

# Marketing Essentials

## School-to-Career Activity Workbook

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**Education**

*Bothell, WA • Chicago, IL • Columbus, OH • New York, NY*

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## INTRODUCTION

This School-to-Career Activity Workbook was developed to help students coordinate in-school instruction with workplace learning experiences. Educational materials and classroom instruction can provide a valuable introduction for people entering the field. Actual work experience in marketing can reinforce in-school instruction and expand career opportunities.

## BENEFITS TO YOU—THE STUDENT

The benefits for marketing students from participation in coordinated work- and school-based learning programs include, but are not limited to:

- improving academic skills with a contextual learning focus;
- providing realistic learning experiences that help to develop interests, abilities, and the acquisition of employability skills;
- developing student maturity by strengthening resourcefulness, problem-solving skills, self-confidence, self-discipline, and responsibility;
- developing human relations skills through personal interaction with employers, customers, clients, and mentors;
- providing academic credit toward a high-school diploma or a one- or two-year post-secondary certificate or associate degree;
- providing educational counseling to match career interests;
- enhancing employment opportunities; and,
- providing a smooth transition from school to work through the development of career and employability skills.

## ASSESSMENT

Each School-to-Career activity is followed by a scoring rubric that includes learning objectives. The scoring rubric lets your instructor give you feedback on your performance in a format that is easy to understand. It also helps you to understand the basis on which your performance will be evaluated.

## RESULTS

Each School-to-Career Activity in this workbook corresponds to one of the 38 chapters in *Marketing Essentials*. The activities are designed to enhance your understanding of marketing and to increase your awareness of how the jobs you do at your workplace can help you learn about marketing and choose a career path.

While completing these activities, you will practice skills such as writing, observing, researching, and reporting. You will also develop your interpersonal skills through interviews with sponsors, mentors, and others. After you complete each activity, think about how the role of marketing applies in your job, the economy, and society.

The completion of the School-to-Career Activities will increase your understanding of the working world and improve your performance on the job. The activities may allow you to explore other career areas that could lead to further training or a full-time career.

Student \_\_\_\_\_

Date \_\_\_\_\_

Class \_\_\_\_\_

Teacher \_\_\_\_\_

# CHAPTER 1 Marketing Is All Around Us

## School-to-Career Research Activity

Name of work site: \_\_\_\_\_

Name of work site mentor: \_\_\_\_\_

Title or position of mentor: \_\_\_\_\_

Marketing includes the developing, promoting, and distributing of ideas, goods, and services to meet customers' needs and wants. It connects businesses to customers, allowing the exchange process to occur. Consult with your work site mentor to complete the following investigation dealing with seven core marketing functions and your company.

After completing this school-to-career investigation, you will be able to

- analyze marketing functions performed by your company, and
- describe how economic utility is added to a selected product offered at your work site.

1. All the marketing activities you see at your work site can be classified into various functions of marketing. Explore these marketing functions by finding out how they occur at your work site.

1a. *Channel management or distribution* involves making decisions about how to get goods into customers' hands. Does your company sell products in a single location or many locations? In one state, one region, nationally, or in the global marketplace?

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1b. *Market planning* involves strategies to target specific markets. Who is responsible in your company or at your work site for creating a marketing plan?

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1c. *Marketing information management* is the process of gathering marketing information to make sound business decisions. How does your company conduct marketing research to learn more about its customers, products, and services?

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**1d.** *Pricing* means deciding how much to charge for goods or services. Who decides what to charge for your company's goods and services? Is it a decision made by management at your location or by others?

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**1e.** *Product/service management* involves all the decisions a business makes in the production and sales of its goods and services. Who decides which products and services to carry for your company?

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**1f.** *Promotion* is any form of communication used to inform, persuade, or remind people about a business and its products. How is your company promoted?

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**1g.** *Selling* is providing customers with goods and services they want to buy. What is the primary good or service sold by your company? Is the primary good or service sold to the retail market or the industrial market?

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2. The functions of marketing add value to a product or add utility to a product. There are five economic utilities: form, place, time, possession, and information. Select a product that is sold at your work site for analysis:

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- 2a. *Form utility* adds value to raw materials to make them useful and deals with the production of the product. Who is the manufacturer of your product? Where is the manufacturer located?

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- 2b. *Place utility* involves having a product where customers can buy it. Where can the products of your company be purchased? What is your company's address?

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- 2c. *Time utility* means offering a product at certain times during the year or having a convenient time of operation. What are your days and hours of operation? Does your business close on special holidays?

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- 2d. *Possession utility* is the actual exchange of a product for some monetary value. Every time a product is sold to someone in a channel of distribution, possession utility is involved. How does your company add possession utility to its products?

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- 2e. *Information utility* involves communication with the customer. How does your company communicate with its customers?

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Student

Date

Evaluator

Date of Evaluation

# CHAPTER 1 Marketing Is All Around Us

## Research Investigation Criteria

*Learning Objectives:*

1. Analyze marketing functions performed by your company.
2. Describe how economic utility is added to a selected product offered at your work site.

		Omitted Answer	Limited Answer, Major Improvement Needed	Acceptable Answer, Some Improvement Needed	Good Answer, Little Improvement Needed	Model Answer, No Improvement Needed	Score
<b>I. Development of Research Topic (amount, depth, and specificity of supporting details)</b>							
<b>Q.1</b>	Marketing Functions	0	1-20	21-22-23	24-26-29	30	_____
<b>Q.2a</b>	Form Utility	0	1-5	6-7	8-9	10	_____
<b>Q.2b</b>	Place Utility	0	1-5	6-7	8-9	10	_____
<b>Q.2c</b>	Time Utility	0	1-5	6-7	8-9	10	_____
<b>Q.2d</b>	Possession Utility	0	1-8	9-10-11	12-13-14	15	_____
<b>Q.2e</b>	Information Utility	0	1-8	9-10-11	12-13-14	15	_____
		Over 8 Errors	7-8 Errors	5-6 Errors	3-4 Errors	1-2 Errors	Free of Errors
<b>II. Mechanical Conventions (ability to spell and use capitalization and punctuation correctly)</b>							
		0	1	2	3	4	5 _____
		Unsatisfactory	Poor	Fair	Good	Excellent	
<b>III. Sentence Structure (ability to write effective and well-structured sentences)</b>							
			1	2	3	4	5 _____

Total Score \_\_\_\_\_

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Student \_\_\_\_\_

Date \_\_\_\_\_

Class \_\_\_\_\_

Teacher \_\_\_\_\_

# CHAPTER 2 The Marketing Plan

## School-to-Career Research Activity

Name of work site: \_\_\_\_\_

Name of work site mentor: \_\_\_\_\_

Title or position of mentor: \_\_\_\_\_

Successful businesses plan for success by conducting a SWOT analysis. The marketing concept states that to make a profit, a business must first satisfy the needs and wants of its customers. Consult with your work site mentor to complete the following investigation into basic marketing concepts and your company.

After completing this school-to-career investigation, you will be able to

- conduct a SWOT analysis for your company,
- perform a customer profile on a product at your work site, and
- analyze how your company is positioned in the market.

1. If a company is “marketing oriented,” it focuses on customer satisfaction and directs all its resources toward offering goods and services that the people want. The company does not force customers to accept whatever it offers.

1a. What are your company’s internal strengths and weaknesses?

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1b. A company must always look for opportunities to create competitive advantage. What external opportunities and threats exist for your company (e.g., competitors, technology, and political and economic factors)?

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2. Most companies target segments of the market as potential customers. Characteristics used to segment markets include demographics, geographics, and psychographics. In the following spaces, perform a customer profile for one product that is sold at your work site. Consult with your mentor and refer to Section 2.2 of *Marketing Essentials* for additional information about market segmentation.

**Customer Profile** for \_\_\_\_\_ (Name of Product)

- 2a. Demographics: Who buys the product by age, gender, income, marital status, ethnic background, education, and occupation?

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- 2b. Geographics: Is your market local, regional, state, national, or global?

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- 2c. Psychographics: Describe your customer's lifestyle, attitudes, personality, and values.

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- 2d. Product Benefits: What styles and versions of the product does your company sell?

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**3.** Market segmentation focuses on reaching a specific group of people. Both products and companies can be positioned to reach different segments of a market. Answer the following to determine how your company has positioned itself in the marketplace.

**3a.** How do you feel your company is positioned in the minds of potential customers? Explain your answer.

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**3b.** In your opinion, what distinguishes your company from its competitors? What advantages does your company have when compared with its competitors?

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**3c.** In your opinion, what consumer needs and preferences are not being addressed by your company?

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**3d.** In your opinion, who are some potential customers not being reached by your company?

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Student

Date

Evaluator

Date of Evaluation

# CHAPTER 2 The Marketing Plan

## Research Investigation Criteria

Learning Objectives:

1. Conduct a SWOT analysis for your company.
2. Perform a customer profile on a product at your work site.
3. Analyze how your company is positioned in the market.

	Omitted Answer	Limited Answer, Major Improvement Needed	Acceptable Answer, Some Improvement Needed	Good Answer, Little Improvement Needed	Model Answer, No Improvement Needed	Score
<b>I. Development of Research Topic (amount, depth, and specificity of supporting details)</b>						
<b>Q.1</b> SWOT Analysis	0	1-8	9-10-11	12-13-14	15	_____
<b>Q.2a</b> Demographics	0	1-8	9-10-11	12-13-14	15	_____
<b>Q.2b</b> Geographics	0	1-2	3	4	5	_____
<b>Q.2c</b> Psychographics	0	1-8	9-10-11	12-13-14	15	_____
<b>Q.2d</b> Product Benefits	0	1-2	3	4	5	_____
<b>Q.2e</b> Target Marketing	0	1-16	17-18-19	20-22-24	25	_____
<b>Q.3</b> Market position	0	1-5	6-7	8-9	10	_____
	<b>Over 8 Errors</b>	<b>7-8 Errors</b>	<b>5-6 Errors</b>	<b>3-4 Errors</b>	<b>1-2 Errors</b>	<b>Free of Errors</b>
<b>II. Mechanical Conventions (ability to spell and use capitalization and punctuation correctly)</b>						
	0	1	2	3	4	5 _____
	<b>Unsatisfactory</b>		<b>Poor</b>	<b>Fair</b>	<b>Good</b>	<b>Excellent</b>
<b>III. Sentence Structure (ability to write effective and well-structured sentences)</b>						
		1	2	3	4	5 _____

Total Score \_\_\_\_\_

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Student \_\_\_\_\_

Date \_\_\_\_\_

Class \_\_\_\_\_

Teacher \_\_\_\_\_

# CHAPTER 3 Political and Economic Analysis

## School-to-Career Research Activity

Name of work site: \_\_\_\_\_

Name of work site mentor: \_\_\_\_\_

Title or position of mentor: \_\_\_\_\_

An economy, or economic system, is the way a nation uses its resources to produce and distribute goods and services. Consult your work site mentor to complete the following investigation of world economies and your company.

After completing this school-to-career investigation, you will be able to

- analyze factors of production for your company,
- explain basic economic questions that affect your company, and
- describe the effects of the business cycle on your company.

**1.** Economists refer to resources as factors of production. Factors of production include everything used in producing goods and services—land, labor, capital, and entrepreneurship.

**1a.** Land is one factor of production. Is the land on which your business is located an economic factor of production? Why or why not?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**1b.** Labor includes full- and part-time workers, managers, professionals, and public employees. How many employees are at your work site? How many are full-time? How many part-time? How many managers?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**1c.** Capital is what is needed to start and operate a business. In addition to the money, what other items at your work site are capital?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

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**1d.** Entrepreneurship refers to the efforts of people to risk time and money to run a business. Who started your company? When was it started? Where was it started?

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**1e.** Was your company first established as a sole proprietorship, partnership, limited liability company, or as a corporation?

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**2.** The United States is a mixed market economy. That means the government is partially involved in economic decisions. (In a pure market economy there is no government involvement.)

**2a.** What goods and services are produced in a traditional economy? What determines what, how, and for whom goods and services are produced?

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**2b.** Who decides how goods and services should be produced in a pure market economy? What must a company do to be successful?

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**2c.** Who decides for whom goods and services should be produced in a command economy?

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**3.** A business cycle refers to change in an economy over time. Business cycles include four phases: expansion, recession, depression, and recovery.

**3a.** In your opinion, what phase of the business cycle is the United States economy in today? Explain your answer.

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**3b.** How is your company adjusting to the present phase of the business cycle?

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Student

Date

Evaluator

Date of Evaluation

# CHAPTER 3 Political and Economic Analysis

## Research Investigation Criteria

Learning Objectives:

1. Analyze factors of production for your company.
2. Explain basic economic questions that affect your company.
3. Describe the effects of the business cycle on your company.

	Omitted Answer	Limited Answer, Major Improvement Needed	Acceptable Answer, Some Improvement Needed	Good Answer, Little Improvement Needed	Model Answer, No Improvement Needed	Score		
<b>I. Development of Research Topic (amount, depth, and specificity of supporting details)</b>								
<b>Q.1</b>	Factors of Production	0	1-20	21-22-23	24-26-29	30	_____	
<b>Q.2</b>	Economic Decisions	0	1-16	17-18-19	20-22-24	25	_____	
<b>Q.3a</b>	Business Cycle	0	1-12	13-14-15	16-17-18-19	20	_____	
<b>Q.3b</b>	Actions in a Business Cycle	0	1-8	9-10-11	12-13-14	15	_____	
		<b>Over 8 Errors</b>	<b>7-8 Errors</b>	<b>5-6 Errors</b>	<b>3-4 Errors</b>	<b>1-2 Errors</b>	<b>Free of Errors</b>	
<b>II. Mechanical Conventions (ability to spell and use capitalization and punctuation correctly)</b>								
		0	1	2	3	4	5	_____
		<b>Unsatisfactory</b>		<b>Poor</b>	<b>Fair</b>	<b>Good</b>	<b>Excellent</b>	
<b>III. Sentence Structure (ability to write effective and well-structured sentences)</b>								
			1	2	3	4	5	_____

Total Score \_\_\_\_\_

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# CHAPTER 4 Global Analysis

## School-to-Career Research Activity

Name of work site: \_\_\_\_\_

Name of work site mentor: \_\_\_\_\_

Title or position of mentor: \_\_\_\_\_

International trade involves the exchange of goods and services among nations. To complete the following investigation dealing with the global marketplace and your company, consult with your work site mentor or the person responsible for buying merchandise.

After completing this school-to-career investigation, you will be able to

- identify selected products that are sold at your work site as imports,
- explain the advantages and disadvantages of international trade,
- identify your company's plans for expansion in international trade,
- identify the impact of balance of trade on individual companies, and
- describe the cultural, economic, and political risks for companies that engage in international trade.

1. Goods and services from other nations are called imports. Goods and services sold to other nations are called exports.

1a. Identify at least five different imported products in your workplace and list their countries of origin in the space below.

**Name of Product**

**Country of Origin**

1. \_\_\_\_\_

\_\_\_\_\_

2. \_\_\_\_\_

\_\_\_\_\_

3. \_\_\_\_\_

\_\_\_\_\_

4. \_\_\_\_\_

\_\_\_\_\_

5. \_\_\_\_\_

\_\_\_\_\_

1b. Why does your company handle imported products?

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**2a.** Identify how international trade benefits consumers, producers, workers, and nations.

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**2b.** What are possible disadvantages of international trade for some domestic companies?

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**2c.** Does your company export any product or service? Why or why not?

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3. Does your company plan to expand into the global market? Why or why not?

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4. The difference in value between exports and imports of a nation is called its balance of trade. How can a country's negative balance of trade affect companies headquartered there?

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5. What are some cultural, economic, and political risks that companies face when engaging in international trade?

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# CHAPTER 4 Global Analysis

## Research Investigation Criteria

### Learning Objectives:

1. Identify selected products that are sold at your work site as imports.
2. Explain the advantages and disadvantages of international trade.
3. Identify your company's plans for expansion into the global market.
4. Identify the impact of balance of trade on individual companies.
5. Describe the cultural, economic, and political risks for companies that engage in international trade.

	Omitted Answer	Limited Answer, Major Improvement Needed	Acceptable Answer, Some Improvement Needed	Good Answer, Little Improvement Needed	Model Answer, No Improvement Needed	Score		
<b>I. Development of Research Topic (amount, depth, and specificity of supporting details)</b>								
Q.1	Imports	0	1-8	9-10-11	12-13-14	15	_____	
Q.2	International Trade Advantages & Disadvantages	0	1-12	13-14-15	16-17-18-19	20	_____	
Q.3	Plans for Expansion	0	1-12	13-14-15	16-17-18-19	20	_____	
Q.4	Balance of Trade	0	1-8	9-10-11	12-13-14	15	_____	
Q.5	Risks of International Trade	0	1-12	13-14-15	16-17-18-19	20	_____	
		<b>Over 8 Errors</b>	<b>7-8 Errors</b>	<b>5-6 Errors</b>	<b>3-4 Errors</b>	<b>1-2 Errors</b>	<b>Free of Errors</b>	
<b>II. Mechanical Conventions (ability to spell and use capitalization and punctuation correctly)</b>								
		0	1	2	3	4	5	_____
		<b>Unsatisfactory</b>		<b>Poor</b>	<b>Fair</b>	<b>Good</b>	<b>Excellent</b>	
<b>III. Sentence Structure (ability to write effective and well-structured sentences)</b>								
			1	2	3	4	5	_____

Total Score \_\_\_\_\_

Student

Date

Class

Teacher

# CHAPTER 5 The Free Enterprise System

## School-to-Career Research Activity

Name of work site: \_\_\_\_\_

Name of work site mentor: \_\_\_\_\_

Title or position of mentor: \_\_\_\_\_

The free enterprise system encourages each individual to decide for himself or herself how to work and how to spend money. Businesses have many of the same freedoms. They are free to take risks and compete in the marketplace for customers to make a profit. Consult with your work site mentor to complete the following investigation dealing with the free enterprise system.

After completing this school-to-career investigation, you will be able to

- describe how the basic principles of free enterprise affect your company,
- explain the role of competition and its effects on your company, and
- analyze how governmental actions affect your company.

1. Ownership, competition, risk, profits, and supply and demand are the basic principles of the free enterprise system.

1a. In the United States, organizations can be owned by the government or by individuals. Who owns your company?

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1b. Risk is the potential for loss or failure. Businesses take risks all the time. What are some risks your company has recently taken?

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1c. Profit is the money from sales left over after all costs and expenses have been paid. What percentage of sales represents profit for your company?

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2. Competition is the struggle between companies for customers. If necessary, consult your mentor to obtain information for the following questions.

2a. Which companies are viewed as the major competitors of your company?

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2b. Does your company stress price competition with its competitors? Why or why not?

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2c. What are some nonprice competitive factors emphasized by your company?

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3. The government has a fourfold role in our free enterprise system. It provides general services, supports business through promotion of growth and development, regulates business, and (on a small scale) competes with private businesses.

3a. What general services does your local government provide to support your company?

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3b. What general services does your state government provide to support your company?

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**3c.** What general services does the federal government provide to support your company?

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**4.** In the United States most laws are designed to protect the safety, health, and welfare of businesses operating in our free enterprise economic system.

**4a.** What are some local and state laws that affect your company?

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**4b.** How does national legislation have an impact on your company?

