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## ABSTRACT

This document presents the Ohio Integrated Technical and Academic Competency profile for marketing technology. The profile is to serve as the basis for curriculum development in Ohio's secondary, adult, and postsecondary programs. The profile includes a comprehensive listing of 580 specialty and foundation key indicators for evaluating mastery of 78 competencies in the following 13 areas: economics; communication and interpersonal skills; business law and ethics; professional development; business, management, and entrepreneurship; functions of marketing distribution; finance; marketing information management; pricing; product/service management; promotion; selling; and business-related technology skills. The competency lists are the result of all-encompassing research and review of existing competency profile lists and include input from industry, labor, professional organizations, professional representation, and national standards. The occupational skill competencies presented reflect the job opportunities and skills required to work in the marketing technology profession/career pathway. Critical academic, employability, and information technology skills have been integrated throughout the list to support the technical skills presented. The competencies are organized so that they can be clustered or grouped in a modular approach and used as the basis for curriculum development in Ohio's secondary, adult, and postsecondary programs. A brief overview of the marketing technology field is included. (MN)

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# Marketing Technology FasTrak Specialization Integrated Technical and Academic Competency (ITAC) Revised

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 Marketing Technology

# FasTrak

Specialization Integrated Technical and Academic Competency (ITAC)

Updated Friday, September 14, 2001 01:45 PM

## Marketing Technology | PDF Download

### Acknowledgements

### Overview

36.01.00.0	<u>Economics</u>
36.02.00.0	<u>Communication and Interpersonal Skills</u>
36.03.00.0	<u>Business Law and Ethics</u>
36.04.00.0	<u>Professional Development</u>
36.05.00.0	<u>Business, Management, and Entrepreneurship</u>
36.06.00.0	<u>Functions of Marketing Distribution</u>
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36.13.00.0	<u>Related Business Skills: Technology</u>



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## Introduction to the Specialization ITAC

Revised 2001

The Ohio Integrated Technical and Academic Competency (ITAC) profiles are developed under the auspices of the Ohio Department of Education and the Ohio State Board of Education. They provide a broad-based educational response to Ohio's need for a skilled workforce. Each Specialization ITAC represents a profile of the professional or occupational competencies deemed essential for a graduate to perform proficiently when he or she graduates from the specialization workforce development programs in Business and Marketing, Industrial and Engineering Systems, Health Occupations, or Family and Consumer Sciences. The Specialization ITAC profile, in conjunction with the competencies identified in the Foundation and Clusters ITACs, provide a career pathway that can lead to employment or further education.

### Process and Intent

The integrated competency lists are the result of all encompassing research and review of existing competency profile lists and includes input from industry, labor, professional organizations, professional and industrial representation, and national standards for a specific industry/profession. Representatives from a broad cross-section of Ohio professional organizations, businesses/professions, industry, and labor played a critical role in identifying current and future knowledge and skills for the industry, and defining the vision and scope of the profession/industry. The instructional methods and teaching strategies are the responsibility of the local school system and/or instructor.

### Curriculum Applications Using the ITAC Competency Profiles

Each profile includes a comprehensive listing of occupational skill competencies that reflect the job opportunities and skills that are required to work in a specific profession/career pathway. Critical academic, employability and information technology skills have been integrated throughout the list to support the technical skills. These competency profiles will be used as the basis for curriculum development in Ohio's secondary, adult, and post-secondary programs. The specialization competency profiles are organized so that they can be clustered or grouped in a modular approach. Individual curriculum specialists can use the competencies profiles to develop instructional programs based on local needs as determined in conjunction with their local advisory committees. i.e., the specialization cluster academy approach. Final assessments will be designed to accompany each profile list and to accommodate student evaluation by modules.

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## Overview

### Marketing Technology

When you go online to shop, you read product information written by a marketing specialist. Every time a new product is introduced by a business, marketing researchers have helped make the decision to develop it. Even the prices you pay for products and services are based on marketing decisions. Many people mistakenly believe that marketing is mostly about selling. But selling is only one function of marketing, and it is not the most important one necessarily. Marketing involves the identification of consumer needs, development of appropriate products, determination of best pricing, selection of the best storage, shipping, and other distribution processes, and the implementation of a variety of promotion strategies.

Careers in marketing are quite extensive and varied and include opportunities for people with varying educational and work experience. Job titles vary in the industry, but they include product manager, e-marketing director, packaging specialist, marketing researcher, business forecaster, media planner, and many others.

The *Ohio Occupational Employment Projections Report, 1998-2008*, indicates that marketing and sales positions will grow by 12.9% from 1998 to 2008. This growth rate ranks second across major occupational groups. The *Occupational Outlook Handbook* indicates that employment of advertising, marketing, promotions, public relations, and sales managers is expected to increase faster than the average for all occupations through 2010.

Marketing skills are needed in every business across all industries. Individuals interested in pursuing marketing careers will find exciting, diverse opportunities for success.



## **36.00.00.0 Marketing Technology**

### **36.01.00.0 Economics**

#### **36.01.01.0 Apply basic economic concepts**

##### **Key Indicators-Foundation:**

- 36.01.01.01 Distinguish between economic goods and services
- 36.01.01.02 Analyze the functions of money
- 36.01.01.03 Explain the concept of economic resources
- 36.01.01.04 Describe the nature of economics and economic activities
- 36.01.01.05 Determine forms of economic utility created by marketing activities
- 36.01.01.06 Explain the principles of supply and demand
- 36.01.01.07 Describe the concept of price
- 36.01.01.08 Apply the concept of opportunity cost to given business situations

#### **36.01.02.0 Explain economic Systems**

##### **Key Indicators-Specialty:**

- 36.01.02.01 Explain the concept of private enterprise
  - 36.01.02.02 Identify factors affecting a business's profit
  - 36.01.02.03 Determine factors affecting business risk
- ##### **Key Indicators-Foundation:**
- 36.01.02.04 Explain the types of economic systems
  - 36.01.02.05 Determine the relationship between government and business
  - 36.01.02.06 Explain the concept of competition

