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# Wisconsin Youth Apprenticeship

## MARKETING

## PROGRAM GUIDE



Department of Workforce Development

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# MARKETING YOUTH APPRENTICESHIP PROGRAM GUIDE

## Description

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Marketing is a multi-faceted, critical business function that is under-girded by such social sciences as economics, psychology, and sociology. Its successful performance depends on the application of mathematics and English principles, the use of scientific problem solving, and the application of technology to marketing situations and problems.

The pace at which marketing activities are changing has accelerated due to environmental shifts taking place in the business world: downsizing, outsourcing, off-shoring, mergers, global competition, world markets, and technological innovations. These changes impact the skills, attitudes, and abilities needed for success in today's workplace.

The annual Challenger, Gray & Christmas, Inc. survey of human resource professionals suggests that new college graduates with the best chance of landing a career are in Business Administration (36.8%), Accounting/Finance, and Marketing. In Wisconsin, 5 of the Top 15 **Occupations with the Most Openings** are Marketing cluster related, including:

- #1: Retail Salespersons
- #3: Cashiers
- #5: Customer Service Representatives
- #8: Office Clerks, and
- #14: Sales Representatives

Additionally, 3 of the Top 25 **High-Growth Occupations** are Marketing cluster related (jobcenterofwisconsin.com, industry projections 2014), including:

- #6: Meeting, Convention, and Event Planners
- #16: Real Estate Brokers, and
- #19: Market Research Analysts and Marketing Specialists

Although the employment statistics bode well for those teaching *business administration* programs in entrepreneurship, finance, management/administration, and marketing, employers are critical of the preparation students receive in their college programs. Some 46% believe there is too much emphasis on book learning versus real-world learning. (Marketing Business Administration (MBA) Research & Curriculum Center at mbaresearch.org.)

Wisconsin Youth Apprenticeship (YA) is a rigorous program that combines academic and related technical classroom instruction with mentored on the job learning for high school students. By training youth apprentices, employers play an active role in shaping the quality of their future workforce, improving the skill level of potential workers, and enhancing their competitive positioning in the marketplace. Employers, school districts, local consortiums, parents, and potential YA students are referred to the Youth Apprenticeship Program Operations Manual for general YA Program requirements.

## Objective

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The Wisconsin Marketing YA Program is designed to provide students with a working understanding of core employability and Marketing skills, as well as occupationally specific skills that serve as the standard for occupational pathways in the Marketing industry. This program provides the framework for educators and industry to work together to produce work-ready, entry-level employees that will compete favorably in a global market, as well as, provide for post-secondary educational advancement while integrating work-based learning in the school and worksite.

The following features distinguish a YA Program from other similar youth school to work programs.

- Level Two Youth Apprenticeship is a two-year program for high school juniors and seniors with an interest in a particular field (i.e. Marketing One-year Youth Apprenticeship Programs are also available to pursue).
- Youth apprentices, parents, employers, YA program coordinators, and school districts enter into a written agreement approved by the Department of Workforce Development.
- Statewide skills are established by the industry, making the youth apprentice skill set more relevant to the state's employers.
- Youth apprentices are trained at the worksite by skilled mentors and are paid minimum wage or better for their work. Students average 10-15 hours/week.
- Youth apprentices receive a high school diploma and a Certificate of Occupational Proficiency from the Wisconsin Department of Workforce Development (DWD) at graduation.
- Youth apprentices may receive advanced standing credit and/or transcribed credit for the YA Program at a Wisconsin Technical College and/or at some four year colleges. See **Appendix F** for current details.
- Statewide skill standards focus on skills and knowledge needed by employers for entry level employment in the Marketing industry.

Students apply and are interviewed by Marketing industry employers for positions in the Marketing YA Program. The state approved skill standards and program guide for the Marketing YA Program are used in both the classroom instruction and worksite learning. If the local school district is unable to provide the related technical classroom instruction courses, they may contract with their local technical college or employer practitioners to do so.

