers are a type of wholesaler.</td>
</tr>
<tr>
<td>15. Agents act as intermediaries.</td>
</tr>
</tbody>
</table>
16. Using an in-house sales force increases a company’s control over its product.  

17. The supply of a product is the responsibility of the consumer. 

18. An example of intensive distribution would be Ralph Lauren. 


20. An example of a direct distribution channel is buying customized Nike footwear via the Nike website. 

Part II Indicate one of the responses A, B, C, or D that best describes the descriptions provided in number 21 – 40. (40 Points – 2 point each) 

| Part II Indicate one of the responses A, B, C, or D that best describes the descriptions provided in number 21 – 40. (40 Points – 2 point each) | A. Distribution Channel  
B. Physical Distribution  
C. Both physical and a channel.  
D. Neither a channel nor physical |
<table>
<thead>
<tr>
<th></th>
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<tbody>
<tr>
<td>21. Piggybacking</td>
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<td>22. Mass Merchandiser</td>
<td>_____</td>
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<tr>
<td>23. The internet</td>
<td>_____</td>
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<td>24. Oil pipeline</td>
<td>_____</td>
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<tr>
<td>25. Electric cable</td>
<td>_____</td>
<td></td>
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<tr>
<td>26. Container ship</td>
<td>_____</td>
<td></td>
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<tr>
<td>27. Television networks</td>
<td>_____</td>
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<td>28. Railroad</td>
<td>_____</td>
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<tr>
<td>29. Fed Ex and UPS</td>
<td>_____</td>
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<tr>
<td>30. Brick and Mortar retailer</td>
<td>_____</td>
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<tr>
<td>31. Common carrier</td>
<td>_____</td>
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<tr>
<td>32. Wholesaler</td>
<td>_____</td>
<td></td>
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<tr>
<td>33. Utility</td>
<td>_____</td>
<td></td>
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<td>34. FABs</td>
<td>_____</td>
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<td>35. Macy’s</td>
<td>_____</td>
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<td>36. Cargo plane</td>
<td>_____</td>
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<tr>
<td>37. Intermediary</td>
<td>_____</td>
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<tr>
<td>38. Freight</td>
<td>_____</td>
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<tr>
<td>39. U.S. Postal Service mail delivery</td>
<td>_____</td>
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<tr>
<td>40. Amazon.com</td>
<td>_____</td>
<td></td>
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</tr>
</tbody>
</table>

Part III Multiple Choice (20 Points – 2 pts each).

41. NAPA Auto Parts is an example of:  
a. Intensive Distribution  
b. Exclusive Distribution  
c. Selective Distribution
42. Coca-Cola is an example of:
   a. Intensive Distribution
   b. Exclusive Distribution
   c. Selective Distribution

43. If a farmer wishes to sell some of her produce right at her farm she would probably choose:
   a. Direct distribution
   b. Indirect distribution
   c. An intermediary
   d. An agent

44. Which of the following is not a role of a Wholesaler?
   a. Buy product in bulk from the manufacturer
   b. Sell the product to retailers
   c. Sell the product to customers
   d. Work as an intermediary between retailers and the manufacturer

45. Which of the following best describes the role of an agent?
   a. Door-to-door salesperson
   b. Intermediary between manufacturer and wholesaler or retailer
   c. Telemarketer
   d. In-house salesperson employed by manufacturer to sell product to customer

46. Which Channel of Distribution best fits the needs of a staple item with a high turnover rate, in which the product does not spoil?
   a. Manufacturer > Customer
   b. Manufacturer > Retailer > Customer
   c. Manufacturer > Wholesaler > Retailer > Customer
   d. Manufacturer > Agent > Customer

47. Which of the following retail stores would most likely dictate the terms of distribution to the manufacturer?
   a. Cold Stones Ice Cream
   b. Radio Shack
   c. Home Depot
   d. McDonald’s

48. Rolex watches would most likely use which of the following distribution strategies?
   a. Intensive Distribution
49. Coca Cola and Pepsi products use the following strategies:
   a. Intensive Distribution
   b. Selective Distribution
   c. Exclusive Distribution
   d. Direct Distribution