#### **36.01.03.0 Analyze cost-profit relationships**

##### **Key Indicators-Specialty:**

- 36.01.03.01 Explain the concept of productivity
- 36.01.03.02 Analyze the impact of labor on productivity
- 36.01.03.03 Explain the concept of organized labor and business
- 36.01.03.04 Explain the law of diminishing returns

#### **36.01.04.0 Explain economic indicators/trends**

##### **Key Indicators-Specialty:**

- 36.01.04.01 Explain measures used to analyze economic conditions
  - 36.01.04.02 Explain the nature of the Consumer Price Index
  - 36.01.04.03 Explain the concept of Gross Domestic Product
- ##### **Key Indicators-Foundation:**
- 36.01.04.04 Identify types of business enterprises and trends affecting them
  - 36.01.04.05 Analyze influences on trends and issues in business and management
  - 36.01.04.06 Analyze historical, social, and political factors affecting trends and issues in business and management
  - 36.01.04.07 Determine the impact of business cycles on business activities
  - 36.01.04.08 Describe the nature of current/past economic problems
  - 36.01.04.09 Identify leading/lagging indicators

#### **36.01.05.0 Evaluate global economic concepts**

##### **Key Indicators-Specialty:**

- 36.01.05.01 Explain the nature of global trade
- 36.01.05.02 Assess the impact of cultural, political and social environments on world trade
- 36.01.05.03 Evaluate influences on a nation's ability to trade

##### **Key Indicators-Foundation:**

- 36.01.05.04 Identify barriers to global trade
- 36.01.05.05 Identify forms of global business activities
- 36.01.05.06 Examine efforts being made to develop a global economy

## **36.02.00.0 Communication and Interpersonal Skills**

### **36.02.01.0 Apply fundamentals of communication**

#### **Key Indicators-Foundation:**

- 36.02.01.01 Explain the nature of effective communications
- 36.02.01.02 Apply effective listening skills
- 36.02.01.03 Use proper grammar and vocabulary
- 36.02.01.04 Reinforce service orientation through communication
- 36.02.01.05 Explain the nature of effective verbal communications
- 36.02.01.06 Address people properly
- 36.02.01.07 Handle telephone calls in a business-like manner
- 36.02.01.08 Persuade others
- 36.02.01.09 Make oral presentations
- 36.02.01.10 Explain the nature of written communications
- 36.02.01.11 Write business letters
- 36.02.01.12 Write informational messages
- 36.02.01.13 Write inquiries
- 36.02.01.14 Write persuasive messages
- 36.02.01.15 Use communication technologies/systems
- 36.02.01.16 Develop negotiation skills
- 36.02.01.17 Proofread written communications

#### **Key Indicators-Foundation:**

- 36.02.01.18 Prepare simple written reports using various formats (e.g., letters, thank-you notes, acknowledgments, transcripts, memorandums)
- 36.02.01.19 Prepare complex written reports (e.g., research, analysis, legal)

### **36.02.02.0 Communicate using telecommunications tools**

#### **Key Indicators-Specialty:**

- 36.02.02.01 Use internet/intranet systems
- 36.02.02.02 Identify company policies regarding use of telecommunication tools (e.g., telephones, answering machine, fax, voice mail, e-mail, teleconferencing systems, internet access and usage)

#### **Key Indicators-Foundation:**

- 36.02.02.03 Operate telecommunications equipment in accordance with company policy
- 36.02.02.04 Communicate via telephones, voice mail, e-mail, FAX, teleconferencing systems
- 36.02.02.05 Maintain up-to-date status with new and emerging communication technologies
- 36.02.02.06 Record complete and accurate telephone messages
- 36.02.02.07 Transmit complete and accurate telephone messages
- 36.02.02.08 Follow established communication etiquette

### **36.02.03.0 Apply staff communications**

- 36.02.03.01 Follow directions
- 36.02.03.02 Explain nature of staff communication
- 36.02.03.03 Explain the use of interdepartmental/company communications
- 36.02.03.04 Give directions for completing job tasks
- 36.02.03.05 Conduct staff meetings

### **36.02.04.0 Apply group-working relationships**

#### **Key Indicators-Specialty:**

- 36.02.04.01 Develop cultural sensitivity
- 36.02.04.02 Foster positive working relationships
- 36.02.04.03 Participate as a team member
- 36.02.04.04 Demonstrate respect of diversity in the workplace
- 36.02.04.05 Demonstrate flexibility in the workplace
- 36.02.04.06 Treat others fairly in the workplace

#### **Key Indicators-Foundation:**

- 36.02.04.07 Provide needed information to customers and coworkers in a considerate, respectful, and timely manner
- 36.02.04.08 Project a professional business image (e.g., appearance, voice, grammar, word usage, enunciation, nonverbal communication)
- 36.02.04.09 Identify essential skills and strategies for working with organizations and groups
- 36.02.04.10 Identify roles of formal and informal groups within organizations
- 36.02.04.11 Demonstrate business professionalism through the use of appropriate manners in accordance with established protocol and company policies



### **36.02.05.0 Develop customer relationships**

- 36.02.05.01 Explain the nature of positive customer/client relations
- 36.02.05.02 Demonstrate a customer-service mindset
- 36.02.05.03 Handle customer inquiries
- 36.02.05.04 Explain communications tools and their impact on customer relationships

### **36.02.06.0 Build customer service**

#### **Key Indicators-Foundation:**

- 36.02.06.01 Identify organization's products and services
- 36.02.06.02 Recognize the importance of all customers to the business
- 36.02.06.03 Identify internal and external customers
- 36.02.06.04 Determine customer's individual needs
- 36.02.06.05 Interact with customers in a professional manner (e.g., prompt, friendly, courteous, helpful, knowledgeable, understandable)
- 36.02.06.06 Follow through on commitments made to customers (e.g., special orders, delivery specifications, new items)
- 36.02.06.07 Communicate business policies to customers
- 36.02.06.08 Handle merchandise returns in accordance with customer service policy
- 36.02.06.09 Handle customer complaints in accordance with customer service policy
- 36.02.06.10 Facilitate customer service through the maintenance of key information systems
- 36.02.06.11 Maintain customer base

