

Course Title	Content Area	Grade Level	Credit (if applicable)		
Marketing II	CTE-Business	10-12	0.5 BPS		
Course Description					
This advanced course offers students hands-on experience in real-world marketing concepts. Students will develop a deep understanding of marketing strategies, including sales techniques, merchandising principles, promotional strategies, social media marketing, pricing, and profit analysis. Students will be able to apply their theoretical learning through the operation of a school-based enterprise. Students enrolled in this course will have the opportunity to earn a school-based enterprise certification. This course equips students with practical skills and knowledge essential for pursuing careers in Marketing, Business Management, Entrepreneurship, and Retail Operations while fostering creativity, teamwork, and leadership.					
Aligned Core Resources			Connection to the <i>BPS Vision of the Graduate</i>		
MBA Research: Marketing Clusters			Collaboration Social and Cross-Cultural Skills Global Awareness Media Literacy Communication Communications and Technology Literacy Information Literacy Goal Directed Financial Literacy Critical Thinking and Problem Solving		
Additional Course Information: Knowledge/Skill Dependent courses/prerequisites			Link to <i>Completed Equity Audit</i>		
Marketing I			Marketing II Equity Curriculum Review		
Standard Matrix					
District Learning Expectations and Standards MBA Research Standards for Marketing	Unit 1: Market Research and Planning	Unit 2: Operations, Distribution, & HR	Unit 3: Pricing and Product Management	Unit 4: Promotion and Selling	Unit 5: Financial Analysis
Marketing Understands the tools, techniques, and systems that businesses use to create exchanges and satisfy organizational objectives	X	X	X	X	X
Financial Analysis Understands tools, strategies, and systems used to maintain, monitor, control, and plan the use of financial resources	X		X	X	X
Operations Understands the processes and systems implemented to monitor, plan, and control the day-to-day activities required for continued business functioning		X			
Market Information Management Understands the concepts, systems, and tools needed to gather, access, synthesize, evaluate, and disseminate information for use in making business decisions	X		X		X
Market Planning Understands the concepts and strategies utilized to determine and target marketing strategies to a select audience	X		X	X	
Product/Service Management	X		X		

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					
Pricing Understands concepts and strategies utilized in determining and adjusting prices to maximize return and meet customers' perceptions of value			X		X
Distribution/Channel Management Understands the concepts and processes needed to identify, select, monitor, and evaluate sales channels		X	X		
Promotion Understands the concepts and strategies needed to communicate information about products, services, images, and/or ideas to achieve a desired outcome				X	
Selling 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				X	
Human Resources Management Understands the tools, techniques, and systems that businesses use to plan, staff, lead, and organize its human resources		X			

Unit Links

- [Unit 1: Market Research and Planning](#)
- [Unit 2: Operations, Distribution, & HR](#)
- [Unit 3: Pricing and Product Management](#)
- [Unit 4: Promotion and Selling](#)
- [Unit 5: Financial Analysis](#)

Unit Title													
Unit 1: Market Research and Planning													
Relevant Standards: Bold indicates priority													
MBA Research Standards for Marketing: Marketing , Financial Analysis, Market Information Management, Market Planning , Product/Service Management													
Essential Question(s)	Enduring Understanding(s)												
<ul style="list-style-type: none"> How do businesses identify and define their target market? What factors are considered when identifying a market? Why is ongoing monitoring and evaluation essential for marketing success? What information is typically included in a customer profile? How do businesses gather data to create a customer profile? 	<ul style="list-style-type: none"> Marketers collect data to identify trends and respond to customer needs in a changing competitive environment. Marketers collect data from numerous resources including primary and secondary research. Accurate customer profiles are essential for understanding and anticipating customer needs, which leads to customer satisfaction and loyalty 												
Demonstration of Learning	Pacing for Unit												
<ul style="list-style-type: none"> Students will conduct primary and secondary research to collect and analyze data for a given market. Students will develop a presentation to showcase business decisions from data analysis. 	5 classes of instruction 3 classes of project based learning												
Family Overview	Integration of Technology												
Family Overview Link	Google Sheets for data analysis Google Forms for data collection												
Unit-specific Vocabulary	Aligned Unit Materials, Resources, and Technology (beyond core resources)												
<table border="0"> <tr> <td>Market Segmentation</td> <td>Geographic Segmentation</td> </tr> <tr> <td>Mass Marketing</td> <td>Demographic Segmentation</td> </tr> <tr> <td>Target Marketing</td> <td>Segmentation</td> </tr> <tr> <td>Niche Marketing</td> <td>Behavior Segmentation</td> </tr> <tr> <td>Target Customer Profile</td> <td>Market Need</td> </tr> <tr> <td>Psychographic</td> <td>Customer Demand</td> </tr> </table>	Market Segmentation	Geographic Segmentation	Mass Marketing	Demographic Segmentation	Target Marketing	Segmentation	Niche Marketing	Behavior Segmentation	Target Customer Profile	Market Need	Psychographic	Customer Demand	US Census Data Bureau of Labor Statistics (BLS) Data Google Trends data Social media analytics
Market Segmentation	Geographic Segmentation												
Mass Marketing	Demographic Segmentation												
Target Marketing	Segmentation												
Niche Marketing	Behavior Segmentation												
Target Customer Profile	Market Need												
Psychographic	Customer Demand												
Opportunities for Interdisciplinary Connections	Anticipated misconceptions												
By integrating psychology, sociology, data science, research, and statistics , marketers can gain deeper insights into consumer behavior, make data-driven decisions, and track emerging trends effectively	<ul style="list-style-type: none"> Market research is just about surveys Using only secondary research is sufficient Assuming all customers want the same thing Customer wants/needs do not change 												
Connections to Prior Units	Connections to Future Units												
N/A	Unit 1: Customer Profiles → Unit 2: Customer Service Unit 1: Customer Profile → Unit 3: Customer Demographics and Preferences Unit 1: Market Research → Unit 4: Using Market Research to inform merchandise planning												
Differentiation through Universal Design for Learning													
UDL Indicator	Teacher Actions												
Lessons 1 & 2: Describing and Using Marketing Data in Decision-Making													
Engagement: <ul style="list-style-type: none"> Use real-world marketing case studies that connect to students' interests (e.g., tech, fashion, sports). This can spark engagement by highlighting the relevance of marketing data in areas they find meaningful. 													

- Offer opportunities for collaboration by allowing students to work in groups to analyze marketing data, which can foster peer interaction and shared learning experiences.

Representation:

- Present content through varied formats, such as videos, infographics, or podcasts on data-driven marketing, to meet diverse learning preferences.
- Use concept mapping tools or graphic organizers to help students understand the relationships among marketing data, decision-making, and business outcomes.

Action/Expression:

- Allow students to present their understanding in multiple formats—such as written reports, video presentations, or data visualizations—so they can demonstrate their learning in ways that align with their strengths.
- Incorporate technology, such as Google Sheets, to visualize data trends to help students analyze and interpret marketing data.

Lesson 3: Tracking Marketing Trends

Engagement:

- Have students track and report on current marketing trends in industries they are interested in.
- Incorporate trend-tracking simulations or tools, such as Google Trends or social media analytics, to highlight real world applications.

Representation:

- Provide articles, videos, and examples that illustrate how tracking trends can impact business decisions.
- Visualize trends through graphs and charts to support students who benefit from concrete, visual representation of abstract concepts.

Action/Expression:

- Have students create reports or presentations summarizing a trend's impact on marketing. This could be a written document, infographic, or verbal report, providing flexibility.
- Offer templates or tools for data tracking, such as a guided spreadsheet, to help students organize and analyze trend data.

Lesson 4-5: Analyzing Customer Behavior

Engagement:

- Create role-play or simulation activities where students act as marketing analysts making recommendations based on customer behavior.
- Allow students to select customer profiles or behavior case studies based on companies they relate to.

Representation:

- Use various models of customer behavior, from text descriptions to videos and interactive simulations, to show the impact of customer behavior on business decisions.
- Provide visual aids, like charts that illustrate consumer purchasing behavior, to help students process complex data.

Action/Expression:

- Give students choices in how they analyze and present customer behavior insights, such as through written reports, charts, or multimedia presentations.

Lesson 6-8: Conducting Market Research and Applying Data Outcomes

Engagement:

- Design a project-based learning scenario where students act as marketing consultants for a business or product, making real-world connections to the concepts.
- Offer choice in the type of product or service they research, allowing them to connect with industries or topics they find compelling.

Representation:

- Provide examples of primary and secondary research methods in various formats, such as instructional videos, sample reports, and research templates.
- Break down research steps and data analysis methods into accessible, guided instructions, ensuring that students understand each phase of the research process.

Action/Expression:

- Allow students to showcase their findings through presentations, reports, or marketing plans, giving them choice in how they demonstrate their understanding and analysis.
- Use interactive tools like Google Forms for surveys and Google Sheets for data analysis to help students engage in hands-on research experiences.

Supporting Multilingual/English Learners

Related CELP standards:

Learning Targets

1. Describing the need for marketing data

Level 1: Identify marketing data (e.g., customer age, sales) through visuals or labels. Use single words or simple phrases to describe why data is useful.