The skill standards are competency based. Competencies are performance-based outcome statements of occupational related skills defined by representatives of Marketing worksites throughout Wisconsin and aligned with State and national skill standards. The competencies in the program include many of the standards and knowledge statements outlined in the National States' Career Cluster Skill Standards for Marketing, <http://www.careertech.org>, the Secretary's Commission on Achieving Necessary Skills (SCANS), the American Marketing Association's Professional Certified Marketer (<https://www.ama.org>), or the Ask Institute Fundamentals of Marketing Concepts ([www.askinstitute.org](http://www.askinstitute.org)). The competencies will be taught at the worksite in combination with supportive, related technical classroom instruction. While the skill competencies are established statewide, program implementation and oversight occurs through local consortium committees to assure local needs are met.

## Target Population

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This program is applicable for a student who has expressed an interest in a customer service, marketing, sales, merchandising, research or marketing management careers. This program makes for an attractive career option for students with a strong desire to work with many different people in a variety of business settings. All students successfully meeting current high school graduation requirements and with a good attendance record for that year are encouraged to apply for the Marketing Youth Apprenticeship (YA) Program. The student must apply to the program in the year before program entry and be on track toward fulfilling high school graduation requirements in their school district.

Marketing industries comprise establishments engaged in a wide variety of industries and sectors. Marketing activities in each of these industries can include Selling, Merchandising, Research, Advertising and Communication, and Marketing Management. Furthermore, all Marketers need to possess excellent customer service skills. The Marketing YA program was structured to require industry-wide foundational skills and industry-specific technical skills.

All Youth Apprentices must complete the core Marketing foundational knowledge competencies consisting of competencies in employability skills, customer service, safety, security, and basic marketing core fundamentals. The Required Skill competencies may be completed concurrently with the specific technical pathway skills.

The Marketing specific technical skill competencies can be chosen based on interest and job placement provided they are allowable by DWD Child Labor Laws. Contact the Department of Workforce Development's Equal Rights Division/Labor Standards Bureau at 608-266-6860 for questions regarding child labor laws.

Potential Marketing Youth Apprentices will be required to complete a minimum of 450 work hours with 180 hours (2 semesters) of related technical classroom instruction for a Level One (1-year) Marketing YA Program or a minimum of 900 work hours with 360 hours (4 semesters) of related technical classroom instruction for a Level Two (2-year) Marketing YA program.

Marketing YA students are required to perform all the skills for EACH UNIT they enroll in. **Level One (one year)** YA students are to choose additional competencies from a MINIMUM of one pathway unit. **Level Two (two year)** YA students are to complete competencies from a MINIMUM of two pathway units.

### Marketing Pathways

1. Professional Sales Unit
2. Merchandising Unit
3. Marketing Communications Unit
4. Marketing Research / Competitive Intelligence Unit
5. Marketing Management / Leadership Unit

## **Marketing YA Program Responsibilities**

The following responsibilities are outlined for individuals involved in the Marketing YA Program.

### **Students –**

1. Maintain academic skills and attendance at the high school to remain on track for high school graduation.
2. Participate in progress reviews as scheduled.
3. Exhibit maturity and responsibility to meet requirements of employment as designated by the employer.

### **Parents or Guardians-**

4. Ensure that adequate transportation is available to and from the worksite.
5. Participate in student progress reviews as scheduled.

### **School District-**

6. Recruit students and coordinate student enrollment in the program with the consortiums and/or employers.
7. Integrate the YA Program related technical classroom instruction and worksite training into the student's overall education program with high school graduation credit issued for each semester successfully completed.
8. Participate in student progress reviews as scheduled.

### **YA Program Coordinators-**

9. Apply and maintain approval from the DWD to operate a YA Program.
10. Ensure a minimum of 450 hours of worksite instruction/experience plus a minimum of 180 hours of related technical classroom instruction for each one year YA program.
11. Establish and meet regularly with an advisory committee that will identify when and where tasks will be taught during the Marketing YA Program.
12. Develop and maintain a yearly commitment with participating high schools, technical colleges, and local businesses to accommodate the number of students involved in the Marketing YA Program.
13. Establish and maintain a YA student grievance procedure.
14. Provide employer mentor training.