### **36.02.07.0 Deal with conflict**

#### **Key Indicators-Specialty:**

- 36.02.07.01 Show empathy and respect for others
- 36.02.07.02 Use appropriate assertiveness
- 36.02.07.03 Demonstrate problem-solving skills
- 36.02.07.04 Demonstrate negotiation skills
- 36.02.07.05 Handle difficult customers
- 36.02.07.06 Interpret business policies to customers/clients
- 36.02.07.07 Handle customer/client complaints
- 36.02.07.08 Handle situation when the customer is at fault
- 36.02.07.09 Explain the nature of organizational change
- 36.02.07.10 Describe the nature of organizational conflict
- 36.02.07.11 Explain the nature of stress management

## **36.03.00.0 Business Law and Ethics**

### **36.03.01.0 Evaluate the relationship between law and business**

#### **Key Indicators-Foundation:**

- 36.03.01.01 Analyze the relationship between ethics and the law
- 36.03.01.02 Identify the impact civil and criminal laws may have on specific business elements and practices
- 36.03.01.03 Identify the impact laws of various jurisdictions may have on specific business elements or operations
- 36.03.01.04 Demonstrate knowledge of contract law

### **36.03.02.0 Evaluate issues related to leadership and managerial ethics**

- 36.03.02.01 Investigate the nature of leadership and managerial ethics
- 36.03.02.02 Research the history of leadership and management theory
- 36.03.02.03 Analyze current issues in leadership and management ethics
- 36.03.02.04 Identify the impact that various employment and social laws may have on leading and managing a business

### **36.03.03.0 Analyze ethical business behavior**

#### **Key Indicators-Foundation:**

- 36.03.03.01 Analyze current trends in computer and business ethics
- 36.03.03.02 Identify various types of ethical and unethical business practices
- 36.03.03.03 Interpret codes of ethics for given businesses
- 36.03.03.04 Identify potential consequences of unethical business practices

### **36.03.04.0 Evaluate issues related to employee ethics**

#### **Key Indicators-Foundation:**

- 36.03.04.01 Analyze current issues in employee ethics
- 36.03.04.02 Identify types of ethical employee behaviors
- 36.03.04.03 Identify ethics established by business for entry-level employees
- 36.03.04.04 Identify unethical behaviors
- 36.03.04.05 Identify potential consequences of unethical behaviors

### **36.03.05.0 Describe ethics in communication**

#### **Key Indicators-Specialty:**

- 36.03.05.01 Respect the privacy of others
- 36.03.05.02 Describe ethical considerations in obtaining, providing, and receiving information across communication channels

### **36.04.00.0 Professional Development**

#### **36.04.01.0 Demonstrate self-understanding**

##### **Key Indicators-Specialty:**

- 36.04.01.01 Identify desirable personality traits important to business
- 36.04.01.02 Maintain appropriate personal appearance
- 36.04.01.03 Maintain positive attitude
- 36.04.01.04 Demonstrate interest and enthusiasm
- 36.04.01.05 Demonstrate responsible behavior
- 36.04.01.06 Demonstrate honesty and integrity
- 36.04.01.07 Recognize personal biases and stereotypes
- 36.04.01.08 Demonstrate ethical work habits
- 36.04.01.09 Demonstrate orderly and systematic behavior
- 36.04.01.10 Demonstrate initiative
- 36.04.01.11 Demonstrate self-control
- 36.04.01.12 Demonstrate appropriate creativity
- 36.04.01.13 Be punctual
- 36.04.01.14 Demonstrate flexibility in meeting deadlines

#### **36.04.02.0 Apply self-development**

##### **Key Indicators-Specialty:**

- 36.04.02.01 Assess personal interests and skills needed for success in business
- 36.04.02.02 Explain the concept of self-esteem
- 36.04.02.03 Use feedback for personal growth
- 36.04.02.04 Adjust to change
- 36.04.02.05 Make decisions
- 36.04.02.06 Set personal goals
- 36.04.02.07 Use time-management principles
- 36.04.02.08 Seek a mentor

#### **36.04.03.0 Apply analytical skills in business operations**

##### **Key Indicators-Foundation:**

- 36.04.03.01 Determine what information is needed to solve problems and make decisions
- 36.04.03.02 Determine whether information is sufficient, insufficient, or extraneous when solving business problems
- 36.04.03.03 Interpret data needed to solve problems and make decisions
- 36.04.03.04 Apply information from tables, charts, and graphs to problem solving, and decision-making
- 36.04.03.05 Interpret work flow and organizational charts
- 36.04.03.06 Apply logic skills to business decisions

#### **36.04.04.0 Apply mathematics skills in business operations**

##### **Key Indicators-Foundation:**

- 36.04.04.01 Use algebraic equations to solve unknowns
- 36.04.04.02 Apply number relations (e.g., greater than, less than, equal)
- 36.04.04.03 Interpret measurement (e.g., weight, capacity, length, area, volume)
- 36.04.04.04 Calculate break-even sales
- 36.04.04.05 Calculate discounts and due dates
- 36.04.04.06 Calculate percentages
- 36.04.04.07 Make estimates based on given data (e.g., time, financial, inventory)
- 36.04.04.08 Prove financial data (e.g., checkbooks, cash drawers, accounting forms)
- 36.04.04.09 Apply keyboarding and 10-key skills
- 36.04.04.10 Make change

### **36.04.05.0 Explain career planning**

#### **Key Indicators-Specialty:**

- 36.04.05.01 Analyze employer expectations in the business environment
  - 36.04.05.02 Analyze trends and issues in business affecting potential careers
  - 36.04.05.03 Explain the rights of workers
  - 36.04.05.04 Identify sources of career information
- #### **Key-Indicators-Foundation:**
- 36.04.05.05 Identify tentative occupational interest
  - 36.04.05.06 Explain employment opportunities in marketing
  - 36.04.05.07 Explain employment opportunities in business
  - 36.04.05.08 Research projected growth and availability of various business and management careers

### **36.04.06.0 Manage professional career**

#### **Key Indicators-Specialty:**

- 36.04.06.01 Develop skills and characteristics wanted by marketing employers
- 36.04.06.02 Identify possible advancement patterns in business careers
- 36.04.06.03 Develop personal/professional goals
- 36.04.06.04 Monitor progress toward personal goals
- 36.04.06.05 Plan for career growth, both nationally and internationally
- 36.04.06.06 Identify the steps to follow in leaving a business position