Level 2: Use sentence frames to explain basic reasons for using marketing data (e.g., "We use data to know what customers like").

Level 3: Describe the need for marketing data in simple sentences, explaining how data helps understand customer needs.

Level 4: Explain the importance of data for making marketing decisions, providing examples in paragraph form or a short presentation.

Level 5: Write a detailed explanation or present on why data is essential in marketing, discussing specific examples and implications for strategy.

2. Identifying data monitored for marketing decision-making

Level 1: Point to or label types of data used in marketing (e.g., sales, customer feedback).

Level 2: Use short phrases to name types of marketing data and briefly state why they're used.

Level 3: Describe in simple sentences different types of data and their uses in marketing (e.g., "Sales data shows what products are popular").

Level 4: List and explain several types of data marketers monitor, with details on how they impact decisions.

Level 5: Analyze different types of marketing data and explain how each informs various aspects of decision-making, using specific examples.

3. Tracking marketing trends

Level 1: Recognize simple trend patterns in visuals (e.g., "more people buy online") and label them.

Level 2: Use basic sentences to describe simple trends (e.g., "Sales are going up").

Level 3: Describe basic trends over time and state why tracking trends helps businesses (e.g., "Trends show what is popular").

Level 4: Track and explain marketing trends, using charts or data summaries, and discuss how trends impact marketing.

Level 5: Provide in-depth analysis on how tracking trends can lead to strategic marketing shifts, with examples from case studies or real-world scenarios.

4. Analyzing customer behavior

Level 1: Identify simple actions customers take (e.g., buying, browsing) and match these to visuals.

Level 2: Use short phrases to describe basic customer behaviors (e.g., "Customers like discounts").

Level 3: Explain basic customer behaviors in short sentences and state how behavior influences marketing.

Level 4: Discuss examples of how customer behavior impacts marketing strategies, using specific examples.

Level 5: Analyze complex patterns in customer behavior and detail how these insights guide marketing decisions and adjustments in real time.

5. Conducting market research and planning marketing strategies according to data outcomes in a real-world situation

Level 1: Recognize examples of simple market research methods (e.g., surveys) through visuals or words.

Level 2: Use sentence frames to describe simple research steps or results (e.g., "We ask people what they buy").

Level 3: Conduct basic research activities with guidance and describe findings in simple terms (e.g., "Many people like this product").

Level 4: Conduct a market research task (e.g., survey or analysis) and plan a basic strategy based on findings, explaining the rationale behind decisions.

Level 5: Independently conduct detailed market research, analyze outcomes, and develop a complex marketing strategy that adapts to real-world situations, presenting insights and supporting decisions with data.

Lesson Sequence	Learning Target	Success Criteria/ Assessment	Resources
1	I can describe the need for marketing data.	<ul style="list-style-type: none">I can describe data-driven marketing.I can discuss marketing data and provide examples of how the information is used.I can use data in the decision-making process to make informed marketing decisions.	

2	I can identify data monitored for marketing decision-making.	<ul style="list-style-type: none"> • Describe in detail the decisions made based on marketing data. • Include product decisions, price decisions, place (distribution) decisions and promotion decisions.
3	I can track marketing trends.	<ul style="list-style-type: none"> • I can describe the importance of tracking trends in business, and provide examples of types of industry trend analysis. • I can discuss the challenges and opportunities of tracking trends in marketing.
4-5	I can analyze customer behavior.	<ul style="list-style-type: none"> • I can explain the importance of customer behavior to drive business decisions and customer growth.
6-8	I can conduct market research and plan marketing strategies according to the data outcomes in a real world situation.	<ul style="list-style-type: none"> • I can conduct primary and secondary market research. • I can analyze data outcomes. • I use data to develop a customer profile. • I can analyze and report marketing trends.

Unit Title																															
Unit 2: Operations, Distribution, & Human Resources																															
Relevant Standards: Bold indicates priority																															
MBA Research Standards for Marketing: Marketing, Distribution/Channel Management, Human Resources Management, Operations																															
Essential Question(s)	Enduring Understanding(s)																														
<ul style="list-style-type: none"> How do employees utilize equipment and tools to complete tasks? How does customer service impact customer satisfaction? How do inventory counts contribute to maintaining accurate stock levels and supporting business operations? How does effective human resource management contribute to creating a positive and productive business environment? 	<ul style="list-style-type: none"> Businesses provide employees with training to effectively complete tasks. Good customer service is important to achieve customer satisfaction. Tracking inventory is important to maintain accurate stock levels. Incentivizing employees with tangible benefits is an important aspect of employee retention 																														
Demonstration of Learning	Pacing for Unit																														
Students will complete a project to demonstrate their ability to create business operations, distribution and human resources.	5 classes of instruction 3 classes of project based learning																														
Family Overview (link below)	Integration of Technology																														
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Unit-specific Vocabulary	Aligned Unit Materials, Resources, and Technology (beyond core resources)																														
<table> <tr> <td>Opening Procedures</td> <td>Physical</td> </tr> <tr> <td>Closing Procedures</td> <td>Distribution/Logistics</td> </tr> <tr> <td>Point of Sale (POS) System</td> <td>- Customer Service</td> </tr> <tr> <td>Use of Equipment</td> <td>- Warehousing/Storage</td> </tr> <tr> <td>Health Procedures</td> <td>- Order Processing</td> </tr> <tr> <td>Safety Procedures</td> <td>- Inventory Control</td> </tr> <tr> <td>Security Precautions</td> <td>- Material Handling/Packaging</td> </tr> <tr> <td>Channel of Distribution</td> <td>Inventory Count (Full Count and Partial Count)</td> </tr> <tr> <td>Direct Channel</td> <td>Inventory Shrinkage</td> </tr> <tr> <td>Indirect Channel</td> <td>Hiring Process</td> </tr> <tr> <td>Supply Chain</td> <td>Performance Management</td> </tr> <tr> <td>Intermediary</td> <td>Development</td> </tr> <tr> <td>Agent/Broker</td> <td>Training</td> </tr> <tr> <td>Merchant</td> <td>Company Culture</td> </tr> <tr> <td>Wholesaler Retailer</td> <td></td> </tr> </table>	Opening Procedures	Physical	Closing Procedures	Distribution/Logistics	Point of Sale (POS) System	- Customer Service	Use of Equipment	- Warehousing/Storage	Health Procedures	- Order Processing	Safety Procedures	- Inventory Control	Security Precautions	- Material Handling/Packaging	Channel of Distribution	Inventory Count (Full Count and Partial Count)	Direct Channel	Inventory Shrinkage	Indirect Channel	Hiring Process	Supply Chain	Performance Management	Intermediary	Development	Agent/Broker	Training	Merchant	Company Culture	Wholesaler Retailer		
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Wholesaler Retailer																															
Opportunities for Interdisciplinary Connections	Anticipated misconceptions																														
By applying psychology, sociology, data science, research, and statistics , businesses can optimize operational efficiency, improve employee performance, enhance customer service, and make data-driven decisions.	<ul style="list-style-type: none"> Once operations and procedures are established they never change. Distribution is only through physical retail locations Human resources is only about hiring and firing 																														
Connections to Prior Units:	Connections to Future Units:																														
Unit 1: Customer Profiles → Unit 2: Customer Service	Unit 2: Distribution → Unit 4: Selling Unit 2: Inventory → Unit 5: Financial Record Keeping Unit 2: Staffing → Unit 5: Budgeting																														
Differentiation through <i>Universal Design for Learning</i>																															

