



# PERFORMANCE INDICATORS

## MARKETING CAREER CLUSTER

### THE MARKETING CAREER CLUSTER PERFORMANCE INDICATORS ARE USED FOR THE FOLLOWING EVENTS:

APPAREL AND ACCESSORIES MARKETING SERIES **AAM**  
*Merchandising Pathway*

AUTOMOTIVE SERVICES MARKETING SERIES **ASM**  
*Marketing Management Pathway*

BUSINESS SERVICES MARKETING SERIES **BSM**  
*Marketing Management Pathway*

BUYING AND MERCHANDISING TEAM DECISION MAKING **BTDM**

FOOD MARKETING SERIES **FMS**  
*Marketing Management Pathway*

INTEGRATED MARKETING CAMPAIGN-EVENT **IMCE**

INTEGRATED MARKETING CAMPAIGN-PRODUCT **IMCP**

INTEGRATED MARKETING CAMPAIGN-SERVICE **IMCS**

MARKETING COMMUNICATIONS SERIES **MCS**  
*Marketing Communications Pathway*

MARKETING MANAGEMENT TEAM DECISION MAKING **MTDM**

PROFESSIONAL SELLING **PSE**

RETAIL MERCHANDISING SERIES **RMS**  
*Merchandising Pathway*

SPORTS AND ENTERTAINMENT MARKETING SERIES **SEM**  
*Marketing Management Pathway*

SPORTS AND ENTERTAINMENT MARKETING TEAM DECISION MAKING **STDM**

Performance indicators are used to define the parameters of the comprehensive written career cluster exam and other activities that are part of the overall competition.

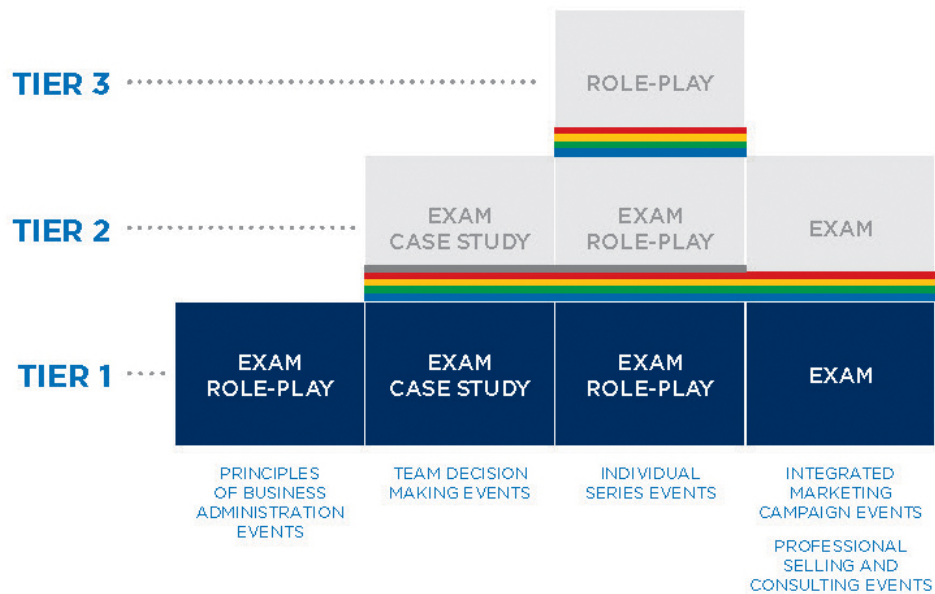
This list was compiled by MBAResearch and Curriculum Center and DECA Inc. and represents efforts to support all DECA competitive events within the overall framework of the National Business Administration Standards. Individual indicators are based on a review of prior research and on extensive review of available online and print literature—both from industry and education.

For additional information on these Performance Indicators, the National Curriculum Framework, or the National Business Administration Standards, please visit the MBAResearch web site at [www.mbaresearch.org](http://www.mbaresearch.org). Questions may be e-mailed to [service@mbaresearch.org](mailto:service@mbaresearch.org).

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## Performance Indicators

- Performance indicators for **PRINCIPLES OF BUSINESS ADMINISTRATION** role-plays and exams will be selected from the business administration core (Tier 1).
- Performance indicators for **TEAM DECISION MAKING** case studies and exams will be selected from the business administration core (Tier 1) and appropriate career cluster (Tier 2).
- Performance indicators for **INDIVIDUAL SERIES** exams will be selected from the business administration core (Tier 1) and appropriate career cluster (Tier 2). Performance indicators for the role-plays will be selected from the business administration core (Tier 1), appropriate career cluster (Tier 2) and appropriate pathway (Tier 3).

The below chart indicates the performance indicators used to develop exam items, role-play scenarios and case studies for each competitive event. For each competitive event listed, members should prepare using the performance indicators listed on the corresponding pages.

	<b>Tier 1</b>	<b>Tier 2</b>	<b>Tier 3</b>
	<b>Business Administration Core</b>	<b>Marketing Career Cluster</b>	<b>Pathway</b>
	<b>Exam Role-Play</b>	<b>Exam Role-Play</b>	<b>Role-Play Only</b>
<b>Apparel and Accessories Marketing Series Event</b>	pages 4-22	pages 23-28	pages 47-53 <i>Merchandising</i>
<b>Automotive Services Marketing Series Event</b>	pages 4-22	pages 23-28	pages 39-42 <i>Marketing Management</i>
<b>Business Services Marketing Series Event</b>	pages 4-22	pages 23-28	pages 39-42 <i>Marketing Management</i>
<b>Buying and Merchandising Team Decision Making Event</b>	pages 4-22	pages 23-28	
<b>Food Marketing Series Event</b>	pages 4-22	pages 23-28	pages 39-42 <i>Marketing Management</i>
<b>Integrated Marketing Campaign-Event*</b>	pages 4-22	pages 23-28	
<b>Integrated Marketing Campaign-Product*</b>	pages 4-22	pages 23-28	
<b>Integrated Marketing Campaign-Service*</b>	pages 4-22	pages 23-28	
<b>Marketing Communications Series Event</b>	pages 4-22	pages 23-28	pages 29-38 <i>Marketing Communications</i>
<b>Marketing Management Team Decision Making Event</b>	pages 4-22	pages 23-28	
<b>Principles of Marketing</b>	pages 4-22		
<b>Professional Selling Event*</b>	pages 4-22	pages 23-28	
<b>Retail Merchandising Series Event</b>	pages 4-22	pages 23-28	pages 47-53 <i>Merchandising</i>
<b>Sports and Entertainment Marketing Series Event</b>	pages 4-22	pages 23-28	pages 39-42 <i>Marketing Management</i>
<b>Sports and Entertainment Marketing Team Decision Making Event</b>	pages 4-22	pages 23-28	

\*These competitive events use the performance indicators for the exam only.

### Key

PQ = Prerequisite level performance indicator content develops employability and job-survival skills and concepts, including work ethics, personal appearance, and general business behavior.

CS = Career Sustaining level performance indicator content develops skills and knowledge needed for continued employment in or study of business based on the application of basic academics and business skills.

SP = Specialist level performance indicator content provides in-depth, solid understanding and skill development in all business functions.