### **36.04.07.0 Apply job-seeking skills**

#### **Key Indicators-Specialty:**

- 36.04.07.01 Utilize job-search strategies
- 36.04.07.02 Prepare documentation needed for obtaining a position
- 36.04.07.03 Write a letter of application
- 36.04.07.04 Prepare a résumé
- 36.04.07.05 Dress appropriately for job interview
- 36.04.07.06 Complete a job application
- 36.04.07.07 Interview for a job
- 36.04.07.08 Write a follow-up letter after job interviews
- 36.04.07.09 Post employment data on the Internet

### **36.04.08.0 Utilize continuing development activities**

#### **Key Indicators-Specialty:**

- 36.04.08.01 Participate in work experiences (e.g., volunteer activities, internships, job-shadowing)
- 36.04.08.02 Explain possible advancement patterns for jobs
- 36.04.08.03 Identify skills needed to enhance career progression
- 36.04.08.04 Use networking techniques for professional growth

#### **Key Indicators-Foundation:**

- 36.04.08.05 Explain the need for ongoing education as a worker
- 36.04.08.06 Utilize resources that can contribute to professional development (e.g., trade journals/periodicals, professional/trade associations, classes/seminars, trade shows, and mentors)

## **36.05.00.0 Business, Management, and Entrepreneurship**

### **36.05.01.0 Explain business fundamentals**

#### **Key Indicators-Specialty:**

- 36.05.01.01 Explain the role of business in society
- 36.05.01.02 Explain marketing and its importance in a global economy
- 36.05.01.03 Describe sales functions and related activities
- 36.05.01.04 Describe marketing functions and related activities
- 36.05.01.05 Explain the concept of production
- 36.05.01.06 Describe crucial elements of a quality culture
- 36.05.01.07 Describe the role of management in the achievement of quality
- 36.05.01.08 Explain the nature of managerial ethics
- 36.05.01.09 Explain types of business ownership
- 36.05.01.10 Describe current business trends
- 36.05.01.11 Differentiate between the concepts of management and leadership

#### **Key Indicators-Foundation:**

- 36.05.01.12 Identify types of business ownership and the characteristics of each
- 36.05.01.13 Identify advantages and disadvantages of various types of business ownership
- 36.05.01.14 Identify areas of management (e.g., human resources, financial, facility, inventory, information systems, logistics, accounting, marketing, and sales) and their relationship to business functions
- 36.05.01.15 Identify the functions of management
- 36.05.01.16 Identify management levels and their role in the organization

### **36.05.02.0 Analyze purchasing functions**

#### **Key Indicators-Specialty:**

- 36.05.02.01 Explain the nature and scope of purchasing
- 36.05.02.02 Explain company buying/purchasing policies
- 36.05.02.03 Explain the nature of the buying process
- 36.05.02.04 Explain the nature of buyer reputation/vendor relationships
- 36.05.02.05 Qualify vendors
- 36.05.02.06 Conduct bidding process
- 36.05.02.07 Choose vendors
- 36.05.02.08 Negotiate contracts with vendors
- 36.05.02.09 Review performance of vendors

### **36.05.03.0 Analyze accounting functions**

#### **Key Indicators-Specialty:**

- 36.05.03.01 Calculate net sales
  - 36.05.03.02 Describe nature of cash flow statements
  - 36.05.03.03 Prepare financial statements
  - 36.05.03.04 Prepare cash flow statements
  - 36.05.03.05 Evaluate balance sheets
  - 36.05.03.06 Describe nature of business records
  - 36.05.03.07 Prepare budgets
  - 36.05.03.08 Analyze cash-flow patterns
  - 36.05.03.09 Calculate financial ratios
  - 36.05.03.10 Interpret financial statements
  - 36.05.03.11 Evaluate profit-and-loss statements
- #### **Key Indicators-Foundation:**
- 36.05.03.12 Explain the concept of basic accounting functions
  - 36.05.03.13 Apply accepted accounting principles and procedures in business operations
  - 36.05.03.14 Employ computer accounting applications
  - 36.05.03.15 Prepare profit-and-loss statements
  - 36.05.03.16 Interpret inventory control system data
  - 36.05.03.17 Analyze financial reports
  - 36.05.03.18 Evaluate cost-profit relationships
  - 36.05.03.19 Identify the components of a financial plan

### **36.05.04.0 Perform banking functions\***

#### **Key Indicators-Specialty:**

- 36.05.04.01 Perform e-commerce banking functions

#### **Key Indicators-Foundation:**

- 36.05.04.02 Maintain a checkbook with proper reconciliation
- 36.05.04.03 Complete bank deposits/records

### **36.05.05.0 Explain general business risk issues**

#### **Key Indicators-Specialty:**

- 36.05.05.01 Explain types of business risk
- 36.05.05.02 Identify speculative business risks
- 36.05.05.03 Explain routine security precautions
- 36.05.05.04 Develop strategies to protect digital data
- 36.05.05.05 Explain nature of risk management
- 36.05.05.06 Explain liability issues
- 36.05.05.07 Analyze public relations risks

### **36.05.06.0 Explain financial risks**

#### **Key Indicators-Specialty:**

- 36.05.06.01 Describe the concept of insurance
- 36.05.06.02 Obtain insurance coverage
- 36.05.06.03 Settle insurance losses
- 36.05.06.04 Establish policies/procedures for preventing internal theft
- 36.05.06.05 Follow policies and procedures for preventing vendor theft
- 36.05.06.06 Follow procedures for preventing burglary
- 36.05.06.07 Inspect currency for counterfeit bills, check authenticity, credit card fraud, smart card fraud, check card fraud, electronic currency fraud
- 36.05.06.08 Evaluate financial status of a client
- 36.05.06.09 Establish credit terms and limits
- 36.05.06.10 Manage a product / service contact