50. A logistics manager should be most familiar with:
   a. The physical distribution of a product
   b. Planning the distribution channels of a product
   c. Keeping a log of sales and purchases made by the company
   d. The distribution intensity of a product
### Principles of Marketing

#### Test 6 – Unit VI

**Name:** ____________________________

<table>
<thead>
<tr>
<th>DESCRIPTION</th>
<th>Pricing Method</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Used when inventories are low, or to “cherry pick” early adapters.</td>
<td>A. Cost-Plus</td>
</tr>
<tr>
<td>2. Usually a Low price strategy used to rid firm of low value ancillary products.</td>
<td>B. Optional product</td>
</tr>
<tr>
<td>3. Frequently employed to rapidly gain share.</td>
<td>C. Bundled</td>
</tr>
<tr>
<td>4. Including various related items together as one “package deal.”</td>
<td>D. Skimming</td>
</tr>
<tr>
<td>5. Applied to items that are specifically used with a main or primary product.</td>
<td>E. By-Product</td>
</tr>
<tr>
<td>6. Introduction of price steps to differentiate the features of items made by a firm.</td>
<td>F. Psychological</td>
</tr>
<tr>
<td>7. Consumer comparison point.</td>
<td>G. Reference</td>
</tr>
<tr>
<td>8. Addition of a set mark-up to the basic cost of an item</td>
<td>H. Product Line</td>
</tr>
<tr>
<td>9. Based on consumer perceptions.</td>
<td>I. Captive Product</td>
</tr>
<tr>
<td>10. Used for “accessories”</td>
<td>J. Predatory</td>
</tr>
<tr>
<td></td>
<td>K. Penetration</td>
</tr>
</tbody>
</table>

**Section II 3 Pts. each. Calculate the following:**

11. Cost = $10, Markup = 15%, Retail price = __________

12. Cost = $10, Price = $15, GPM % = __________

13. Investment = $10, Profit = $4, ROI = __________

14. Cost = $10, Price = $12, Markup % = __________

15. Retail price = $14, Markup % = 40, Cost = __________
Part III Matching (2pts. Each)

16. Satisfaction a consumer anticipates having with a product. A. EDLP

17. The process of exchanging goods or services without using money. B. Profit

18. The sum of an item’s cost and its mark-up. C. Price Discrimination

19. Higher than average prices that suggest higher product quality. D. Value

20. The revenue remaining when costs and expenses are subtracted. E. Prestige

21. One company’s percentage of the total sales volume generated by all makers of a product. F. List Price

22. A pricing policy that excludes promotions and discounts. G. Barter

23. Illegal pricing designed to drive a competitor out of business. H. Market Share

24. Occurs when a manufacturer charges one customer an unreasonably higher price than another customer. I. Retail Price

25. Basic price offered by a manufacturer that excludes discounts. J. Predatory

K. Captive Product

Section IV. Write T for True or F for False (2 pts. Each)

26. The price of an object often helps establish the image of the company that sells it. T

27. A video store sells 3 used DVDs for $10. This is an example of bundle pricing. F

28. Trade discounts occur when barter is used. F

29. The retail price of a wrist watch is $60.75. The watch costs the retail store $45. F
Therefore the percentage markup on the cost is 35 percent.

___ 30. A net price is lower than a gross price.

___ 31. Prices on items like unique, life saving drugs, tend to be relatively inelastic.

___ 32. State government officials are responsible for enforcing minimum price laws.

___ 33. US federal laws tend to promote competition.

___ 34. The Sherman Act attempted to address price discrimination issues not covered by the Clayton Act.

___ 35. The demand for products that have many close substitutes tends to be elastic.

Part V. Essay (20 Points)
Choose one of the federal laws listed below. Prepare a 150 – 200 word essay. Explain the history of the law, the purpose of the law, and the influences the law has on American business.