## **Instructional Area: Business Law (BL)**

**Standard: Understands business's responsibility to know, abide by, and enforce laws and regulations that affect business operations and transactions**

**Performance Element: Acquire foundational knowledge of business laws and regulations to understand their nature and scope.**

**Performance Indicators:**

Comply with the spirit and intent of laws and regulations (BL:163) (CS)

Discuss the nature of law and sources of law in the United States (BL:067) (SP)

Describe the United States' judicial system (BL:068) (SP)

Describe methods used to protect intellectual property (BL:051) (SP)

Describe legal issues affecting businesses (BL:001) (SP)

**Performance Element: Understand the civil foundations of the legal environment of business to demonstrate knowledge of contracts.**

**Performance Indicators:**

Identify the basic torts relating to business enterprises (BL:069) (SP)

Describe the nature of legally binding contracts (BL:002) (SP)

**Performance Element: Explore the regulatory environment of United States' businesses to understand the diversity of regulations.**

**Performance Indicators:**

Describe the nature of legal procedure (BL:070) (SP)

Discuss the nature of debtor-creditor relationships (BL:071) (SP)

Explain the nature of agency relationships (BL:072) (SP)

Discuss the nature of environmental law (BL:073) (SP)

Discuss the role of administrative law (BL:074) (SP)

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

**Performance Indicators:**

Explain types of business ownership (BL:003) (CS)

**Performance Element: Acquire knowledge of commerce laws and regulations to continue business operations.**

**Performance Indicators:**

Explain the nature of import/export law (BL:145) (SP)

Describe the nature of customs regulations (BL:126) (SP)

## **Instructional Area: Communication Skills (CO)**

**Standard: Understands the concepts, strategies, and systems used to obtain and convey ideas and information**

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

**Performance Indicators:**

Identify sources that provide relevant, valid written material (CO:054) (PQ)

Extract relevant information from written materials (CO:055) (PQ)

Apply written directions to achieve tasks (CO:056) (PQ)

Analyze company resources to ascertain policies and procedures (CO:057) (CS)

**Performance Element: Apply active listening skills to demonstrate understanding of what is being said.**

**Performance Indicators:**

Explain communication techniques that support and encourage a speaker (CO:082) (PQ)

Follow oral directions (CO:119) (PQ)

Demonstrate active listening skills (CO:017) (PQ)

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

**Performance Indicators:**

Explain the nature of effective verbal communications (CO:147) (PQ)

Ask relevant questions (CO:058) (PQ)

Interpret others' nonverbal cues (CO:059) (PQ)

Provide legitimate responses to inquiries (CO:060) (PQ)

Give verbal directions (CO:083) (PQ)

Employ communication styles appropriate to target audience (CO:084) (CS)

Defend ideas objectively (CO:061) (CS)

Handle telephone calls in a businesslike manner (CO:114) (CS)

Participate in group discussions (CO:053) (CS)

Facilitate (lead) group discussions (CO:201) (SP)

Make oral presentations (CO:025) (SP)

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

**Performance Indicators:**

Utilize note-taking strategies (CO:085) (CS)

Organize information (CO:086) (CS)

Select and use appropriate graphic aids (CO:087) (CS)

**Performance Element: Write internal and external business correspondence to convey and obtain information effectively.**

**Performance Indicators:**

Explain the nature of effective written communications (CO:016) (CS)

Select and utilize appropriate formats for professional writing (CO:088) (CS)

Edit and revise written work consistent with professional standards (CO:089) (CS)

Write professional emails (CO:090) (CS)

Write business letters (CO:133) (CS)

Write informational messages (CO:039) (CS)

Write inquiries (CO:040) (CS)

Write persuasive messages (CO:031) (SP)

Write executive summaries (CO:091) (SP)

Prepare simple written reports (CO:094) (SP)

Explain how digital communications (e.g., email, text messages, chats) exposes business to risk (CO:202) (SP)

Adapt written correspondence to targeted audiences (CO:203) (SP)

Use data visualization techniques (e.g., infographics, heat-maps, dynamic model outputs) (CO:204) (SP)

**Performance Element: Use social media to communicate with a business's stakeholders.**

**Performance Indicators:**

Describe the impact of a person's social media brand on the achievement of organizational objectives (CO:205) (CS)

Distinguish between using social media for business and personal purposes (CO:206) (CS)

**Performance Element: Communicate with staff to clarify workplace objectives.**

**Performance Indicators:**

Explain the nature of staff communication (CO:014) (CS)

Choose and use appropriate channel for workplace communication (CO:092) (CS)

Participate in a staff meeting (CO:063) (CS)

Participate in problem-solving groups (CO:067) (CS)

## **Instructional Area: Customer Relations (CR)**

**Standard: Understands the techniques and strategies used to foster positive, ongoing relationships with customers**

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

**Performance Indicators:**

Explain the nature of positive customer relations (CR:003) (CS)

Demonstrate a customer service mindset (CR:004) (CS)

Develop rapport with customers (CR:029) (CS)

Reinforce service orientation through communication (CR:005) (CS)

Respond to customer inquiries (CR:006) (CS)

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

Interpret business policies to customers/clients (CR:007) (CS)

Build and maintain relationships with customers (CR:030) (SP)

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

**Performance Indicators:**

Handle difficult customers (CR:009) (CS)

Handle customer/client complaints (CR:010) (CS)

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

**Performance Indicators:**

Identify company's brand promise (CR:001) (CS)

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

**Performance Element: Understand the nature of customer relationship management to show its contributions to a company.**

**Performance Indicators:**

Discuss the nature of customer relationship management (CR:016) (SP)

Explain the role of ethics in customer relationship management (CR:017) (SP)

Describe the use of technology in customer relationship management (CR:018) (SP)

## **Instructional Area: Economics (EC)**

**Standard: Understands the economic principles and concepts fundamental to business operations**

**Performance Element: Understand fundamental economic concepts to obtain a foundation for employment in business.**

**Performance Indicators:**

Distinguish between economic goods and services (EC:002) (CS)

Explain the concept of economic resources (EC:003) (CS)

Describe the concepts of economics and economic activities (EC:001) (CS)

Determine economic utilities created by business activities (EC:004) (CS)

Explain the principles of supply and demand (EC:005) (CS)

Describe the functions of prices in markets (EC:006) (CS)

**Performance Element: Understand the nature of business to show its contributions to society.**

**Performance Indicators:**

Explain the role of business in society (EC:070) (CS)

Describe types of business activities (EC:071) (CS)

Describe types of business models (EC:138) (SP)

Explain the organizational design of businesses (EC:103) (SP)

Discuss the global environment in which businesses operate (EC:104) (SP)

Describe factors that affect the business environment (EC:105) (SP)

Explain the nature of business ethics (EC:106) (SP)

Explain how organizations adapt to today's markets (EC:107) (SP)

**Performance Element: Understand economic systems to be able to recognize the environments in which businesses function.**

**Performance Indicators:**

Explain the types of economic systems (EC:007) (CS)

Identify the impact of small business/entrepreneurship on market economies (EC:065) (CS)

Explain the concept of private enterprise (EC:009) (CS)

Identify factors affecting a business's profit (EC:010) (CS)

Determine factors affecting business risk (EC:011) (CS)

Explain the concept of competition (EC:012) (CS)