### **36.05.07.0 Explain safety risks**

#### **Key Indicators-Specialty:**

- 36.05.07.01 Explain routine security precautions
- 36.05.07.02 Follow safety precautions
- 36.05.07.03 Follow procedures for handling accidents
- 36.05.07.04 Follow procedures for dealing with workplace threats
- 36.05.07.05 Correct hazardous conditions
- 36.05.07.06 Establish fire-prevention program
- 36.05.07.07 Establish safety policies and procedures

### **36.05.08.0 Explain business regulation**

#### **Key Indicators-Specialty:**

- 36.05.08.01 Describe legal issues affecting businesses
- 36.05.08.02 Describe nature of legally binding contracts
- 36.05.08.03 Explain nature of personnel regulations
- 36.05.08.04 Explain nature of workplace regulations
- 36.05.08.05 Explain nature of trade regulations
- 36.05.08.06 Explain nature of environmental regulations
- 36.05.08.07 Explain nature of tax regulations on business
- 36.05.08.08 Explain nature of businesses' reporting requirements

### **36.05.09.0 Follow human resources policies**

#### **Key Indicators-Specialty:**

- 36.05.09.01 Describe ethics in personnel issues
- 36.05.09.02 Plan/organize the work efforts of others
- 36.05.09.03 Schedule employees
- 36.05.09.04 Delegate responsibility for job tasks
- 36.05.09.05 Explain standards for job performance
- 36.05.09.06 Establish goals based on standards
- 36.05.09.07 Develop job descriptions
- 36.05.09.08 Follow personnel policies
- 36.05.09.09 Explain nature of wage and benefit programs
- 36.05.09.10 Recognize chain of command
- 36.05.09.11 Collect data for implementation of compensation plan

### **36.05.10.0 Perform staffing functions**

#### **Key Indicators-Specialty:**

- 36.05.10.01 Determine hiring needs
- 36.05.10.02 Recruit new employees
- 36.05.10.03 Select new employees
- 36.05.10.04 Conduct exit interviews
- 36.05.10.05 Dismiss/fire employees
- 36.05.10.06 Maintain employee records
- 36.05.10.07 Manage employees
- 36.05.10.08 Identify legal issues impacting staffing functions

#### **Key Indicators-Foundation:**

- 36.05.10.09 Calculate payrolls
- 36.05.10.10 Identify the kinds of rewards, incentives, and motivators people seek at work
- 36.05.10.11 Identify the role of performance evaluations

### **36.05.11.0 Explain leadership functions**

#### **Key Indicators-Specialty:**

- 36.05.11.01 Orient new employees
- 36.05.11.02 Explain management's role in orienting new employees
- 36.05.11.03 Explain the role of training and human resource development
- 36.05.11.04 Explain the nature of management/supervisory training
- 36.05.11.05 Conduct training class/program
- 36.05.11.06 Explain the nature of leadership in an organization
- 36.05.11.07 Identify methods to build employee morale
- 36.05.11.08 Explain the concept of staff motivation
- 36.05.11.09 Explain the relationship between communication and employee attitude
- 36.05.11.10 Explain the concept of employee participation in decision-making
- 36.05.11.11 Provide feedback regarding work efforts
- 36.05.11.12 Encourage team building
- 36.05.11.13 Handle employee complaints and grievances
- 36.05.11.14 Ensure equitable opportunities for employees
- 36.05.11.15 Assess employee morale
- 36.05.11.16 Assess employee performance
- 36.05.11.17 Explain the nature of remedial action
- 36.05.11.18 Conduct meetings

### **36.05.12.0 Use controlling functions**

#### **Key Indicators-Specialty:**

- 36.05.12.01 Explain the nature of overhead/operating costs
- 36.05.12.02 Explain employee's role in expense control
- 36.05.12.03 Control use of supplies
- 36.05.12.04 Describe the nature of managerial control (e.g., control process, types of control, what is controlled)
- 36.05.12.05 Identify routine activities for maintaining business facilities and equipment
- 36.05.12.06 Plan maintenance program
- 36.05.12.07 Negotiate service and maintenance contracts
- 36.05.12.08 Negotiate lease or purchase of facility
- 36.05.12.09 Explain the nature of operating budgets
- 36.05.12.10 Develop a company budget
- 36.05.12.11 Use budgets to control operations
- 36.05.12.12 Develop expense-control plans
- 36.05.12.13 Analyze operating results in relation to budget/industry

### **36.05.13.0 Develop planning skills**

#### **Key Indicators-Specialty:**

- 36.05.13.01 Develop project plans
- 36.05.13.02 Determine technical assistance needed by business owners
- 36.05.13.03 Develop company objectives for a strategic business unit
- 36.05.13.04 Develop strategies to achieve company goals/objectives
- 36.05.13.05 Explain external planning considerations
- 36.05.13.06 Identify assumptions for creating projected cash-flow statements
- 36.05.13.07 Identify assumptions for creating projected profit-and-loss statements (for a new business)
- 36.05.13.08 Develop business plan

#### **Key Indicators-Foundation:**

- 36.05.13.09 Explain the nature/parts of business plans
- 36.05.13.10 Identify the relationship between the business plan and the business organization

### **36.05.14.0 Explain basic e-commerce concepts**

#### **Key Indicators-Specialty:**

- 36.05.14.01 Define e-commerce concepts
- 36.05.14.02 Describe the components of e-commerce (e.g., 'front-end', 'back-end')
- 36.05.14.03 Explain how e-commerce is similar to, and different from traditional commerce
- 36.05.14.04 Explain history and development of e-commerce
- 36.05.14.05 Discuss the global impact of e-commerce
- 36.05.14.06 Explain the scope of e-commerce and how it relates to business practices
- 36.05.14.07 Explain how e-commerce relates to e-business and e-terminology
- 36.05.14.08 Describe the impact of wireless e-commerce
- 36.05.14.09 Describe the impact of emerging technologies
- 36.05.14.10 Explain business-to-business e-commerce
- 36.05.14.11 Explain business-to-consumer e-commerce
- 36.05.14.12 Explain consumer-to-consumer e-commerce
- 36.05.14.13 Describe the impact of e-commerce on business and society
- 36.05.14.14 Analyze the impact of timing of implementation by industry
- 36.05.14.15 Explain permission marketing