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**4c.** Does any government agency or department directly compete with your company in providing goods and services? Do you think government should compete with private enterprise?

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Student

Date

Evaluator

Date of Evaluation

# CHAPTER 5 The Free Enterprise System

## Research Investigation Criteria

Learning Objectives:

1. Describe how the basic principles of free enterprise affect your company.
2. Explain the role of competition and its effects on your company.
3. Analyze how governmental actions affect your company.

	Omitted Answer	Limited Answer, Major Improvement Needed	Acceptable Answer, Some Improvement Needed	Good Answer, Little Improvement Needed	Model Answer, No Improvement Needed	Score
<b>I. Development of Research Topic (amount, depth, and specificity of supporting details)</b>						
<b>Q.1a</b> Ownership	0	1-8	9-10-11	12-13-14	15	_____
<b>Q.1b</b> Risk	0	1-8	9-10-11	12-13-14	15	_____
<b>Q.1c</b> Profit	0	1-5	6-7	8-9	10	_____
<b>Q.2</b> Competition	0	1-12	13-14-15	16-17-18-19	20	_____
<b>Q.3</b> Government Services	0	1-8	9-10-11	12-13-14	15	_____
<b>Q.4</b> Government Regulations	0	1-8	9-10-11	12-13-14	15	_____
	<b>Over 8 Errors</b>	<b>7-8 Errors</b>	<b>5-6 Errors</b>	<b>3-4 Errors</b>	<b>1-2 Errors</b>	<b>Free of Errors</b>
<b>II. Mechanical Conventions (ability to spell and use capitalization and punctuation correctly)</b>						
	0	1	2	3	4	5 _____
		<b>Unsatisfactory</b>	<b>Poor</b>	<b>Fair</b>	<b>Good</b>	<b>Excellent</b>
<b>III. Sentence Structure (ability to write effective and well-structured sentences)</b>						
		1	2	3	4	5 _____

Total Score \_\_\_\_\_

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Student \_\_\_\_\_

Date \_\_\_\_\_

Class \_\_\_\_\_

Teacher \_\_\_\_\_

# CHAPTER 6 Legal and Ethical Issues

## School-to-Career Research Activity

Name of work site: \_\_\_\_\_

Name of work site mentor: \_\_\_\_\_

Title or position of mentor: \_\_\_\_\_

Every business plans, organizes, and controls resources to produce and market useful goods or services. Successful businesses demonstrate social responsibility by making ethical decisions and contributing to the needs of society. Consult with your work site mentor to complete the following investigation into business, society, and your company.

After completing this school-to-career investigation, you will be able to

- explain the basic business functions for your company,
- analyze the nature and scope of your company,
- describe socially responsible activities conducted by your company, and
- describe workplace trends that exist at your work site.

1. Business has two primary functions—the production and the marketing of goods and services. How a business goes about these primary functions is determined by management.

1a. How is your company involved with the production and marketing of goods and services?

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1b. Management plans, organizes, and controls resources to reach company goals. What are your company’s goals? How do a company’s goals differ from a company’s mission statement?

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2. Businesses can be categorized by size, profit orientation, and product.

2a. The U.S. Small Business Administration defines a small business as one with fewer than 500 employees if a manufacturing firm, or fewer than 100 employees if a retail firm. Would you classify your company as a large or small business by this definition? How many employees work for your company? What is the source of your information?

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2b. Is your company a for-profit or nonprofit organization? What is the basic difference between them?

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2c. Would you classify your company as a goods provider or a service provider? Explain your choice.

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3. Business practices are regulated by laws that protect consumers, workers, investors, and the general public. Some companies also exhibit extra social responsibility by helping the environment and those in need.

3a. What conservation and recycling practices does your company use to protect the environment or available natural resources?

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**3b.** How does your company demonstrate ethical behavior in the marketing of products and services?

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**4.** Many businesses are making the workplace more comfortable and friendly.

**4a.** Is flextime allowed at your work site? What are the advantages and disadvantages of flextime?

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**4b.** Is on-site child care provided by your company? What are the advantages and disadvantages of on-site child care?

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# CHAPTER 6 Legal and Ethical Issues

## Research Investigation Criteria

### Learning Objectives:

1. Explain the basic business functions for your company.
2. Analyze the nature and scope of your company.
3. Describe socially responsible activities conducted by your company.
4. Describe workplace trends that exist at your work site.

	Omitted Answer	Limited Answer, Major Improvement Needed	Acceptable Answer, Some Improvement Needed	Good Answer, Little Improvement Needed	Model Answer, No Improvement Needed	Score
<b>I. Development of Research Topic (amount, depth, and specificity of supporting details)</b>						
<b>Q.1</b> Business Functions	0	1-12	13-14-15	16-17-18-19	20	_____
<b>Q.2</b> Business Classifications	0	1-12	13-14-15	16-17-18-19	20	_____
<b>Q.3a</b> Conservation Practices	0	1-8	9-10-11	12-13-14	15	_____
<b>Q.3b</b> Ethical Behavior	0	1-8	9-10-11	12-13-14	15	_____
<b>Q.4</b> Workplace Trends	0	1-12	13-14-15	16-17-18-19	20	_____
	<b>Over 8 Errors</b>	<b>7-8 Errors</b>	<b>5-6 Errors</b>	<b>3-4 Errors</b>	<b>1-2 Errors</b>	<b>Free of Errors</b>
<b>II. Mechanical Conventions (ability to spell and use capitalization and punctuation correctly)</b>						
	0	1	2	3	4	5 _____
		<b>Unsatisfactory</b>	<b>Poor</b>	<b>Fair</b>	<b>Good</b>	<b>Excellent</b>
<b>III. Sentence Structure (ability to write effective and well-structured sentences)</b>						
		1	2	3	4	5 _____

Total Score \_\_\_\_\_

Student \_\_\_\_\_

Date \_\_\_\_\_

Class \_\_\_\_\_

Teacher \_\_\_\_\_

# CHAPTER 7 Basic Math Skills

## School-to-Career Research Activity

Name of work site: \_\_\_\_\_

Name of work site mentor: \_\_\_\_\_

Title or position of mentor: \_\_\_\_\_

Mathematical and computational skills are essential for all marketing employees. Employees in marketing must be familiar with the appropriate mathematical techniques and know how to use them. If necessary, consult with your work site mentor to complete the following investigation dealing with fundamentals of mathematics used at your work site.

After completing this school-to-career investigation, you will be able to

- explain why employers desire employees with mathematical skills,
- explain how mathematical skills are used at your work site, and
- describe how calculators are used at your workplace.

1. Did you have to take a pre-employment test to determine your math skills? Why do many employers require mathematical proficiency before employment?

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2. What are some ways you deal with fractions and decimals on the job?

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3. Graphs and charts are used to present mathematical data in a way that is often easier for people to see and understand. There are three types of graphs: bar, line, and circle.

3a. When are bar graphs the best choice to present mathematical information at a work site?

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3b. When are line graphs the best choice to present mathematical information at a work site?

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3c. When are circle graphs the best choice to present mathematical information at a work site?

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4. In what ways are calculators used at your workplace?

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# CHAPTER 7 Basic Math Skills

## Research Investigation Criteria

### Learning Objectives:

1. Explain why employers desire employees with mathematical skills.
2. Explain how mathematical skills are used at your work site.
3. Describe how calculators are used at your workplace.

		Omitted Answer	Limited Answer, Major Improvement Needed	Acceptable Answer, Some Improvement Needed	Good Answer, Little Improvement Needed	Model Answer, No Improvement Needed	Score
<b>I. Development of Research Topic (amount, depth, and specificity of supporting details)</b>							
<b>Q.1</b>	Pre-employment Math Test	0	1-8	9-10-11	12-13-14	15	_____
<b>Q.2</b>	Fractions/Decimal Use	0	1-8	9-10-11	12-13-14	15	_____
<b>Q.3a</b>	Bar Graph Use	0	1-5	6-7	8-9	10	_____
<b>Q.3b</b>	Line Graph Use	0	1-5	6-7	8-9	10	_____
<b>Q.3c</b>	Circle Graph Use	0	1-5	6-7	8-9	10	_____
<b>Q.4</b>	Calculator Use	0	1-8	9-10-11	12-13-14	15	_____
<b>Q.5</b>	Basic Skills	0	1-8	9-10-11	12-13-14	15	_____
		<b>Over 8 Errors</b>	<b>7-8 Errors</b>	<b>5-6 Errors</b>	<b>3-4 Errors</b>	<b>1-2 Errors</b>	<b>Free of Errors</b>
<b>II. Mechanical Conventions (ability to spell and use capitalization and punctuation correctly)</b>							
		0	1	2	3	4	5 _____
		<b>Unsatisfactory</b>		<b>Poor</b>	<b>Fair</b>	<b>Good</b>	<b>Excellent</b>
<b>III. Sentence Structure (ability to write effective and well-structured sentences)</b>							
		1	2	3	4	5	_____

Total Score \_\_\_\_\_

Student \_\_\_\_\_

Date \_\_\_\_\_

Class \_\_\_\_\_

Teacher \_\_\_\_\_

# CHAPTER 8 Communication Skills

## School-to-Career Research Activity

Name of work site: \_\_\_\_\_

Name of work site mentor: \_\_\_\_\_

Title or position of mentor: \_\_\_\_\_

Communication is the exchange of information, ideas, and feelings. Marketers must be able to communicate effectively in speech and writing and listen carefully to customers, supervisors, and co-workers. Reading and writing skills are also essential. If necessary, consult with your work site mentor to complete the following investigation dealing with communication skills.

After completing this school-to-career investigation, you will be able to

- explain how listening skills are used at your work site,
- explain how reading skills are used at your work site,
- analyze how speaking skills are used at your work site, and
- identify how writing skills are used at your work site.

1. Identify at least three ways that you use listening skills to assist you in performing assigned job duties and tasks at your work site.

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2. What documents do you read as part of assigned job duties at your work site?

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3. Marketers are required to communicate well in a variety of situations. Such expertise comes from practice.

3a. When have you had to inform someone at the work site? With whom did you communicate and what information was shared?

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3b. When have you had to persuade someone at the work site? With whom did you communicate and what did you say to be effective?

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3c. When have you had to entertain someone at the work site? With whom did you communicate and what did you say to be effective?

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3d. Are parliamentary procedures used at your work site? Why or why not?

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**4.** Answering the telephone properly is important for taking messages and, in some businesses, to accurately complete an order for products and services.

**4a.** Can customers purchase your work site's products over the telephone? Why or why not?

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**4b.** What is the proper way to answer the telephone at your work site?

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**5.** Writing includes communicating thoughts, ideas, information, and messages through documents such as letters, e-mail, directions, manuals, reports, graphs, and flow charts. Explain how you use your writing skills at your work site.

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# CHAPTER 8 Communication Skills

## Research Investigation Criteria

### Learning Objectives:

1. Explain how listening skills are used at your work site.
2. Explain how reading skills are used at your work site.
3. Analyze how speaking skills are used at your work site.
4. Identify how writing skills are used at your work site.

	Omitted Answer	Limited Answer, Major Improvement Needed	Acceptable Answer, Some Improvement Needed	Good Answer, Little Improvement Needed	Model Answer, No Improvement Needed	Score	
<b>I. Development of Research Topic (amount, depth, and specificity of supporting details)</b>							
<b>Q.1</b>	Listening Skills	0	1-12	13-14-15	16-17-18-19	20	
<b>Q.2</b>	Reading Skills	0	1-8	9-10-11	12-13-14	15	
<b>Q.3</b>	Speaking Skills	0	1-12	13-14-15	16-17-18-19	20	
<b>Q.4</b>	Telephone Usage	0	1-12	13-14-15	16-17-18-19	20	
<b>Q.5</b>	Writing Skills	0	1-8	9-10-11	12-13-14	15	
		<b>Over 8 Errors</b>	<b>7-8 Errors</b>	<b>5-6 Errors</b>	<b>3-4 Errors</b>	<b>1-2 Errors</b>	<b>Free of Errors</b>
<b>II. Mechanical Conventions (ability to spell and use capitalization and punctuation correctly)</b>							
		0	1	2	3	4	5
		<b>Unsatisfactory</b>		<b>Poor</b>	<b>Fair</b>	<b>Good</b>	<b>Excellent</b>
<b>III. Sentence Structure (ability to write effective and well-structured sentences)</b>							
		1	2	3	4	5	

Total Score \_\_\_\_\_

Student

Date

Class

Teacher

# CHAPTER 9 Technology for Marketing

## School-to-Career Research Activity

Name of work site: \_\_\_\_\_

Name of work site mentor: \_\_\_\_\_

Title or position of mentor: \_\_\_\_\_

To be successful in the highly competitive marketplace, businesses must use the latest and best technology. Computer technologies and e-commerce can lead to increased productivity, higher efficiency, and greater sales and profits. To complete the following investigation dealing with computer technology, consult with your work site mentor or someone responsible for computer applications and skills at your work site.

After completing this school-to-career investigation, you will be able to

- explain how software programs are used at your work site,
- explain specialized computer applications used at your work site, and
- describe the use of electronic commerce at your work site.

1. There are countless computer software programs available to individuals and businesses. Major software programs used by businesses include word processing, database management, spreadsheet, desktop publishing, graphics and design, and communications.

1a. How are word processing programs used at your work site? If word processing programs are not used at your work site, how might they be used to benefit your company?

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1b. How are database programs used at your work site? If database programs are not used at your work site, how might they be used to assist your company?

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**1c.** How are spreadsheet programs used at your work site? If spreadsheet programs are not used at your work site, how might they be used to help your company?

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**1d.** How are desktop publishing programs used at your work site? If desktop publishing programs are not used at your work site, how might they be used to assist your company?

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**1e.** How are graphics and design programs used at your work site? If graphics and design programs are not used at your work site, how might they be used to assist your company?

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**1f.** How are presentation programs used at your work site? If presentation programs are not used at your work site, how might they be used to assist your company?

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**2.** Specialized computer technology in marketing includes point-of-sale (POS) systems, online services, electronic mail, and interactive television.

**2a.** Does your business use a POS computer system? If so, what type of system and equipment do you use? If not, explain why the system is not necessary.

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**2b.** If a POS system is used, how does the system feed information directly from the merchandise tags or product labels into the computer?

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**2c.** Internet Service Providers and browsing software allow people to use their computers to access services and information on the Internet. Are any online services used at your work site? If so, explain how the service(s) are used. If not, how may they be used by a marketing business?

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**2d.** E-mail is mail sent from one computer to another through a network. Does your company communicate with employees using e-mail? If so, how is e-mail used at your work site? If not, what are some possible uses for e-mail at your work site?

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**2e.** Does your work site use electronic commerce? If so, explain how it is used. If not, what are some possible uses for e-commerce at your work site?

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Student

Date

Evaluator

Date of Evaluation

# CHAPTER 9 Technology for Marketing

## Research Investigation Criteria

*Learning Objectives:*

1. Explain how software programs are used at your work site.
2. Explain specialized computer applications used at your work site.
3. Describe the use of electronic commerce at your work site.

	Omitted Answer	Limited Answer, Major Improvement Needed	Acceptable Answer, Some Improvement Needed	Good Answer, Little Improvement Needed	Model Answer, No Improvement Needed	Score
<b>I. Development of Research Topic (amount, depth, and specificity of supporting details)</b>						
<b>Q.1a</b> Word Processing	0	1–5	6–7	8–9	10	_____
<b>Q.1b</b> Database Programs	0	1–5	6–7	8–9	10	_____
<b>Q.1c</b> Spreadsheet Programs	0	1–5	6–7	8–9	10	_____
<b>Q.1d</b> Desktop Publishing	0	1–5	6–7	8–9	10	_____
<b>Q.1e</b> Graphics/ Design Programs	0	1–5	6–7	8–9	10	_____
<b>Q.1f</b> Communications Programs	0	1–5	6–7	8–9	10	_____
<b>Q.2</b> Computer Applications	0	1–20	21–22–23	24–26–29	30	_____
	<b>Over 8 Errors</b>	<b>7–8 Errors</b>	<b>5–6 Errors</b>	<b>3–4 Errors</b>	<b>1–2 Errors</b>	<b>Free of Errors</b>
<b>II. Mechanical Conventions (ability to spell and use capitalization and punctuation correctly)</b>						
	0	1	2	3	4	5 _____
	<b>Unsatisfactory</b>		<b>Poor</b>	<b>Fair</b>	<b>Good</b>	<b>Excellent</b>
<b>III. Sentence Structure (ability to write effective and well-structured sentences)</b>						
		1	2	3	4	5 _____

Total Score \_\_\_\_\_

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Student

Date

Class

Teacher

# CHAPTER 10 Interpersonal Skills

## School-to-Career Research Activity

Name of work site: \_\_\_\_\_

Name of work site mentor: \_\_\_\_\_

Title or position of mentor: \_\_\_\_\_

Interpersonal skills are very important in the workplace. Studies have shown that between 80 and 85 percent of a person’s success in the workplace is due to having good interpersonal skills. If necessary, consult with your work site mentor to complete the following investigation.

After completing this school-to-career investigation, you will be able to

- analyze how you can demonstrate desirable personal traits, and
- explain aspects of teamwork used at your work site.

1. It is important to get along with others and be pleasant and productive. Being honest, having integrity, and playing fairly are important aspects of life and a career. What are three ways you can demonstrate ethical behavior at your work site?

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2. Creativity, initiative, responsibility, a good attitude, and self-control are traits that contribute to a successful career in marketing. Reflect on your work site responsibilities and explain how your actions at the work site can demonstrate important personal traits.

- 2a. I can demonstrate creativity at my work site by

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**2b.** I can demonstrate initiative at my work site by

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**2c.** I can demonstrate responsibility at my work site by

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**2d.** I can demonstrate a good attitude at my work site by

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**2e.** I can demonstrate self-control at my work site by

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**2f.** Marketers use a number of interpersonal skills when handling customers. Provide at least four examples of job tasks that require you to use interpersonal skills.

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**3.** Teamwork is very important in the workplace. Reflect on your work site and your personal responsibilities to answer the following questions.

**3a.** Has the training you have received prepared you for more than one task or job? Why is cross-training important in today's workplace?

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**3b.** What are the essential elements for teams to work effectively at your work site?

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**3c.** How are team leaders selected for various projects and work activities at your work site? What functions do the team leaders perform?