UDL Indicator	Teacher Actions:
<p>Lesson 1: I can follow instructions for use of equipment, tools, and machinery.</p> <p><i>Engagement:</i></p> <ul style="list-style-type: none"> ● Allow students to work in small groups to practice using the equipment and tools. <p><i>Representation:</i></p> <ul style="list-style-type: none"> ● Provide step-by-step video demonstrations or visual aids showing how to use the equipment/tools, alongside written instructions. ● Offer interactive simulations or virtual labs for students who may not have immediate access to the physical equipment. ● Provide annotated diagrams or photos highlighting key components of the equipment. <p><i>Action/Expression:</i></p> <ul style="list-style-type: none"> ● Have students demonstrate their understanding by verbally explaining how they would use the equipment. ● Offer written or video-based assessments to ensure they can describe proper usage of tools and machinery. <p>Lesson 2: I can explain the relationship between customer service and distribution.</p> <p><i>Engagement:</i></p> <ul style="list-style-type: none"> ● Encourage discussion and debate on real-world scenarios where poor customer service impacted distribution processes (e.g., delayed shipments). ● Incorporate activities like group problem-solving or case studies to increase engagement. <p><i>Representation:</i></p> <ul style="list-style-type: none"> ● Provide visual representations such as flowcharts, diagrams, or infographics showing how customer service and distribution are connected. ● Use real-world case studies or role-playing videos to illustrate the impact of customer service on distribution. <p><i>Action/Expression:</i></p> <ul style="list-style-type: none"> ● Let students present their understanding through written reports, oral presentations, or multimedia projects. ● Have students create a visual diagram or infographic showing the relationship between customer service and distribution. <p>Lesson 3: I can complete inventory counts.</p> <p><i>Engagement:</i></p> <ul style="list-style-type: none"> ● Allow students to complete inventory counts in teams, promoting peer collaboration and support. ● Include hands-on practice with real or virtual inventory tasks to foster engagement. <p><i>Representation:</i></p> <ul style="list-style-type: none"> ● Provide digital tools, such as apps or spreadsheets, to track inventory counts, which can be more interactive and engaging. ● Use visual aids (e.g., charts, tables, and graphs) to demonstrate how inventory is recorded and counted. <p><i>Action/Expression:</i></p> <ul style="list-style-type: none"> ● Students can demonstrate their skills in various ways: manually completing an inventory sheet, entering data into an inventory system, or explaining the process to the class. <p>Lesson 4: I can discuss the nature of human resources management.</p> <p><i>Engagement:</i></p> <ul style="list-style-type: none"> ● Have students engage in case study analysis or role-play activities where they act as HR managers solving issues within a company. ● Use interactive online HR simulations to increase engagement and deepen understanding of HR practices. <p><i>Representation:</i></p> <ul style="list-style-type: none"> ● Provide a variety of materials such as articles, videos, and podcasts on HR management practices. ● Use role-playing or skits to show real-life examples of HR issues like recruitment, employee conflict resolution, and performance reviews. <p><i>Action/Expression:</i></p> <ul style="list-style-type: none"> ● Let students present HR management concepts in formats such as essays, presentations, or videos. ● Have them create a portfolio of HR management strategies, policies, or job descriptions. <p>Lesson 5: I can assess employee performance.</p> <p><i>Engagement:</i></p> <ul style="list-style-type: none"> ● Allow students to evaluate case studies of employee performance or practice through role-play scenarios. ● Provide opportunities for peer assessments to engage students in evaluating each other's performance. <p><i>Representation:</i></p> <ul style="list-style-type: none"> ● Provide rubrics and exemplars to help students understand the criteria for assessing employee 	

performance.

- Use video demonstrations of performance assessments (e.g., conducting performance reviews) to show best practices.

Action/Expression:

- Students can complete written performance appraisals, create presentations, or demonstrate assessment techniques in role-play scenarios.
- Allow students to reflect on their own performance assessment strategies through journals or discussions.

Lesson 6-8: I can create operational, distribution, and human resources decisions for a business.

Engagement:

- Encourage students to participate in business planning simulations where they make operational, distribution, and HR decisions.
- Use group projects to allow students to collaborate on real-world decision-making scenarios.

Representation:

- Provide clear frameworks or decision-making models for creating operational, distribution, and HR decisions.
- Use case studies or simulations where students can explore real-world business decisions in these areas.
- Offer diagrams or flowcharts illustrating how different decisions impact various business operations.

Action/Expression:

- Have students create business plans or decision-making documents that reflect operational, distribution, or HR strategies.
- Offer students different ways to express their decision-making process, such as through written reports, oral presentations, or multimedia projects.

Supporting Multilingual/English Learners

Related *CELP standards:*

Learning Targets:

1. Following instructions for use of equipment, tools, and machinery

Level 1: Can follow simple, one-step verbal or written instructions with visual support. Requires frequent repetition or clarification of instructions.

Level 2: Can follow short, multi-step instructions with some support. Asks clarifying questions to ensure understanding of the instructions.

Level 3: Can independently follow multi-step instructions related to equipment use. Interprets simple safety or operational diagrams with minimal support.

Level 4: Can follow detailed, complex multi-step instructions. Can make requests for clarification and paraphrase instructions to ensure understanding.

Level 5: Can fully understand and follow complex, industry-specific instructions with little to no support. Can provide instructions to others using appropriate terminology.

2. Explaining the relationship between customer service and distribution

Level 1: Can use pictures or visuals to explain the basic concept of customer service and distribution. Provides basic answers in one or two words or phrases.

Level 2: Can explain the connection between customer service and distribution using simple phrases or sentences. Provides basic examples or descriptions with some help.

Level 3: Can explain the relationship between customer service and distribution using a few sentences with some accuracy. Uses basic vocabulary (e.g., "customer satisfaction," "shipping," "delivery").

Level 4: Can explain the relationship clearly, providing several details and examples. Discusses the impact of customer service on distribution efficiency or challenges.

Level 5: Can offer a comprehensive, in-depth explanation that analyzes the relationship from multiple perspectives. Justifies decisions related to customer service and distribution with sophisticated language.

3. Completing inventory counts

Level 1: Can recognize numbers and simple terms related to inventory (e.g., counting objects or quantities with visual support). Needs significant help interpreting inventory lists.

Level 2: Can count items and match them to inventory lists with some support. Can write basic inventory numbers with some errors.

Level 3: Can independently count inventory items and record numbers with occasional errors. Matches items with labels and basic product names.

Level 4: Can conduct inventory counts independently, identify discrepancies, and report them. Can read simple

inventory lists and understand quantities, prices, and product names.

Level 5: Can analyze and complete complex inventory counts, including handling multiple categories and product variations. Documents inventory counts and discrepancies in a professional format with little to no assistance.

4. Discussing the nature of human resources management

Level 1: Can recognize and identify basic human resources terms (e.g., hiring, employees). May use pictures or visuals to describe basic HR processes.

Level 2: Can describe basic HR concepts using simple language (e.g., "HR helps people get jobs"). Can explain basic HR ideas with limited detail.

Level 3: Can discuss the basic principles of human resources management (e.g., hiring, training, employee relations). Can use simple vocabulary to describe the function of HR within a business.

Level 4: Can describe the role of human resources in greater detail, including policies and practices (e.g., recruitment, retention, performance reviews). Uses industry-specific vocabulary with some accuracy.

Level 5: Can explain the responsibilities and challenges of human resources management using detailed examples. Can participate in discussions using formal HR-related terminology.

5. Assessing employee performance

Level 1: Can identify basic traits of employee performance (e.g., hard-working, on time). May need help understanding simple performance reviews or basic evaluations.

Level 2: Can describe basic characteristics of employee performance in simple terms (e.g., "good worker," "needs improvement"). Can use basic criteria to assess performance with guidance.

Level 3: Can assess employee performance based on simple criteria (e.g., punctuality, quality of work). Can write a short evaluation using basic performance descriptors.

Level 4: Can assess performance using multiple criteria and justify ratings.

Can write a more detailed evaluation that includes strengths and areas for improvement.

Level 5: Can conduct performance assessments based on a variety of factors, providing well-organized feedback. Can engage in discussions about performance reviews and provide constructive feedback.

6. I can create operational, distribution, and human resources decisions for a business.

Level 1: Can provide simple responses about business decisions using visuals (e.g., diagrams or simple charts). Needs help making connections between operational, distribution, and HR factors.

Level 2: Can describe basic business decisions using simple language. Can provide basic ideas for improving business operations, with some support.

Level 3: Can create basic business decisions, considering operational, distribution, and HR factors, with limited support. Can write short descriptions or plans for business decisions.

Level 4: Can create detailed business decisions, explaining their rationale for operational, distribution, and HR choices. Provides clear written plans and explanations, using appropriate terminology.

Level 5: Can create complex business decisions, offering detailed justifications for choices in operations, distribution, and HR management. Writes comprehensive business plans or proposals with minimal support.

Lesson Sequence	Learning Target	Success Criteria/ Assessment	Resources
1	I can follow instructions for use of equipment, tools and machinery	<ul style="list-style-type: none"> I can describe the types of equipment, tools and machinery used in a retail environment. I can discuss training and checks and balances in regard to equipment used in a retail environment. 	
2	I can explain the relationship between customer service and distribution.	<ul style="list-style-type: none"> I can discuss how to establish positive customer relationships. I can explain how the timing of orders, stock rotation and product availability affects a businesses ability to provide customers with goods and services. 	
3	I can complete inventory counts.	<ul style="list-style-type: none"> I can explain the process for inventory control. 	
4	I can discuss the nature of human resources management.	<ul style="list-style-type: none"> I can describe the acquisition and selection process for store employees. I can provide a description of how employees are motivated to do their job well. I can discuss how businesses maintain and provide tangible benefits to their employees. 	