## **36.06.00.0 Functions of Marketing Distribution**

### **36.06.01.0 Explain the nature and scope of distribution**

#### **Key Indicators-Specialty:**

- 36.06.01.01 Explain the nature and scope of distribution
- 36.06.01.02 Explain the nature of channels of distribution
- 36.06.01.03 Describe the use of technology in the distribution function
- 36.06.01.04 Explain legal considerations in distribution
- 36.06.01.05 Describe ethical considerations in distribution
- 36.06.01.06 Explain supply chain management

### **36.06.02.0 Use order fulfillment**

#### **Key Indicators-Specialty:**

- 36.06.02.01 Explain the relationship between customer service and distribution
- 36.06.02.02 Prepare invoices
- 36.06.02.03 Use an information system for order fulfillment

### **36.06.03.0 Explain warehousing/stock handling**

#### **Key Indicators-Specialty:**

- 36.06.03.01 Explain receiving processes
- 36.06.03.02 Explain shipping processes
- 36.06.03.03 Explain storing considerations
- 36.06.03.04 Explain the nature of warehousing

### **36.06.04.0 Coordinate management of distribution**

#### **Key Indicators-Specialty:**

- 36.06.04.01 Coordinate distribution with other marketing activities
- 36.06.04.02 Explain the nature of channel-member relationships
- 36.06.04.03 Explain the nature of channel strategies
- 36.06.04.04 Select channels of distribution
- 36.06.04.05 Evaluate channel members

### **36.06.05.0 Perform shipping and mailing functions**

#### **Key Indicators-Foundation:**

- 36.06.05.01 Identify various classes of shipments and mail
- 36.06.05.02 Sort/distribute shipments and mail
- 36.06.05.03 Identify requirements for shipping/mail (e.g., package, domestic, international)
- 36.06.05.04 Select shipment method appropriate for shipping/mail needs

## **36.07.00.0 Finance**

### **36.07.01.0 Explain the nature and scope of financing**

#### **Key Indicators-Specialty:**

- 36.07.01.01 Explain the nature and scope of financing
- 36.07.01.02 Describe the use of technology in the financing function
- 36.07.01.03 Analyze critical banking relationships

### **36.07.02.0 Use the principles of extending credit**

#### **Key Indicators-Specialty:**

- 36.07.02.01 Explain the purposes and importance of credit
- 36.07.02.02 Follow company policy regarding methods of payment

#### **Key Indicators-Foundation:**

- 36.07.02.03 Analyze the differences in the uses of credit cards, debit cards, installment loans, term loans and commercial loans
- 36.07.02.04 Calculate the cost of accepting credit cards
- 36.07.02.05 Determine the factors involved in issuing credit
- 36.07.02.06 Identify the components of credit reports

### **36.07.03.0 Obtain business credit**

#### **Key Indicators-Specialty:**

- 36.07.03.01 Explain the purpose and importance of obtaining business credit
- 36.07.03.02 Identify risks associated with obtaining business credit
- 36.07.03.03 Describe sources of financing for businesses
- 36.07.03.04 Explain loan evaluation criteria used by lending institutions
- 36.07.03.05 Determine financing needed for business operations
- 36.07.03.06 Determine financing needed to start a business
- 36.07.03.07 Complete loan application package



## **36.08.00.0 Marketing-Information Management**

### **36.08.01.0 Explain the nature and scope of marketing information management**

#### **Key Indicators-Specialty:**

- 36.08.01.01 Describe the need for marketing information
- 36.08.01.02 Assess marketing-information needs
- 36.08.01.03 Explain the nature and scope of the marketing-information management function
- 36.08.01.04 Explain the role of ethics in marketing-information management
- 36.08.01.05 Describe the use of technology in the marketing-information management function

### **36.08.02.0 Complete a comprehensive marketing information management system**

#### **Key Indicators-Specialty:**

- 36.08.02.01 Plan marketing information management system
- 36.08.02.02 Design measurement criteria
- 36.08.02.03 Implement the system
- 36.08.02.04 Evaluate the systems performance
- 36.08.02.05 Adjust the system, if necessary

### **36.08.03.0 Conduct information gathering**

#### **Key Indicators-Specialty:**

- 36.08.03.01 Identify information monitored for marketing decision-making
- 36.08.03.02 Search the Internet for marketing information
- 36.08.03.03 Monitor internal records for marketing information
- 36.08.03.04 Collect marketing information from others (e.g., customers, staff, vendors)
- 36.08.03.05 Conduct a benchmarking study (e.g., competitive analysis, historic analysis, current trends)
- 36.08.03.06 Explain the nature of marketing research in a marketing-information management system
- 36.08.03.07 Explain types of marketing research
- 36.08.03.08 Write research reports
- 36.08.03.09 Explain types of user research
- 36.08.03.10 Conduct primary/secondary research
- 36.08.03.11 Analyze results
- 36.08.03.12 Explain the concept of data mining
- 36.08.03.13 Explain the levels of data warehousing (e.g., data warehouse, data mart, data store)

### **36.08.04.0 Process information**

#### **Key Indicators-Specialty:**

- 36.08.04.01 Describe techniques for processing marketing information
- 36.08.04.02 Design a database for retrieval of information
- 36.08.04.03 Interpret descriptive statistics for marketing decision-making

### **36.08.05.0 Report information**

#### **Key Indicators-Specialty:**

- 36.08.05.01 Write marketing reports
- 36.08.05.02 Present report findings and recommendations

### **36.08.06.0 Use marketing planning**

#### **Key Indicators-Specialty:**

- 36.08.06.01 Identify considerations in implementing global marketing strategies
- 36.08.06.02 Explain the concept of market and market identification
- 36.08.06.03 Define customer profile
- 36.08.06.04 Select target market
- 36.08.06.05 Explain the role of situational analysis in the marketing-planning process
- 36.08.06.06 Conduct Student Weaknesses Opportunities Trusts (SWOT) analysis for use in marketing planning process
- 36.08.06.07 Develop marketing plan
- 36.08.06.08 Monitor marketing conditions
- 36.08.06.09 Describe measures used to control marketing planning
- 36.08.06.10 Explain the nature of marketing plans
- 36.08.06.11 Conduct marketing audits