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Student

Date

Evaluator

Date of Evaluation

# CHAPTER 10 Interpersonal Skills

## Research Investigation Criteria

*Learning Objectives:*

1. Analyze how you can demonstrate desirable personal traits.
2. Explain aspects of teamwork used at your work site.

	Omitted Answer	Limited Answer, Major Improvement Needed	Acceptable Answer, Some Improvement Needed	Good Answer, Little Improvement Needed	Model Answer, No Improvement Needed	Score		
<b>I. Development of Research Topic (amount, depth, and specificity of supporting details)</b>								
<b>Q.1</b>	Ethical Behavior	0	1-12	13-14-15	16-17-18-19	20	_____	
<b>Q.2a</b>	Creativity	0	1-2	3	4	5	_____	
<b>Q.2b</b>	Initiative	0	1-2	3	4	5	_____	
<b>Q.2c</b>	Responsibility	0	1-2	3	4	5	_____	
<b>Q.2d</b>	Attitude	0	1-2	3	4	5	_____	
<b>Q.2e</b>	Self-control	0	1-2	3	4	5	_____	
<b>Q.2f</b>	Interpersonal Skills	0	1-12	13-14-15	16-17-18-19	20	_____	
<b>Q.3</b>	Teamwork	0	1-16	17-18-19	20-22-24	25	_____	
		<b>Over 8 Errors</b>	<b>7-8 Errors</b>	<b>5-6 Errors</b>	<b>3-4 Errors</b>	<b>1-2 Errors</b>	<b>Free of Errors</b>	
<b>II. Mechanical Conventions (ability to spell and use capitalization and punctuation correctly)</b>								
		0	1	2	3	4	5	_____
		<b>Unsatisfactory</b>		<b>Poor</b>	<b>Fair</b>	<b>Good</b>	<b>Excellent</b>	
<b>III. Sentence Structure (ability to write effective and well-structured sentences)</b>								
		1	2	3	4	5	_____	

Total Score \_\_\_\_\_

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# CHAPTER 11 Management Skills

## School-to-Career Research Activity

Name of work site: \_\_\_\_\_

Name of work site mentor: \_\_\_\_\_

Title or position of mentor: \_\_\_\_\_

A position in management is one of the greatest challenges any employee can face. Management involves communication and interpersonal skills plus the abilities to plan, organize, supervise, and solve problems. To complete the following investigation on management skills, consult with your work site mentor or interview someone involved directly with management at your work site.

After completing this school-to-career investigation, you will be able to

- describe the management structure used in your company,
- analyze the management techniques used at your work site, and
- explain employee motivation at your work site.

1. Management helps a business reach goals through the use of human resources, technology, and material resources. Refer to company literature (such as newsletters, annual reports, and the Web site), interview management personnel, or consult with your mentor to answer the following questions dealing with the management structure of your company.

1a. All managers perform similar functions, but their responsibilities differ according to their management level. Top managers have the greatest responsibilities. Who are the top managers in your company? What are their titles?

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1b. Middle management carries out top management’s decisions. They provide the link between top management and supervisory-level management. What are the names and position titles of the middle managers in your company?

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**1c.** Supervisory-level personnel are the people who assign work duties and supervise employees on the job. What are the name and position title of your supervisor?

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**2.** Functions of management include planning, organizing, and controlling. Managers set goals and determine how to reach them. They determine who will do what and how they will do it. They set standards and evaluate performance. Analyze your responsibilities and interview your mentor to see how these basic management functions are performed at your work site.

**2a.** Planning involves deciding what will be done and how it will be accomplished. Does your work site have a written management plan? If so, who in the organization receives a copy of it? If not, why has it been found to be unnecessary?

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**2b.** Businesses reach goals by organizing a coordinated effort. Would you consider your business's organizational structure to be vertical or horizontal? Why?

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**2c.** Controlling involves three basic activities: setting employee standards, evaluating performance, and solving any problems. Before standards are developed, many companies compose a mission statement. Write your company's formal statement in the space that follows or attach a copy of it. If your company does not have one, consult with your mentor and compose a mission statement for your work site.

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**2d.** How frequently are regular employee performance reviews conducted at your work site? Are employees informed of what is involved in a review? If yes, explain.

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**2e.** Who is responsible for conducting the reviews? Are employees asked to submit a self-evaluation to their reviewers?

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**2f.** If you receive a positive review, does it lead to a salary increase or a promotion? If you receive a negative review, what provisions are made to improve your review the next time?

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**2g.** How does management attempt to motivate employees at your work site?

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Student

Date

Evaluator

Date of Evaluation

# CHAPTER 11 Management Skills

## Research Investigation Criteria

Learning Objectives:

1. Describe the management structure used in your company.
2. Analyze the management techniques used at your work site.
3. Explain employee motivation at your work site.

	Omitted Answer	Limited Answer, Major Improvement Needed	Acceptable Answer, Some Improvement Needed	Good Answer, Little Improvement Needed	Model Answer, No Improvement Needed	Score
<b>I. Development of Research Topic (amount, depth, and specificity of supporting details)</b>						
<b>Q.1</b> Management Structure	0	1-12	13-14-15	16-17-18-19	20	_____
<b>Q.2a</b> Planning Function	0	1-5	6-7	8-9	10	_____
<b>Q.2b</b> Organizing Function	0	1-5	6-7	8-9	10	_____
<b>Q.2c</b> Controlling Function	0	1-5	6-7	8-9	10	_____
<b>Q.2d</b> Performance Reviews	0	1-2	3	4	5	_____
<b>Q.2e</b> Evaluator Performance	0	1-2	3	4	5	_____
<b>Q.2f</b> Results of Review	0	1-5	6-7	8-9	10	_____
<b>Q.2g</b> Employee Motivation	0	1-12	13-14-15	16-17-18-19	20	_____
	<b>Over 8 Errors</b>	<b>7-8 Errors</b>	<b>5-6 Errors</b>	<b>3-4 Errors</b>	<b>1-2 Errors</b>	<b>Free of Errors</b>
<b>II. Mechanical Conventions (ability to spell and use capitalization and punctuation correctly)</b>						
	0	1	2	3	4	5 _____
	<b>Unsatisfactory</b>		<b>Poor</b>	<b>Fair</b>	<b>Good</b>	<b>Excellent</b>
<b>III. Sentence Structure (ability to write effective and well-structured sentences)</b>						
		1	2	3	4	5 _____

Total Score \_\_\_\_\_

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Student

Date

Class

Teacher

# CHAPTER 12 Selling Overview

## School-to-Career Research Activity

Name of work site: \_\_\_\_\_

Name of work site mentor: \_\_\_\_\_

Title or position of mentor: \_\_\_\_\_

Selling involves providing customers with the goods and services they wish to buy. A salesperson needs to learn how a product's features will benefit the customer. It is often said that customers do not buy products. They buy what the products will do for them. Salespeople point out features and benefits, helping customers to make the best possible decision. For those who possess the necessary personal traits, there are many sales positions and career opportunities available. To complete the following investigation on selling, consult with your work site mentor or interview someone involved directly with the selling process at your work site.

After completing this school-to-career investigation, you will be able to

- identify feature-benefits for a selected product at your work site,
- explain how customers make buying decisions at your work site,
- analyze pre-approach techniques used at your work site, and
- recognize how pre-approach activities differ in retail and business-to-business selling situations.

1. Salespeople attempt to match the features of a product to a customer's needs and wants. Identify a product or service available for purchase at your work site and conduct a feature-benefit analysis.

1a. What is the product you have chosen for analysis?

\_\_\_\_\_

1b. A product feature is a physical characteristic or quality of a good or service. The most basic or generic feature is its intended use. What is the generic feature for your product? How does this feature help the product's performance? What will this feature do for the person who buys the product?

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**1c.** Tangible product features are the physical characteristics. What are the tangible product features of your product? How do these features help the product's performance? What will these features do for the person who buys the product?

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**1d.** Extended product features are not always physically a part of the product. However, they are important to the purchase decision. What are the extended product features for your product? How do these features help the product's performance? What will these features do for the person who buys the product?

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**2.** Product information is essential for success in sales. Knowing about the product's price, composition, and manufacturing process helps a salesperson explain why one product is better than another. Where do salespeople at your work site obtain product information?

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3. Some customers need no assistance from salespeople. Others require significant time and effort, depending on what type of decision is being made—extensive, limited, or routine. What type of decision making do customers use when purchasing the product listed in Question 1? Why?

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4. The pre-approach involves getting ready to sell. It includes specific techniques for finding new customers. Looking for new customers is called prospecting. If you work in an industrial setting, what sources and methods of prospecting are used at your work site? If you work in a retail setting, is your company involved in sales prospecting? Why or why not?

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5. According to your mentor or a salesperson at your company, how do pre-approach activities differ in business-to-business and retail settings?

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# CHAPTER 12 Selling Overview

## Research Investigation Criteria

### Learning Objectives:

1. Identify feature-benefits for a selected product at your work site.
2. Explain how customers make buying decisions at your work site.
3. Analyze pre-approach techniques used at your work site.
4. Recognize how pre-approach activities differ in retail and business-to-business selling situations.

	Omitted Answer	Limited Answer, Major Improvement Needed	Acceptable Answer, Some Improvement Needed	Good Answer, Little Improvement Needed	Model Answer, No Improvement Needed	Score
<b>I. Development of Research Topic (amount, depth, and specificity of supporting details)</b>						
<b>Q.1</b> Feature Benefit Analysis	0	1-12	13-14-15	16-17-18-19	20	_____
<b>Q.2</b> Product Information	0	1-8	9-10-11	12-13-14	15	_____
<b>Q.3</b> Type of Decision Making	0	1-8	9-10-11	12-13-14	15	_____
<b>Q.4</b> Pre-approach	0	1-12	13-14-15	16-17-18-19	20	_____
<b>Q.5</b> Pre-approach Differences	0	1-12	13-14-15	16-17-18-19	20	_____
	<b>Over 8 Errors</b>	<b>7-8 Errors</b>	<b>5-6 Errors</b>	<b>3-4 Errors</b>	<b>1-2 Errors</b>	<b>Free of Errors</b>
<b>II. Mechanical Conventions (ability to spell and use capitalization and punctuation correctly)</b>						
	0	1	2	3	4	5 _____
	<b>Unsatisfactory</b>		<b>Poor</b>	<b>Fair</b>	<b>Good</b>	<b>Excellent</b>
<b>III. Sentence Structure (ability to write effective and well-structured sentences)</b>						
		1	2	3	4	5 _____

Total Score \_\_\_\_\_

# CHAPTER 13 Beginning the Sales Process

## School-to-Career Research Activity

Name of work site: \_\_\_\_\_

Name of work site mentor: \_\_\_\_\_

Title or position of mentor: \_\_\_\_\_

Professional salespeople go through a series of seven steps when helping a customer to make a purchase. These steps include:

1. Approaching the customer
2. Determining needs
3. Presenting the product
4. Handling customer questions and objections
5. Closing the sale
6. Suggestion selling
7. Follow-up activities

Consult with your work site mentor or interview someone involved directly with the selling process at your work site to complete the following investigation on the second step in the selling process—the approach.

After completing this school-to-career investigation, you will be able to

- explain the importance of the sales approach,
- describe the sales approach guidelines used at your work site,
- describe the sales approaches used at your work site, and
- analyze successful selling traits at your work site.

1. Approaching a customer is an important step in the selling process. Why is this step important in industrial and retail settings?

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2. What specific rules, guidelines, or procedures does your company suggest when approaching a customer?

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3. There are three ways to approach retail customers: the service approach, the greeting approach, and the merchandise approach. If your work site is in a retail setting, prepare an approach statement for each of the three methods as suggested by your company. If your work site is in an industrial setting, develop your approach statements according to what you learned in chapters 12 and 13 of *Marketing Essentials*.

3a. Using the service approach, how might a salesperson ask a customer if he or she needs assistance?

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3b. Using the greeting approach, how might a salesperson welcome a customer?

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3c. Using the merchandise approach method, what might a salesperson say about a product that a customer is examining?

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Student \_\_\_\_\_

Date \_\_\_\_\_

Evaluator \_\_\_\_\_

Date of Evaluation \_\_\_\_\_

# CHAPTER 13 Beginning the Sales Process

## Research Investigation Criteria

Learning Objectives:

1. Explain the importance of the sales approach.
2. Describe the sales approach guidelines used at your work site.
3. Describe the sales approaches used at your work site.
4. Analyze successful selling traits at your work site.

	Omitted Answer	Limited Answer, Major Improvement Needed	Acceptable Answer, Some Improvement Needed	Good Answer, Little Improvement Needed	Model Answer, No Improvement Needed	Score
<b>I. Development of Research Topic (amount, depth, and specificity of supporting details)</b>						
<b>Q.1</b> Importance of the Approach	0	1-5	6-7	8-9	10	_____
<b>Q.2</b> Rules, Guidelines for the Approach	0	1-5	6-7	8-9	10	_____
<b>Q.3</b> Approach Methods	0	1-20	21-22-23	24-26-29	30	_____
<b>Q.4</b> Selling Skills and Traits	0	1-12	13-14-15	16-17-18-19	20	_____
<b>Q.5</b> Salesperson Qualities	0	1-12	13-14-15	16-17-18-19	20	_____
	<b>Over 8 Errors</b>	<b>7-8 Errors</b>	<b>5-6 Errors</b>	<b>3-4 Errors</b>	<b>1-2 Errors</b>	<b>Free of Errors</b>
<b>II. Mechanical Conventions (ability to spell and use capitalization and punctuation correctly)</b>						
	0	1	2	3	4	5 _____
	<b>Unsatisfactory</b>		<b>Poor</b>	<b>Fair</b>	<b>Good</b>	<b>Excellent</b>
<b>III. Sentence Structure (ability to write effective and well-structured sentences)</b>						
		1	2	3	4	5 _____

Total Score \_\_\_\_\_

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Student \_\_\_\_\_

Date \_\_\_\_\_

Class \_\_\_\_\_

Teacher \_\_\_\_\_

# CHAPTER 14 Presenting the Product

## School-to-Career Research Activity Part I: Product Presentation

Name of work site: \_\_\_\_\_

Name of work site mentor: \_\_\_\_\_

Title or position of mentor: \_\_\_\_\_

Customer needs are directly related to buying motives (rational, emotional, or a combination). A salesperson must uncover the customer's needs and address them when presenting the product. Consult with your work site mentor or interview someone involved directly with the selling process at your work site to complete the following investigation on product presentation techniques.

After completing this school-to-career investigation, you will be able to

- describe what to say for a product presentation at your work site, and
- analyze product presentation techniques for a selected product at your work site.

1. During the product presentation phase of the sale, you show a product and tell about it. As you are determining the customer's buying motives, you should display products that match the needs you have uncovered. Guidelines for an effective product presentation include:
  - selecting the product(s) and price(s) to show the customer,
  - limiting the number of products to show, and
  - knowing what to say and do during the presentation.

Complete the following simulation activity for a product from your work site.

- 1a. Choose a typical kind of product at your work site.

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- 1b. Choose three different examples of the product to present to the customer. Name and describe the features.

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- 1c. What are the individual prices for your selected items?

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**1d.** Identify at least three features and three benefits for each item. Consult with your work site mentor or use company literature to help you identify the features and benefits.

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**1e.** What is the best way to display your selected product?

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**1f.** What special techniques can a salesperson use to demonstrate your selected product?

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**1g.** If it is impractical to demonstrate your product, what sales aids can you use to emphasize certain selling points during product presentations?

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# CHAPTER 14 Presenting the Product

## Research Investigation Criteria Part 1: Product Presentation

*Learning Objectives:*

1. Describe what to say for a product presentation at your work site.
2. Analyze product presentation techniques for a selected product at your work site.

	Omitted Answer	Limited Answer, Major Improvement Needed	Acceptable Answer, Some Improvement Needed	Good Answer, Little Improvement Needed	Model Answer, No Improvement Needed	Score
<b>I. Development of Research Topic (amount, depth, and specificity of supporting details)</b>						
<b>Q.1a</b> Product Selection	0	1-12	13-14-15	16-17-18-19	20	_____
<b>Q.1d</b> Product Features/ Benefits	0	1-20	21-22-23	24-26-29	30	_____
<b>Q.1e</b> Product Handling	0	1-5	6-7	8-9	10	_____
<b>Q.1f</b> Product Demonstration	0	1-5	6-7	8-9	10	_____
<b>Q.1g</b> Product Sales Aids	0	1-5	6-7	8-9	10	_____
<b>Q.2</b> Customer Involvement	0	1-5	6-7	8-9	10	_____
	<b>Over 8 Errors</b>	<b>7-8 Errors</b>	<b>5-6 Errors</b>	<b>3-4 Errors</b>	<b>1-2 Errors</b>	<b>Free of Errors</b>
<b>II. Mechanical Conventions (ability to spell and use capitalization and punctuation correctly)</b>						
	0	1	2	3	4	5 _____
		<b>Unsatisfactory</b>	<b>Poor</b>	<b>Fair</b>	<b>Good</b>	<b>Excellent</b>
<b>III. Sentence Structure (ability to write effective and well-structured sentences)</b>						
		1	2	3	4	5 _____

Total Score \_\_\_\_\_

Student \_\_\_\_\_

Date \_\_\_\_\_

Class \_\_\_\_\_

Teacher \_\_\_\_\_

# CHAPTER 14 Presenting the Product

## School-to-Career Research Activity Part II: Objections

Name of work site: \_\_\_\_\_

Name of work site mentor: \_\_\_\_\_

Title or position of mentor: \_\_\_\_\_

Objections are concerns, hesitations, doubts, or other honest reasons that prevent a customer from making a purchase. Excuses are insincere reasons that a customer gives for not buying a product or not seeing a salesperson. Marketers must be able to sort out objections and excuses when making a sale. Consult with your work site mentor or interview a salesperson at your work site to complete the following investigation on handling customer questions and objections.

After completing this school-to-career investigation, you will be able to

- identify the nature and importance of objections used at your work site,
- explain methods of handling customer objections at your work site, and
- describe methods of handling objections used at your work site.

1. Most common objections are based upon the five buying decisions of need, product, source, price, and time. Find out from your mentor or a salesperson at your work site which of these common objections is used most frequently. Why is one objection more frequent than the others?

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2. Ask your work site mentor or sales representative what is the most frequently heard objection and how he or she responds to it. Based on what you have learned from Chapter 14 of *Marketing Essentials*, do you think that the statement is appropriate? Why or why not?

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3. Salespeople use specialized methods to learn more about a customer’s objections. For the following situations, provide an example of a sales dialogue at your work site that demonstrates each of the following methods for handling objections. If necessary, ask your mentor for assistance or review the examples shown in Chapter 14, Section 2, of *Marketing Essentials*.
- 3a. Salespeople use the *substitution* method to learn more about a customer’s needs. Provide an example of a sales dialogue at your work site that demonstrates the substitution method.

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- 3b. The *boomerang method* of handling customer objections returns the objection to the customer. Provide an example of a sales dialogue at your work site that demonstrates the boomerang method.

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- 3c. The *superior point method* acknowledges a customer’s objections and offsets them with other features and benefits. Provide an example of a sales dialogue at your work site that demonstrates the superior point method.

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**3d.** Salespeople use the *direct denial method* when they provide proof and accurate information to counter an objection. Provide an example of a sales dialogue at your work site that demonstrates the direct denial method.

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**3e.** Salespeople use the *demonstration method* when they illustrate product or service features in response to objections. Provide an example of a sales dialogue at your work site utilizing the demonstration method.

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**3f.** Salespeople may respond to a customer’s objection by citing a third party’s testimonial about a product. Provide an example of a sales dialogue at your work site that demonstrates the *third party method*.

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# CHAPTER 14 Presenting the Product

## Research Investigation Criteria Part 2: Objections

*Learning Objectives:*

1. Identify the nature and importance of objections used at your work site.
2. Explain methods of handling customer objections at your work site.
3. Describe methods of handling objections used at your work site.