Topic Options
- Clayton Antitrust Act
- Sherman Antitrust Act
- Robinson Patman Act
Introduction to Marketing
Test 7 – Unit VII

Name____________________________________

Part I True or False, Use scantron (20 Points)

1. The product mix includes all of the different products a company makes. T F
2. A product line is an unrelated group of products. T F
3. Prior to market launch products are typically in the R&D phase. T F
4. Nike is an example of a “manufacturer’s brand.” T F
5. Customers typically only accept one out of every ten new products introduced to the marketplace. T F
6. If GM were to add a new product line of fuel efficient cars, it would add to the width of their family of passenger cars. T F
7. Brand licensing is the legal authorization to allow another company to use the brand, brand mark, or trade character for a fee. T F
8. A brand takes on several human-like characteristics which allow it to appeal to a specific target audience. T F
9. All products follow the same shaped product life cycle curve. T F
10. The packaging of a product is not important to consumer perception. T F

Part II Multiple Choice, Use scantron. (40 Points)

11. Using census bureau information as the basis for a research study is an example of using:
   a. Primary data
   b. Secondary data
   c. Open-ended questions
   d. Psychographic studies

12. Which of the following is not a branding strategy?
   a. Brand extension
   b. Brand licensing
   c. Co-branding
13. Branding is important in product planning because:
   a. It makes it easy for the customer to identify the product
   b. It gives the customer incentives to buy the product
   c. It helps the customer discounts to buy the product
   d. It allows the product to be distributed more efficiently

14. A Ford F-150 “Harley Davidson” model truck is an example of:
   a. Brand extension
   b. Brand licensing
   c. Co-branding
   d. Generic branding
   e. Mixed brands

15. Primary data are often obtained via:
   a. Surveys
   b. Technological methods
   c. Observation
   d. Experimental Method
   e. All of the above

16. Well-written survey questions can be:
   a. Open ended
   b. Difficult to understand
   c. Forced choice
   d. Both A and C
   e. None of the above

17. Craftsman® and Kenmore® are examples of:
   a. National brands
   b. Private distributor brands
   c. Generic brands
   d. Obsolete brands
   e. Manufacturer’s brands

18. Which brand strategy involves simultaneously offering a combination of manufacturer, private distributor, and generic brands?
   a. Brand extension
   b. Brand licensing
   c. Co-branding
   d. Generic branding
   e. Mixed brands
19. A brand name and a trade name are:
   a. The same thing
   b. Used only for B2B selling situations
   c. A tool for market researchers to differentiate data sources
   d. Different because one represents a product and the other a company

20. What are UPC bar codes primarily used for?
   a. Inventory management
   b. Federal Trade Commission reports
   c. To measure Unit Pricing Conditions for products
   d. None of the above

21. Which of the following is an example of a brand mark?
   a. ®
   b. ©
   c. Reebok
   d. 

22. This branding strategy represents a product category and does not carry a company or brand name. An example of this would be a product called, “Pancake Mix.”
   a. Brand extension
   b. Brand licensing
   c. Co-branding
   d. Generic branding
   e. Mixed brands

23. Gatorade 20oz “Tropical Burst” product is best categorized as a:
   a. Brand
   b. Product line
   c. Product item
   d. Product mix
   e. Co-brand

24. Tony the Tiger is an example of:
   a. Trade character
   b. Trademark
   c. Trade name
   d. Brand name
   e. Brand mark

25. Which of the following is most likely not a decision a company would make about a product that is in the decline stage of the product life cycle?
   a. Sell or license the product
   b. Recommit to the product by allocating more marketing to it
   c. Modernize or altering the product
   d. Re-introduce the product to the public for those who do not know about it
26. Which of the following is not part of the marketing research process?
   a. Defining the problem
   b. Analyzing data
   c. Obtaining data
   d. Data maturity
   e. Applying the Results

27. An educated guess in marketing research is known as:
   a. Longevity
   b. Defining the problem
   c. Primary Data
   d. Secondary Data
   e. Hypothesis

28. The part of a target population that is assumed to represent the entire population is known as:
   a. Sample
   b. Target
   c. Cohort
   d. Variable
   e. Control

29. “Pop Tarts” with Smuckers strawberry jam filling is best categorized as a:
   a. Generic Brand
   b. Product line
   c. Product item
   d. Product mix
   e. Co-brand

30. Each of these is a step in the new product development process except:
   a. Obsolescence
   b. Generating ideas
   c. Evaluating customer acceptance
   d. Writing a business proposal
   e. Testing the product

Part III Matching (30 Points), use scantron:
Match the term on the left with the type of research on the right.