### **Related Technical Classroom Instruction Faculty-**

15. Qualify in the specialty areas being taught in the YA Program.

### **Employers and Worksite Mentors-**

16. SEE **Appendix B** – Marketing YA Implementation Guide for Employers.
17. Participate in a mentor training session and provide on the job training of the Youth Apprentices.

### **Department of Workforce Development-**

18. Monitor national and state regulatory agencies, such as the U.S. Department of Labor (DOL), U.S. Occupational Safety and Health Administration (OSHA), and WI Department of Safety and Professional Services for changes and impacts on the Marketing Youth Apprenticeship Program.

## **Program Guide Organization**

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The competencies in the program include many of the standards and knowledge statements outlined in the National States' Career Cluster Skill Standards for Marketing, <http://www.careertech.org>, the American Marketing Association's Professional Certified Marketer (<https://www.ama.org>), and the Assessment of Skills and Knowledge For Business (A\*S\*K) Institute Fundamentals of Marketing Concepts ([www.askinstitute.org](http://www.askinstitute.org)).

The Marketing YA Program also requires that Related Technical Classroom Instruction is provided to support attainment of the knowledge necessary to master the competencies. While recommendations for specific Related Technical Classroom Instruction are detailed separately in **Appendix C**, instructional requirements will vary depending on local consortium and advisory group decisions. It is strongly advised that local consortiums work with their advisory groups to determine appropriate Related Technical Classroom Instruction based on their local needs and resources.

The Youth Apprenticeship Program curriculum is written and organized according to the Worldwide Instructional Design System (WIDS) format and includes the Marketing YA Skill Standards Checklist and Course Outcome Summary (COS) for the program. Overall progress is documented on the Marketing YA Skill Standards Checklist which lists skill level achievement for each competency achieved. The COS outlines each skill competency with its corresponding performance standards and learning objectives. The Performance Standards describe the behaviors, as applicable, that employers should look for in order to evaluate the competency. The Learning Objectives outline the required content to be covered in the related technical classroom instruction. (SEE **Appendix D** - Wisconsin Instructional Design System (WIDS) Format and Youth Apprenticeship Program Guide Terms and **Appendix E** - Use and Distribution of the Curriculum for further details.)

## **Evaluation**

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The student must successfully complete the related technical classroom instruction and demonstrate the minimum skill level required on the Marketing YA Skill Standards Checklist for each competency according to the applicable curriculum. Worksite mentors and/or instructors use this checklist to evaluate the learner on each of the required skills. It is the responsibility of the mentor(s) to rate the students skill level on all tasks performed at the worksite.

## **Marketing YA Program Completion**

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Upon successful completion of high school and the Level Two (2 year) Marketing YA Program requirements, the youth apprentice will receive a high school diploma and the applicable Certification of Occupational Proficiency from the Department of Workforce Development indicating "Marketing Youth Apprenticeship in (Name of Specific Pathway(s))" attained. Youth Apprentices who successfully complete a Level One (1 year) Marketing YA Program and who are on track for graduation will be eligible for a Level One Certificate from the Department of Workforce Development. Furthermore, the YA students may;

1. Continue to work in the Marketing industry.
2. Pursue a degree or diploma from a Wisconsin Technical College with advanced standing and/or transcribed credit.
3. Apply for admission to a four-year University of Wisconsin school with high school academic elective credit for admission.
4. Go into military service.

(SEE **Appendix F** for current agreements for post-secondary credit at Wisconsin Technical Colleges and University of Wisconsin colleges.)