5	I can assess employee performance.	<ul style="list-style-type: none"> ● I can explain the various methods used to measure and evaluate employee performance. ● I can describe student responsibilities in evaluating employee performance (peer evaluation, self-evaluation)
6-8	I can create operational, distribution and human resources decisions for a business.	<ul style="list-style-type: none"> ● I can design daily operational procedures ● I can create channels of product distribution ● I can delegate and evaluate employee performance

Unit Title	
Unit 3: Pricing and Product Management	
Relevant Standards: Bold indicates priority	
MBA Research Standards for Marketing: Pricing, Product/Service Management	
Essential Question(s)	Enduring Understanding(s)
<ul style="list-style-type: none"> • What is the role of pricing in the overall marketing strategy of a business? • How does pricing affect the perceived value of a product or service? • What are the different pricing strategies that businesses can use? • How do market conditions and consumer behavior impact pricing decisions? • What factors should be considered when planning a merchandise assortment? • How do customer demographics and preferences influence merchandise planning? • How can data and market research be used to inform merchandise planning decisions? 	<ul style="list-style-type: none"> • Pricing is a crucial element of the marketing strategy that directly impacts a business's profitability, market positioning, and competitive advantage. • The price of a product or service affects how customers see its value, making them think it's either a high-quality or low-quality option based on how much it costs. • Changes in the economy, what competitors are doing, and how customers are buying can all influence how businesses decide to price their products or services. • Using data and market research helps businesses understand customer habits, market trends, and what competitors are doing, so they can make smart decisions about what products to offer.
Demonstration of Learning	Pacing for Unit
Students will create a product line and select appropriate pricing strategies and profit margins for a retail environment.	5 classes of instruction 3 classes of project based learning.
Family Overview (link below)	Integration of Technology
Family Overview Link	
Unit-specific Vocabulary	Aligned Unit Materials, Resources, and Technology (beyond core resources)
Under/Over Pricing Vendors Return on Investment (ROI) Merchandise Assortment Market Share Product Line Break-Even Point Product Width Price Elasticity Product Depth Price Elastic/Inelastic Product Length Pricing Strategies Product Consistency Product Mix - Segmented Brand - Psychological Brand Mix - Promotional Merchandise Assortment - Geographical Stock Turnover - International) Reductions Discount and Allowances - Markdown Retail Image - Discounts - Shortages	
Opportunities for Interdisciplinary Connections	Anticipated misconceptions
Blending mathematical calculations, statistical analysis, psychological insights, research-based strategies, and economic theory in creating, evaluating, and refining pricing strategies.	<ul style="list-style-type: none"> • Price is equal to cost • Lowering prices always increases sales • Higher prices mean better quality • Product management is only about creating new products.
Connections to Prior Units	Connections to Future Units

Unit 1: Customer Profile → Unit 3: Customer Demographics and Preferences	Unit 3: Merchandise Assortment → Unit 4: Promotional Plans Unit 3: Pricing Strategies → Unit 5: Cash Flow and Profitability
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Differentiation through *Universal Design for Learning*

UDL Indicator	Teacher Actions
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Lesson 1: I can explain the nature and scope of the pricing function.

- Engagement:*
- Real-World Connections: Start with a discussion of real-world pricing scenarios (e.g., pricing strategies of popular brands or during sales events) to make the content relevant and engaging.
 - Choice: Allow students to choose a product or service to analyze in terms of its pricing function (e.g., luxury goods, tech products, or groceries), catering to different interests.

- Representation:*
- Multiple Formats: Present the nature and scope of pricing through a variety of mediums, such as:
 - Infographics and diagrams outlining different pricing strategies (e.g., cost-plus, value-based, and competitive pricing).
 - Videos or podcasts that discuss the role of pricing in business and its connection to other functions (like marketing and sales).
 - Case Studies: Use case studies of businesses that have adjusted their pricing based on market conditions.

- Action/Expression:*
- Written/Oral Explanation: Students can demonstrate their understanding by either writing a report or giving a short presentation explaining the nature and scope of pricing.
 - Mind Maps/Concept Maps: Students can create a visual representation (e.g., a mind map) that shows how the pricing function connects to other business functions like cost control, profitability, and customer perception.

Lesson 2: I can explain factors affecting pricing decisions.

- Engagement:*
- Scenario-Based Learning: Provide different scenarios where students must determine pricing factors for a given product (e.g., launching a new tech product, seasonal pricing for clothing).
 - Interactive Polls or Quizzes: Use technology tools like Kahoot! or Google Forms to engage students in identifying and discussing factors (e.g., supply and demand, competition, consumer behavior).

- Representation:*
- Graphic Organizers: Use charts or tables to help students visualize and categorize the different factors affecting pricing decisions (e.g., market conditions, competitor pricing, cost of production).
 - Videos/Case Studies: Show video clips or case studies that highlight real-world businesses adjusting their pricing decisions based on factors like cost, competition, or consumer demand.

- Action/Expression:*
- Role-Playing: Have students role-play as business managers who must make pricing decisions based on different influencing factors.
 - Writing or Presenting a Pricing Strategy: Students could write a brief strategy or create a presentation explaining how specific factors (like cost, competition, or market conditions) would affect the price of a particular product.

Lesson 3: I can identify components of a retail image.

- Engagement:*
- Exploration: Encourage students to explore retail environments (physical stores or websites) and identify different components that contribute to a retail image (e.g., store layout, signage, advertising, customer service).
 - Field Trips/Virtual Tours: If possible, organize a field trip to local stores or use virtual tours of flagship stores (e.g., luxury brands or big-box retailers) to observe components of retail image.

- Representation:*
- Visual Examples: Provide a variety of visual examples (photos, videos, or websites) that show different retail images and ask students to identify the components.
 - Comparative Analysis: Show side-by-side comparisons of retail images (e.g., a high-end boutique versus a discount store) and have students analyze what makes each store's image unique.

Action/Expression:

- Design a Retail Image: Have students design their own retail image for a business, considering elements like signage, layout, branding, and customer experience. They can express this through digital design tools (e.g., Canva) or sketches.
- Present an Analysis: Have students create a report or presentation analyzing the retail image of a brand or business and explaining the components that make up its image.

Lesson 4: I can plan merchandise assortments.

Engagement:

- Simulated Store Planning: Have students work in groups to plan a merchandise assortment for a hypothetical store. Allow for creativity in deciding what products to sell based on factors like seasonality, target market, and budget.
- Games/Challenges: Create a "store planning challenge" where students have a limited budget and must choose a variety of products to stock in their store.

Representation:

- Templates/Guides: Provide structured templates or guides that outline the steps for planning a merchandise assortment, including product categories, inventory levels, and customer preferences.
- Data and Graphs: Use sales data and inventory turnover rates to help students understand how to plan assortments based on demand and profitability.

Action/Expression:

- Create an Assortment Plan: Have students design a merchandise assortment plan for a store, choosing products from a selection of options based on target market needs and trends. This can be done through spreadsheets, visual layouts, or presentation tools.
- Presentation: Students can present their merchandise assortments to the class, explaining their rationale and how they balanced variety, price, and demand.

Lesson 5-7: I can plan merchandise assortments and determine an appropriate pricing structure.

Engagement:

- Project-Based Learning: Assign a project where students plan both merchandise assortments and pricing strategies for a new business. They could work in teams and compete to present the most successful store concept.
- Real-World Problem Solving: Present a scenario where a business is struggling with its pricing and merchandise selection. Students must work together to create a comprehensive plan that addresses both areas.

Representation:

- Step-by-Step Guidelines: Provide detailed instructions or a guide for how to combine merchandise assortment planning with pricing decisions, including factors like markup, pricing tiers, and product mix.
- Real-World Examples: Show examples of businesses that have successfully integrated merchandise planning with pricing strategies (e.g., a retail chain's holiday sale plan or a boutique's pricing strategy for new arrivals).

Action/Expression:

- Integrated Plan: Have students create a complete merchandising and pricing plan for a hypothetical retail store. This plan should include product assortment, pricing strategy, promotional tactics, and inventory control.
- Peer Review/Feedback: Have students present their plans to the class or in small groups for peer review. They should receive constructive feedback on both their assortment planning and pricing structure.

Supporting Multilingual/English Learners

Related <i>CELP standards:</i>	Learning Targets
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<p>1. Explaining the nature and scope of the pricing function</p> <p>Level 1: Can identify basic terms related to pricing (e.g., "price," "cost") with visual support. May provide one or two word responses when asked about pricing.</p> <p>Level 2: Can describe the general idea of pricing with some support (e.g., "Price is how much something costs"). Can use simple sentences to explain the pricing function in a business context.</p> <p>Level 3: Can explain the nature of pricing, including its role in a business, in a few sentences. Describes basic pricing functions, such as determining cost and setting price.</p> <p>Level 4: Can explain the scope of pricing, considering multiple aspects such as cost, competition, and consumer demand. Can provide examples of different pricing strategies and their purposes.</p> <p>Level 5: Can provide a detailed explanation of the nature and scope of the pricing function, including advanced</p>	
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pricing concepts such as price elasticity and market positioning. Can offer a comprehensive analysis of how pricing impacts overall business strategy.

2. Explaining factors affecting pricing decisions.

Level 1: Can recognize simple factors that affect price, such as "expensive" and "cheap," with visual support. May need help identifying the factors involved.

Level 2: Can name basic factors affecting pricing, like demand and cost, with some explanation. May need support to explain how these factors influence price.

Level 3: Can describe common factors affecting pricing, such as cost of production, competition, and demand, in simple sentences. Provides some examples of how each factor affects pricing decisions.

Level 4: Can explain multiple factors affecting pricing in detail, such as market conditions, target audience, and competitor pricing. Discusses how businesses use these factors to determine optimal pricing.