31. Internet Resource   a. Primary Research
32. “Prom Survey”     b. Secondary Research
33. Phone Directory
34. Observation
35. Experimentation
Match the details on the left with the most appropriate stage on the right. Use each term on the right only once.

36. Least profitable stage of the product life cycle  a. R&D
37. Focus on building awareness  b. Introduction
38. Advertising shifts towards battling competition  c. Growth
39. Innovation!  d. Maturity
40. Sales and profit increase, and advertising focuses on consumer awareness  e. Decline

Matching Use each term on the right only once.

41. Research ignoring attitudes and perceptions  a. Forced choice
42. Research observing results from changes in marketing variables  b. Validity
43. Nearly identical results from a certain research technique  c. Reliability
44. Research that measures what was intended to be measured  d. Experimental
45. Choose answers from list of options  e. Observation

Part IV Open Ended (5 Points): Answer on the back of your scantron sheet.

Describe and compare the five functions of product packaging.
SENIOR TRIP RESEARCH

The junior class has begun to plan their “senior trip” for next year. Six students plus one advisor showed up at the planning meeting that was to decide where and when they would go on the trip. Among the possible destinations for the trip were:

- Orlando, Florida
- New Orleans, Louisiana
- Montreal, Quebec
- Bahamas Cruise from New York Harbor

Another big issue was how much to spend. There were different opinions as to what the maximum amount should be as follows:

- < $ 400
- < $ 600
- < $ 800
- < $1,000

Another discussion had to do with what activities were most preferred by the students. Among the suggestions were:

- Amusements/rides
- Athletic Events
- Cultural/Sightseeing
- “Partying”

It seems the meeting provided more questions than answers. Since you have taken a marketing class the committee turns to you for a recommendation on what to do. Can you help the class officers decide what to do by executing the research activities on the next page?
I. Answer in short paragraphs.

1. Briefly explain how marketing research can help you make a decision in this case. What are your goals for this process?

2. What type of research should the committee execute to get an accurate reading of what the junior class would like to do?

3. Who should be the target of the research?

4. If there are 450 students in the class, explain how many students you will need to get input from in order for the information to be meaningful and accurate.

II. Develop a research plan that describes, in detail, how you are going to acquire the information you need to make an informed, valid decision.

III. Develop a survey form to gather the information that you need to formulate your recommendation.

IV. Complete your survey with arbitrary numbers that add up to your research sample target. Express your findings in percentages and make a recommendation to the committee based on the research findings.

-----------------------------------------------------------------------------------------------
Unit 8 Career/Aptitude Assessment

Online resource:

http://www.careercolleges.com/career-assessment-test.jsp
Principles of Marketing – Final Exam

****DO NOT WRITE ON THIS TEST PAPER****

Take your time, read questions carefully, and check your work when finished. Good Luck!

Section I True or False – Use the scantron card. (50 Points 1 point each)