	Omitted Answer	Limited Answer, Major Improvement Needed	Acceptable Answer, Some Improvement Needed	Good Answer, Little Improvement Needed	Model Answer, No Improvement Needed	Score
<b>I. Development of Research Topic (amount, depth, and specificity of supporting details)</b>						
<b>Q.1</b> Common Objections	0	1-8	9-10-11	12-13-14	15	_____
<b>Q.2</b> Responses to Objections	0	1-8	9-10-11	12-13-14	15	_____
<b>Q.3a</b> Substitution Method	0	1-5	6-7	8-9	10	_____
<b>Q.3b</b> Boomerang Method	0	1-5	6-7	8-9	10	_____
<b>Q.3b</b> Superior Point Method	0	1-5	6-7	8-9	10	_____
<b>Q.3c</b> Direct Denial Method	0	1-5	6-7	8-9	10	_____
<b>Q.3d</b> Demonstration Method	0	1-5	6-7	8-9	10	_____
<b>Q.3f</b> Third Party Method	0	1-5	6-7	8-9	10	_____
	<b>Over 8 Errors</b>	<b>7-8 Errors</b>	<b>5-6 Errors</b>	<b>3-4 Errors</b>	<b>1-2 Errors</b>	<b>Free of Errors</b>
<b>II. Mechanical Conventions (ability to spell and use capitalization and punctuation correctly)</b>						
	0	1	2	3	4	5 _____
	<b>Unsatisfactory</b>		<b>Poor</b>	<b>Fair</b>	<b>Good</b>	<b>Excellent</b>
<b>III. Sentence Structure (ability to write effective and well-structured sentences)</b>						
		1	2	3	4	5 _____

Total Score \_\_\_\_\_

Student

Date

Class

Teacher

# CHAPTER 15 Closing the Sale

## School-to-Career Research Activity

Name of work site: \_\_\_\_\_

Name of work site mentor: \_\_\_\_\_

Title or position of mentor: \_\_\_\_\_

An effective salesperson recognizes facial expressions, actions, comments, and other signals that indicate a readiness to buy. When the salesperson sees these buying signals, he or she commences to close the sale. Consult with your work site mentor or refer to company literature to complete the following investigation concerning closing sales, suggestion selling and follow-up activities with customers.

After completing this school-to-career investigation, you will be able to

- explain methods of closing the sale used at your work site,
- describe suggestion selling methods used at your work site, and
- summarize after-sale activities used at your work site.

1. Specialized methods of closing a sale include the *which* close, *standing room only* close, *direct* close, and *service* close. For each method, develop a closing statement appropriate for your work site.

1a. The *which* close encourages a customer to make a decision between two items. Create a *which* close statement for two related products handled at your work site.

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1b. The *standing room only* close emphasizes a product's limited supply or temporary sales price. Create a *standing room only* closing statement for a product sold at your work site.

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**1c.** The *direct* close entails directly asking for a sale. Create a direct close statement for your work site.

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**1d.** The *service* close emphasizes gift wrapping, return policies, special sale arrangements, warranties, guarantees, and other forms of service. Create a service close statement for your work site.

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**2.** After completing a sale, a salesperson may suggestion sell additional goods or services such as related merchandise, larger quantities, or other special sales opportunities. Ask your work site mentor or a salesperson at your work site to provide an example of each of the following methods of suggestion selling.

**2a.** Provide an example of related merchandise that could be sold with a product or service at your work site.

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**2b.** Provide an example of offering larger quantities of a product or service at your work site.

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**2c.** Provide an example of a special sale arrangement for a product or service at your work site.

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2d. What are the benefits of suggestion selling?

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3. Does your work site provide any special incentives to encourage employees to suggestion sell?

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4. What after-sale arrangements does your company provide to customers?

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5. According to your work site mentor or manager, what is “customer relationship management”? How does your work site use relationship management? Why is relationship management important?

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Student

Date

Evaluator

Date of Evaluation

# CHAPTER 15 Closing the Sale

## Research Investigation Criteria

*Learning Objectives:*

1. Explain methods of closing the sale used at your work site.
2. Describe suggestion selling methods used at your work site.
3. Summarize after-sale activities used at your work site.

	Omitted Answer	Limited Answer, Major Improvement Needed	Acceptable Answer, Some Improvement Needed	Good Answer, Little Improvement Needed	Model Answer, No Improvement Needed	Score
<b>I. Development of Research Topic (amount, depth, and specificity of supporting details)</b>						
<b>Q.1</b> Closing Methods	0	1-20	21-22-23	24-26-29	30	_____
<b>Q.2</b> Suggestion Selling	0	1-12	13-14-15	16-17-18-19	20	_____
<b>Q.3</b> Special Selling Incentives	0	1-5	6-7	8-9	10	_____
<b>Q.4</b> After-Sale Arrangements	0	1-8	9-10-11	12-13-14	15	_____
<b>Q.5</b> Relationship management	0	1-8	9-10-11	12-13-14	15	_____
	<b>Over 8 Errors</b>	<b>7-8 Errors</b>	<b>5-6 Errors</b>	<b>3-4 Errors</b>	<b>1-2 Errors</b>	<b>Free of Errors</b>
<b>II. Mechanical Conventions (ability to spell and use capitalization and punctuation correctly)</b>						
	0	1	2	3	4	5 _____
		<b>Unsatisfactory</b>	<b>Poor</b>	<b>Fair</b>	<b>Good</b>	<b>Excellent</b>
<b>III. Sentence Structure (ability to write effective and well-structured sentences)</b>						
		1	2	3	4	5 _____

Total Score \_\_\_\_\_

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Student \_\_\_\_\_

Date \_\_\_\_\_

Class \_\_\_\_\_

Teacher \_\_\_\_\_

# CHAPTER 16 Using Math in Sales

## School-to-Career Research Activity

Name of work site: \_\_\_\_\_

Name of work site mentor: \_\_\_\_\_

Title or position of mentor: \_\_\_\_\_

All sales, whether cash, check, debit, or credit, end with the recording of the transaction and the presenting of proof of payment to the customer. Consult with your work site mentor or use available company literature to complete the following investigation of sales transactions at your work site.

After completing this school-to-career investigation, you will be able to

- explain point-of-sale (POS) procedures used at your work site, and
- describe the types of sales transactions used at your work site.

1. What is the main type of cash register or point-of-sale terminal used at your work site? What important functions do cash registers and point-of-sale terminals perform?

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2. Understanding point-of-sale (POS) procedures is essential for marketing employees. If necessary, interview someone who operates a cash register or point-of-sale terminal to answer the following questions about your company's procedures.

2a. Who is responsible for opening or closing the point-of-sale equipment at your work site?

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2b. What is the amount of your opening cash fund? What procedures are used to open and close the POS equipment at your work site?

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2c. What procedures are followed if a shortage or overage occurs at cash register closing?

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2d. What procedures are followed if a mistake or error occurs during a point-of-sale operation at your work site? Who is responsible for correcting errors?

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2e. What information is found on a sales receipt generated by a point-of-sale terminal?

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3. Describe the procedure for making change at your work site. How does your work site's procedure compare to the steps identified in Chapter 16 in your textbook? Which method of making change do you think is preferred by customers?

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4. In a cash sale, the customer pays by cash, personal check, or traveler's check. In a debit card sale, the customer uses an ATM card. Credit card sales involve the use of bank or company credit cards. What methods of payment are accepted at your work site?

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5. Some companies allow various types of sales transactions as additional customer services.
- 5a. Does your work site provide for layaway or will-call sales? If so, how much deposit is required, what is the required periodic payment, and how long can the customer pay for the item(s)? If not, why not?

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- 5b. Are on-approval sales used at your work site? Why or why not?

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- 5c. Are COD sales used at your work site? Why or why not?

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- 5d. What are the procedures for handling returns, exchanges, and allowances at your work site?

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Student

Date

Evaluator

Date of Evaluation

# CHAPTER 16 Using Math in Sales

## Research Investigation Criteria

*Learning Objectives:*

1. Explain point-of-sale procedures used at your work site.
2. Describe the types of sales transactions used at your work site.

	Omitted Answer	Limited Answer, Major Improvement Needed	Acceptable Answer, Some Improvement Needed	Good Answer, Little Improvement Needed	Model Answer, No Improvement Needed	Score
<b>I. Development of Research Topic (amount, depth, and specificity of supporting details)</b>						
<b>Q.1</b> Type & Function of POS Terminal	0	1-8	9-10-11	12-13-14	15	_____
<b>Q.2</b> Cash Register Procedures	0	1-20	21-22-23	24-26-29	30	_____
<b>Q.3</b> Change-making Procedures	0	1-8	9-10-11	12-13-14	15	_____
<b>Q.4</b> Methods of Payment	0	1-5	6-7	8-9	10	_____
<b>Q.5</b> Customer Services	0	1-12	13-14-15	16-17-18-19	20	_____
	<b>Over 8 Errors</b>	<b>7-8 Errors</b>	<b>5-6 Errors</b>	<b>3-4 Errors</b>	<b>1-2 Errors</b>	<b>Free of Errors</b>
<b>II. Mechanical Conventions (ability to spell and use capitalization and punctuation correctly)</b>						
	0	1	2	3	4	5 _____
	<b>Unsatisfactory</b>		<b>Poor</b>	<b>Fair</b>	<b>Good</b>	<b>Excellent</b>
<b>III. Sentence Structure (ability to write effective and well-structured sentences)</b>						
		1	2	3	4	5 _____

Total Score \_\_\_\_\_

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Student \_\_\_\_\_

Date \_\_\_\_\_

Class \_\_\_\_\_

Teacher \_\_\_\_\_

# CHAPTER 17 Promotional Concepts and Strategies

## School-to-Career Research Activity Part I: Promotional Mix

Name of work site: \_\_\_\_\_

Name of work site mentor: \_\_\_\_\_

Title or position of mentor: \_\_\_\_\_

Businesses and organizations use promotion to inform, persuade, and remind people about their products. They also use promotion to create or improve their public image. Personal selling, advertising, direct marketing, public relations, and sales promotion make up the five basic types of promotion. Their combination is called a promotional mix. Consult with your work site mentor to learn more about the promotional mix used at your company.

After completing this school-to-career investigation, you will be able to

- explain the characteristics of personal selling and advertising at your work site,
- describe the characteristics of public relations and publicity at your work site, and
- describe how the promotional mix is determined at your work site.

1. Advertising, direct marketing, publicity, and sales promotion are forms of nonpersonal selling—communicating with customers other than through direct face-to-face contact. The remaining way for a business to communicate with its customers is through personal selling—making an oral sales presentation to one or more potential buyers. What type of training does your company provide for its selling staff?

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2. Advertising involves the nonpersonal presentation and promotion of ideas, goods, or services paid for by an identified sponsor. How does your business advertise its products and services?

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**3.** Trade promotions are designed to expose wholesalers and retailers to a product. At trade shows, businesses introduce new products, encourage sales of existing products, and gain continued company support and product support.

**3a.** Does your business participate in trade shows? If so, who attends them?

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**3b.** Sales incentives are given to managers and employees who successfully meet or exceed their company's sales quotas for a particular product or line of products. Are sales incentives provided to managers and employees in your company? If so, what kinds? If not, why doesn't the company offer them?

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**4.** Public relations and publicity involves creating a demand for a business product through news presentations in print, radio, television, or electronic media.

**4a.** What kind of public relations efforts does your company use?

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**4b.** Publicity is used by public relations specialists to place newsworthy information about a business in the media. It differs from advertising because it is free. In the past year has the publicity your company has received been positive or negative? Why?

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5. Finding the right promotional mix is crucial to achieve promotional goals.
- 5a.** What individual or department determines the promotional mix used in your company?

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- 5b.** Give an example of how your company coordinates promotional elements.

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Student

Date

Evaluator

Date of Evaluation

# CHAPTER 17 Promotional Concepts and Strategies

## Research Investigation Criteria Part 1: Promotional Mix

Learning Objectives:

1. Explain the characteristics of selling and advertising at your work site.
2. Describe the characteristics of public relations and publicity at your work site.
3. Describe how the promotional mix is determined at your work site.

		Omitted Answer	Limited Answer, Major Improvement Needed	Acceptable Answer, Some Improvement Needed	Good Answer, Little Improvement Needed	Model Answer, No Improvement Needed	Score
<b>I. Development of Research Topic (amount, depth, and specificity of supporting details)</b>							
<b>Q.1</b>	Selling	0	1-11	12-13-14	15-16-17	18	_____
<b>Q.2</b>	Advertising	0	1-11	12-13-14	15-16-17	18	_____
<b>Q.3</b>	Sales Promotion	0	1-11	12-13-14	15-16-17	18	_____
<b>Q.4</b>	Public Relations	0	1-11	12-13-14	15-16-17	18	_____
<b>Q.5</b>	Promotional Mix	0	1-11	12-13-14	15-16-17	18	_____
		<b>Over 8 Errors</b>	<b>7-8 Errors</b>	<b>5-6 Errors</b>	<b>3-4 Errors</b>	<b>1-2 Errors</b>	<b>Free of Errors</b>
<b>II. Mechanical Conventions (ability to spell and use capitalization and punctuation correctly)</b>							
		0	1	2	3	4	5 _____
		<b>Unsatisfactory</b>		<b>Poor</b>	<b>Fair</b>	<b>Good</b>	<b>Excellent</b>
<b>III. Sentence Structure (ability to write effective and well-structured sentences)</b>							
		1		2	3	4	5 _____

Total Score \_\_\_\_\_

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Student

Date

Class

Teacher

# CHAPTER 17 Promotional Concepts and Strategies

## School-to-Career Research Activity Part II: Public Relations

Name of work site: \_\_\_\_\_

Name of work site mentor: \_\_\_\_\_

Title or position of mentor: \_\_\_\_\_

Because publicity is unpaid, many people see it as more credible than advertising. Businesses generate positive publicity by engaging in public relations activities. If necessary, consult with your work site mentor to answer the following questions related to public relations and publicity at your company.

After completing this school-to-career investigation, you will be able to

- describe the nature and scope of public relations at your work site, and
- describe the role of public relations and publicity in your company’s promotional mix.

1. Public relations includes all activities designed to create goodwill toward a business.

1a. Who is responsible for public relations in your business? What are some of the duties of your company’s public relations specialist?

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1b. What activities have been conducted at your work site to create good publicity? If none have been conducted, what are some ways your company can create a news event and gain positive publicity?

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2. Different public relations activities are geared toward different audiences. Businesses are concerned with their employees, customers, and the general public.
- 2a. Successful businesses have loyal and motivated employees. How does your business conduct activities for employees to foster positive attitudes?

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- 2b. Good employee relations are fostered by clearly defined job titles and job descriptions. What is your official job title and job description?

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- 2c. What benefits are offered by your business to full-time employees?

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3. Good communication between employees and customers is vital in promoting a favorable business image. Many businesses provide special services and amenities to maintain good customer relations.

- 3a. Does your business allow customers to pay by check, debit card, credit card, layaway, or a company charge account? Briefly describe each acceptable method of payment.

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**3b.** Does your business offer delivery service to your customers? How are those charges, if applicable, calculated?

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**3c.** What other customer services does your business provide for its customers?

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**4.** Community relations include the activities that businesses engage in to acquire or maintain the respect of the community. How does your business participate in the civic, social, and cultural life of your community?

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**5.** Unlike advertising, direct marketing, personal selling, and sales promotion, public relations and publicity are not designed to directly increase sales. Interview your work site mentor, asking his or her opinion about the real value of public relations and publicity to your work site's promotional mix. What are the benefits of public relations and publicity for your business?

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# CHAPTER 17 Promotional Concepts and Strategies

## Research Investigation Criteria Part 2: Public Relations

### Learning Objectives:

1. Describe the nature and scope of public relations at your work site.
2. Describe the role of public relations and publicity in your company's promotional mix.

	Omitted Answer	Limited Answer, Major Improvement Needed	Acceptable Answer, Some Improvement Needed	Good Answer, Little Improvement Needed	Model Answer, No Improvement Needed	Score		
<b>I. Development of Research Topic (amount, depth, and specificity of supporting details)</b>								
Q.1	Public Relations	0	1-5	6-7	8-9	10	_____	
Q.2	Public Relations Activities	0	1-16	17-18-19	20-22-24	25	_____	
Q.3	Customer Services	0	1-16	17-18-19	20-22-24	25	_____	
Q.4	Community Relations	0	1-12	13-14-15	16-17-18-19	20	_____	
Q.5	Value of Public Relations	0	1-5	6-7	8-9	10	_____	
		<b>Over 8 Errors</b>	<b>7-8 Errors</b>	<b>5-6 Errors</b>	<b>3-4 Errors</b>	<b>1-2 Errors</b>	<b>Free of Errors</b>	
<b>II. Mechanical Conventions (ability to spell and use capitalization and punctuation correctly)</b>								
		0	1	2	3	4	5	_____
		<b>Unsatisfactory</b>		<b>Poor</b>	<b>Fair</b>	<b>Good</b>	<b>Excellent</b>	
<b>III. Sentence Structure (ability to write effective and well-structured sentences)</b>								
			1	2	3	4	5	_____

Total Score \_\_\_\_\_

Student \_\_\_\_\_

Date \_\_\_\_\_

Class \_\_\_\_\_

Teacher \_\_\_\_\_

# CHAPTER 18 Visual Merchandising and Display

## School-to-Career Research Activity

Name of work site: \_\_\_\_\_

Name of work site mentor: \_\_\_\_\_

Title or position of mentor: \_\_\_\_\_

The effective use of visual merchandising and display allow businesses to convey distinct, clear, and consistent images for their customers. Visual merchandising includes the coordination of physical elements in a place of business to project the right image to customers. Display entails the visual and artistic presentation of a product to a target group of customers. You may consult with your work site mentor to answer the following questions.

After completing this school-to-career investigation, you will be able to

- explain how exterior and interior features contribute to your company’s image,
- list the various kinds of displays used at your work site, and
- summarize the proper procedures used at your work site to maintain and dismantle displays.

1. The total exterior of a business is known as the storefront. What kind of image does your business want to project by the appearance of its storefront? How does your business project its image through appearance?

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2. Store layout refers to how a store is laid out to facilitate sales and serve customer needs. How does your business allocate floor space for sales, merchandise, and employee and customer use?

- 2a. What percentage of your business’s layout is assigned to selling?

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- 2b. What percentage of your business’s layout is assigned to merchandise space? Is the space adequate, in your opinion? Why or why not?

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**2c.** Describe the amount and kind of space available for employee use.

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**2d.** What kind of space is available for customer convenience?

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**3.** A business's image can be affected by lighting, colors, store fixtures, and floor and wall coverings.

**3a.** How are the walls and floor covered?

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**3b.** How is lighting used at your work site?

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**3c.** What is the predominant color scheme used at your work site?

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**3d.** What type of fixtures are used at your work site?

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**3e.** What image does the combination of the above elements project to customers?

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**4.** There are five types of interior displays: closed displays, open displays, architectural displays, point-of-purchase displays, and store decorations. What types of interior displays does your company use? Is there a predominant type of display?

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**5.** Once a display has been constructed, it needs to be maintained. The merchandise displayed must be kept clean and attractive. What procedures are used at your work site to maintain displays and the merchandise on display?