#### **Key Indicators-Foundation:**

- 36.08.06.12 Explain the concept of marketing strategies
- 36.08.06.13 Analyze market segmentation and its role in the marketing plan
- 36.08.06.14 Evaluate performance of marketing plan
- 36.08.06.15 Identify current trends in marketing and their effects on business operations



### **36.09.00.0 Pricing**

#### **36.09.01.0 Explain the nature and scope of pricing**

**Key Indicators-Specialty:**

- 36.09.01.01 Explain the nature and scope of the pricing function
- 36.09.01.02 Describe the role of business ethics in pricing
- 36.09.01.03 Explain the use of technology in the pricing function
- 36.09.01.04 Explain legal considerations for pricing

#### **36.09.02.0 Determine prices**

**Key Indicators-Specialty:**

- 36.09.02.01 Explain factors affecting pricing decisions
- 36.09.02.02 Select approach for setting a base price (e.g., cost, demand, competition)
- 36.09.02.03 Determine cost of product (e.g., breakeven, ROI, markup)
- 36.09.02.04 Calculate break-even point
- 36.09.02.05 Identify strategies for pricing new products (e.g., for imitative new products, for innovative new products)
- 36.09.02.06 Select product-mix pricing strategies (e.g., product line, option-product, captive-product, by-product, product bundle)
- 36.09.02.07 Determine discounts and allowances that can be used to adjust base prices
- 36.09.02.08 Use psychological pricing to adjust base prices
- 36.09.02.09 Select promotional pricing strategies used to adjust base prices
- 36.09.02.10 Determine geographic pricing strategies to adjust base prices
- 36.09.02.11 Identify segmented pricing strategies that can be used to adjust base prices
- 36.09.02.12 Set prices
- 36.09.02.13 Adjust prices to maximize profitability

### **36.10.00.0 Product/Service Management**

#### **36.10.01.0 Explain the nature and scope of product/service management**

**Key Indicators-Specialty:**

- 36.10.01.01 Explain the nature and scope of the product/service management function
- 36.10.01.02 Identify the impact of product life cycles on marketing decisions
- 36.10.01.03 Describe the use of technology in the product/service management function
- 36.10.01.04 Explain business ethics in product/service management

#### **36.10.02.0 Explain quality assurances**

**Key Indicators-Specialty:**

- 36.10.02.01 Describe the uses of grades and standards in marketing
- 36.10.02.02 Explain warranties and guarantees
- 36.10.02.03 Identify consumer protection provisions of appropriate agencies

#### **36.10.03.0 Determine product/service mix**

**Key Indicators-Specialty:**

- 36.10.03.01 Explain the concept of product/service mix
- 36.10.03.02 Describe the nature of product/service bundling
- 36.10.03.03 Plan product/service mix
- 36.10.03.04 Determine services to provide customers

#### **36.10.04.0 Explain positioning and branding**

**Key Indicators-Specialty:**

- 36.10.04.01 Describe factors used by marketers to position products/businesses
- 36.10.04.02 Explain the nature of branding
- 36.10.04.03 Explain co-branding and its impact on positioning
- 36.10.04.04 Explain the role of customer service in positioning/image
- 36.10.04.05 Develop strategies to position product/business

## **36.11.00.0 Promotion**

### **36.11.01.0 Explain the nature and scope of promotion**

#### **Key Indicators-Specialty:**

- 36.11.01.01 Explain the communication process used in promotion
- 36.11.01.02 Explain the role of promotion as a marketing function
- 36.11.01.03 Explain the types of promotion
- 36.11.01.04 Identify the elements of the promotional mix
- 36.11.01.05 Describe the use of business ethics in promotion
- 36.11.01.06 Describe the use of technology in the promotion function
- 36.11.01.07 Describe the regulation of promotion

### **36.11.02.0 Assess external marketing services**

#### **Key Indicators-Specialty:**

- 36.11.02.01 Identify the types of external advertising (e.g., sales promotion, direct marketing, public relations, marketing research, product/package/interactive design)
- 36.11.02.02 Determine the role of external marketing services
- 36.11.02.03 Identify service providers
- 36.11.02.04 Recommend service provider strategies

### **36.11.03.0 Use advertising**

#### **Key Indicators-Specialty:**

- 36.11.03.01 Explain the types of advertising media
- 36.11.03.02 Explain components of advertisements
- 36.11.03.03 Write promotional messages that appeal to targeted markets
- 36.11.03.04 Explain the nature of direct advertising strategies
- 36.11.03.05 Describe considerations in using databases in advertising
- 36.11.03.06 Develop media strategies
- 36.11.03.07 Calculate media costs
- 36.11.03.08 Select advertising media
- 36.11.03.09 Buy advertisements
- 36.11.03.10 Evaluate effectiveness of advertising
- 36.11.03.11 Identify opportunities for cooperative partnerships

### **36.11.04.0 Use web site as a marketing tool**

#### **Key Indicators-Specialty:**

- 36.11.04.01 Create web site
- 36.11.04.02 Develop web site design/components
- 36.11.04.03 Develop web site strategies
- 36.11.04.04 Evaluate web site effectiveness
- 36.11.04.05 Update web site
- 36.11.04.06 Identify global and legal implications of web site marketing

### **36.11.05.0 Use direct marketing**

#### **Key Indicators-Specialty:**

- 36.11.05.01 Explain the types of direct marketing
- 36.11.05.02 Analyze the use of direct marketing
- 36.11.05.03 Develop a direct marketing plan
- 36.11.05.04 Identify legal parameters in direct marketing

### **36.11.06.0 Use publicity/public relations**

#### **Key Indicators-Specialty:**

- 36.11.06.01 Write a news release
- 36.11.06.02 Develop media relations
- 36.11.06.03 Create reputation management strategies
- 36.11.06.04 Analyze costs/benefits of company participation in community activities
- 36.11.06.05 Develop a public relations plan
- 36.11.06.06 Assess new technologies
- 36.11.06.07 Develop crisis management plan

### **36.11.07.0 Develop sales promotions**

#### **Key Indicators-Specialty:**

- 36.11.07.01 Design frequency marketing program
- 36.11.07.02 Analyze use of specialty promotions
- 36.11.07.03 Develop a sales promotion plan