1. Attitude research measures the opinions people have. T F
2. A discount and a markdown are essentially the same thing. T F
3. Lawn care is an example of a marketing good. T F
4. Marketers do not need to get involved in a company’s distribution plan. T F
5. The MOHS Prom Survey was an example of collecting secondary research. T F
6. Complementary products are items that are given away for free. T F
7. Demographic information refers to physical statistics about people including age, income, and gender. T F
8. Cultural factors should not be considered in international marketing. T F
9. The breakeven point is the point in time when one begins to make a profit. T F
10. Virtually all jobs involve working with people, data, and things, or some combination of these. T F
11. Effective Public Relations is a key goal of marketers. T F
12. The Marketing “P” for “Place” generally relates to trucks and stores. T F
13. Over 10% of Americans earn their livings in marketing-related careers. T F
14. Form utility refers to the amount of time a good or service can save you. T F
15. The terms “customer” and “consumer” are essentially synonymous. T F
16. Most big companies test products prior to placing them on the market. T F
17. A fad product usually remains in the marketplace only a short time.  T  F
18. Ethical Behavior is based on knowing the difference between right and wrong.  T  F
19. Profit is the money earned from conducting business after all costs and expenses have been paid.  T  F
20. Consumer perceptions of value are exclusively determined by the price of the item.  T  F
21. A $400 suit marked down 40% will cost $240.  T  F
22. An example of a monopoly is the local electric company.  T  F
23. Geographic segmentation would probably not be used by the makers of snow skis.  T  F
24. “Piggyback service” refers to carrying trailers on flatbed rail cars.  T  F
25. The U.S. provides a significant amount of freedom of business ownership.  T  F
26. A sample is a subset of the universe of data points that are of interest to a researcher.  T  F
27. Observational data is often useless due to the biases of the observer.  T  F
28. Primary research is cheaper than secondary research.  T  F
29. A container ship is an example of a distribution channel.  T  F
30. Nike has a low market share of the athletic footwear market.  T  F
31. Psychographic information relates to people’s values, beliefs, and ideas.  T  F
32. Market segmentation is the process by which potential customers are sorted and classified for effective communications.  T  F
33. A target market is a group that a marketer wishes to avoid because they have no potential for using her product.  T  F
34. The 4 “P’s” of marketing includes “distribution.”  T  F
35. Packaging is seldom used to convey marketing information.  T  F
36. The typical goal of expanding a product line is to increase sales and profits.  T  F
37. Generic brands do not carry a company or brand name.  T  F
38. A trademark is given legal protection by the government.  T  F
39. Coca Cola brand marketing is an example of the customization strategy.  T  F
40. Selling via the internet is also known as “e-commerce.”  T  F
41. Secondary data refers to the initial collection of data, that is used specifically for a specific research need.  T  F
42. The product mix has both width and depth.  T  F
43. All products follow the same shaped product life cycle.  T  F
44. Form utility occurs when a raw material is transformed into something more useful.  T  F
45. The term “media” refers to channels of marketing communication.  T  F
46. Newspaper ad rates are usually billed on a “cost per column inch” basis.  T  F
47. The term “CPM” refers to the cost for every million viewers of a given advertisement.  T  F
48. The term GRPs refers to the gross revenue and profit a company makes.  T  F
49. Another word for “value addition” is utility.  T  F
50. A prototype is a preliminary version of a proposed new product.  T  F

**Part II Multiple Choice (20 points 1 point each) – Use Scantron Card**

51. A product feature is a(n)?
   a. Benefit
   b. Attribute
   c. Advantage
   d. Comparison
   e. Service
52. Another word for value-added is:
   a. Feature
   b. Resume
   c. Promotion
   d. Merchandising
   e. Utility

53. The part of the ANPOCS method that deals with buyer concerns is?
   a. The approach
   b. Overcoming objections
   c. Suggestive selling
   d. Closing
   e. The presentation

54. Rolex watches would most likely use which of the following distribution strategies?
   a. Intensive Distribution
   b. Selective Distribution
   c. Exclusive Distribution
   d. Direct Distribution

55. Which of the following is an example of a wholesaler?
   a. Home Depot
   b. Wal-Mart
   c. Sam’s Club
   d. Macy’s
   e. None of the Above

56. When dealing with buyer objections it is wise to:
   a. Listen carefully
   b. Acknowledge the customer’s objections 40%
   c. Restate the objections
   d. Respond to the objection
   e. All of the above are true

57. The percentage of the market owned by a company.
   a. Market Positioning
   b. Market Share
   c. Market Price
   d. Market Slice
   e. Green Marketing
58. An educated guess in marketing research is known as:
   a. Longevity
   b. Defining the problem
   c. Primary Data
   d. Secondary Data
   e. Hypothesis

59. A Ford F-150 “Harley Davidson” model truck is an example of:
   a. Brand extension
   b. Brand licensing
   c. Co-branding
   d. Generic branding
   e. Mixed brands

60. Penetration pricing
   a. Applies to services only
   b. Is illegal
   c. Is a high-priced attempt to promote prestige
   d. Is used for optional products
   e. Is useful for gaining rapid market share

61. Which of the following is not considered a Marketing Good?
   a. Lawn Care
   b. Computer
   c. Pencil
   d. Orange Juice
   e. Britney Spears CD

62. Predatory Pricing
   a. Is illegal
   b. Is designed to put competitors out of business
   c. Requires that the price be below the provider’s cost
   d. Does not apply to short term promotional events
   e. All of the above