Level 5: Can analyze and explain a wide range of factors affecting pricing, including external factors like economic conditions and customer perceptions.

Offers a sophisticated explanation of the interplay between various factors in pricing strategy.

3. Identifying components of a retail image

Level 1: Can identify basic visual components of a retail store, such as "sign," "store," or "products." May need visual aids to help identify components of a retail image.

Level 2: Can name and describe a few key components of a retail image (e.g., "store layout," "signage") with some help. Can provide basic examples of what makes a store look attractive or professional.

Level 3: Can identify and describe several key components of a retail image (e.g., store design, customer service, marketing materials) and how they contribute to the store's overall image. Provides clear descriptions of how components work together to create a cohesive retail image.

Level 4: Can identify and explain the components of a retail image in detail, including both tangible (e.g., store layout, product display) and intangible aspects (e.g., customer experience, brand messaging). Describes how a strong retail image influences customer perception and buying behavior.

Level 5: Can provide an in-depth analysis of the components of a retail image, considering both internal and external factors. Can discuss how a retail image is aligned with brand identity and customer expectations.

4. Planning merchandise assortments

Level 1: Can recognize basic types of merchandise (e.g., "shirts," "shoes") with visual support. May need help identifying different categories of products.

Level 2: Can list some categories of merchandise (e.g., "clothes," "accessories") and describe them briefly. Can provide simple suggestions for merchandise assortment.

Level 3: Can plan basic merchandise assortments by grouping products based on category or customer need. Can explain why certain products belong together in an assortment.

Level 4: Can plan a more complex assortment, considering factors like customer demographics, seasonality, and sales trends. Provides detailed reasoning behind the choice of products included in the assortment.

Level 5: Can create a comprehensive merchandise assortment plan, balancing variety, pricing, and customer preferences. Justifies choices based on market research, trends, and sales data, creating a well-rounded and profitable assortment.

4. Planning merchandise assortments and determine an appropriate pricing structure

Level 1: Can select a few items to include in a basic assortment with visual aids. Needs support in determining appropriate prices for these items.

Level 2: Can create simple assortments and suggest basic price points for items. May rely on support to understand the relationship between pricing and product assortment.

Level 3: Can plan a basic merchandise assortment with consideration for product variety and price range. Can determine appropriate pricing for items based on simple factors such as cost and competition.

Level 4: Can create a detailed merchandise assortment, taking into account customer preferences, trends, and seasonality. Determines pricing based on a variety of factors, such as cost, competition, and market positioning.

Level 5: Can create an advanced merchandise assortment plan, analyzing customer data, product lifecycle, and profitability. Determines an optimal pricing structure that maximizes profitability while ensuring customer satisfaction and market competitiveness.

Lesson Sequence	Learning Target	Success Criteria/ Assessment	Resources
1	I can explain the nature and scope of the pricing function.	<ul style="list-style-type: none"> I can provide detailed and specific examples of the pricing strategies I can discuss the impact pricing strategies have on 	

		sales.
2	I can explain factors affecting pricing decisions.	<ul style="list-style-type: none"> • I can discuss various ways product's prices were determined and explain how prices impact a business. • I can provide specific examples of pricing decisions that involve a variety of products and various cost determinations. • I can discuss how pricing decisions are evaluated for effectiveness. • I can analyze the success and/or failure of the pricing plan
3	I can identify components of a retail image.	<ul style="list-style-type: none"> • I can provide a detailed description of a product. • I can discuss how products are viewed by customers.
4	I can plan merchandise assortments.	<ul style="list-style-type: none"> • I can discuss the components of a product line's brand mix. • I can explain the process for planning merchandise assortment.
5-7	I can plan merchandise assortments and determine an appropriate pricing structure.	<ul style="list-style-type: none"> • I can select an appropriate pricing strategy, determine cost of goods sold, calculate markup, and track success through profit earned.

Unit Title	
Unit 4: Promotion and Selling	
Relevant Standards: Bold indicates priority	
MBA Research Standards for Marketing: Marketing, Promoting, Selling	
Essential Question(s)	Enduring Understanding(s)
<ul style="list-style-type: none"> How does the choice of a promotional channel affect the reach and impact of a brand's message? What are effective selling strategies in a retail environment? How can effective promotional strategies and selling techniques influence consumer behavior and drive business success? 	<ul style="list-style-type: none"> Businesses choose specific promotional channels to convey a brand's message Effective selling strategies in a retail environment involve understanding customer needs, building relationships, and creating positive shopping experiences to influence purchasing decisions and foster long-term loyalty. Creating a successful promotional plan requires a comprehensive approach, including understanding customer needs, tracking marketing activities, and effectively communicating product benefits through advertisements.
Demonstration of Learning	Pacing for Unit
Students will create a promotional campaign to reach brand objectives.	11 class sessions
Family Overview (link below)	Integration of Technology
Family Overview Link	Online Graphic Design Software Video Editing Software Social Media Content Creation Tools
Unit-specific Vocabulary	Aligned Unit Materials, Resources, and Technology (beyond core resources)
Product Promotion Rebates Institutional Promotion Coupons Sales Promotion Visual Merchandising Promotional Strategy Displays Promotional Mix Cross Merchandising Reach Promotional Events Frequency Customer Relationship Cost Per Thousand (CPT) Management (CRM) Cost Per Click (CPC) Personal Selling Digital Marketing Business to Business Social Media Marketing Selling Influencer Marketing Selling Process Brand Loyalty - Pre-approach Content Marketing - Approach the Viral Marketing - Customer Guerrilla Marketing - Determine Needs Endorsement - Present the Product Publicity - Handle Questions + Sponsorship Objectives Sweepstakes - Close the Sale Loyalty Programs - Suggestive Selling Samples - Follow Up	
Opportunities for Interdisciplinary Connections	Anticipated misconceptions

<p>Math, statistics, psychology, research, economics, and technology work together to design, evaluate, and optimize promotional campaigns and customer engagement strategies.</p>	<ul style="list-style-type: none"> • Promotion is only advertising • Selling is only cold calling • The only goal of promotion is to increase sales • Promotional success is easy to measure • Promotions can fix a bad product • Promotions are only for new products
<p>Connections to Prior Units</p>	<p>Connections to Future Units</p>
<p>Unit 1: Market Research → Unit 4: Using Market Research to inform merchandise planning Unit 2: Distribution → Unit 4: Selling Unit 3: Merchandise Assortment → Unit 4: Promotional Plans</p>	<p>Unit 4: Promotional Plans → Unit 5: Promotional Budget</p>
<p>Differentiation through <i>Universal Design for Learning</i></p>	
<p>UDL Indicator</p>	<p>Teacher Actions</p>
<p>Lesson: I can explain the nature of a promotional plan. <i>Engagement:</i></p> <ul style="list-style-type: none"> • Real-World Examples: Start with examples of promotional plans from well-known brands. Show how they structure campaigns for specific events like holidays or product launches. • Group Work: Let students collaborate to design a promotional plan for a hypothetical product, fostering interaction and peer learning. <p><i>Representation:</i></p> <ul style="list-style-type: none"> • Visual Aids: Provide diagrams, templates, and flowcharts outlining the components of a promotional plan, such as objectives, budget, target audience, media channels, and timelines. • Videos/Case Studies: Show case studies or video clips of successful promotional campaigns. Break down the elements that contributed to their success. <p><i>Action/Expression:</i></p> <ul style="list-style-type: none"> • Create a Promotional Plan: Have students create their own promotional plans for a product or service, using templates or digital tools to organize their ideas. • Presentation: Ask students to present their promotional plans, allowing them to express their ideas through slideshows, videos, or posters. <p>Lesson 2: I can explain the use of visual merchandising in retailing. <i>Engagement:</i></p> <ul style="list-style-type: none"> • Store Visits: If possible, organize a visit to a local retail store or conduct a virtual tour of famous retailers (e.g., Apple Store, high-end fashion retailers) to observe their visual merchandising. • Discussion: Facilitate a class discussion about the impact of visual merchandising on consumer behavior and sales. <p><i>Representation:</i></p> <ul style="list-style-type: none"> • Images and Videos: Use visual examples of effective visual merchandising (displays, store layouts, signage) to help students understand the concept. • Comparative Analysis: Present two contrasting examples of visual merchandising: one well-executed and one less effective. Have students analyze what makes one more successful than the other. <p><i>Action/Expression:</i></p> <ul style="list-style-type: none"> • Design a Visual Display: Have students design a visual display for a product or store using digital tools (e.g., Canva, SketchUp) or through physical models. • Reflection: Students can write a reflective piece or give a presentation explaining how they would use visual merchandising to enhance a retail environment. <p>Lesson 3: I can use cross-merchandising techniques. <i>Engagement:</i></p> <ul style="list-style-type: none"> • Hands-On Activity: Give students a selection of products and have them work in groups to create a cross-merchandising display. For example, pairing a camera with a memory card or pairing complementary clothing items. • Case Study: Show examples of successful cross-merchandising in stores (e.g., combining cooking utensils with ingredients in a kitchenware section). <p><i>Representation:</i></p> <ul style="list-style-type: none"> • Product Pairing Examples: Provide a variety of examples of cross-merchandising strategies (e.g., books with 	

book lights, snacks with movies).