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

**Performance Indicators:**

Determine the relationship between government and business (EC:008) (CS)

Describe the nature of taxes (EC:072) (SP)



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

**Performance Indicators:**

Explain the concept of productivity (EC:013) (CS)

Analyze impact of specialization/division of labor on productivity (EC:014) (SP)

Explain the concept of organized labor and business (EC:015) (SP)

Explain the impact of the law of diminishing returns (EC:023) (SP)

**Performance Element: Understand economic indicators to recognize economic trends and conditions.**

**Performance Indicators:**

Discuss the measure of consumer spending as an economic indicator (EC:081) (SP)

Describe the economic impact of inflation on business (EC:083) (SP)

Explain the concept of Gross Domestic Product (GDP) (EC:017) (SP)

Discuss the impact of a nation's unemployment rates (EC:082) (SP)

Explain the economic impact of interest-rate fluctuations (EC:084) (SP)

Determine the impact of business cycles on business activities (EC:018) (SP)

**Performance Element: Understand global trade's impact to aid business decision-making.**

**Performance Indicators:**

Explain the nature of global trade (EC:016) (SP)

Discuss the impact of globalization on business (EC:109) (SP)

Describe the determinants of exchange rates and their effects on the domestic economy (EC:100) (SP)

Explain cultural considerations that impact global business relations (EC:110) (SP)

Discuss the impact of cultural and social environments on global trade (EC:045) (SP)

Describe the impact of electronic communication tools (e.g., Internet, video- and computer-conferencing, webcasts, email) on global business activities (EC:111) (SP)

Explain the impact of major trade alliances on business activities (EC:112) (SP)

Describe the impact of the political environment on world trade (EC:113) (SP)

Explain the impact of geography on world trade (EC:114) (SP)

Describe the impact of a country's history on world trade (EC:115) (SP)

Explain the impact of a country's economic development on world trade (EC:116) (SP)

Discuss the impact of bribery and foreign monetary payments on business (EC:140) (SP)

Identify requirements for international business travel (e.g., passport, visa, proof of citizenship, immunizations, and sponsorship letters) (EC:141) (SP)

## **Instructional Area: Emotional Intelligence (EI)**

**Standard: Understands techniques, strategies, and systems used to foster self-understanding and enhance relationships with others**

**Performance Element: Foster self-understanding to recognize the impact of personal feelings on others.**

**Performance Indicators:**

Describe the nature of emotional intelligence (EI:001) (PQ)

Explain the concept of self-esteem (EI:016) (PQ)

Recognize and overcome personal biases and stereotypes (EI:017) (PQ)

Assess personal strengths and weaknesses (EI:002) (PQ)

Assess personal behavior and values (EI:126) (PQ)

**Performance Element: Develop personal traits to foster career advancement.**

**Performance Indicators:**

Identify desirable personality traits important to business (EI:018) (PQ)

Exhibit self-confidence (EI:023) (PQ)

Demonstrate interest and enthusiasm (EI:020) (PQ)

Demonstrate initiative (EI:024) (PQ)

**Performance Element: Apply ethics to demonstrate trustworthiness.**

**Performance Indicators:**

Demonstrate honesty and integrity (EI:022) (PQ)

Demonstrate responsible behavior (EI:021) (PQ)

Demonstrate fairness (EI:127) (PQ)

Assess risks of personal decisions (EI:091) (PQ)

Demonstrate ethical work habits (EI:004) (PQ)

Take responsibility for decisions and actions (EI:075) (PQ)

Build trust in relationships (EI:128) (CS)

Describe the nature of ethics (EI:123) (CS)

Explain reasons for ethical dilemmas (EI:124) (CS)

Recognize and respond to ethical dilemmas (EI:125) (CS)

Manage commitments in a timely manner (EI:077) (CS)

Develop tolerance for ambiguity (EI:092) (CS)

**Performance Element: Exhibit techniques to manage emotional reactions to people and situations.**

**Performance Indicators:**

Exhibit a positive attitude (EI:019) (PQ)

Demonstrate self-control (EI:025) (PQ)

Explain the use of feedback for personal growth (EI:003) (PQ)

Adjust to change (EI:026) (PQ)

**Performance Element: Identify with others' feelings, needs, and concerns to enhance interpersonal relations.**

**Performance Indicators:**

- Respect the privacy of others (EI:029) (PQ)
- Show empathy for others (EI:030) (PQ)
- Maintain the confidentiality of others (EI:103) (CS)
- Exhibit cultural sensitivity (EI:033) (CS)
- Leverage personality types in business situations (EI:104) (SP)

**Performance Element: Use communication skills to foster open, honest communications.**

**Performance Indicators:**

- Explain the nature of effective communications (EI:007) (PQ)
- Explain ethical considerations in providing information (EI:038) (SP)
- Foster open, honest communication (EI:129) (SP)
- Collaborate with others (EI:130) (SP)
- Solicit feedback (EI:106) (SP)
- Use social media to solicit new ideas and solutions (EI:107) (SP)

**Performance Element: Use communication skills to influence others.**

**Performance Indicators:**

- "Sell" ideas to others (EI:108) (SP)
- Persuade others (EI:012) (SP)
- Demonstrate negotiation skills (EI:062) (SP)

**Performance Element: Manage stressful situations to minimize potential negative impact.**

**Performance Indicators:**

- Use appropriate assertiveness (EI:008) (PQ)
- Use conflict-resolution skills (EI:015) (CS)
- Explain the nature of office politics (EI:109) (CS)
- Overcome problems and difficulties associated with office politics/turf wars (EI:095) (CS)
- Explain the nature of stress management (EI:028) (SP)

**Performance Element: Implement teamwork techniques to accomplish goals.**

**Performance Indicators:**

- Participate as a team member (EI:045) (CS)
- Use consensus-building skills (EI:011) (SP)
- Motivate team members (EI:059) (SP)

**Performance Element: Employ leadership skills to achieve workplace objectives.**

**Performance Indicators:**

Explain the concept of leadership (EI:009) (CS)

Explain the nature of ethical leadership (EI:131) (CS)

Model ethical behavior (EI:132) (CS)

Determine personal vision (EI:063) (CS)

Inspire others (EI:133) (CS)

Demonstrate adaptability (EI:006) (CS)

Develop an achievement orientation (EI:027) (CS)

Challenge the status quo (EI:134) (CS)

Lead change (EI:005) (CS)

Enlist others in working toward a shared vision (EI:060) (CS)

Coach others (EI:041) (CS)

Use power appropriately (EI:135) (SP)

Recognize/Reward others for their efforts and contributions (EI:014) (SP)

**Performance Element: Manage internal and external business relationships to foster positive interactions.**

**Performance Indicators:**

Treat others with dignity and respect (EI:036) (PQ)

Foster positive working relationships (EI:037) (CS)

Consider conflicting viewpoints (EI:136) (CS)

Assess long-term value and impact of actions on others (EI:137) (SP)

Maintain collaborative partnerships with colleagues (EI:061) (SP)

Explain the impact of political relationships within an organization (EI:034) (SP)

Explain the nature of organizational culture (EI:064) (SP)

Interpret and adapt to a business's culture (EI:112) (SP)

## **Instructional Area: Entrepreneurship (EN)**

**Standard: Understands the concepts, processes, and skills associated with identifying new ideas, opportunities, and methods and with creating or starting a new project or venture**