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Student

Date

Evaluator

Date of Evaluation

# CHAPTER 18 Visual Merchandising and Display

## Research Investigation Criteria

*Learning Objectives:*

1. Explain how exterior and interior features contribute to your company's image.
2. List the various kinds of displays used at your work site.
3. Summarize the proper procedures used at your work site to maintain and dismantle displays.

	Omitted Answer	Limited Answer, Major Improvement Needed	Acceptable Answer, Some Improvement Needed	Good Answer, Little Improvement Needed	Model Answer, No Improvement Needed	Score
<b>I. Development of Research Topic (amount, depth, and specificity of supporting details)</b>						
<b>Q.1</b> Storefront	0	1-5	6-7	8-9	10	_____
<b>Q.2</b> Store Layout	0	1-12	13-14-15	16-17-18-19	20	_____
<b>Q.3</b> Store Interior	0	1-20	21-22-23	24-26-29	30	_____
<b>Q.4</b> Interior Displays	0	1-8	9-10-11	12-13-14	15	_____
<b>Q.5</b> Display Maintenance	0	1-8	9-10-11	12-13-14	15	_____
	<b>Over 8 Errors</b>	<b>7-8 Errors</b>	<b>5-6 Errors</b>	<b>3-4 Errors</b>	<b>1-2 Errors</b>	<b>Free of Errors</b>
<b>II. Mechanical Conventions (ability to spell and use capitalization and punctuation correctly)</b>						
	0	1	2	3	4	5 _____
		<b>Unsatisfactory</b>	<b>Poor</b>	<b>Fair</b>	<b>Good</b>	<b>Excellent</b>
<b>III. Sentence Structure (ability to write effective and well-structured sentences)</b>						
		1	2	3	4	5 _____

Total Score \_\_\_\_\_

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Student \_\_\_\_\_

Date \_\_\_\_\_

Class \_\_\_\_\_

Teacher \_\_\_\_\_

# CHAPTER 19 Advertising

## School-to-Career Research Activity

Name of work site: \_\_\_\_\_

Name of work site mentor: \_\_\_\_\_

Title or position of mentor: \_\_\_\_\_

The main purpose of advertising is to promote ideas, goods, or services by an identified sponsor. Consult with your work site mentor to learn more about advertising media used at your company.

After completing this school-to-career investigation, you will be able to

- identify the main kinds of advertising used at your work site, and
- identify the various types of advertising (print, electronic, and broadcast) used at your work site.

1. Promotional advertising is designed to increase sales of a business or organization. Institutional advertising is designed to create a favorable impression and goodwill.

1a. Does your work site use promotional advertising, institutional advertising, or a combination of the two? Provide examples to justify your response.

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1b. Who determines what products or services to advertise in your business? Are those decisions made by one person or by a committee?

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2. Print media include newspapers, magazines, signs, billboards, direct mail, and anything else printed.
- 2a. Does your business advertise in any daily, weekly, or special shopper newspapers? If so, identify the newspaper or newspapers.

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- 2b. If your business advertises in a newspaper, what section does the advertisement usually go in? (sports, classifieds, front page, etc.) If your business has a preferred location for its newspaper ads, explain the reasoning behind its preference.

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3. Does your business perform direct mail advertising? If so, what type of direct mail advertising (print or electronic) is sent to potential customers? How are the mailing lists developed?

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4. Does your work site use nonstandardized or standardized outdoor signs? Why?

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5. Directory advertising may be placed in residential or business phone books.

5a. Does your business advertise in the white pages or Yellow Pages directories?

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5b. Under what heading or headings may your business be found in the Yellow Pages directory index?

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6. Many businesses use broadcast and electronic media (television, radio, the Internet) to sell their products.

6a. Does your business advertise on the Internet? If yes, identify the type of online advertising it uses. If no, explain the rationale.

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6b. Does your business advertise on the radio or television? If so, identify the stations on which the advertisements appear. Explain the rationale behind the selected stations.

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Student

Date

Evaluator

Date of Evaluation

# CHAPTER 19 Advertising

## Research Investigation Criteria

*Learning Objectives:*

1. Identify the main kinds of advertising used at your work site.
2. Identify the various types of advertising (print, electronic, and broadcast) used at your work site.

	Omitted Answer	Limited Answer, Major Improvement Needed	Acceptable Answer, Some Improvement Needed	Good Answer, Little Improvement Needed	Model Answer, No Improvement Needed	Score
<b>I. Development of Research Topic (amount, depth, and specificity of supporting details)</b>						
<b>Q.1</b> Promotional/ Institutional Advertising	0	1-12	13-14-15	16-17-18-19	20	_____
<b>Q.2</b> Newspaper Advertising	0	1-12	13-14-15	16-17-18-19	20	_____
<b>Q.3</b> Direct Mail Advertising	0	1-5	6-7	8-9	10	_____
<b>Q.4</b> Signage	0	1-8	9-10-11	12-13-14	15	_____
<b>Q.5</b> Directory Advertising	0	1-5	6-7	8-9	10	_____
<b>Q.6</b> Electronic and Broadcast	0	1-8	9-10-11	12-13-14	15	_____
	<b>Over 8 Errors</b>	<b>7-8 Errors</b>	<b>5-6 Errors</b>	<b>3-4 Errors</b>	<b>1-2 Errors</b>	<b>Free of Errors</b>
<b>II. Mechanical Conventions (ability to spell and use capitalization and punctuation correctly)</b>						
	0	1	2	3	4	5 _____
	<b>Unsatisfactory</b>		<b>Poor</b>	<b>Fair</b>	<b>Good</b>	<b>Excellent</b>
<b>III. Sentence Structure (ability to write effective and well-structured sentences)</b>						
		1	2	3	4	5 _____

Total Score \_\_\_\_\_

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# CHAPTER 20 Print Advertisements

## School-to-Career Research Activity

Name of work site: \_\_\_\_\_

Name of work site mentor: \_\_\_\_\_

Title or position of mentor: \_\_\_\_\_

Deciding which print media to use and how much to spend are important steps in advertising. An entire department may be devoted to such choices, or an advertising agency may be consulted. Consult with your work site mentor and interview an employee at your company who is responsible for developing and placing print ads.

After completing this school-to-career investigation, you will be able to

- describe how print ads are developed at your work site,
- identify the major elements (headline, copy, illustrations, and signature) used in your print advertisements, and
- explain how advertising proofs are checked at your work site.

**1.** The financial resources of a business determine whether a business creates an ad itself or uses an advertising agency.

**1a.** Who is responsible for developing print ads for your business? Are ads developed by an individual or a team?

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**1b.** Cooperative advertising is a cost-sharing arrangement whereby advertising is paid for by both a supplier and a local advertiser. Does your business participate in a cooperative advertising arrangement? If so, identify a supplier (typically, a manufacturer) that participates and what kinds of promotional materials are supplied.

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2. Select a recent print advertisement for your business that has run in a local newspaper or magazine. If your business does not run print ads, select any print ad and answer the following questions.

2a. A headline uses lettering, slogans, and sayings to get the readers' attention, arouse their interest, and lead them to read the rest of the ad. What is the headline in your print advertisement? How does it appeal to the reader?

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2b. The copy is the selling message in a written advertisement. What is the copy for your business's advertisement? What key words were used to establish contact with the reader? Does the copy appeal to consumers' needs?

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2c. Print advertisements often include photographs, drawings, or other graphic elements. Describe the illustration used in your advertisement. What image does it project?

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3. The signature or logotype (logo) is a business's distinctive identification symbol. What is your business's logo? What image does it project?

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4. Identify your business's name, location, telephone number, Web site address, and business hours as they appear in its logo.

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5. Does your business have a slogan? If so, what is its slogan? What image does the slogan project?

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6. Advertising proofs show exactly how a print advertisement will appear when printed. Who checks advertising proofs for your company? How should print advertisements be evaluated?

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# CHAPTER 20 Print Advertisements

## Research Investigation Criteria

### Learning Objectives:

1. Describe how print ads are developed at your work site.
2. Identify the major elements (headline, copy, illustrations, and signature) used in your print advertisements.
3. Explain how advertising proofs are checked at your work site.

	Omitted Answer	Limited Answer, Major Improvement Needed	Acceptable Answer, Some Improvement Needed	Good Answer, Little Improvement Needed	Model Answer, No Improvement Needed	Score
<b>I. Development of Research Topic (amount, depth, and specificity of supporting details)</b>						
<b>Q.1</b> Responsibility for Advertising	0	1-8	9-10-11	12-13-14	15	_____
<b>Q.2</b> Print Advertising	0	1-28	28-29-31	32-35-39	40	_____
<b>Q.3</b> Signature	0	1-2	3	4	5	_____
<b>Q.4</b> Contact Information	0	1-2	3	4	5	_____
<b>Q.5</b> Slogan	0	1-2	3	4	5	_____
<b>Q.6</b> Advertising Proofs	0	1-12	13-14-15	16-17-18-19	20	_____
	<b>Over 8 Errors</b>	<b>7-8 Errors</b>	<b>5-6 Errors</b>	<b>3-4 Errors</b>	<b>1-2 Errors</b>	<b>Free of Errors</b>
<b>II. Mechanical Conventions (ability to spell and use capitalization and punctuation correctly)</b>						
	0	1	2	3	4	5 _____
	<b>Unsatisfactory</b>		<b>Poor</b>	<b>Fair</b>	<b>Good</b>	<b>Excellent</b>
<b>III. Sentence Structure (ability to write effective and well-structured sentences)</b>						
		1	2	3	4	5 _____

Total Score \_\_\_\_\_

Student \_\_\_\_\_

Date \_\_\_\_\_

Class \_\_\_\_\_

Teacher \_\_\_\_\_

# CHAPTER 21 Channels of Distribution

## School-to-Career Research Activity

Name of work site: \_\_\_\_\_

Name of work site mentor: \_\_\_\_\_

Title or position of mentor: \_\_\_\_\_

Channels of distribution include producers, manufacturers, and final users of a product. When the product is purchased for use in a business, the final user is classified as an industrial user. When the product is purchased for personal use, the final user is classified as a consumer. Consult with your work site mentor to answer the following questions relating to channels of distribution.

After completing this school-to-career investigation, you will be able to

- define the channel(s) of distribution for your company,
- identify the key considerations in distribution planning for your company, and
- describe the level of distribution intensity for your work site.

1. Apart from producers and manufacturers, there are other channel members called intermediaries. Intermediaries move products from the producer to the final user. Would you classify your work site as a merchant intermediary or an agent intermediary? Why?

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2. Channels of distribution can be classified as direct or indirect. Direct distribution occurs when the goods or services are sold from the producer directly to the final user, while indirect distribution involves one or more intermediaries.

2a. What kind of distribution channel (direct or indirect) is used for your work site?

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2b. Which distribution channel explained in *Marketing Essentials* Chapter 21 best represents the way goods and services move from the producer to the final user in your business? Why?

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**2c.** Select one product sold at your work site and identify all the channel members involved with getting the product to your business location, starting with its manufacturer.

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**2d.** Who is the final user in your business?

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**3.** Planning distribution involves a product’s physical movement and transfer of ownership from producer to consumer. Major considerations include the use of one or multiple channels, control, costs, and intensity of distribution.

**3a.** Does your business use one channel or multiple channels of distribution? Why?

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**3b.** If your business uses multiple channels, who are some of its industrial and retail consumers? If not, list some industrial or retail consumers who might be interested in your business’s product or service.

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- 4. How does the concept of control versus costs affect distribution planning for manufacturers and producers?

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- 5. Intensity of distribution relates to how products are sold through the distribution channel. Selective distribution allows a limited number of outlets in a geographical area to sell a product. Exclusive distribution involves protected territories for distribution of a product.

- 5a. Would you consider your work site to have selective or exclusive distribution for your geographical area? Why?

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- 5b. Why would a dealer want exclusive distribution for a product?

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Student

Date

Evaluator

Date of Evaluation

# CHAPTER 21 Channels of Distribution

## Research Investigation Criteria

Learning Objectives:

1. Define the channel(s) of distribution for your company.
2. Identify the key considerations in distribution planning for your company.
3. Describe the level of distribution intensity for your work site.

	Omitted Answer	Limited Answer, Major Improvement Needed	Acceptable Answer, Some Improvement Needed	Good Answer, Little Improvement Needed	Model Answer, No Improvement Needed	Score
<b>I. Development of Research Topic (amount, depth, and specificity of supporting details)</b>						
<b>Q.1</b> Channel Intermediaries	0	1-8	9-10-11	12-13-14	15	_____
<b>Q.2</b> Channels of Distribution	0	1-12	13-14-15	16-17-18-19	20	_____
<b>Q.3</b> Distribution Planning	0	1-12	13-14-15	16-17-18-19	20	_____
<b>Q.4</b> Control versus Costs	0	1-8	9-10-11	12-13-14	15	_____
<b>Q.5</b> Intensity of Distribution	0	1-12	13-14-15	16-17-18-19	20	_____
	Over 8 Errors	7-8 Errors	5-6 Errors	3-4 Errors	1-2 Errors	Free of Errors
<b>II. Mechanical Conventions (ability to spell and use capitalization and punctuation correctly)</b>						
	0	1	2	3	4	5 _____
	Unsatisfactory	Poor	Fair	Good	Excellent	
<b>III. Sentence Structure (ability to write effective and well-structured sentences)</b>						
		1	2	3	4	5 _____

Total Score \_\_\_\_\_

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# CHAPTER 22 Physical Distribution

## School-to-Career Research Activity

Name of work site: \_\_\_\_\_

Name of work site mentor: \_\_\_\_\_

Title or position of mentor: \_\_\_\_\_

Physical distribution or logistics involves transporting, storing, order processing, stock handling, and inventory control of materials and products. This investigation will focus on the activities involved with physical distribution. If necessary, consult with your work site mentor to answer the following questions relating to physical distribution at your work site and in your company.

After completing this school-to-career investigation, you will be able to

- explain the nature and scope of physical distribution at your work site,
- identify the transportation systems used for the distribution of products at your work site, and
- describe the storage needs of your company.

**1.** Manufacturers, wholesalers, and retailers all use some type of transportation to move goods from the seller to buyers. Goods are moved by six major transportation forms: motor carriers, railroads, marine shipping, pipelines, air carriers, and transportation service companies.

**1a.** Does your work site receive goods by motor carrier? If so, explain the type of products typically received by motor carriers.

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**1b.** Does your work site receive goods by railroad? If so, what products are typically received by rail?

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**1c.** Does your work site receive goods by marine shipping? If so, what products are typically received by marine shipping?

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**1d.** Does your work site receive goods by pipelines? If so, explain what products are typically received by using pipelines.

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**1e.** Does your work site receive goods by air carriers? If so, what products are typically received by using air carriers?

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**1f.** Does your work site receive goods by transportation service companies? If so, what products are typically received by using transportation service companies?

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**2.** Motor carriers (trucks) handle nearly 80 percent of all shipments weighing less than 1,000 pounds. Most businesses use trucks for local deliveries. Does your company use trucks to ship goods and services? If so, what types of products are shipped by your company using trucks? If not, explain the reasons for not using trucks.

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**3.** The four types of motor carriers are common carriers, contract carriers, private carriers, and exempt carriers.

**3a.** Does your work site use common carriers to ship products? If so, which carriers?

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**3b.** Does your work site use contract carriers to ship products? If so, which carriers?

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**3c.** Does your work site use private carriers to ship products? If so, which carriers?

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**3d.** How frequently does your work site use an exempt carrier to ship products?

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**4.** There are four kinds of transportation service companies: the U.S. Postal Service, express delivery services, bus package carriers, and freight forwarders.

**4a.** What products does your work site typically ship using the U.S. Postal Service?

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**4b.** Does your work site use express carriers to ship products? If so, what type of products?

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**4c.** Does your work site use bus package carriers to ship products? If so, which carriers?

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**4d.** Does your work site use freight forwarders to ship products? If so, which products?

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**5.** Most products are stored in warehouses or distribution centers—facilities in which goods are received, identified, sorted, stored, prepared, and dispatched for shipment.

**5a.** Does your business use a warehouse? If so, what type is it? If not, why not?

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**5b.** Does your business use a distribution center? If so, where is it located?

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Student

Date

Evaluator

Date of Evaluation

# CHAPTER 22 Physical Distribution

## Research Investigation Criteria

Learning Objectives:

1. Explain the nature and scope of physical distribution at your work site.
2. Identify the transportation systems used for the distribution of products at your work site.
3. Describe the storage needs of your company.

	Omitted Answer	Limited Answer, Major Improvement Needed	Acceptable Answer, Some Improvement Needed	Good Answer, Little Improvement Needed	Model Answer, No Improvement Needed	Score
<b>I. Development of Research Topic (amount, depth, and specificity of supporting details)</b>						
<b>Q.1</b> Transportation Forms	0	1-8	9-10-11	12-13-14	15	_____
<b>Q.2</b> Motor Carriers	0	1-8	9-10-11	12-13-14	15	_____
<b>Q.3</b> Types of Carriers	0	1-12	13-14-15	16-17-18-19	20	_____
<b>Q.4</b> Transportation Service	0	1-12	13-14-15	16-17-18-19	20	_____
<b>Q.5</b> Warehouse/Distribution	0	1-12	13-14-15	16-17-18-19	20	_____
	Over 8 Errors	7-8 Errors	5-6 Errors	3-4 Errors	1-2 Errors	Free of Errors
<b>II. Mechanical Conventions (ability to spell and use capitalization and punctuation correctly)</b>						
	0	1	2	3	4	5 _____
	Unsatisfactory	Poor	Fair	Good	Excellent	
<b>III. Sentence Structure (ability to write effective and well-structured sentences)</b>						
		1	2	3	4	5 _____

Total Score \_\_\_\_\_

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# CHAPTER 23 Purchasing

## School-to-Career Research Activity

Name of work site: \_\_\_\_\_

Name of work site mentor: \_\_\_\_\_

Title or position of mentor: \_\_\_\_\_

All businesses must have someone in charge of the purchasing function. In a small business, it is often the owner or manager. In larger businesses, it may be other management-level employees. Purchasers determine what to buy and make arrangements regarding the final price, delivery, services, and payment. Consult your work site mentor to answer the following questions relating to purchasing at your company and at your work site.

After completing this school-to-career investigation, you will be able to

- list the steps used in the buying process for your company,
- discuss how buyers analyze customers' needs and wants for your company and at your work site,
- identify how suppliers are selected for your company, and
- list the criteria used in evaluating supply sources for your company.

1. In manufacturing and service businesses, those responsible for purchasing are known as purchasing agents. In wholesale or retail situations, they are simply referred to as buyers.

1a. Who purchases products for your business?

\_\_\_\_\_

1b. Does your business practice centralized buying, decentralized buying, or a combination of both? Explain your answer.

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\_\_\_\_\_

\_\_\_\_\_

2. The purchasing process includes determining what to buy, selecting suppliers and negotiating teams, and placing the order and evaluation.

2a. How far in advance of the selling season are your business's purchasing plans developed?

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**2b.** How does your business analyze customers' needs and wants?

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**2c.** What are the major trade shows for your type of business? When and where are they usually held?

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**2d.** What are the major trade publications for your type of business?

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**2e.** Does your business perform online purchasing? Why or why not?

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3. How does your business identify merchandise suppliers?

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4. How are suppliers selected for purchases made at your work site or business?

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5. How does your work site or business measure the quality of goods and services?