- Interactive Demonstrations: Use a digital tool or app to show how cross-merchandising can be implemented in virtual retail environments.

Action/Expression:

- Create a Cross-Merchandising Plan: Have students create a cross-merchandising strategy for a product category, explaining the rationale behind each pairing.
- Role-Playing: Students can role-play as retail managers or sales associates, presenting cross-merchandising ideas to a “customer” or team.

Lesson 4: I can identify ways to track the effectiveness of selected promotion activities.

Engagement:

- Real-World Examples: Provide examples of businesses tracking the success of their promotional activities (e.g., through sales metrics, surveys, or online analytics).
- Interactive Tools: Introduce students to tools used to track promotion effectiveness, such as Google Analytics, customer feedback surveys, or point-of-sale data.

Representation:

- Visual Data: Provide charts, graphs, and case studies showing how promotional effectiveness is tracked and analyzed (e.g., before-and-after sales figures).
- Step-by-Step Guides: Offer clear guidelines on methods of tracking promotional success, such as conversion rates, ROI, or customer engagement metrics.

Action/Expression:

- Create a Tracking Plan: Ask students to design a plan for tracking the effectiveness of a promotion they’ve created, specifying key metrics and tools they would use.
- Data Analysis: Provide a set of promotional data and ask students to analyze it to determine the effectiveness of a campaign.

Lesson 5: I can understand the use of an advertisement's components to communicate with targeted audiences.

Engagement:

- Ad Breakdown: Show students examples of advertisements and have them break down the components: headline, visuals, call-to-action, and targeted messaging.
- Discussion: Facilitate discussions on how different ads appeal to different audiences and what makes them effective or ineffective.

Representation:

- Component Analysis: Provide an infographic or chart explaining the key components of an advertisement, such as tone, imagery, text, and how each targets specific audiences.
- Case Studies: Use real-world advertisements and analyze how they target particular demographics (e.g., Coca-Cola’s holiday campaigns targeting families vs. their youth-targeted campaigns).

Action/Expression:

- Create an Advertisement: Have students design an advertisement (print, digital, or video) targeting a specific demographic. They must include all key components (visuals, messaging, call-to-action).
- Peer Review: Students can present their advertisements to peers for feedback, evaluating the effectiveness of each element.

Lesson 6: I can determine customer/client needs.

Engagement:

- Customer Personas: Use customer personas or case studies to illustrate how businesses determine customer needs through research, surveys, or feedback.
- Role-Playing: Have students role-play as customer service representatives or salespeople trying to identify customer needs in a simulated scenario.

Representation:

- Visual Tools: Provide tools like surveys, questionnaires, or customer feedback forms that help businesses assess customer needs.
- Market Research Data: Show examples of how businesses gather and interpret customer data to understand needs.

Action/Expression:

- Survey Creation: Ask students to design a survey or interview guide to assess customer needs for a specific product or service.
- Report Writing: Have students write a report or give a presentation on how to determine customer needs using various research techniques.

Lesson 7: I can acquire a foundational knowledge of selling to understand its nature and scope.

Engagement:

- Interactive Scenarios: Use role-playing to simulate sales interactions, where students practice identifying customer needs and presenting solutions.
- Real-World Insights: Invite guest speakers from sales professions to talk about their experiences and the importance of selling techniques.

Representation:

- Sales Process Breakdown: Provide visual aids like flowcharts or step-by-step guides that explain the sales process from prospecting to closing a sale.
- Video Demonstrations: Show videos of effective sales presentations or real-world sales environments to illustrate key concepts.

Action/Expression:

- Role-Play Sales Interactions: Have students practice sales techniques by role-playing customer interactions where they identify needs and present solutions.
- Sales Presentation: Ask students to create and deliver a sales presentation for a product, demonstrating their understanding of the sales process.

Lesson 8: I can acquire product knowledge to communicate product benefits and to ensure appropriateness of product for the customer.

Engagement:

- Product Demos: Allow students to interact with actual products or product prototypes to explore their features and benefits.
- Real-Life Context: Use examples from the marketplace where product knowledge has led to successful sales or customer satisfaction.

Representation:

- Product Information Sheets: Provide clear, detailed product descriptions, features, and benefits to help students learn how to communicate these aspects effectively.
- Video Demonstrations: Use video reviews or demonstrations of products to show how product knowledge is communicated in real-world contexts.

Action/Expression:

- Create a Product Pitch: Have students prepare a product pitch that clearly outlines the benefits and suitability of the product for a specific customer.
- Customer Interaction: Ask students to role-play a scenario where they use their product knowledge to match a customer with the right product.

Lesson 9-11: I can apply the components and coordinating elements of advertisements to reach a target audience.

Engagement:

- Ad Design Challenge: Have students collaborate in teams to design advertisements aimed at a specific audience (e.g., millennials, parents, athletes).
- Analyze Ads: Show ads from various industries and have students analyze how different elements (imagery, text, and tone) are coordinated to appeal to specific target groups.

Representation:

- Advertising Breakdown: Provide a breakdown of how to coordinate elements of an ad (e.g., visual elements, language, and messaging) to resonate with the target audience.
- Case Studies: Use case studies of successful advertising campaigns, demonstrating how each component aligns with the target market.

Action/Expression:

- Create an Ad Campaign: Students create a full ad campaign, integrating all the components (visuals, messaging, and media) to target a particular audience effectively.
- Ad Critique: Have students present their ad campaigns to the class and critique each other's work, evaluating how well they applied the components to the target audience.

Supporting Multilingual/English Learners

Related CELP standards	Learning Targets
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1. Explaining the nature of a promotional plan

Level 1: Can recognize promotional activities or advertisements (e.g., flyers, sales). May be able to identify a promotion in simple terms (e.g., "sale" or "discount").

Level 2: Can describe the basic concept of a promotional plan (e.g., "a plan to tell people about a sale"). Can mention a few elements of a promotional plan (e.g., discounts, advertisements).

Level 3: Can explain the nature of a promotional plan, including its purpose and basic components (e.g., goals, target audience, budget). Describes the role of promotions in business.

Level 4: Can describe the full scope of a promotional plan, discussing its elements in detail (e.g., objectives, strategies, channels). Can explain how different types of promotions are used to achieve business goals.

Level 5: Can provide a detailed and strategic explanation of how a promotional plan is developed, including market research and evaluation methods. Can analyze the effectiveness of different promotional tactics.

2. Explaining the use of visual merchandising in retailing

Level 1: Can recognize basic visual merchandising components (e.g., store displays, signs) with visual support. May identify simple examples (e.g., window displays, product placements).

Level 2: Can describe basic elements of visual merchandising (e.g., "displays make the store look nice" or "things are arranged neatly"). Can identify how displays attract customers' attention.

Level 3: Can explain the purpose of visual merchandising, including how it influences customer behavior (e.g., drawing attention to sales, creating a welcoming atmosphere). Can identify and describe examples of visual merchandising techniques in retail.

Level 4: Can explain the principles of effective visual merchandising, such as color, lighting, and product arrangement. Can discuss how these elements are used to enhance the shopping experience and increase sales.

Level 5: Can analyze and develop advanced visual merchandising strategies for a retail environment, considering customer psychology and market trends. Can create a detailed visual merchandising plan to align with store branding and promotional goals.

3. Using cross-merchandising techniques

Level 1: Can recognize simple cross-merchandising examples (e.g., "shoes with socks" or "coffee with mugs") with support. May need assistance identifying cross-merchandising in retail settings.

Level 2: Can describe simple cross-merchandising techniques, such as placing complementary items together (e.g., "t-shirts next to jeans"). Can suggest basic pairings of items that could be cross-merchandised.

Level 3: Can explain how cross-merchandising works to encourage additional purchases (e.g., "placing toothpaste next to toothbrushes"). Can apply basic cross-merchandising techniques to a specific store or product line.

Level 4: Can plan and implement effective cross-merchandising strategies to increase sales, considering customer behavior and product relationships. Can explain how cross-merchandising can enhance the shopping experience.

Level 5: Can develop advanced cross-merchandising plans, optimizing product placement for maximum sales and customer convenience. Can analyze the effectiveness of cross-merchandising strategies and adjust plans based on sales data.

4. Identifying ways to track the effectiveness of selected promotion activities.

Level 1: Can recognize basic ways promotions are tracked (e.g., "counting how many things sold"). May require support in understanding how promotions are evaluated.

Level 2: Can name simple tracking methods, such as counting items sold or measuring customer participation. Can identify basic metrics used to evaluate promotions (e.g., sales increase, customer interest).

Level 3: Can describe methods for tracking promotion effectiveness, such as sales data analysis or customer feedback surveys. Can explain how these methods help businesses evaluate the success of promotions.

Level 4: Can identify and implement multiple tracking techniques, such as ROI analysis, coupon redemption rates, and website traffic. Can analyze promotional data to assess the impact on business performance.