**Performance Element: Understand fundamental factors about entrepreneurship to recognize its role and importance in the economy**

**Performance Indicators:**

Describe the nature of entrepreneurship (EN:039) (SP)

Explain the role requirements of entrepreneurs and owners (EN:040) (SP)

Describe the use of business ethics in entrepreneurship (EN:044) (SP)

Describe small-business opportunities in international trade (EN:041) (SP)

## Instructional Area: Financial Analysis (FI)

**Standard: Understands tools, strategies, and systems used to maintain, monitor, control, and plan the use of financial resources**

**Performance Element: Understand the fundamental principles of money needed to make financial exchanges.**

**Performance Indicators:**

Explain forms of financial exchange (cash, credit, debit, electronic funds transfer, etc.) (FI:058) (PQ)

Identify types of currency (paper money, coins, banknotes, government bonds, treasury notes, etc.) (FI:059) (PQ)

Describe functions of money (medium of exchange, unit of measure, store of value) (FI:060) (PQ)

Describe sources of income (wages/salaries, interest, rent, dividends, transfer payments, etc.) (FI:061) (PQ)

Explain the time value of money (FI:062) (CS)

Explain the purposes and importance of credit (FI:002) (CS)

Explain legal responsibilities associated with financial exchanges (FI:063) (CS)

**Performance Element: Analyze financial needs and goals to determine financial requirements.**

**Performance Indicators:**

Explain the need to save and invest (FI:270) (CS)

Set financial goals (FI:065) (CS)

Develop personal budget (FI:066) (CS)

Determine personal net worth (FI:562) (CS)

**Performance Element: Manage personal finances to achieve financial goals.**

**Performance Indicators:**

Explain the nature of tax liabilities (FI:067) (PQ)

Interpret a pay stub (FI:068) (PQ)

Prepare bank account documents (e.g., checks, deposit/withdrawal slips, endorsements, etc.) (FI:560) (PQ)

Maintain financial records (FI:069) (PQ)

Read and reconcile bank statements (FI:070) (PQ)

Calculate the cost of credit (FI:782) (CS)

Demonstrate the wise use of credit (FI:071) (CS)

Validate credit history (FI:072) (CS)

Make responsible financial decisions (FI:783) (CS)

Protect against identity theft (FI:073) (CS)

Pay bills (FI:565) (CS)

Apply for a consumer loan (FI:625) (SP)

Control debt (FI:568) (CS)

Prepare personal income tax forms (FI:074) (CS)

Discuss the nature of retirement planning (FI:569) (CS)

Explain the nature of estate planning (FI:572) (CS)

**Performance Element: Understand the use of financial-services providers to aid in financial-goal achievement.**

**Performance Indicators:**

Describe types of financial-services providers (FI:075) (CS)

Discuss considerations in selecting a financial-services provider (FI:076) (CS)

**Performance Element: Use investment strategies to ensure financial well-being.**

**Performance Indicators:**

Explain types of investments (FI:077) (CS)

**Performance Element: Use risk management products to protect a business's financial well-being.**

**Performance Indicators:**

Describe the concept of insurance (FI:081) (CS)

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

**Performance Indicators:**

Describe the need for financial information (FI:579) (CS)

Explain the concept of accounting (FI:085) (CS)

Discuss the role of ethics in accounting (FI:351) (SP)

Explain the use of technology in accounting (FI:352) (SP)

Explain legal considerations for accounting (FI:353) (SP)

**Performance Element: Implement accounting procedures to track money flow and to determine financial status.**

**Performance Indicators:**

Describe the nature of cash flow statements (FI:091) (SP)

Explain the nature of balance sheets (FI:093) (SP)

Describe the nature of income statements (FI:094) (SP)

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

**Performance Indicators:**

Explain the role of finance in business (FI:354) (CS)

Discuss the role of ethics in finance (FI:355) (SP)

Explain legal considerations for finance (FI:356) (SP)

**Performance Element: Manage financial resources to ensure solvency.**

**Performance Indicators:**

Describe the nature of budgets (FI:106) (SP)

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

**Standard: Understands the tools, techniques, and systems that businesses use to plan, staff, lead, and organize its human resources**

**Performance Element: Understand the role and function of human resources management to obtain a foundational knowledge of its nature and scope.**

**Performance Indicators:**

Discuss the nature of human resources management (HR:410) (CS)

Explain the role of ethics in human resources management (HR:411) (SP)

Describe the use of technology in human resources management (HR:412) (SP)

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

**Performance Indicators:**

Orient new employees (HR:360) (CS)

## **Instructional Area: Marketing (MK)**

**Standard: Understands the tools, techniques, and systems that businesses use to create exchanges and satisfy organizational objectives**

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

**Performance Indicators:**

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

Describe marketing functions and related activities (MK:002) (CS)

**Performance Element: Acquire foundational knowledge of customer/client/business behavior to understand what motivates decision-making.**

**Performance Indicators:**

Explain factors that influence customer/client/business buying behavior (MK:014) (SP)

Discuss actions employees can take to achieve the company's desired results (MK:015) (SP)

Demonstrate connections between company actions and results (e.g., influencing consumer buying behavior, gaining market share, etc.) (MK:019) (SP)

## **Instructional Area: Information Management (NF)**

**Standard: Understands tools, strategies, and systems needed to access, process, maintain, evaluate, and disseminate information to assist business decision-making**

**Performance Element: Use information literacy skills to increase workplace efficiency and effectiveness.**

**Performance Indicators:**

- Assess information needs (NF:077) (CS)
- Obtain needed information efficiently (NF:078) (CS)
- Evaluate quality and source of information (NF:079) (CS)
- Draw conclusions based on information analysis (NF:278) (CS)
- Apply information to accomplish a task (NF:080) (CS)
- Store information for future use (NF:081) (CS)

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

**Performance Indicators:**

- Discuss the nature of information management (NF:110) (CS)
- Explain the role of ethics in information management (NF:111) (SP)
- Explain legal issues associated with information management (NF:076) (SP)

**Performance Element: Utilize information-technology tools to manage and perform work responsibilities.**

**Performance Indicators:**

- Identify ways that technology impacts business (NF:003) (PQ)
- Explain the role of information systems (NF:083) (PQ)
- Discuss principles of computer systems (NF:084) (PQ)
- Use basic operating systems (NF:085) (PQ)
- Describe the scope of the Internet (NF:086) (PQ)
- Demonstrate basic e-mail functions (NF:004) (PQ)
- Demonstrate personal information management/productivity applications (NF:005) (PQ)
- Demonstrate basic web-search skills (NF:006) (PQ)
- Demonstrate basic word processing skills (NF:007) (PQ)
- Demonstrate basic presentation applications (NF:008) (PQ)
- Demonstrate basic database applications (NF:009) (PQ)
- Demonstrate basic spreadsheet applications (NF:010) (PQ)
- Use an integrated business software application package (NF:088) (CS)
- Demonstrate collaborative/groupware applications (NF:011) (CS)
- Create and post basic web page (NF:042) (CS)
- Collaborate on and aggregate complex internal documents to create a common voice (NF:215) (SP)



**Performance Element: Maintain business records to facilitate business operations.**

**Performance Indicators:**

Describe the nature of business records (NF:001) (SP)