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Student

Date

Evaluator

Date of Evaluation

# CHAPTER 23 Purchasing

## Research Investigation Criteria

Learning Objectives:

1. List the steps used in the buying process for your company.
2. Discuss how buyers analyze customers' needs and wants for your company and at your work site.
3. Identify how suppliers are selected for your company.
4. List the criteria used in evaluating supply sources for your company.

	Omitted Answer	Limited Answer, Major Improvement Needed	Acceptable Answer, Some Improvement Needed	Good Answer, Little Improvement Needed	Model Answer, No Improvement Needed	Score
<b>I. Development of Research Topic (amount, depth, and specificity of supporting details)</b>						
Q.1 Purchasing Responsibility	0	1-12	13-14-15	16-17-18-19	20	_____
Q.2 Purchasing Procedures	0	1-20	21-22-23	24-26-29	30	_____
Q.3 Identification of Suppliers	0	1-12	13-14-15	16-17-18-19	20	_____
Q.4 Selection of Suppliers	0	1-5	6-7	8-9	10	_____
Q.5 Evaluation of Goods and Services	0	1-5	6-7	8-9	10	_____
	<b>Over 8 Errors</b>	<b>7-8 Errors</b>	<b>5-6 Errors</b>	<b>3-4 Errors</b>	<b>1-2 Errors</b>	<b>Free of Errors</b>
<b>II. Mechanical Conventions (ability to spell and use capitalization and punctuation correctly)</b>						
	0	1	2	3	4	5 _____
		<b>Unsatisfactory</b>	<b>Poor</b>	<b>Fair</b>	<b>Good</b>	<b>Excellent</b>
<b>III. Sentence Structure (ability to write effective and well-structured sentences)</b>						
		1	2	3	4	5 _____

Total Score \_\_\_\_\_

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Student \_\_\_\_\_

Date \_\_\_\_\_

Class \_\_\_\_\_

Teacher \_\_\_\_\_

# CHAPTER 24 Stock Handling and Inventory Control

## School-to-Career Research Activity

Name of work site: \_\_\_\_\_

Name of work site mentor: \_\_\_\_\_

Title or position of mentor: \_\_\_\_\_

Whether a business handles raw materials, parts, or merchandise, there must be a procedure for processing them. The stock-handling process includes receiving, checking, and marking goods with information such as price and location. Consult with your work site mentor to answer the following questions relating to stock handling and control used at your work site.

After completing this school-to-career investigation, you will be able to

- describe how merchandise is received, checked, and marked at your work site,
- explain the type(s) of unit inventory control used at your work site, and
- explain the stock management plans used at your work site.

1. Merchandise ordered by a store is received, checked, and marked with a selling price before it is transferred to the sales area.

1a. Where is the receiving area located at your work site?

\_\_\_\_\_

1b. Who is responsible for receiving merchandise at your work site?

\_\_\_\_\_

2. Every business records the goods it receives in a receiving record or log.

2a. Explain the process used at your work site to check merchandise.

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2b. There are four methods used to check merchandise: the blind check, direct check, spot check, and the quality check. Which methods are used at your work site?

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3. After merchandise has been received and checked, it must be marked with the selling price and other information.

3a. Is the merchandise received at your work site source-marked or otherwise price-marked by the manufacturer?

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3b. What types of information are found on price tickets or the UPC code?

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4. Inventory management is the process of buying and storing merchandise for sale while controlling the costs of ordering, shipping, handling, and storage. Good inventory management balances the costs of inventory with the benefits of maintaining a large inventory. The number of times that average inventory is sold and replaced in a given time period is called the stock turnover rate. What is the stock turnover rate for your business?

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5. Inventory management involves dollar and unit control. Unit control refers to the quantities of merchandise that a business handles during a stated period of time. Two methods of tracking inventory are the perpetual inventory system and the physical inventory system.

5a. Does your work site use a perpetual inventory system? If so, is it based on a manual or point-of-sale system?

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5b. Does your work site use a physical inventory system? If so, how often?

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5c. During what months of the year is inventory normally taken? Why?

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**5d.** In your opinion, how can inventory shortages or shrinkage be reduced at your work site?

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**6.** Buyers use three basic stock management plans: the basic stock list, a model stock list, and a never-out list.

**6a.** What merchandise should always be on your work site's basic stock list? Why?

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**6b.** If appropriate for your business, what kinds of merchandise should be included on your work site's model stock plan? Why?

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**6c.** What types of merchandise should be included on your work site's never-out list? Why?

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# CHAPTER 24 Stock Handling and Inventory Control

## Research Investigation Criteria

### Learning Objectives:

1. Describe how merchandise is received, checked, and marked at your work site.
2. Explain the type(s) of unit inventory control used at your work site.
3. Explain the stock management plans used at your work site.

	Omitted Answer	Limited Answer, Major Improvement Needed	Acceptable Answer, Some Improvement Needed	Good Answer, Little Improvement Needed	Model Answer, No Improvement Needed	Score
<b>I. Development of Research Topic (amount, depth, and specificity of supporting details)</b>						
<b>Q.1</b> Receiving Procedures	0	1-5	6-7	8-9	10	_____
<b>Q.2</b> Checking Procedures	0	1-12	13-14-15	16-17-18-19	20	_____
<b>Q.3</b> Price Marking	0	1-12	13-14-15	16-17-18-19	20	_____
<b>Q.4</b> Stock Turnover	0	1-5	6-7	8-9	10	_____
<b>Q.5</b> Inventory Management	0	1-12	13-14-15	16-17-18-19	20	_____
<b>Q.6</b> Stock Plans	0	1-5	6-7	8-9	10	_____
	<b>Over 8 Errors</b>	<b>7-8 Errors</b>	<b>5-6 Errors</b>	<b>3-4 Errors</b>	<b>1-2 Errors</b>	<b>Free of Errors</b>
<b>II. Mechanical Conventions (ability to spell and use capitalization and punctuation correctly)</b>						
	0	1	2	3	4	5 _____
	<b>Unsatisfactory</b>		<b>Poor</b>	<b>Fair</b>	<b>Good</b>	<b>Excellent</b>
<b>III. Sentence Structure (ability to write effective and well-structured sentences)</b>						
		1	2	3	4	5 _____

Total Score \_\_\_\_\_

**3b.** Are there any products that your work site sells that are reduced in price during certain seasons of the year? If so, give at least two examples.

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**3c.** Are there any products that your work site sells that are increased in price during certain seasons of the year? If so, give at least two examples.

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**3d.** Does your company have seasonal sales for certain products? If so, identify one such product and its traditional selling period.

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**4.** Do government laws, rules, or regulations affect the prices that your company charges for products and services?

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# CHAPTER 25 Price Planning

## School-to-Career Research Activity

Name of work site: \_\_\_\_\_

Name of work site mentor: \_\_\_\_\_

Title or position of mentor: \_\_\_\_\_

Price is an important factor in the success or failure of a business. It establishes and maintains a firm's image, competitive edge, and profits. It may also influence advertising strategies and determine profits. Customers use price to make judgments about products and the companies that make them. Consult with your work site mentor to answer the following questions relating to price planning at your work site.

After completing this school-to-career investigation, you will be able to

- report the goals of pricing for your company,
- distinguish between market share and market position for your company,
- identify market factors that affect price planning for your company, and
- discuss government regulations that affect price planning for your company.

1. Pricing plays an important role in establishing and maintaining a company's market share. Three goals of price planning include obtaining market share, achieving a return on investment, and meeting the competition. Companies may engage in price competition to take business away from competitors.

1a. Who are your company's competitors?

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1b. Does your company engage in price competition to increase its market share? If so, identify products or services for which prices have been cut.

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1c. Who in your company is responsible for price planning decisions?

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**1d.** Some companies concentrate on meeting the prices of their competition. Others set the price of the products for their industry. Do you consider your company to be an industry price leader or a follower? Why?

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**2.** Market share relates to a company's percentage of sales within a target market. Market position relates to the image a company hopes to maintain.

**2a.** Where can you find out what percentage of the market share has been gained by your company?

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**2b.** How would you describe the market position established for your company?

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**2c.** What marketing strategies does your company use to maintain its market position?

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**3.** Price planning is affected by costs, expenses, supply, demand, profits, and other factors.

**3a.** New products often have high prices. What products have gone down in price since their introduction at your work site? What may account for their lowered prices?

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# CHAPTER 26 Pricing Strategies

## Research Investigation Criteria

### Learning Objectives:

1. Explain the basic pricing concept (cost-oriented, demand-oriented or competition-oriented) used by your company.
2. Identify the various pricing strategies used at your work site.

	Omitted Answer	Limited Answer, Major Improvement Needed	Acceptable Answer, Some Improvement Needed	Good Answer, Little Improvement Needed	Model Answer, No Improvement Needed	Score
<b>I. Development of Research Topic (amount, depth, and specificity of supporting details)</b>						
<b>Q.1</b> Pricing Strategy	0	1-12	13-14-15	16-17-18-19	20	_____
<b>Q.2</b> Pricing Policy	0	1-12	13-14-15	16-17-18-19	20	_____
<b>Q.3</b> Psychological Pricing	0	1-12	13-14-15	16-17-18-19	20	_____
<b>Q.4</b> Price Lining	0	1-8	9-10-11	12-13-14	15	_____
<b>Q.5</b> Discount Pricing	0	1-8	9-10-11	12-13-14	15	_____
	<b>Over 8 Errors</b>	<b>7-8 Errors</b>	<b>5-6 Errors</b>	<b>3-4 Errors</b>	<b>1-2 Errors</b>	<b>Free of Errors</b>
<b>II. Mechanical Conventions (ability to spell and use capitalization and punctuation correctly)</b>						
	0	1	2	3	4	5 _____
	<b>Unsatisfactory</b>		<b>Poor</b>	<b>Fair</b>	<b>Good</b>	<b>Excellent</b>
<b>III. Sentence Structure (ability to write effective and well-structured sentences)</b>						
		1	2	3	4	5 _____

Total Score \_\_\_\_\_

# CHAPTER 26 Pricing Strategies

## School-to-Career Research Activity

Name of work site: \_\_\_\_\_

Name of work site mentor: \_\_\_\_\_

Title or position of mentor: \_\_\_\_\_

It is very important for companies to find the right price for their target market. There are three basic pricing concepts: cost-oriented, demand-oriented, and competition-oriented. Consult with your work site mentor to answer the following questions relating to price strategies and pricing techniques used in your company and at your work site.

After completing this school-to-career investigation, you will be able to

- explain the basic pricing concept (cost-oriented, demand-oriented, or competition-oriented) used by your company, and
- identify the various pricing strategies used at your work site.

1. Cost-oriented pricers generate prices by adding costs and expenses to projected profit margins. Demand-oriented pricers base their figures on how much customers are willing to pay for given goods and services. Competition-oriented pricers study competitors to determine prices. What is the pricing strategy used in your company? Why?

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2. Every business must choose between a one-price policy and a flexible-price policy. What pricing policy does your company follow? Why?

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- 4b.** Select a particular product line and identify the price lines for the product. Give the price and model or style number for each product in the product line.

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- 4c.** Do you think that the price lines are properly drawn? Why or why not?

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- 5.** Discount pricing involves offering reductions for cash transactions, large purchases, trade or seasonal discounts, and allowances.

- 5a.** Select one type of discount pricing used by your company and give an example of one product that can be sold using any of the above techniques.

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- 5b.** What is one advantage of the discount pricing technique that you selected?

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3. Psychological pricing creates an illusion for customers or makes shopping easier for them. Common psychological pricing techniques are odd-even pricing, prestige pricing, multiple-unit pricing, and everyday low pricing.
- 3a. Some believe that odd prices connote bargains and even prices connote quality. If your work site practices odd-even pricing, select four products that are either odd- or even-priced and state their prices.

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- 3b. Does your work site practice prestige pricing for any products? Why or why not?

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- 3c. Does your work site practice multiple-unit pricing for any products? If so, list one example and give the multiple-unit price for the item.

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- 3d. When prices are lower than average, promotional pricing is used in conjunction with sales promotions. Loss leaders and special event pricing are two basic types of promotional advertising. Does your company practice promotional pricing? If so, what are some products or services at your work site that have recently served as loss leaders or special sales merchandise?

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4. Companies that practice price lining offer all merchandise in a given category at a limited number of prices.

- 4a. Does your company practice price lining? Why or why not?

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Student \_\_\_\_\_

Date \_\_\_\_\_

Evaluator \_\_\_\_\_

Date of Evaluation \_\_\_\_\_

# CHAPTER 25 Price Planning

## Research Investigation Criteria

Learning Objectives:

1. Report the goals of pricing for your company.
2. Distinguish between market share and market position for your company.
3. Identify market factors that affect price planning for your company.
4. Discuss government regulations that affect price planning for your company.

	Omitted Answer	Limited Answer, Major Improvement Needed	Acceptable Answer, Some Improvement Needed	Good Answer, Little Improvement Needed	Model Answer, No Improvement Needed	Score
<b>I. Development of Research Topic (amount, depth, and specificity of supporting details)</b>						
<b>Q.1</b> Goals of Pricing	0	1-20	21-22-23	24-26-29	30	_____
<b>Q.2</b> Market Share versus Market Position	0	1-12	13-14-15	16-17-18-19	20	_____
<b>Q.3</b> Market Factors	0	1-20	21-22-23	24-26-29	30	_____
<b>Q.4</b> Government Regulations	0	1-5	6-7	8-9	10	_____
	<b>Over 8 Errors</b>	<b>7-8 Errors</b>	<b>5-6 Errors</b>	<b>3-4 Errors</b>	<b>1-2 Errors</b>	<b>Free of Errors</b>
<b>II. Mechanical Conventions (ability to spell and use capitalization and punctuation correctly)</b>						
	0	1	2	3	4	5 _____
	<b>Unsatisfactory</b>		<b>Poor</b>	<b>Fair</b>	<b>Good</b>	<b>Excellent</b>
<b>III. Sentence Structure (ability to write effective and well-structured sentences)</b>						
		1	2	3	4	5 _____

Total Score \_\_\_\_\_

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Student \_\_\_\_\_

Date \_\_\_\_\_

Class \_\_\_\_\_

Teacher \_\_\_\_\_

# CHAPTER 27 Pricing Math

## School-to-Career Research Activity

Name of work site: \_\_\_\_\_

Name of work site mentor: \_\_\_\_\_

Title or position of mentor: \_\_\_\_\_

Retailers and wholesalers base dollar and percentage markups on cost or retail price. However, they may give discounts to customers and employees. Consult with your work site mentor to answer the following questions related to pricing math used at your work site.

After completing this school-to-career investigation, you will be able to

- explain how markup is calculated for your company, and
- identify the various discounts offered to your company.

1. According to your work site mentor, what is the difference between profit and markup?

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2. Markup may be determined by percentage of retail or percentage of cost.

2a. Does your work site calculate markup as a percentage of retail or as a percentage of cost?

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\_\_\_\_\_

2b. According to your work site mentor, why does your company calculate markup by percentage of retail or percentage of cost?

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\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

2c. Does your company have an average markup percentage for all products sold? If so, what is your average markup percentage?

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\_\_\_\_\_  
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**2d.** What products in your company have the lowest markup?

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**2e.** What products in your company have the highest markup?

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**3.** Companies may mark down merchandise to reduce the quantity of goods in stock.

**3a.** Who determines when products or services should be marked down in your company?

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**3b.** What procedures are followed when markdowns are taken at your work site?

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**4.** A discount is a reduction in the prices of goods and services to customers. Do you receive employee discounts on products or services purchased at your work site? If so, explain them.

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**5.** Some discounts offered by manufacturers and distributors include cash, trade, quantity, promotional, and seasonal discounts.

**5a.** What merchandise has your business purchased with a cash discount? Name the terms.

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**5b.** What, if any, merchandise has been purchased with a trade discount? Name the merchandise and the trade discount percentage.

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**5c.** What, if any, merchandise has been purchased with a quantity discount? Was the quantity discount quoted as a percentage of price or as part of a price list?

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**5d.** What merchandise has been purchased with a promotional discount? Explain the discount.

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**5e.** What merchandise has been purchased with a seasonal discount? Name the conditions.

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Student

Date

Evaluator

Date of Evaluation

# CHAPTER 27 Pricing Math

## Research Investigation Criteria

*Learning Objectives:*

1. Explain how markup is calculated for your company.
2. Identify the various discounts offered to your company.

	Omitted Answer	Limited Answer, Major Improvement Needed	Acceptable Answer, Some Improvement Needed	Good Answer, Little Improvement Needed	Model Answer, No Improvement Needed	Score	
<b>I. Development of Research Topic (amount, depth, and specificity of supporting details)</b>							
<b>Q.1</b>	Profit vs. Markup	0	1-5	6-7	8-9	10	_____
<b>Q.2</b>	Markup Calculations	0	1-12	13-14-15	16-17-18-19	20	_____
<b>Q.3</b>	Markdown Analysis	0	1-12	13-14-15	16-17-18-19	20	_____
<b>Q.4</b>	Employee Discounts	0	1-5	6-7	8-9	10	_____
<b>Q.5</b>	Trade Discounts	0	1-20	21-22-23	24-26-29	30	_____
	<b>Over 8 Errors</b>	<b>7-8 Errors</b>	<b>5-6 Errors</b>	<b>3-4 Errors</b>	<b>1-2 Errors</b>	<b>Free of Errors</b>	
<b>II. Mechanical Conventions (ability to spell and use capitalization and punctuation correctly)</b>							
	0	1	2	3	4	5	_____
	<b>Unsatisfactory</b>		<b>Poor</b>	<b>Fair</b>	<b>Good</b>	<b>Excellent</b>	
<b>III. Sentence Structure (ability to write effective and well-structured sentences)</b>							
		1	2	3	4	5	_____

Total Score \_\_\_\_\_

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Student \_\_\_\_\_

Date \_\_\_\_\_

Class \_\_\_\_\_

Teacher \_\_\_\_\_

# CHAPTER 28 Marketing Research

## School-to-Career Research Activity

Name of work site: \_\_\_\_\_

Name of work site mentor: \_\_\_\_\_

Title or position of mentor: \_\_\_\_\_

Marketing research involves the systematic gathering, recording, and analyzing of information to make sound business decisions. Consult with your work site mentor or someone responsible for marketing research in your company to answer the following questions related to marketing research conducted by your company and used at your work site.

After completing this school-to-career investigation, you will be able to

- describe the marketing information system used in your company, and
- identify marketing research activities conducted by your company.

1. The main purpose of marketing research is to obtain information about the preferences, opinions, habits, trends, and plans of potential customers.

1a. Who or what department is responsible for conducting marketing research for your company?

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1b. What are some ways your company obtains information about customer needs?

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\_\_\_\_\_  
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1c. Why does your company engage in marketing research activities?

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2. A management information system is a set of procedures and methods that regularly generates, stores, analyzes, and distributes marketing information.

2a. Does your company have a management information system to plan and implement marketing strategies? Why or why not?

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2b. What types of reports and information are shared with management and employees?

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2c. A database is a collection or file of related information about a specific topic. Does your company or work site have a database of your customers? If so, how was the information obtained for it?

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3. Some fields of marketing research include attitude research, market intelligence, media research, and product research.