Level 5: Can design a comprehensive evaluation system to track the effectiveness of promotions across multiple channels. Can assess the long-term impact of promotional activities on brand awareness and customer loyalty.

5. Understanding the use of an advertisement's components to communicate with targeted audiences.

Level 1: Can recognize basic elements of an advertisement (e.g., picture, price) with support. May identify an ad's purpose (e.g., "It shows what's on sale").

Level 2: Can describe basic components of an ad (e.g., headline, image, price) and their general purpose. Can identify how an advertisement aims to attract customers.

Level 3: Can explain how different components of an advertisement (e.g., copy, visuals, call-to-action) work together to communicate a message to a target audience. Can describe how advertisements are tailored to specific audiences.

Level 4: Can explain in detail how an advertisement's components are strategically chosen to appeal to a target

market (e.g., tone, imagery, messaging). Can analyze the effectiveness of an advertisement in reaching its intended audience.

Level 5: Can develop and critique advertisements, ensuring that all components are aligned with target audience needs, behaviors, and preferences. Can use advanced marketing principles to create ads that effectively communicate brand values and promotions.

6. Determining customer/client needs

Level 1: Can recognize basic customer needs (e.g., “people need food” or “people need clothes”). May need support to identify specific needs in a business context.

Level 2: Can describe basic customer needs (e.g., “customers need good service” or “customers need low prices”). Can observe and mention common customer expectations.

Level 3: Can identify customer needs based on behaviors, feedback, or market research (e.g., “customers need a fast checkout process”). Can discuss how businesses meet customer needs through products and services.

Level 4: Can analyze customer needs in depth, using data, trends, and direct feedback to determine unmet needs. Can apply this understanding to improve business offerings and customer satisfaction.

Level 5: Can conduct detailed needs assessments for target markets or individual clients. Can develop strategies to meet customer needs, including personalized services or products, based on advanced research and analysis.

7. Acquiring foundational knowledge of selling to understand its nature and scope

Level 1: Can recognize basic selling terms (e.g., “selling,” “money”) with support. May understand selling as a simple exchange of products or services for money.

Level 2: Can describe the basic idea of selling, such as “selling is when someone buys something from a store.” Can identify basic aspects of selling, like customers and salespeople.

Level 3: Can explain the fundamental nature of selling, including the process of identifying customer needs and making a sale. Can describe the role of a salesperson in the selling process.

Level 4: Can explain the scope of selling, including various types of sales techniques (e.g., consultative, transactional) and the importance of customer relationships. Can discuss the impact of sales strategies on customer satisfaction and business outcomes.

Level 5: Can analyze the selling process from start to finish, incorporating advanced sales techniques (e.g., upselling, relationship selling). Can provide a detailed evaluation of different sales strategies and their effectiveness in various industries.

8. Acquiring product knowledge to communicate product benefits and ensure appropriateness of product for the customer

Level 1: Can identify basic features of a product (e.g., color, size) with support. May need help understanding how to communicate these features to others.

Level 2: Can describe a product’s basic benefits (e.g., “This shirt is soft and comfortable”) with support. Can recognize the relevance of product features to customer needs.

Level 3: Can explain the key benefits of a product, matching those benefits to specific customer needs. Can suggest appropriate products based on basic customer preferences.

Level 4: Can acquire detailed product knowledge and explain how features meet customer needs. Can advise customers on appropriate products based on a deeper understanding of their preferences and needs.

Level 5: Can analyze and communicate product benefits in detail, providing tailored recommendations that match customer requirements. Can ensure the appropriateness of the product for the customer through in-depth product knowledge and expertise.

9. Applying the components and coordinating elements of advertisements to reach a target audience.

Level 1: Can recognize basic components of an advertisement (e.g., images, text). May need support identifying how the advertisement is directed to a specific audience.

Level 2: Can describe the components of an advertisement and their purpose (e.g., “the picture is to catch attention”). Can identify how advertisements target different groups of people.

Level 3: Can explain how different components (e.g., copy, imagery, offer) are coordinated to communicate with a specific target audience. Can describe how advertisers select appropriate elements for different audience segments.

Level 4: Can design an advertisement that aligns components (e.g., message, design, channel) to effectively reach a specific target audience. Can explain the strategic use of advertisements to drive engagement.

Level 5: Can create detailed, sophisticated advertisements using a deep understanding of the target audience’s preferences and behaviors. Can evaluate the effectiveness of coordinated advertising components and adjust strategies based on audience feedback.

Lesson	Learning Target	Success Criteria/	Resources
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Sequence		Assessment	
1	I can explain the nature of a promotional plan.	<ul style="list-style-type: none"> I can describe promotional objectives for a business. I can describe a promotional budget and explain how it is incorporated into the promotional mix. 	
2	I can explain the use of visual merchandising in retailing.	<ul style="list-style-type: none"> I can describe how visual merchandising is implemented in a business. 	
3	I can use cross-merchandising techniques.	<ul style="list-style-type: none"> I can provide specific details a business uses for cross-merchandising strategies. 	
4	I can identify ways to track the effectiveness of selected promotion activities	<ul style="list-style-type: none"> I can describe promotional channels used to communicate with targeted audiences. I can evaluate the effectiveness of a business' promotional strategy. 	
5	I can understand the use of an advertisement's components to communicate with targeted audiences.	<ul style="list-style-type: none"> I can explain the components and coordinating elements of advertisements. 	
6	I can determine customer/client needs.	<ul style="list-style-type: none"> I can use data to determine customer/client needs and the actions that need to be taken to address these needs. I can utilize customer service techniques to ensure their needs are met. 	
7	I can acquire a foundational knowledge of selling to understand its nature and scope.	<ul style="list-style-type: none"> I can explain the nature and scope of the selling function. I can explain the role of customer service as a component of selling relationships I can describe key factors in building a clientele I can evaluate legal and ethical considerations in selling I can explore the types of technology used in the selling function. 	
8	I can acquire product knowledge to communicate product benefits and to ensure appropriateness of product for the customer.	<ul style="list-style-type: none"> I can analyze product information to identify product features and benefits. I can discuss motivational theories that impact buying behavior. 	
9 - 11	I can apply the components and coordinating elements of advertisements to reach a target audience.	<ul style="list-style-type: none"> I can design an effective promotional campaign to reach brand objectives. 	

Unit Title																					
Unit 5: Financial Analysis																					
Relevant Standards: Bold indicates priority																					
MBA Research Standards for Marketing: Marketing, Financial Analysis, Market Information Management																					
Essential Question(s)	Enduring Understanding(s)																				
<ul style="list-style-type: none"> • How does finance influence the overall success and strategic direction of a business? • Why is accurate and timely financial information essential for business operations and decision-making? • How do budgets serve as a financial planning and control tool in business? • What are strategies for maintaining accurate and reliable financial records? 	<ul style="list-style-type: none"> • Finance is crucial for making informed business decisions, managing resources effectively, and ensuring long-term sustainability. • Financial information is vital for evaluating performance, planning future activities, and making informed strategic decisions. • Budgets help businesses plan for future expenses and revenues, control spending, and allocate resources efficiently. • Maintaining accurate financial records is essential for tracking business performance, ensuring legal compliance, and supporting decision-making processes. 																				
Demonstration of Learning	Pacing for Unit																				
Students complete a Financial Analysis Project	4 class sessions																				
Family Overview (link below)	Integration of Technology																				
Family Overview Link																					
Unit-specific Vocabulary	Aligned Unit Materials, Resources, and Technology (beyond core resources)																				
<table border="0"> <tr> <td>Static budget</td> <td>Liabilities</td> </tr> <tr> <td>Performance-based budget</td> <td>Current Liabilities</td> </tr> <tr> <td>Zero-based budget</td> <td>Long-term Liabilities</td> </tr> <tr> <td>Variance-based budget</td> <td>Net Worth</td> </tr> <tr> <td>Personal Financial Statement</td> <td>Income Statement</td> </tr> <tr> <td>Balance sheets</td> <td>Cash Flow Statement</td> </tr> <tr> <td>Assets</td> <td>Liquidity Ratios</td> </tr> <tr> <td>- Current</td> <td>Leverage Ratios</td> </tr> <tr> <td>- Concurrent</td> <td>Activity Ratios</td> </tr> <tr> <td></td> <td>Profitability Ratios</td> </tr> </table>	Static budget	Liabilities	Performance-based budget	Current Liabilities	Zero-based budget	Long-term Liabilities	Variance-based budget	Net Worth	Personal Financial Statement	Income Statement	Balance sheets	Cash Flow Statement	Assets	Liquidity Ratios	- Current	Leverage Ratios	- Concurrent	Activity Ratios		Profitability Ratios	
Static budget	Liabilities																				
Performance-based budget	Current Liabilities																				
Zero-based budget	Long-term Liabilities																				
Variance-based budget	Net Worth																				
Personal Financial Statement	Income Statement																				
Balance sheets	Cash Flow Statement																				
Assets	Liquidity Ratios																				
- Current	Leverage Ratios																				
- Concurrent	Activity Ratios																				
	Profitability Ratios																				
Opportunities for Interdisciplinary Connections	Anticipated misconceptions																				
Math, statistics, economics, psychology, research, and technology combine to create a comprehensive understanding of finance in business. This knowledge is critical for running a successful organization, making informed decisions, and ensuring long-term profitability.	<p>Financial analysis ins only for accountants</p> <p>High revenue means financial success</p> <p>All companies use the same financial metrics</p> <p>Short term performance is more important than long-term planning.</p>																				
Connections to Prior Units	Connections to Future Units																				
Unit 2: Inventory → Unit 5: Financial Record Keeping Unit 2: Staffing → Unit 5: Budgeting Unit 3: Pricing Strategies → Unit 5: Cash Flow and Profitability Unit 4: Promotional Plans → Unit 5: Promotional Budget	N/A																				
Differentiation through <i>Universal Design for Learning</i>																					
UDL Indicator	Teacher Actions																				

Lesson 1: I can explain the role of finance in business.