63. The effect of competition in a free market enterprise includes which of the following?
   a. Lower Prices
   b. Better Products
   c. Monopolies
   d. All of the Above
   e. Answers a and b
64. All of these are accomplished through packaging except:
   a. Inventory management
   b. Maintenance of freshness
   c. Promotion
   d. R&D
   e. Theft deterrence

65. Which of the following is not an example of a retailer?
   a. Shop Rite
   b. Wal-Mart
   c. Coca Cola
   d. Macy’s
   e. None of the Above

   a. 4%
   b. 10%
   c. 40%
   d. 2.5%
   e. 250%

67. By law, food product packages must contain:
   a. The weight of the product
   b. Nutritional information
   c. Name and address of the manufacturer or distributor
   d. Notices of hazards
   e. All of the above

68. An example of a manufacturer’s brand is:
   a. Coca Cola
   b. A generic brand
   c. A private label brand
   d. A brand extension
   e. A licensed brand

69. A planogram is most similar to:
   a. A strategic plan
   b. A licensing plan
   c. Co-branding
   d. A map showing where products are located in a store
   e. None of these
70. By-product pricing
   a. Applies to industrial goods only
   b. Is used for secondary products that are left over when a primary product is made
   c. Is a high-priced attempt to promote prestige
   d. Is used for optional products
   e. Is similar to combination pricing

71. Calculate the Markup % for a good that costs $10, and is sold for $12.
   a. 1.2%
   b. 10%
   c. 20%
   d. 120%
   e. 150%

72. Changing the product to meet the needs of an international consumer would be an example of:
   a. Globalization
   b. Exploration
   c. Modification
   d. World Trade Organization
   e. Customization

73. Each of these is a step in the new product development process except:
   a. Obsolescence
   b. Generating Ideas
   c. Evaluating customer acceptance
   d. Writing a business proposal
   e. Testing the product

74. Bundled pricing
   a. Applies to multi-packs of the same item
   b. Often occurs with fast food value meals
   c. Usually does not provide a financial benefit for the customer
   d. Answers B and C
   e. Is used by large institutions only

75. This is the least profitable stage of the product life cycle due to high costs.
   a. Introduction
   b. Growth
   c. Maturity
   d. Decline
   e. None of the Above
76. Using census bureau information as the basis for a research study is an example of using:
   a. Primary data
   b. Secondary data
   c. Open-ended questions
   d. Psychographic studies

77. Where Revenue = Expenses
   a. Balance of Trade
   b. Break Even Point
   c. Point of No Return
   d. Surplus
   e. Shortage

78. A consumer discount coupon for $2 off a good or service would be an example of:
   a. Promotion
   b. Public Relations
   c. Trade Allowance
   d. All of the Above
   e. None of the Above

79. The piece of the promotional mix that mostly deals with institutional “image.”
   a. Personal Selling
   b. Advertising
   c. Sales Promotions
   d. Public Relations
   e. None of the Above

80. Which of the following is not important in the ANPOCS method?
   a. Asking questions of the buyer
   b. Providing features, advantages, and benefits
   c. Getting an order from the buyer
   d. Recommending solutions for the buyer
   e. All are important

Part III Matching (20 Points), use scantron:
Match the term on the left with the type of research on the right.

81. Internet Resource                  c. Primary Research
82. “Prom Survey”                    d. Secondary Research
83. Phone Directory
84. Observation
85. Experimentation
Match the details on the left with the most appropriate stage on the right. Use each term on the right only once.

86. Least Profitable Stage of the product life cycle
87. Focus on building awareness
88. Advertising shifts towards battling competition
89. Innovation!
90. Sales and profit increase, and advertising focuses on consumer satisfaction

Matching: Use each term on the right only once.

91. Research ignoring attitudes and perceptions
92. Research observing results from changes in marketing variables
93. Nearly identical results from a certain research technique
94. Research that measures what was intended to be measured
95. Choose answers from list of options

Matching: Indicate what the following are examples of

96. A press conference
97. A telemarketing campaign
98. Free samples
99. Billboards
100. An internet “pop-up” for a dating service

Matching: Use each term on the right only once.

e. Forced choice
f. Validity
g. Reliability
h. Experimental
e. Observation

Matching: Indicate what the following are examples of

a. Advertising
b. Sales Promotion
c. Public Relations
d. Personal selling
e. None of theses