3a. Attitude or opinion research is designed to obtain information on how people feel about certain products, ideas, or companies. Does your company engage in opinion research? If so, give an example.

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3b. Market intelligence is concerned with the size, location, and/or makeup of the market for a particular product or service. Does your company engage in market intelligence research? If so, give an example.

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**3c.** Media research focuses on issues of media selection and frequency. Does your company engage in media research? If so, give an example of a media research activity conducted by your company.

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**3d.** Product research includes evaluating product design and acceptance, package design, and product usage. Does your company engage in product research? If so, give an example of a recent product research activity conducted by your company.

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**3e.** According to your work site mentor, what are some of the benefits and limitations of marketing research?

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Evaluator

Date of Evaluation

# CHAPTER 28 Marketing Research

## Research Investigation Criteria

*Learning Objectives:*

1. Describe the marketing information system used in your company.
2. Identify marketing research activities conducted by your company.

	Omitted Answer	Limited Answer, Major Improvement Needed	Acceptable Answer, Some Improvement Needed	Good Answer, Little Improvement Needed	Model Answer, No Improvement Needed	Score
<b>I. Development of Research Topic (amount, depth, and specificity of supporting details)</b>						
<b>Q.1a-b</b> Marketing Research Responsibility	0	1-12	13-14-15	16-17-18-19	20	_____
<b>Q.1c</b> Purpose of Marketing Research	0	1-5	6-7	8-9	10	_____
<b>Q.2a-c</b> Marketing Information System	0	1-12	13-14-15	16-17-18-19	20	_____
<b>Q.3a-d</b> Types of Research	0	1-20	21-22-23	24-26-29	30	_____
<b>Q.3e</b> Limitation of Marketing Research	0	1-5	6-7	8-9	10	_____
	<b>Over 8 Errors</b>	<b>7-8 Errors</b>	<b>5-6 Errors</b>	<b>3-4 Errors</b>	<b>1-2 Errors</b>	<b>Free of Errors</b>
<b>II. Mechanical Conventions (ability to spell and use capitalization and punctuation correctly)</b>						
	0	1	2	3	4	5 _____
		<b>Unsatisfactory</b>	<b>Poor</b>	<b>Fair</b>	<b>Good</b>	<b>Excellent</b>
<b>III. Sentence Structure (ability to write effective and well-structured sentences)</b>						
		1	2	3	4	5 _____

Total Score \_\_\_\_\_

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# CHAPTER 29 Conducting Marketing Research

## School-to-Career Research Activity

Name of work site: \_\_\_\_\_

Name of work site mentor: \_\_\_\_\_

Title or position of mentor: \_\_\_\_\_

Companies take five major steps when conducting marketing research: defining the problem, obtaining data, analyzing the data, recommending solutions to the problem, and applying the results. Each step is performed sequentially to arrive at a solution to a problem.

After completing this school-to-career investigation, you will be able to

- define a marketing research problem for your work site,
- design a survey questionnaire,
- collect, analyze, and compile primary data,
- recommend solutions to a marketing problem, and
- complete a final marketing research report.

With the assistance and permission of your work site mentor, design a 15-item survey questionnaire regarding some aspect of your company's operations.

Use the information presented in Chapter 29 Section 2 of *Marketing Essentials* to assist you with the design of your survey instrument. After you have prepared your questionnaire, collect, analyze, and interpret data. Then prepare a 5- to 10-page typed report. Support the report with tables, charts, figures, appendices, notes, and other such appropriate features, and be sure to include a copy of your questionnaire.

Student \_\_\_\_\_

Date \_\_\_\_\_

Evaluator \_\_\_\_\_

Date of Evaluation \_\_\_\_\_

# CHAPTER 29 Conducting Marketing Research

## Research Investigation Criteria

Learning Objectives:

1. Define a marketing research problem for your work site.
2. Design a survey questionnaire.
3. Collect, analyze, and compile primary data.
4. Recommend solutions to a marketing problem.
5. Complete a final marketing research report.

	Unsatisfactory	Poor	Fair	Good	Excellent	Model Answer	Score
<b>I.</b> Content of Report	0	1	2	3	4	5	_____
Appropriateness	0	1	2	3	4	5	_____
Unity and Focus	0	1	2	3	4	5	_____
Development	0	1	2	3	4	5	_____
Organization	0	1	2	3	4	5	_____
Sentence Structure	0	1	2	3	4	5	_____
Usage	0	1	2	3	4	5	_____
<b>II.</b> Organization of Report	1-11	12-13	14-15	16-17	18-19	20	_____
<b>III.</b> Survey Instrument	0	1-20	21-23	24-26	27-29	30	_____
	<b>1-4 Pages</b>	<b>5-6 Pages</b>	<b>7 Pages</b>	<b>8 Pages</b>	<b>9 Pages</b>	<b>10 Pages</b>	
<b>IV.</b> Length of Paper	9	11	12	13	14	15	_____

Total Score \_\_\_\_\_

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Student \_\_\_\_\_

Date \_\_\_\_\_

Class \_\_\_\_\_

Teacher \_\_\_\_\_

# CHAPTER 30 Product Planning

## School-to-Career Research Activity

Name of work site: \_\_\_\_\_

Name of work site mentor: \_\_\_\_\_

Title or position of mentor: \_\_\_\_\_

Product planning involves making decisions about the product and service features needed to sell a business's products, services, or ideas. These decisions relate to product mix, packaging, labeling, warranties, guarantees, and branding. A well-defined product plan allows a business to coordinate existing products and features, add new products, and delete other products. Consult with your work site mentor to answer the following questions about product planning at your company.

After completing this school-to-career investigation, you will be able to

- describe a product mix strategy used at your work site,
- explain the nature and scope of product planning for your company, and
- analyze the life cycle of a product sold at your work site.

1. Product mix includes all the different products that a company makes or sells. A product mix is made up of all product lines and items offered by a business.
  - 1a. A product line is a group of closely related products manufactured or sold by a business. Select one product sold at your work site. Then identify all the different manufacturers (or brands) of the product within the product line.

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- 1b. A product item is a specific model, brand, or size within a product line. Choose one manufacturer or brand from above. What are some different models and/or sizes of its products?

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2. A product mix is defined by the width and depth of its product offerings.

2a. *Product width* refers to the number of different product lines a business manufactures or sells. In your opinion, does your work site maintain product width that is wide or narrow? Why?

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2b. *Product depth* refers to the number of product items offered within each product line. In your opinion, does your work site maintain product depth that is deep or shallow for the product line selected in Question 1? Why or why not?

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3. Interview your work site mentor to answer the following questions regarding product mix.

3a. What is the target market for your company?

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3b. What kind of product offerings do your customers want?

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3c. Should any existing product lines be expanded? Why or why not?

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**3d.** Should any of the existing product lines be modified? Why or why not?

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**3e.** Should any of the existing product lines be deleted? Why or why not?

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**3f.** What image does your company want to project?

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**4.** All products pass through a life cycle of four stages: introduction, growth, maturity, and decline. Examine one product offered at your work site. Based upon its sales performance, what stage of its product life cycle is the product in? Why?

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Student

Date

Evaluator

Date of Evaluation

# CHAPTER 30 Product Planning

## Research Investigation Criteria

Learning Objectives:

1. Describe a product mix strategy used at your work site.
2. Explain the nature and scope of product planning for your company.
3. Analyze the life cycle of a product sold at your work site.

	Omitted Answer	Limited Answer, Major Improvement Needed	Acceptable Answer, Some Improvement Needed	Good Answer, Little Improvement Needed	Model Answer, No Improvement Needed	Score
<b>I. Development of Research Topic (amount, depth, and specificity of supporting details)</b>						
<b>Q.1</b>	Product Line/Item	0	1-12	13-14-15	16-17-18-19	20 _____
<b>Q.2</b>	Product Width/Depth	0	1-12	13-14-15	16-17-18-19	20 _____
<b>Q.3</b>	Product Mix	0	1-20	21-22-23	24-26-29	30 _____
<b>Q.4</b>	Life Cycle Stage	0	1-12	13-14-15	16-17-18-19	20 _____
	<b>Over 8 Errors</b>	<b>7-8 Errors</b>	<b>5-6 Errors</b>	<b>3-4 Errors</b>	<b>1-2 Errors</b>	<b>Free of Errors</b>
<b>II. Mechanical Conventions (ability to spell and use capitalization and punctuation correctly)</b>						
	0	1	2	3	4	5 _____
	<b>Unsatisfactory</b>		<b>Poor</b>	<b>Fair</b>	<b>Good</b>	<b>Excellent</b>
<b>III. Sentence Structure (ability to write effective and well-structured sentences)</b>						
		1	2	3	4	5 _____

Total Score \_\_\_\_\_

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# CHAPTER 31 Branding, Packaging, and Labeling

## School-to-Career Research Activity

Name of work site: \_\_\_\_\_

Name of work site mentor: \_\_\_\_\_

Title or position of mentor: \_\_\_\_\_

Eye-catching brand names, unique packaging, and colorful labels are excellent promotional techniques that help to sell products. Consult with your work site mentor to answer the following questions about the importance of branding, packaging, and labeling at your company.

After completing this school-to-career investigation, you will be able to

- analyze the branding elements of a product at your work site,
- identify types of brands used at your work site,
- analyze the packaging of a selected product, and
- analyze a label for a product sold at your work site.

**1.** A brand is a name, term, design, or symbol (or a combination of them) that identifies the products of a company or group of companies. A brand can include a brand name, brand mark, trade name, trade character, and trademark. Select one product at your work site for brand analysis.

**1a.** A brand name is the word, group of words, letters, or numbers that can be spoken. What is the brand name of the product you selected?

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\_\_\_\_\_

**1b.** A brand mark is the part of the brand that is the symbol, design, or distinctive coloring or lettering. What is the brand mark identification for the product you selected?

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\_\_\_\_\_

**1c.** A trade name identifies the company or division of a particular company. What is the trade name for your product?

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\_\_\_\_\_

**1d.** A trade character is a personified brandmark, with a human form or human characteristics. Does your product have a trade character? If so, describe the character.

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**1e.** A trademark is a brand name, brand mark, trade character, or combination that is given legal protection. Does your product have a trademark? If so, identify it.

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**2.** Manufacturers, wholesalers, and retailers all brand their products.

**2a.** Does your company sell national or producer brands? If so, identify five of them.

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**2b.** Does your company sell any private distributor brands? If so, identify examples.

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**2c.** Why do companies carry private distributor brands?

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**2d.** Are generic brands sold at your work site? Provide five examples or explain why they are not sold.

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3. Select a product and examine its packaging.

3a. What are the distinctive promotional and selling features of the product package you selected?

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3b. Does the package have any unique properties or identity? If so, explain.

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3c. What packaging materials are used to protect your product?

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3d. How could you improve the product's packaging?

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4. A label is an information tag, wrapper, seal, or imprinted message that is attached to a product or its package. What information is on your selected product's label?

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# CHAPTER 31 Branding, Packaging, and Labeling

## Research Investigation Criteria

### Learning Objectives:

1. Analyze the branding elements of a product at your work site.
2. Identify types of brands used at your work site.
3. Analyze the packaging of a selected product.
4. Analyze a label for a product sold at your work site.

	Omitted Answer	Limited Answer, Major Improvement Needed	Acceptable Answer, Some Improvement Needed	Good Answer, Little Improvement Needed	Model Answer, No Improvement Needed	Score	
<b>I. Development of Research Topic (amount, depth, and specificity of supporting details)</b>							
<b>Q.1</b>	Brand Analysis	0	1-20	21-22-23	24-26-29	30	_____
<b>Q.2</b>	Types of Brands	0	1-16	17-18-19	20-22-24	25	_____
<b>Q.3</b>	Packaging Analysis	0	1-16	17-18-19	20-22-24	25	_____
<b>Q.4</b>	Label Analysis	0	1-5	6-7	8-9	10	_____
	<b>Over 8 Errors</b>	<b>7-8 Errors</b>	<b>5-6 Errors</b>	<b>3-4 Errors</b>	<b>1-2 Errors</b>	<b>Free of Errors</b>	
<b>II. Mechanical Conventions (ability to spell and use capitalization and punctuation correctly)</b>							
	0	1	2	3	4	5	_____
	<b>Unsatisfactory</b>		<b>Poor</b>	<b>Fair</b>	<b>Good</b>	<b>Excellent</b>	
<b>III. Sentence Structure (ability to write effective and well-structured sentences)</b>							
		1	2	3	4	5	_____

Total Score \_\_\_\_\_

# CHAPTER 32 Extended Product Features

## School-to-Career Research Activity

Name of work site: \_\_\_\_\_

Name of work site mentor: \_\_\_\_\_

Title or position of mentor: \_\_\_\_\_

Warranties and credit are two popular forms of extended product features. Such features are subject to federal and state legislation. Consult with your work site mentor to learn more about extended product features at your work site.

After completing this school-to-career investigation, you will be able to

- analyze a warranty for a selected product at your work site,
- explain the importance of warranties to product planning, and
- explore the use of credit at your work site.

1. A warranty is a promise or guarantee given to a customer that a product will meet certain standards. Does your business offer warranties regarding materials, workmanship, and/or performance? Explain.

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2. An express warranty is given to induce a customer to buy. Describe a written warranty for a product at your work site. If there is no written warranty, describe what an express warranty might state regarding use of a selected product.

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3. There are two types of written warranties—a full warranty and a limited warranty.

- 3a. Does the product you selected in Question 2 have a full or limited warranty?

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**3b.** What specific exclusions are specified as part of the warranty?

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**3c.** Describe why warranties are important to your company.

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**4.** Describe other extended product features provided by your company.

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**5.** Credit allows a business or individual to obtain products or money in exchange for a promise to pay later. The two major forms of credit are consumer and business credit.

**5a.** Does your business issue a store or gasoline credit card? If so, what is the name of your card? What is the credit limit for people who open new accounts?

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**5b.** What bank credit cards does your business accept?

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**5c.** Does your business accept travel and entertainment credit cards? If so, name the cards that are accepted.

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5d. Does your business accept debit cards?

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6. There are four major consumer credit plans in use today: 30-day accounts, installment accounts, revolving accounts, and budget accounts.

6a. Does your business offer consumer credit plans to customers? If so, what types are offered? If not, why not?

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6b. Select a consumer credit plan that your business offers and explain the procedures and conditions of repayment.

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6c. Several federal statutes govern the use of credit. Does your state have laws that regulate the use of credit? If yes, briefly explain these laws.

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Student

Date

Evaluator

Date of Evaluation

# CHAPTER 32 Extended Product Features

## Research Investigation Criteria

*Learning Objectives:*

1. Analyze a warranty for a selected product at your work site.
2. Explain the importance of warranties to product planning.
3. Explore the use of credit at your work site.

	Omitted Answer	Limited Answer, Major Improvement Needed	Acceptable Answer, Some Improvement Needed	Good Answer, Little Improvement Needed	Model Answer, No Improvement Needed	Score
<b>I. Development of Research Topic (amount, depth, and specificity of supporting details)</b>						
<b>Q.1</b> Warranty	0	1-5	6-7	8-9	10	_____
<b>Q.2</b> Express Warranty	0	1-5	6-7	8-9	10	_____
<b>Q.3</b> Full or Limited Warranty	0	1-8	9-10-11	12-13-14	15	_____
<b>Q.4</b> Other Extended Product Features	0	1-8	9-10-11	12-13-14	15	_____
<b>Q.5</b> Credit Cards	0	1-12	13-14-15	16-17-18-19	20	_____
<b>Q.6</b> Consumer Credit Plans	0	1-12	13-14-15	16-17-18-19	20	_____
	<b>Over 8 Errors</b>	<b>7-8 Errors</b>	<b>5-6 Errors</b>	<b>3-4 Errors</b>	<b>1-2 Errors</b>	<b>Free of Errors</b>
<b>II. Mechanical Conventions (ability to spell and use capitalization and punctuation correctly)</b>						
	0	1	2	3	4	5 _____
	<b>Unsatisfactory</b>		<b>Poor</b>	<b>Fair</b>	<b>Good</b>	<b>Excellent</b>
<b>III. Sentence Structure (ability to write effective and well-structured sentences)</b>						
		1	2	3	4	5 _____

Total Score \_\_\_\_\_

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# CHAPTER 33 Entrepreneurial Concepts

## School-to-Career Research Activity

Name of work site: \_\_\_\_\_

Name of work site mentor: \_\_\_\_\_

Title or position of mentor: \_\_\_\_\_

Entrepreneurs are people who attempt to earn money and make profits by taking the risk of owning and operating a business. Consult with your parents, work site mentor, marketing teacher, or another teacher to identify an entrepreneur in your community. Then complete the following investigation about entrepreneurship.

After completing this school-to-career investigation, you will have identified and interviewed an entrepreneur and you will be able to

- discuss the advantages and disadvantages of entrepreneurship,
- identify the personal characteristics and skills of entrepreneurs, and
- discuss business ownership.

1. Set up an interview with an entrepreneur. Be prepared, arrive on time, and dress appropriately for the interview. Follow the questions provided. After the interview, send a thank-you letter.

Name of entrepreneur: \_\_\_\_\_

Name of company: \_\_\_\_\_

Date/time of interview: \_\_\_\_\_

- 1a. When and why did you start your own business?

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- 1b. What are some advantages of owning and operating your own business?

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**1c.** What are the disadvantages of owning and operating your own business?

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**2.** Successful entrepreneurs require special skills, education, training, and personal characteristics.

**2a.** What are some special personal characteristics that helped you succeed?

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**2b.** What special skills, education, or training helped you get started as an entrepreneur?

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**3.** There are four ways to enter business: start your own, purchase a franchise, purchase an existing nonfranchise, or take over a family business. How did you start your business?

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**4.** Businesses may be legally organized as sole proprietorships, partnerships, corporations, or limited liability companies.

**4a.** What legal organization did you choose when you started your business?

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# CHAPTER 33 Entrepreneurial Concepts

## Research Investigation Criteria

### Learning Objectives:

1. Identify and interview an entrepreneur.
2. Discuss the advantages and disadvantages of entrepreneurship.
3. Identify the personal characteristics and skills of entrepreneurs.
4. Discuss business ownership.