Engagement:

- Real-World Examples: Begin with examples of how businesses (large and small) use finance to make decisions, grow, and sustain operations (e.g., how a company raises capital or invests in new projects).
- Interactive Discussion: Engage students in a discussion about how different departments in a business (marketing, operations, HR) rely on financial information to make decisions.

Representation:

- Visual Aids: Provide diagrams, infographics, or charts that illustrate the flow of money in a business (e.g., revenue, costs, profit, investment).
- Case Studies: Present real-world case studies of businesses and how finance plays a role in their success or failure. For example, how poor financial management led to bankruptcy or how effective financial planning contributed to growth.

Action/Expression:

- Create a Business Plan: Have students create a basic business plan that outlines the role of finance in their operations (e.g., budgeting, forecasting, investment).
- Group Project: In groups, students can design a financial strategy for a business scenario, explaining how financial decisions will affect the business.

Lesson 2: I can describe the need for financial information.

Engagement:

- Scenario-Based Learning: Present students with various business scenarios (e.g., launching a new product or expanding to a new market) and ask them to identify what financial information would be needed to make informed decisions.
- Class Polls/Discussions: Use polls or surveys to ask students about financial decisions they've made in personal life (e.g., budgeting, saving) and relate these to business finance needs.

Representation:

- Data and Visuals: Provide visual tools like financial reports, balance sheets, and cash flow statements to show what types of financial information are used in business decisions.
- Videos or Guest Speakers: Show videos explaining how businesses use financial data (e.g., market analysis, cost analysis) to inform decisions. Alternatively, invite a finance professional to talk about their role in a business.

Action/Expression:

- Analyze Financial Reports: Have students analyze a sample financial report, identifying key pieces of information (e.g., profitability, cash flow) that a business would need for decision-making.
- Create a Financial Dashboard: Ask students to design a financial dashboard that displays key information necessary for managing a business's finances.

Lesson 3: I can describe the nature of budgets.

Engagement:

- Budgeting Simulation: Engage students in a budgeting simulation where they have to create a budget for a hypothetical business or personal project, making trade-offs and decisions based on limited resources.
- Discussion: Have students brainstorm what different types of budgets are needed in a business (e.g., operating budget, marketing budget, capital budget) and why.

Representation:

- Visual Budget Templates: Provide clear examples of different types of budgets, such as operating budgets, cash flow budgets, and capital expenditure budgets, in both tabular and graphic formats.
- Interactive Budgeting Tools: Use tools like spreadsheets or budget software to show how budgets are created and tracked in real time, providing a practical demonstration.

Action/Expression:

- Create a Budget: Have students create a basic budget for a business scenario (e.g., a startup, a non-profit organization, or a school event). They should identify income sources, expenses, and any areas that need to be adjusted to stay within budget.
- Present a Budget: Ask students to present their budgets, explaining how they allocated resources and why they made specific financial decisions.

Lesson 4: I can maintain the financial records.

Engagement:

- Real-World Examples: Start with examples of how businesses maintain financial records, such as tracking expenses and income, managing invoices, and monitoring cash flow.

- Hands-On Practice: Provide students with real financial documents (e.g., receipts, invoices, payment records) and ask them to practice recording transactions.

Representation:

- Templates and Tools: Provide templates for common financial records like income statements, balance sheets, and cash flow statements. Use software like QuickBooks or Excel to demonstrate how records are tracked and updated.
- Step-by-Step Guides: Offer visual aids or checklists that guide students through the process of maintaining accurate financial records.

Action/Expression:

- Record Transactions: Have students simulate the process of maintaining financial records by recording a series of hypothetical business transactions in a ledger or spreadsheet.
- Create a Financial Recordkeeping System: Ask students to design a simple system for maintaining financial records for a small business, demonstrating their understanding of proper record-keeping practices.

Supporting Multilingual/English Learners

Related CELP standards:

Learning Targets

1. Explaining the role of finance in business.

Level 1: Can recognize the basic idea of finance in business (e.g., "finance is about money"). May identify simple examples of finance (e.g., "buying things" or "paying bills").

Level 2: Can describe the role of finance in business in basic terms (e.g., "Finance helps a business make money" or "Finance is needed to pay for things"). Can identify some financial activities within a business (e.g., budgeting, paying for supplies).

Level 3: Can explain the importance of finance in business, including its role in supporting daily operations, managing expenses, and ensuring profitability. Can discuss how businesses use finance to make decisions (e.g., investing in new products or managing cash flow).

Level 4: Can describe the role of finance in broader business strategy, such as financing growth, managing risks, and ensuring long-term sustainability. Can explain how finance supports business planning and decision-making.

Level 5: Can analyze the relationship between finance and other business functions (e.g., marketing, operations, human resources). Can evaluate the impact of financial decisions on business success and sustainability/

2. Describing the need for financial information

Level 1: Can recognize that businesses need money to operate. May understand that financial information is needed for basic activities like paying bills or buying supplies.

Level 2: Can describe why financial information is important for businesses (e.g., "so they know how much money they have"). Can identify simple uses of financial information, such as tracking sales or expenses.

Level 3: Can explain how financial information is used in decision-making, such as tracking income and expenses or preparing for taxes. Can describe the importance of financial records for understanding the business's health and success.

Level 4: Can discuss in detail how financial information supports various business functions, such as budgeting, forecasting, and investment decisions. Can explain how accurate financial data helps in strategic planning.

Level 5: Can analyze how businesses use financial information to make informed decisions, assess financial health, and ensure long-term profitability. Can discuss the importance of transparency and accuracy in financial reporting for stakeholders.

3. Describing the nature of budgets

Level 1: Can recognize that a budget involves managing money (e.g., "spending and saving"). May need support in understanding the purpose of a budget in business.

Level 2: Can describe a basic budget as a way to plan how money is spent (e.g., "a budget helps you not spend too much"). Can identify simple categories in a budget (e.g., income, expenses).

Level 3: Can explain the purpose of a budget in a business context, such as tracking income and controlling expenses. Can describe the basic components of a budget, including revenues and expenditures.

Level 4: Can describe the process of creating a budget, including setting financial goals, estimating income and expenses, and monitoring budget performance. Can explain how budgets help businesses plan for growth and control costs.

Level 5: Can develop and manage detailed budgets for different business areas, such as operations, marketing, and staffing. Can analyze budget performance, adjust financial plans based on actual outcomes, and make recommendations for improving financial efficiency.

4. Maintaining financial records

Level 1: Can recognize financial records, such as receipts or invoices. May need help understanding the purpose of maintaining these records.

Level 2: Can describe basic financial record-keeping activities, such as tracking receipts or organizing invoices. Can identify simple records that businesses keep for financial purposes.

Level 3: Can explain the importance of accurate financial record-keeping, including tracking income and expenses, maintaining receipts, and documenting transactions. Can describe different types of financial records (e.g., income statements, balance sheets).

Level 4: Can maintain organized financial records, ensuring they are accurate and up-to-date. Can track and categorize transactions, reconcile accounts, and prepare basic financial reports.

Level 5: Can manage and oversee comprehensive financial record-keeping systems. Can ensure the accuracy and integrity of financial data, prepare detailed financial statements, and assist in audits or financial reviews.

Lesson Sequence	Learning Target	Success Criteria/ Assessment	Resources
1	I can explain the role of finance in business.	<ul style="list-style-type: none"> ● I can explain the significance of finance and how it can determine the ultimate success of the business. 	
2	I can describe the need for financial information.	<ul style="list-style-type: none"> ● I can discuss why financial information is needed to provide information about the operations, economic outlook, and cash flow of a business. ● I can explain why it is essential to read, understand and analyze financial information to effectively run a business. 	
3	I can describe the nature of budgets.	<ul style="list-style-type: none"> ● I can explain the importance of budgets for a business. ● I can describe how the budgeting process influences decision-making within the business. 	
4	I can maintain the financial records.	<ul style="list-style-type: none"> ● I can describe how financial records are kept and used for a business. ● I can discuss the importance of financial record keeping. ● I can describe the types of technology used for financial-information management in a business. 	