Maintain customer records (NF:002) (SP)

**Performance Element: Acquire information to guide business decision-making.**

**Performance Indicators:**

Describe current business trends (NF:013) (SP)

Monitor internal records for business information (NF:014) (SP)

Conduct an environmental scan to obtain business information (NF:015) (SP)

Interpret statistical findings (NF:093) (SP)

Translate research findings into actionable business recommendations (NF:216) (SP)

**Performance Element: Create and access databases to acquire information for business decision-making.**

**Performance Indicators:**

Explain the principles of data analysis (NF:139) (SP)

Explain the nature of tools that can be used to access information in the database system (NF:140) (SP)

Access information in the database system (NF:141) (SP)

**Performance Element: Apply data mining methods to acquire pertinent information for business decision-making.**

**Performance Indicators:**

Discuss the nature of data mining (NF:148) (CS)

Describe data mining tools and techniques (NF:149) (SP)

Discuss the importance of ethics in data mining (NF:150) (SP)

Demonstrate basic data mining techniques (NF:151) (SP)

Interpret data mining findings (NF:152) (SP)

## **Instructional Area: Operations (OP)**

**Standard: Understands the processes and systems implemented to monitor, plan, and control the day-to-day activities required for continued business functioning**

**Performance Element: Understand operation's role and function in business to value its contribution to a company.**

**Performance Indicators:**

Explain the nature of operations (OP:189) (CS)

Discuss the role of ethics in operations (OP:190) (SP)

Describe the use of technology in operations (OP:191) (SP)

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

**Performance Indicators:**

Describe health and safety regulations in business (OP:004) (PQ)

Report noncompliance with business health and safety regulations (OP:005) (PQ)

**Performance Element: Implement safety procedures to minimize loss.**

**Performance Indicators:**

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

Follow safety precautions (OP:007) (PQ)

Maintain a safe work environment (OP:008) (CS)

Explain procedures for handling accidents (OP:009) (CS)

Handle and report emergency situations (OP:010) (CS)

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

**Performance Indicators:**

Explain routine security precautions (OP:013) (CS)

Follow established security procedures/policies (OP:152) (CS)

Protect company information and intangibles (OP:153) (CS)

**Performance Element: Comply with security rules, regulations, and codes (e.g., property, privacy, access, confidentiality) to protect customer and company information, reputation, and image.**

**Performance Indicators:**

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

Maintain data security (OP:064) (CS)

**Performance Element: Acquire a foundational knowledge of project management to understand its nature and scope.**

**Performance Indicators:**

Explain the nature of project management (OP:158) (SP)

Describe the role of ethics in project management (OP:675) (SP)

**Performance Element: Utilize project management skills to improve workflow and minimize costs.**

**Performance Indicators:**

Plan project (OP:519) (CS)

Monitor projects and take corrective actions (OP:520) (CS)

Evaluate project success (OP:521) (CS)

Identify resources needed for project (OP:003) (SP)

Develop project plan (OP:001) (SP)

Apply project-management tools to monitor and communicate project progress (OP:002) (SP)

Evaluate project results (OP:159) (SP)

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

**Performance Indicators:**

Explain the nature and scope of purchasing (OP:015) (CS)

Place orders/reorders (OP:016) (CS)

Maintain inventory of supplies (OP:031) (CS)

Discuss the importance of utilizing ethical purchasing methods (OP:246) (SP)

Explain the impact of the purchasing process on productivity (OP:247) (SP)

Manage the bid process in purchasing (OP:160) (SP)

Select vendors (OP:161) (SP)

Evaluate vendor performance (OP:162) (SP)

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

**Performance Indicators:**

Explain the concept of production (OP:017) (CS)

**Performance Element: Implement quality-control processes to minimize errors and to expedite workflow.**

**Performance Indicators:**

Identify quality-control measures (OP:163) (SP)

Utilize quality control methods at work (OP:164) (SP)

Describe crucial elements of a quality culture (OP:019) (SP)

Resolve problems with suppliers' quality issues (OP:652) (SP)

**Performance Element: Implement expense-control strategies to enhance a business's financial wellbeing.**

**Performance Indicators:**

Explain the nature of overhead/operating costs (OP:024) (SP)

Explain employee's role in expense control (OP:025) (SP)

**Performance Element: Implement organizational skills to improve efficiency and work flow.**

**Performance Indicators:**

Organize and prioritize work (OP:228) (CS)

Coordinate work with that of team members (OP:230) (CS)

Coordinate activities with those of other departments (OP:196) (SP)

**Performance Element: Maintain work flow to enhance productivity.**

**Performance Indicators:**

Monitor and ensure completion of delegated tasks (OP:354) (SP)

Streamline work processes (OP:355) (SP)

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

**Performance Indicators:**

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

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

**Performance Indicators:**

Explain the concept of supply chain (OP:443) (CS)

Explain the benefits of supply chain collaboration (OP:444) (SP)

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

**Standard: Understands concepts, tools, and strategies used to explore, obtain, and develop in a business career**

**Performance Element: Acquire self-development skills to enhance relationships and improve efficiency in the work environment.**

**Performance Indicators:**

Maintain appropriate personal appearance (PD:002) (PQ)

Demonstrate systematic behavior (PD:009) (PQ)

Set personal goals (PD:018) (CS)

Balance personal and professional responsibilities (PD:179) (SP)

**Performance Element: Understand and follow company rules and regulations to maintain employment.**

**Performance Indicators:**

Adhere to company protocols and policies (PD:250) (CS)

Follow rules of conduct (PD:251) (CS)

Follow chain of command (PD:252) (CS)

**Performance Element: Achieve organizational goals to contribute to company growth.**

**Performance Indicators:**

Determine the nature of organizational goals (PD:254) (SP)

Ascertain employee's role in meeting organizational goals (PD:255) (SP)

**Performance Element: Utilize critical-thinking skills to determine best options/outcomes.**

**Performance Indicators:**

Explain the need for innovation skills (PD:126126) (CS)

Make decisions (PD:017) (CS)

Demonstrate problem-solving skills (PD:077) (CS)

Demonstrate appropriate creativity (PD:012) (SP)

Use time-management skills (PD:019) (SP)

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

**Performance Indicators:**

Assess personal interests and skills needed for success in business (PD:013) (PQ)

Analyze employer expectations in the business environment (PD:020) (PQ)

Explain the rights of workers (PD:021) (PQ)

Identify sources of career information (PD:022) (CS)

Identify tentative occupational interest (PD:023) (CS)

Explain employment opportunities in business (PD:025) (CS)

Explain career opportunities in entrepreneurship (PD:066) (CS)

**Performance Element: Implement job-seeking skills to obtain employment.**

**Performance Indicators:**

Utilize job-search strategies (PD:026) (PQ)

Complete a job application (PD:027) (PQ)

Interview for a job (PD:028) (PQ)

Write a follow-up letter after job interviews (PD:029) (CS)

Write a letter of application (PD:030) (CS)

Prepare a résumé (PD:031) (CS)

Use networking techniques to identify employment opportunities (PD:037) (SP)

**Performance Element: Utilize career-advancement activities to enhance professional development.**

**Performance Indicators:**

Describe techniques for obtaining work experience (e.g., volunteer activities, internships) (PD:032) (PQ)