## **Appendices**

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Appendix A - Work Contracts, Employment of Minors (Child Labor Laws), Liability & Insurance

Appendix B - Marketing YA Implementation Guide for Employers

- Benefits to the Employer
- Role of the Employer
- Role of the Mentor
- Checklist for Program Participation
- Checklist for Program Operation
- Frequently Asked Questions

Appendix C - Recommended Related Technical Classroom Instruction

Appendix D - Wisconsin Instructional Design System (WIDS)  
Format and Youth Apprenticeship Program Guide Terms

Appendix E - Use and Distribution of the Curriculum

Appendix F - Post Secondary Advanced Standing Credits

Appendix G - Grandfather Clause – Program Transition Guidelines

Appendix H - Marketing Skill Standards Checklist

Appendix I - Marketing YA Course Outcome Summary:  
Overview and Table of Contents (COS)

Appendix J - Required Skills Curriculum (Units 1-3)

Appendix K - Professional Sales Pathway (Unit 4)

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Appendix O - Marketing Management Pathway (Unit 8)



# Appendix A

## MARKETING YOUTH APPRENTICESHIP PROGRAM

### WORK CONTRACTS, EMPLOYMENT OF MINORS, LIABILITY & INSURANCE

#### WORK CONTRACTS

##### Education Training Agreement -

Students and employers participating in an approved youth apprenticeship program must have a signed **Education/Training Agreement (ETA)** on file with both the **school** and the **employer**. The local Youth Apprenticeship Coordinator will provide their partner employers with a copy of the YA ETA. This form is also available from the Department of Workforce Development at [http://dwd.wisconsin.gov/dwd/forms/dws/detw\\_9471\\_e.htm](http://dwd.wisconsin.gov/dwd/forms/dws/detw_9471_e.htm).

##### Work Permits -

Work Permits are not required for 16-year old and 17-year-old minors. The Wisconsin DWD Equal Rights Division has more information on the [Employment of Minors](http://dwd.wisconsin.gov/er/labor_standards/work_permit/law_changes_06232017.htm) ([http://dwd.wisconsin.gov/er/labor\\_standards/work\\_permit/law\\_changes\\_06232017.htm](http://dwd.wisconsin.gov/er/labor_standards/work_permit/law_changes_06232017.htm)). For more information, contact the [Equal Rights office](http://dwd.wisconsin.gov/er/contacts.htm) (<http://dwd.wisconsin.gov/er/contacts.htm>).

#### EMPLOYMENT OF MINORS LAWS

Youth apprentices enrolled in approved youth apprenticeship programs and their employers are subject to all state and federal child labor laws regarding the employment of minors. The Department of Workforce Development (DWD) will review all statewide youth apprenticeship curriculum for compliance with the child labor laws and will clarify the laws whenever necessary to allow for program implementation. Youth apprentices are **allowed** to work in **some otherwise prohibited** occupations because they meet the criteria of "**student learner**" AND the work performed is **incidental** to their training and is for intermittent **and for short periods of time** (DWD 270.14(3)(c)1). However, they are **not exempt** from the employment of minors' laws by virtue of being enrolled in a youth apprenticeship program. Students and employers must comply with laws regarding hours of labor (not limited for 16- and 17-year-old minors; restricted for younger minors); employment; minimum wages and overtime and the like.

Liability for on-the-job accidents is established through the DWD Worker's Compensation system, learn more at <https://dwd.wisconsin.gov/wc/>. DWD can assure employers that they will not be cited (by DWD) for illegally employing a minor in a prohibited occupation if the students are enrolled in a DWD-approved Youth Apprenticeship program and a signed Education/Training Agreement is on file with both the student's high school and the employer. This means that employers will not be assessed treble fines should an injury occur which results in the employer being cited.

Readers should refer Wis. Admin. Code [DWD 270.12](#) and [270.14](#) "Child Labor," for descriptions and definitions of the occupations or activities which are normally prohibited to minors.