### **36.11.08.0 Manage promotion**

#### **Key Indicators-Specialty:**

- 36.11.08.01 Explain the nature of a promotional plan
- 36.11.08.02 Coordinate activities in the promotional mix
- 36.11.08.03 Use past advertisements to aid in promotional planning
- 36.11.08.04 Prepare promotional budget
- 36.11.08.05 Manage promotional allowances
- 36.11.08.06 Develop promotional plan for a business

### **36.12.00.0 Selling**

#### **36.12.01.0 Explain the nature and scope of selling**

##### **Key Indicators-Specialty:**

- 36.12.01.01 Explain the nature and scope of the selling function
- 36.12.01.02 Explain role of customer service as a component of selling strategy
- 36.12.01.03 Explain key factors in building a clientele
- 36.12.01.04 Explain company selling policies
- 36.12.01.05 Explain business ethics in selling
- 36.12.01.06 Describe use of technology in the selling function
- 36.12.01.07 Describe nature of selling regulations

#### **36.12.02.0 Analyze product/service knowledge**

##### **Key Indicators-Specialty:**

- 36.12.02.01 Acquire product/service information for use in selling
- 36.12.02.02 Analyze product/service information to identify product features and benefits

#### **36.12.03.0 Use selling process/techniques**

##### **Key Indicators-Specialty:**

- 36.12.03.01 Explain the selling process
- 36.12.03.02 Prepare for the sales presentation
- 36.12.03.03 Establish relationship with client/customer
- 36.12.03.04 Address needs of individual personalities
- 36.12.03.05 Determine customer/client needs
- 36.12.03.06 Identify customer's buying motives
- 36.12.03.07 Facilitate customer buying decisions
- 36.12.03.08 Differentiate between consumer and organizational buying behavior
- 36.12.03.09 Assess customer/client needs
- 36.12.03.10 Recommend specific product
- 36.12.03.11 Demonstrate product
- 36.12.03.12 Prescribe solution to customer needs
- 36.12.03.13 Convert customer/client objections into selling points
- 36.12.03.14 Demonstrate negotiation skills
- 36.12.03.15 Develop a sales proposal including legal terms and conditions
- 36.12.03.16 Close the sale
- 36.12.03.17 Demonstrate suggestion selling
- 36.12.03.18 Sell goods/services/ideas to individuals
- 36.12.03.19 Sell goods/services/ideas to groups
- 36.12.03.20 Plan follow-up strategies utilized in selling techniques

#### **36.12.04.0 Use support activities**

##### **Key Indicators-Specialty:**

- 36.12.04.01 Calculate miscellaneous charges
- 36.12.04.02 Process sales documentation
- 36.12.04.03 Prospect for customers
- 36.12.04.04 Create sales letters, product descriptions, and sales materials
- 36.12.04.05 Demonstrate sales presentation skills
- 36.12.04.06 Create a presentation software package to support sales presentation
- 36.12.04.07 Use presentation software to develop sales support presentations (e.g., presentation software)

### **36.12.05.0 Manage selling activities**

#### **Key Indicators-Specialty:**

- 36.12.05.01 Plan strategies for meeting sales quotas
- 36.12.05.02 Analyze sales reports
- 36.12.05.03 Explain the nature of sales forecasts
- 36.12.05.04 Forecast sales
- 36.12.05.05 Analyze the marketing dynamics that affect sales
- 36.12.05.06 Assess customer relations management strategies
- 36.12.05.07 Explain the nature of sales management
- 36.12.05.08 Explain the nature of sales training
- 36.12.05.09 Analyze technology for use in the sales function
- 36.12.05.10 Develop a sales force incentive plan
- 36.12.05.11 Develop a sales plan including strategies for meeting sales quota

### **36.13.00.0 Related Business Skills: Technology**

#### **36.13.01.0 Analyze the role of technology in business**

##### **Key Indicators-Foundation:**

- 36.13.01.01 Explain the benefits and drawbacks of technological advancements
- 36.13.01.02 Research future trends in technology
- 36.13.01.03 Determine current technology needs for various types of businesses
- 36.13.01.04 Identify the impact of technology on business
- 36.13.01.05 Integrate technology into every applicable business process
- 36.13.01.06 Use technological tools (e.g., graphic design, advanced internet skills)

#### **36.13.02.0 Reproduce documents**

##### **Key Indicators-Foundation:**

- 36.13.02.01 Determine best reprographic method for given jobs
- 36.13.02.02 Maintain reprographic equipment
- 36.13.02.03 Select paper according to reprographic requirements
- 36.13.02.04 Troubleshoot equipment problems

#### **36.13.03.0 Create spreadsheets for business applications**

##### **Key Indicators-Foundation:**

- 36.13.03.01 Gather information needed to create usable spreadsheet files according to company needs
- 36.13.03.02 Follow written and/or oral instructions and specifications for preparing spreadsheets
- 36.13.03.03 Integrate spreadsheet files with other application software
- 36.13.03.04 Perform special spreadsheet functions (e.g., products, summations, percentages)

#### **36.13.04.0 Create databases for business applications**

##### **Key Indicators-Foundation:**

- 36.13.04.01 Gather information needed to create usable database files according to company needs
- 36.13.04.02 Follow written and/or oral instructions and specifications for preparing databases
- 36.13.04.03 Integrate database files with other application software
- 36.13.04.04 Perform special database functions (e.g., merge, sort, purge, query, report)

#### **36.13.05.0 Create word-processed documents for business applications**

##### **Key Indicators-Foundation:**

- 36.13.05.01 Follow written and/or oral instructions and specifications for preparing word processing files
- 36.13.05.02 Create documents in accordance with established company format and style (e.g., letter, resumes, memorandums, newsletters, manuscripts, reports)
- 36.13.05.03 Integrate word-processing files with other application software
- 36.13.05.04 Perform special word-processing functions (e.g., borders, shading, columns, tables)

#### **36.13.06.0 Perform desktop-publishing functions for business applications**

##### **Key Indicators-Foundation:**

- 36.13.06.01 Create a document using desktop-publishing functions
- 36.13.06.02 Import data
- 36.13.06.03 Scan images
- 36.13.06.04 Produce a publication



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