	Omitted Answer	Limited Answer, Major Improvement Needed	Acceptable Answer, Some Improvement Needed	Good Answer, Little Improvement Needed	Model Answer, No Improvement Needed	Score
<b>I. Development of Research Topic (amount, depth, and specificity of supporting details)</b>						
<b>Q.1a</b> Start of Business	0	1-2	3	4	5	_____
<b>Q.1b</b> Advantages	0	1-5	6-7	8-9	10	_____
<b>Q.1c</b> Disadvantages	0	1-5	6-7	8-9	10	_____
<b>Q.2</b> Personal and Special Skills	0	1-12	13-14-15	16-17-18-19	20	_____
<b>Q.3</b> Ways to Enter Business	0	1-5	6-7	8-9	10	_____
<b>Q.4</b> Legal Organization	0	1-8	9-10-11	12-13-14	15	_____
<b>Q.5</b> Professional Organizations	0	1-5	6-7	8-9	10	_____
<b>Q.6</b> Preparation	0	1-5	6-7	8-9	10	_____
	<b>Over 8 Errors</b>	<b>7-8 Errors</b>	<b>5-6 Errors</b>	<b>3-4 Errors</b>	<b>1-2 Errors</b>	<b>Free of Errors</b>
<b>II. Mechanical Conventions (ability to spell and use capitalization and punctuation correctly)</b>						
	0	1	2	3	4	5 _____
	<b>Unsatisfactory</b>		<b>Poor</b>	<b>Fair</b>	<b>Good</b>	<b>Excellent</b>
<b>III. Sentence Structure (ability to write effective and well-structured sentences)</b>						
		1	2	3	4	5 _____

Total Score \_\_\_\_\_

# CHAPTER 34 Risk Management

## School-to-Career Research Activity

Name of work site: \_\_\_\_\_

Name of work site mentor: \_\_\_\_\_

Title or position of mentor: \_\_\_\_\_

Business risk is the possibility of business loss or failure. There are three kinds of business risks—economic, natural, and human. While a business cannot totally eliminate all the risks of doing business, marketers can reduce and manage risks through careful planning. Risks are managed by using marketing information, analyzing opportunities, and making decisions to balance risks with adequate monetary returns. Consult with your work site mentor for assistance completing the following investigation about risk management at your company.

After completing this school-to-career investigation, you will be able to

- explain the nature and scope of risk management at your work site, and
- determine how risks are handled by your company and at your work site.

1. Economic risks are caused by changes in overall business conditions. These changes can include the amount or type of competition, changing consumer lifestyles, population changes, limited usefulness or stylishness of some products, product obsolescence, government regulation, inflation, or recession.

- 1a. What economic risks does your business face?

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- 1b. Of the economic risks facing your business, which economic risk would have the greatest impact on your business? Why?

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2. Natural risks are risks resulting from natural causes.

2a. What kinds of natural risks does your business face?

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2b. What does your business do to protect itself against natural risks?

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3. Human risks are caused by human mistakes and the unpredictability of employees or customers.

3a. What are some of the more common human risks faced by your business?

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3b. How does your work site prevent employee or customer theft?

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3c. What procedures does your work site follow if a customer is suspected of shoplifting?

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- 4. The best way to prevent the human risk of employee carelessness and incompetence is through employee screening and training.
- 4a. Are prospective employees required to pass interviews, take drug tests, or receive medical examinations prior to beginning work? If yes, explain what types of interviews, tests, or examinations are required.

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- 4b. Were you given an employee orientation before you began work? If so, describe what kind of information was shared with you. If not, describe what information would have been helpful to you before you began to work.

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- 4c. Were you given any special work site training or safety instruction before you began to work? If so, describe the type of training received. If not, what type of training might your work site provide to make learning your job easier?

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- 5. What procedures are followed in the event of a customer or employee accident?

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Student

Date

Evaluator

Date of Evaluation

# CHAPTER 34 Risk Management

## Research Investigation Criteria

Learning Objectives:

1. Explain the nature and scope of risk management at your work site.
2. Explain how risks are handled by your company and at your work site.

	Omitted Answer	Limited Answer, Major Improvement Needed	Acceptable Answer, Some Improvement Needed	Good Answer, Little Improvement Needed	Model Answer, No Improvement Needed	Score
<b>I. Development of Research Topic (amount, depth, and specificity of supporting details)</b>						
<b>Q.1</b> Economic Risks	0	1-8	9-10-11	12-13-14	15	_____
<b>Q.2</b> Natural Risks	0	1-8	9-10-11	12-13-14	15	_____
<b>Q.3</b> Human Risks	0	1-12	13-14-15	16-17-18-19	20	_____
<b>Q.4</b> Employee Screening/ Training	0	1-20	21-22-23	24-26-29	30	_____
<b>Q.5</b> Accident Procedures	0	1-5	6-7	8-9	10	_____
	Over 8 Errors	7-8 Errors	5-6 Errors	3-4 Errors	1-2 Errors	Free of Errors
<b>II. Mechanical Conventions (ability to spell and use capitalization and punctuation correctly)</b>						
	0	1	2	3	4	5 _____
	Unsatisfactory	Poor	Fair	Good	Excellent	
<b>III. Sentence Structure (ability to write effective and well-structured sentences)</b>						
		1	2	3	4	5 _____

Total Score \_\_\_\_\_

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# CHAPTER 35 Developing a Business Plan

## School-to-Career Research Activity

Name of work site: \_\_\_\_\_

Name of work site mentor: \_\_\_\_\_

Title or position of mentor: \_\_\_\_\_

A business plan gives an overall picture of a proposed business to potential investors and lenders. It must be well organized and easy to read, and it should contain four main sections: (1) a description and analysis of a proposed business situation; (2) an organizational plan; (3) marketing plan; and (4) a financial plan. Consult with your work site mentor for assistance when completing the following investigation about the business plan at your business.

After completing this school-to-career investigation, you will be able to

- analyze and describe a current business situation,
- complete a self-analysis of your business experience and training,
- conduct a trading area and market analysis for your business, and
- discuss your present business location.

1. A business philosophy is a statement of how a business should be run, showing an understanding of its role in the marketplace. The philosophy reveals a company's attitude toward its customers, employees, and competitors. What is the business philosophy of your company? If your company has a published business philosophy, attach it to this investigation.

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2. A self-analysis is a description of one's personal education, training, strengths, weaknesses, and plan for continued professional development. Perform a self-analysis of your ability to be successful at your current work site. Describe your education, training, strengths, and future plans.

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3. A trading area is the geographical area from which a business draws its customers. Consult your local chamber of commerce, the U.S. Census, your work site mentor, the Survey of Buying Power, or other available resources to answer the following questions about your company.

3a. What are the demographics of your geographical area?

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3b. How would you assess the economic conditions where your company is located?

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3c. What is the buying power index (BPI) for your geographical area?

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3d. What does the buying power index tell you about your present location?

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3e. Who are your major competitors in your geographical area?

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4. A target market represents the specific group of people that a business wants to reach.

4a. What is the target market for your business?

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4b. Describe the buying behavior of your business's customers.

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5. Properly locating a business is one of the most important decisions a business can make.

5a. Where is your work site located? Is it a good location for your business? Why or why not?

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5b. In your opinion, is parking sufficient for your business? Why or why not?

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5c. Do you consider your present work site to be located in a safe area? Why or why not?

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# CHAPTER 35 Developing a Business Plan

## Research Investigation Criteria

### Learning Objectives:

1. Analyze and describe a current business situation.
2. Complete a self-analysis of your business experience and training.
3. Conduct a trading area and market analysis for your business.
4. Discuss your present business location.

	Omitted Answer	Limited Answer, Major Improvement Needed	Acceptable Answer, Some Improvement Needed	Good Answer, Little Improvement Needed	Model Answer, No Improvement Needed	Score
<b>I. Development of Research Topic (amount, depth, and specificity of supporting details)</b>						
<b>Q.1</b>	Business Philosophy	0	1-12	13-14-15	16-17-18-19	20
<b>Q.2</b>	Self-analysis	0	1-12	13-14-15	16-17-18-19	20
<b>Q.3</b>	Trading Area Analysis	0	1-12	13-14-15	16-17-18-19	20
<b>Q.4</b>	Target Market	0	1-8	9-10-11	12-13-14	15
<b>Q.5</b>	Business Location	0	1-8	9-10-11	12-13-14	15
	<b>Over 8 Errors</b>	<b>7-8 Errors</b>	<b>5-6 Errors</b>	<b>3-4 Errors</b>	<b>1-2 Errors</b>	<b>Free of Errors</b>
<b>II. Mechanical Conventions (ability to spell and use capitalization and punctuation correctly)</b>						
	0	1	2	3	4	5
	<b>Unsatisfactory</b>		<b>Poor</b>	<b>Fair</b>	<b>Good</b>	<b>Excellent</b>
<b>III. Sentence Structure (ability to write effective and well-structured sentences)</b>						
		1	2	3	4	5

Total Score \_\_\_\_\_

Student \_\_\_\_\_

Date \_\_\_\_\_

Class \_\_\_\_\_

Teacher \_\_\_\_\_

# CHAPTER 36 Financing the Business

## School-to-Career Research Activity

Name of work site: \_\_\_\_\_

Name of work site mentor: \_\_\_\_\_

Title or position of mentor: \_\_\_\_\_

During this school-to-work activity you will analyze and describe financial aspects of your business. Consult with your work site mentor for assistance when completing the following investigation about the financial aspects of your business.

After completing this school-to-career investigation, you will be able to

- describe the purpose of financial statements,
- determine start-up costs of a selected business, and
- analyze financial statements used by your business.

1. What is the purpose of preparing financial documents?

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2. Business start-up costs are a projection of how much money it will take to operate a new business during its first year of operation.

2a. What are the average start-up costs for your type of business?

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2b. What are some of the factors that determine start-up costs for a new business?

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**2c.** One-time costs are expenses that will not be repeated after you begin operating a business. What are some one-time costs that are typical for your type of business?

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**2d.** Continuing costs are operating expenses that a business pays throughout the life of the business. What are some continuing costs that are typical for your type of business?

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**3.** An income statement summarizes a business's income and expenses during a specific period, such as a month, a quarter, or a year. It is sometimes called a profit and loss statement.

**3a.** Who is responsible for preparing income statements for your business?

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**3b.** How often are income statements prepared for your business?

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**3c.** Who in your business reviews the income statement after it is prepared?

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**4.** A balance sheet summarizes a business's assets, liabilities, and owner's equity.

**4a.** What are some examples of current assets that are expected to be converted into cash for your business in the upcoming year?

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**4b.** Fixed assets are assets used over a period of years to operate a business. What are some examples of fixed assets owned by your business?

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**4c.** Liabilities are classified as current and long-term. Current liabilities are the debts of a business that are expected to be paid off during the current year. What are some examples of current liabilities for your business?

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**4d.** Long-term liabilities are debts that are not due to be paid in the coming year. What are some examples of long-term liabilities for your business?

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**5.** What does equity or net worth represent on your business's balance sheet? Why is it important information to a potential lender?

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Student

Date

Evaluator

Date of Evaluation

# CHAPTER 36 Financing the Business

## Research Investigation Criteria

*Learning Objectives:*

1. Describe the purpose of financial statements.
2. Determine start-up costs of a selected business.
3. Analyze financial statements used by your business.

	Omitted Answer	Limited Answer, Major Improvement Needed	Acceptable Answer, Some Improvement Needed	Good Answer, Little Improvement Needed	Model Answer, No Improvement Needed	Score
<b>I. Development of Research Topic (amount, depth, and specificity of supporting details)</b>						
<b>Q.1</b> Purpose of Financial Documents	0	1-5	6-7	8-9	10	_____
<b>Q.2</b> Start-up Costs	0	1-16	17-18-19	20-22-24	25	_____
<b>Q.3</b> Income Statement	0	1-12	13-14-15	16-17-18-19	20	_____
<b>Q.4</b> Balance Sheet	0	1-12	13-14-15	16-17-18-19	20	_____
<b>Q.5</b> Net Worth	0	1-8	9-10-11	12-13-14	15	_____
	<b>Over 8 Errors</b>	<b>7-8 Errors</b>	<b>5-6 Errors</b>	<b>3-4 Errors</b>	<b>1-2 Errors</b>	<b>Free of Errors</b>
<b>II. Mechanical Conventions (ability to spell and use capitalization and punctuation correctly)</b>						
	0	1	2	3	4	5 _____
		<b>Unsatisfactory</b>	<b>Poor</b>	<b>Fair</b>	<b>Good</b>	<b>Excellent</b>
<b>III. Sentence Structure (ability to write effective and well-structured sentences)</b>						
		1	2	3	4	5 _____

Total Score \_\_\_\_\_

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Student \_\_\_\_\_

Date \_\_\_\_\_

Class \_\_\_\_\_

Teacher \_\_\_\_\_

# CHAPTER 37 Identifying Career Opportunities

## School-to-Career Research Activity

Name of work site: \_\_\_\_\_

Name of work site mentor: \_\_\_\_\_

Title or position of mentor: \_\_\_\_\_

It's important to consider skills, values, goals, and interests while planning a career. By studying different job positions in a specific area of marketing (e.g., apparel and accessories, hospitality and tourism, sport marketing, etc.), you are better able to apply your aptitudes and interest to a marketing career that you will enjoy and find rewarding.

After completing this school-to-career investigation, you will be able to

- select a job position in marketing to investigate,
- describe various aspects of the job you selected, and
- complete a career assessment.

1. What job position and what area of marketing did you select to investigate?

\_\_\_\_\_  
\_\_\_\_\_

2. What are the most common job duties and tasks in this marketing position?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

3. The working environment is the place and the conditions in which you work.

3a. What are the physical surroundings where work is performed for this marketing job? (noisy or quiet, indoors or outdoors, hot or cold, air conditioned, etc.)

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

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**3b.** What are the working conditions for this marketing position? (steady or seasonal employment; standing or sitting; light or heavy lifting; working with data, people, or things; regular or irregular hours; etc.)

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**4.** It is helpful to have an aptitude for your work, and a knack or potential for learning a specific skill.

**4a.** What skills and abilities are needed for your chosen job position in marketing?

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**4b.** What physical requirements are required for this job? (artistic flair; color perception; manual dexterity; lifting; ability to stand, sit, or bend; etc.)

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**5.** Every job requires a certain level of education and training. What type of education is usually required for your selected job position?

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**6.** The career outlook describes the availability of jobs. If the career outlook is good, there will be many opportunities for jobs and advancement. What is the career outlook for your selected job position? What is the long-term outlook?

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# CHAPTER 37 Identifying Career Opportunities

## Research Investigation Criteria

### Learning Objectives:

1. Select a job position in marketing to investigate.
2. Describe various aspects of the job you selected.
3. Complete a career assessment.

	Omitted Answer	Limited Answer, Major Improvement Needed	Acceptable Answer, Some Improvement Needed	Good Answer, Little Improvement Needed	Model Answer, No Improvement Needed	Score
<b>I. Development of Research Topic (amount, depth, and specificity of supporting details)</b>						
<b>Q.1</b> Career Selected	0	1–2	3	4	5	_____
<b>Q.2</b> Job Duties	0	1–5	6–7	8–9	10	_____
<b>Q.3</b> Work Environment	0	1–5	6–7	8–9	10	_____
<b>Q.4</b> Aptitudes	0	1–5	6–7	8–9	10	_____
<b>Q.5</b> Education and Training	0	1–5	6–7	8–9	10	_____
<b>Q.6</b> Career Outlook	0	1–5	6–7	8–9	10	_____
<b>Q.7</b> Earnings	0	1–5	6–7	8–9	10	_____
<b>Q.8</b> Likes and Dislikes	0	1–5	6–7	8–9	10	_____
<b>Q.9</b> Promotional Opportunities	0	1–5	6–7	8–9	10	_____
<b>Q.10</b> Employment Locations	0	1–2	3	4	5	_____
	<b>Over 8 Errors</b>	<b>7–8 Errors</b>	<b>5–6 Errors</b>	<b>3–4 Errors</b>	<b>1–2 Errors</b>	<b>Free of Errors</b>
<b>II. Mechanical Conventions (ability to spell and use capitalization and punctuation correctly)</b>						
	0	1	2	3	4	5 _____
	<b>Unsatisfactory</b>		<b>Poor</b>	<b>Fair</b>	<b>Good</b>	<b>Excellent</b>
<b>III. Sentence Structure (ability to write effective and well-structured sentences)</b>						
		1	2	3	4	5 _____

Total Score \_\_\_\_\_

Student \_\_\_\_\_

Date \_\_\_\_\_

Class \_\_\_\_\_

Teacher \_\_\_\_\_

# CHAPTER 38 Finding and Applying For a Job

## School-to-Career Research Activity

Name of work site: \_\_\_\_\_

Name of work site mentor: \_\_\_\_\_

Title or position of mentor: \_\_\_\_\_

Cover letters, résumés, job interviews, follow-ups, legal documents, and work permits—finding and getting a job can be a complex process. For this reason, it is important to be equipped and organized during a job search. Consult with your work site mentor or use available company literature to complete the following investigation about finding and getting a job with your company.

After completing this school-to-career investigation, you will be able to

- discuss legal employment for minors in your state,
- determine how job openings are advertised in your company,
- analyze the application process used in your company, and
- analyze the job interviewing process used in your company.

1. What, if any, legal documents were needed before you were able to work at your company?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

2. A job lead is information about a job opening. Job leads may come from family members, friends, past and present employers, advertisements, and many other sources.

2a. How does your company recruit new employees?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

2b. How did you find out about your present job?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

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3. Application forms, letters of application, résumés, and cover letters are important elements of the job application process.

3a. Did your company require a job application before employment? If so, did you have to complete it at the work site, or were you able to take it home?

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3b. Some companies require all job applications to be completed on site. What is the reasoning behind this procedure?

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3c. Who did you use for references on the employment application for your present job? Who do you think are good references to use on an application form?

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3d. Was a letter of application and/or résumé required for your job? If one was not required, does your company require them for any other job positions at your work site?

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4. Most jobs require interviews. It is important to prepare for the interview, conduct oneself properly during the interview, and follow up on the interview afterwards.

4a. How did you prepare for your job interview at this company?

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**4b.** What interviewing techniques or procedures would you suggest to other applicants?

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**4c.** How did you follow up on your job interview with your company?

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**5.** If you were responsible for hiring workers at your company, what personal traits would you look for in new employees?

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**6.** If you were responsible for hiring workers at your company, what education, skills, training, and abilities would you look for in new employees?

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# CHAPTER 38 Finding and Applying For a Job

## Research Investigation Criteria

### Learning Objectives:

1. Discuss legal employment for minors in your state.
2. Determine how job openings are advertised in your company.
3. Analyze the application process used in your company.
4. Analyze the job interviewing process used in your company.

	Omitted Answer	Limited Answer, Major Improvement Needed	Acceptable Answer, Some Improvement Needed	Good Answer, Little Improvement Needed	Model Answer, No Improvement Needed	Score		
<b>I. Development of Research Topic (amount, depth, and specificity of supporting details)</b>								
<b>Q.1</b>	Legal Documents	0	1-5	6-7	8-9	10	_____	
<b>Q.2</b>	Job Leads	0	1-12	13-14-15	16-17-18-19	20	_____	
<b>Q.3</b>	Application Process	0	1-12	13-14-15	16-17-18-19	20	_____	
<b>Q.4</b>	Job Interview Process	0	1-12	13-14-15	16-17-18-19	20	_____	
<b>Q.5</b>	Desired Personal Traits	0	1-5	6-7	8-9	10	_____	
<b>Q.6</b>	Desired Education	0	1-5	6-7	8-9	10	_____	
		<b>Over 8 Errors</b>	<b>7-8 Errors</b>	<b>5-6 Errors</b>	<b>3-4 Errors</b>	<b>1-2 Errors</b>	<b>Free of Errors</b>	
<b>II. Mechanical Conventions (ability to spell and use capitalization and punctuation correctly)</b>								
		0	1	2	3	4	5	_____
		<b>Unsatisfactory</b>		<b>Poor</b>	<b>Fair</b>	<b>Good</b>	<b>Excellent</b>	
<b>III. Sentence Structure (ability to write effective and well-structured sentences)</b>								
			1	2	3	4	5	_____

Total Score \_\_\_\_\_

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