Explain the need for ongoing education as a worker (PD:033) (PQ)

Explain possible advancement patterns for jobs (PD:034) (PQ)

Identify skills needed to enhance career progression (PD:035) (SP)

Utilize resources that can contribute to professional development (e.g., trade journals/periodicals, professional/trade associations, classes/seminars, trade shows, and mentors) (PD:036) (SP)

## **Instructional Area: Strategic Management (SM)**

**Standard: Understands tools, techniques, and systems that affect a business's ability to plan, control, and organize an organization/department**

**Performance Element: Recognize management's role to understand its contribution to business success.**

**Performance Indicators:**

Explain the concept of management (SM:001) (CS)

Explain factors that affect management (SM:100) (SP)

**Performance Element: Identify potential business threats and opportunities to protect a business's financial well-being.**

**Performance Indicators:**

Explain the nature of risk management (SM:075) (SP)

Conduct a risk assessment of an event (SM:076) (SP)

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

**Standard:** Understands concepts, tools, and strategies used to explore, obtain, and develop in a business career

**Performance Element:** Understand responsibilities in marketing to demonstrate ethical/legal behavior.

**Performance Indicators:**

Explain the need for professional and ethical standards in marketing (PD:137) (SP)

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

**Performance Indicators:**

Explain employment opportunities in marketing (PD:024) (CS)

## **Instructional Area: Product/Service Management (PM)**

**Standard:** Understands the concepts and processes needed to obtain, develop, maintain, and improve a product or service mix in response to market opportunities and to build brand for the organization

**Performance Element:** Acquire a foundational knowledge of product/service management to understand its nature and scope.

**Performance Indicators:**

Explain the nature and scope of the product/service management function (PM:001) (SP)

Identify the impact of product life cycles on marketing decisions (PM:024) (SP)

Describe the use of technology in the product/service management function (PM:039) (SP)

Explain business ethics in product/service management (PM:040) (SP)

**Performance Element:** Generate product ideas to contribute to ongoing business success.

**Performance Indicators:**

Identify product opportunities (PM:134) (SP)

Identify methods/techniques to generate a product idea (PM:127) (SP)

Generate product ideas (PM:128) (SP)

**Performance Element:** Apply quality assurances to enhance product/service offerings.

**Performance Indicators:**

Describe the uses of grades and standards in marketing (PM:019) (CS)

Explain warranties and guarantees (PM:020) (CS)

Identify consumer protection provisions of appropriate agencies (PM:017) (SP)

**Performance Element:** Employ product-mix strategies to meet customer expectations.

**Performance Indicators:**

Explain the concept of product mix (PM:003) (SP)

Describe the nature of product bundling (PM:041) (SP)

**Performance Element: Position company to acquire desired business image.**

**Performance Indicators:**

Explain the nature of corporate branding (PM:206) (SP)

Describe factors used by businesses to position corporate brands (PM:207) (SP)

Identify customer touch points (PM:277) (SP)

**Performance Element: Position products/services to acquire desired business image.**

**Performance Indicators:**

Describe factors used by marketers to position products/services (PM:042) (SP)

Explain the nature of product/service branding (PM:021) (SP)

Describe the role of customer voice in branding (PM:276) (SP)

## Instructional Area: Channel Management (CM)

**Standard: Understands the concepts and processes needed to identify, select, monitor, and evaluate sales channels**

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

**Performance Indicators:**

Explain the nature and scope of channel management (CM:001) (CS)

Explain the nature of channels of distribution (CM:003) (CS)

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

Explain legal considerations in channel management (CM:005) (SP)

Describe ethical considerations in channel management (CM:006) (SP)

**Performance Element: Manage channel activities to minimize costs and to determine distribution strategies.**

**Performance Indicators:**

Coordinate channel management with other marketing activities (CM:007) (SP)

Explain the nature of channel-member relationships (CM:008) (SP)

Explain the nature of affinity partner relationships (CM:021) (SP)



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

**Standard:** Understands the concepts, systems, and tools needed to gather, access, synthesize, evaluate, and disseminate information for use in making business decisions

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

**Performance Indicators:**

Describe the need for marketing data (IM:012) (CS)

Identify data monitored for marketing decision making (IM:184) (SP)

Explain the nature and scope of the marketing-information management function (IM:001) (SP)

Explain the role of ethics in marketing-information management (IM:025) (SP)

Describe the use of technology in the marketing-information management function (IM:183) (SP)

Describe the regulation of marketing-information management (IM:419) (SP)

**Performance Element:** Understand marketing-research activities to show command of their nature and scope.

**Performance Indicators:**

Explain the nature of marketing research (IM:010) (SP)

Discuss the nature of marketing research problems/issues (IM:282) (SP)

**Performance Element:** Understand marketing-research design considerations to evaluate their appropriateness for the research problem/issue.

**Performance Indicators:**

Describe methods used to design marketing research studies (i.e., descriptive, exploratory, and causal) (IM:284) (SP)

Describe options businesses use to obtain marketing research data (i.e., primary and secondary research) (IM:281) (SP)

Discuss the nature of sampling plans (i.e., who, how many, how chosen) (IM:285) (SP)

**Performance Element:** Understand data-collection methods to evaluate their appropriateness for the research problem/issue.

**Performance Indicators:**

Describe data-collection methods (e.g., observations, mail, diaries, telephone, Internet, discussion groups, interviews, scanners, tracking tools) (IM:289) (SP)

Explain characteristics of effective data-collection instruments (IM:418) (SP)

**Performance Element:** Interpret marketing information to test hypotheses and/or to resolve issues.

**Performance Indicators:**

Explain techniques for processing marketing data (IM:062) (SP)

Monitor/measure customer “buzz” (IM:469) (SP)

Explain the use of descriptive statistics in marketing decision making (IM:191) (SP)

**Performance Element: Evaluate marketing research procedures and findings to assess their credibility.**

**Performance Indicators:**

Identify sources of error in a research project (e.g., response errors, interviewer errors, non-response errors, sample design) (IM:292) (SP)

Evaluate questionnaire design (e.g., types of questions, question wording, routing, sequencing, length, layout) (IM:293) (SP)

Assess appropriateness of marketing research for the problem/issue (e.g., research methods, sources of information, timeliness of information, etc.) (IM:428) (SP)

## **Instructional Area: Market Planning (MP)**

**Standard: Understands the concepts and strategies utilized to determine and target marketing strategies to a select audience**

**Performance Element: Develop marketing strategies to guide marketing tactics.**

**Performance Indicators:**

Explain the concept of marketing strategies (MP:001) (CS)

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

**Performance Indicators:**

Explain the concept of market and market identification (MP:003) (CS)

**Performance Element: Employ marketing-information to plan marketing activities.**

**Performance Indicators:**

Explain the nature of marketing planning (MP:006) (SP)

Explain the nature of marketing plans (MP:007) (SP)

Explain the role of situation analysis in the marketing planning process (MP:008) (SP)

Explain the nature of sales forecasts (MP:013) (SP)

## **Instructional Area: Pricing (PI)**

**Standard: Understands concepts and strategies utilized in determining and adjusting prices to maximize return and meet customers' perceptions of value**

**Performance Element: Develop a foundational knowledge of pricing to understand its role.**

**Performance Indicators:**

Explain the nature and scope of the pricing function (PI:001) (SP)

Describe the role of business ethics in pricing (PI:015) (SP)

Explain the use of technology in the pricing function (PI:016) (SP)

Explain legal considerations for pricing (PI:017) (SP)

Explain factors affecting pricing decisions (PI:002) (SP)

## **Instructional Area: Promotion (PR)**

**Standard: Understands the concepts and strategies needed to communicate information about products, services, images, and/or ideas to achieve a desired outcome**

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

**Performance Indicators:**

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

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

Identify the elements of the promotional mix (PR:003) (SP)

Describe the use of business ethics in promotion (PR:099) (SP)

Describe the use of technology in the promotion function (PR:100) (SP)

Describe the regulation of promotion (PR:101) (SP)

**Performance Element: Understand promotional channels used to communicate with targeted audiences.**

**Performance Indicators:**

Explain types of advertising media (PR:007) (SP)

Describe word-of-mouth channels used to communicate with targeted audiences (PR:247) (SP)

Explain the nature of direct marketing channels (PR:089) (SP)

Identify communications channels used in sales promotion (PR:249) (SP)

Explain communications channels used in public-relations activities (PR:250) (SP)

**Performance Element: Understand the use of an advertisement's components to communicate with targeted audiences.**

**Performance Indicators:**

Explain the components of advertisements (PR:014) (SP)

Explain the importance of coordinating elements in advertisements (PR:251) (SP)

**Performance Element: Understand the use of public-relations activities to communicate with targeted audiences.**

**Performance Indicators:**

Identify types of public-relations activities (PR:252) (SP)

Discuss internal and external audiences for public-relations activities (PR:253) (SP)

## **Instructional Area: Selling (SE)**

**Standard: Understands the concepts and actions needed to determine client needs and wants and respond through planned, personalized communication that influences purchase decisions and enhances future business opportunities**

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

**Performance Indicators:**

Explain the nature and scope of the selling function (SE:017) (CS)

Explain the role of customer service as a component of selling relationships (SE:076) (CS)

Explain company selling policies (SE:932) (CS)

Explain key factors in building a clientele (SE:828) (SP)

Explain legal and ethical considerations in selling (SE:106) (SP)

Describe the use of technology in the selling function (SE:107) (SP)

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

**Performance Indicators:**

Acquire product information for use in selling (SE:062) (CS)

Analyze product information to identify product features and benefits (SE:109) (SP)

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

**Performance Indicators:**

Explain the selling process (SE:048) (CS)

Discuss motivational theories that impact buying behavior (SE:359) (SP)

## **Instructional Area: Economics (EC)**

**Standard:** Understands the economic principles and concepts fundamental to business operations

**Performance Element:** Understand global trade's impact to aid business decision-making.

**Performance Indicators:**

Identify the effects of global trade on retailing (EC:094) (SP)

Explain current retail trends driven by global trade (EC:102) (SP)

## **Instructional Area: Marketing (MK)**

**Standard:** Understands the tools, techniques, and systems that businesses use to create exchanges and satisfy organizational objectives

**Performance Element:** Acquire an understanding of marketing's role and function in business to facilitate work among departments.

**Performance Indicators:**

Distinguish between retailing and marketing (MK:003) (CS)

Explain the importance of merchandising to retailers (MK:020) (CS)

## **Instructional Area: Information Management (NF)**

**Standard:** Understands tools, strategies, and systems needed to access, process, maintain, evaluate, and disseminate information to assist business decision-making

**Performance Element:** Utilize information-technology tools to manage and perform merchandising responsibilities.

**Performance Indicators:**

Analyze the impact of technology on retailing (NF:041) (SP)

Utilize merchandising software (NF:107) (SP)

Obtain information from retail databases to aid in product planning and control (NF:104) (SP)

**Performance Element:** Maintain marketing information to facilitate merchandising activities.

**Performance Indicators:**

Maintain purchase orders (NF:102) (SP)

Maintain order logs (NF:108) (SP)

## **Instructional Area: Operations (OP)**

**Standard: Understands the processes and systems implemented to monitor, plan, and control the day-to-day activities required for continued business functioning**

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

**Performance Indicators:**

Explain policies/procedures for handling shoplifters (OP:122) (CS)

Devise/Enact merchandise security measures to minimize inventory shrinkage (OP:172) (SP)

**Performance Element: Implement organizational skills to improve efficiency and work flow.**

**Performance Indicators:**

Follow up orders (OP:040) (CS)

**Performance Element: Prepare registers/terminals for sales operations.**

**Performance Indicators:**

Prepare cash drawers/banks (OP:194) (CS)

Open/Close register/terminal (OP:195) (CS)

**Performance Element: Acquire foundational knowledge of distribution to understand its role and function.**

**Performance Indicators:**

Explain the nature and scope of distribution (OP:522) (CS)

Explain the relationship between customer service and distribution (OP:523) (CS)

Describe the use of technology in distribution (OP:524) (SP)

Explain legal considerations in distribution (OP:525) (SP)

Describe ethical considerations in distribution (OP:526) (SP)

Explain distribution issues and trends (OP:377) (SP)

Discuss the use of electronic data interchange (EDI) (OP:378) (SP)

**Performance Element: Utilize order-fulfillment processes to move product through the supply chain.**

**Performance Indicators:**

Use an information system for order fulfillment (OP:380) (CS)

Fulfill orders (OP:381) (CS)

**Performance Element: Implement receiving processes to ensure accuracy and quality of incoming shipments.**

**Performance Indicators:**

Explain the receiving process (OP:384) (CS)

Explain stock-handling techniques used in receiving deliveries (OP:385) (CS)

Process incoming merchandise (OP:386) (CS)

Resolve problems with incoming shipments (OP:387) (CS)

**Performance Element: Utilize stock-handling procedures to process incoming inventory.**

**Performance Indicators:**

- Attach source and anti-theft tags (OP:389) (CS)
- Price mark merchandise (OP:390) (CS)
- Make and record price changes (OP:391) (SP)
- Identify hang-tag needs (OP:392) (SP)
- Assign codes to each product item (OP:393) (SP)
- Route stock to sales floor (OP:394) (CS)
- Rotate stock (OP:395) (CS)
- Process returned/damaged product (OP:396) (CS)
- Transfer stock to/from branches (OP:397) (SP)
- Enter product descriptions into a PoS system (OP:398) (SP)

**Performance Element: Utilize warehousing procedures to store inventory until needed.**

**Performance Indicators:**

- Explain storing considerations (OP:400) (CS)
- Explain the nature of warehousing (OP:401) (CS)
- Store inventory (OP:402) (CS)

**Performance Element: Understand transportation processes to move products through the supply chain.**

**Performance Indicators:**

- Explain shipping processes (OP:405) (CS)
- Identify factors considered when selecting best shipping method (OP:406) (SP)

**Performance Element: Utilize inventory-control methods to minimize costs and to meet customer demand.**

**Performance Indicators:**

- Maintain inventory levels (OP:407) (CS)
- Report out-of-stocks (OP:408) (CS)
- Complete inventory counts (OP:409) (CS)
- Monitor merchandise classification system (OP:410) (SP)
- Allocate merchandise to stores/regions (OP:411) (SP)
- Track stock by location for department/class/vendor level (OP:412) (SP)
- Describe inventory control systems (OP:413) (CS)
- Explain types of unit inventory-control systems (OP:414) (SP)
- Determine inventory shrinkage (OP:415) (SP)
- Maintain inventory-control systems (OP:416) (SP)
- Implement category management process (OP:417) (SP)

**Performance Element: Manage distribution activities to minimize costs and to determine distribution strategies.**

**Performance Indicators:**

- Ensure timely delivery of advertised merchandise (OP:420) (SP)

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

**Standard: Understands concepts, tools, and strategies used to explore, obtain, and develop in a business career**

**Performance Element: Acquire information about merchandising to aid in making career choices.**

**Performance Indicators:**

Explain the evolution of retailing (PD:148) (CS)

Describe the role of merchandisers in retailing (PD:128) (CS)

**Performance Element: Understand career opportunities in retailing to make career decisions.**

**Performance Indicators:**

Identify career opportunities in retailing (PD:038) (CS)

Explain career opportunities in merchandising (PD:134) (CS)

## **Instructional Area: Product/Service Management (PM)**

**Standard: Understands the concepts and processes needed to obtain, develop, maintain, and improve a product or service mix in response to market opportunities and to build brand for the organization**

**Performance Element: Apply quality assurances to enhance product/service offerings.**

**Performance Indicators:**

Determine the impact of product standards' issues associated with global business (PM:278) (SP)

**Performance Element: Utilize assortment-mix strategies to create maximum mix of products at minimum cost.**

**Performance Indicators:**

Obtain samples (PM:253) (SP)

Determine quality of merchandise to offer (PM:223) (SP)

Plan merchandise assortment (e.g., styling, sizes, quantities, colors) (PM:254) (SP)

**Performance Element: Develop merchandise plans (budgets) to guide selection of retail products.**

**Performance Indicators:**

Explain the nature of merchandise plans (budgets) (PM:061) (SP)

Calculate open-to-buy (PM:058) (SP)

Create/maintain daily sales plan (PM:219) (SP)

Identify emerging trends (PM:257) (SP)

Plan stock (PM:062) (SP)

Plan reductions (e.g., anticipated markdowns, employee/other discounts, stock shortages) (PM:063) (SP)

Plan purchases (PM:064) (SP)

Compare and contrast buying from domestic sources with that of foreign sources (PM:192) (SP)

Determine final cost of purchases from domestic and international sources (PM:193) (SP)



**Performance Element: Perform buying activities to obtain products for resale.**

**Performance Indicators:**

- Write purchase orders (PM:258) (SP)
- Analyze the use of central buying (PM:259) (SP)
- Determine stock turnover (PM:224) (SP)
- Determine what to buy/reorder (PM:260) (SP)
- Determine quantities to buy/reorder (PM:261) (SP)
- Determine when to buy/reorder (PM:262) (SP)
- Establish reorder points (PM:232) (SP)

**Performance Element: Analyze vendor performance to choose vendors and goods/services.**

**Performance Indicators:**

- Evaluate vendors' goods and services (PM:239) (SP)
- Choose vendors (PM:263) (SP)
- Negotiate terms with suppliers (PM:264) (SP)

**Performance Element: Position products/services to acquire desired business image.**

**Performance Indicators:**

- Identify components of a retail image (PM:243) (SP)

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

**Standard: Understands the concepts, systems, and tools needed to gather, access, synthesize, evaluate, and disseminate information for use in making business decisions**

**Performance Element: Utilize marketing information to drive merchandising activities.**

**Performance Indicators:**

- Analyze information from suppliers (IM:300) (SP)
- Scan marketplace to identify factors that could influence merchandising decisions (IM:396) (SP)
- Analyze competitors' offerings (IM:298) (SP)

## **Instructional Area: Promotion (PR)**

**Standard: Understands the concepts and strategies needed to communicate information about products, services, images, and/or ideas to achieve a desired outcome**

**Performance Element: Advertise to communicate promotional messages to targeted audiences.**

**Performance Indicators:**

- Proof ads (PR:346) (SP)

**Performance Element: Utilize special events to increase sales.**

**Performance Indicators:**

- Plan special events (PR:360) (SP)
- Prepare store/department for special event (PR:068) (SP)

**Performance Element: Employ visual merchandising techniques to increase interest in product offerings.**

**Performance Indicators:**

Explain the use of visual merchandising in retailing (PR:023) (CS)  
Distinguish between visual merchandising and display (PR:302) (CS)  
Place merchandise for impact (PR:342) (SP)  
Determine on-floor assortments (PR:284) (SP)  
Use cross-merchandising techniques (PR:358) (SP)  
Read/Implement planograms (PR:349) (SP)

**Performance Element: Implement display techniques to attract customers and increase sales potential.**

**Performance Indicators:**

Explain types of display arrangements (PR:026) (CS)  
Maintain displays (PR:052) (CS)  
Dismantle/Store displays/display fixtures/forms (PR:054) (CS)  
Create promotional signs (PR:109) (SP)  
Select and use display fixtures/forms (PR:031) (SP)  
Use lighting to highlight products (PR:359) (SP)  
Set up point-of-sale displays and handouts (PR:114) (SP)  
Create displays (PR:047) (SP)

**Performance Element: Manage promotional activities to maximize return on promotional efforts.**

**Performance Indicators:**

Develop promotional calendar (PR:209) (SP)  
Plan/Schedule displays/themes with management (PR:077) (SP)

## **Instructional Area: Selling (SE)**

**Standard: Understands the concepts and actions needed to determine client needs and wants and respond through planned, personalized communication that influences purchase decisions and enhances future business opportunities**

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

**Performance Indicators:**

Explain the use of brand names in selling (SE:019) (CS)

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

**Performance Indicators:**

- Establish relationship with customer/client (SE:110) (CS)
- Determine customer/client needs (SE:111) (CS)
- Recommend specific product (SE:114) (CS)
- Demonstrate good/service (SE:374) (SP)
- Convert customer/client objections into selling points (SE:874) (SP)
- Close the sale (SE:895) (SP)
- Demonstrate suggestion selling (SE:875) (SP)
- Plan follow-up strategies for use in retail selling (SE:489) (SP)

**Performance Element: Implement support activities to facilitate the selling process.**

**Performance Indicators:**

- Arrange delivery of purchases (SE:023) (CS)
- Pack and wrap purchases (SE:887) (CS)
- Process special orders for retail sales (SE:009) (CS)
- Sell gift certificates (SE:016) (CS)
- Process retail telephone orders (SE:835) (CS)
- Process returns/exchanges (SE:162) (CS)
- Process retail sales documentation (SE:117) (SP)

**Performance Element: Collect payment from customer to complete customer transaction.**

**Performance Indicators:**

- Calculate miscellaneous charges for retail sales (SE:116) (CS)
- Process sales transactions (e.g., cash, credit, check) (SE:329) (CS)
- Accept checks from customers (SE:152) (CS)
- Operate register/terminal (SE:153) (CS)

**Performance Element: Guide sales staff to improve their success rate and to minimize staff turnover.**

**Performance Indicators:**

- Provide information about incoming merchandise to sales staff (SE:396) (SP)
- Monitor on-floor selling activities (SE:389) (SP)