Youth apprentices who are 16-17 years old may operate the following light power driven machinery **without meeting the student learner criteria:**

Mowers, tractors, snow blowers, electric clippers, sod cutters, non-powered pruning saws, drill presses, grinder wheels, lathes and portable power-driven machinery such as drills, sanders and floor maintenance equipment such as polishers and scrubbers. Powered pruning shears **MAY NOT** be operated until age 18.

Twin-axle vehicles and motor vehicles -

16-year-old students **CANNOT** be operated on public roadways at all. 17-year-old students may on an incidental basis operate a motor vehicle under 6,000 pounds gross vehicle weight on a public roadway during daylight hours. It is recommended that the employer consult with their insurance company before allowing any motor vehicle operation by a minor. There are other limitations on this operation. **See Wis. Admin. Code § DWD 270.12(21).**

The **student learner exception** limits the minor to **using hazardous equipment** on an **incidental basis** [less than 5% of their work time] and only occasionally [can't be a regular part of their job]. For example, the student learner exception works better in a job like carpentry where most of the work is acceptable but occasionally the minor might need to use a saw to cut a piece to fit.

### **Student Learner Criteria -**

To be considered a student learner youth apprentices must meet the following criteria:

1. They are enrolled in a youth apprenticeship program approved by DWD;
2. They are enrolled in school and receiving school credit for program participation;
3. They receive appropriate safety instruction at the school and at the workplace;
4. The work performed is under direct and close supervision of a qualified and experienced person;
5. The work performed in any occupation declared hazardous is incidental to their training and is for intermittent and short periods of time (refer to DWD 270.14(3)(c)1; and
6. There is a schedule of organized and progressive work processes to be performed on the job (i.e. the worksite is following the state curriculum).

### **Hours of Work -**

The hours an apprentice spends working in the program *during* the hours that school is in session during the day **DO NOT COUNT** towards the limitation on total hours a minor may work. See the DWD [Equal Rights Division](http://dwd.wisconsin.gov/er/) web site (<http://dwd.wisconsin.gov/er/>). for applicable hours and times of the day that minors may work in Wisconsin. These hours of work restrictions apply to youth who are under 16 years old.

## **LIABILITY AND INSURANCE**

As employees of the company, youth apprentices are covered by worker's compensation in the event of injury on the job. Employers should review their specific liability coverage to ensure there are no restrictions on employing minors and/or on coverage of minors operating particular machinery. Schools are not allowed to cover youth apprentices through their own workers' compensation policy while the youth apprentice is an employee of the local business.

As stated previously, neither DWD nor local schools cannot exonerate employers from liability if a youth apprentice is injured on the job. It is important that a signed ETA be on kept on file by both the school and the employer to ensure that employers will not be cited for illegally employing a minor in a prohibited occupation.

### **General Liability –**

An employer is liable for the service provided at their facility. In general, an employer has adequate general liability and Workers' Compensation coverage, no additional liability is required as a result of the Youth Apprenticeship program. However, before participating in the program, an employer may wish to consult with their insurance carrier.

### **Transportation –**

In general, the party responsible for transportation is liable in case of an accident. Youth apprentices responsible for their own transportation to and from the worksite are responsible for their own insurance. In instances where the school provides transportation for the youth apprentices, the school is responsible for insurance coverage. Only if the facility provides transportation to and from work for the youth apprentice is the facility responsible for this insurance coverage.

### **Workers' Compensation –**

Once a youth apprentice becomes a paid employee they must be covered by the Workers' Compensation coverage of their employer.

### **Unemployment Insurance Benefits –**

If a youth apprentice is enrolled full-time in a public educational institution and receives school credit for their participation in the YA program, then they are NOT eligible to file for unemployment insurance benefits from the employer. Youth apprentices who do NOT meet this criterion may be eligible for unemployment insurance benefits.

### **Worker Displacement –**

No employer may hire a youth apprentice who will displace any currently employed worker, including a partial displacement, such as reduction in the hours of non-overtime work, wages, or employment benefits.

### **Layoffs/Strikes –**

A youth apprentice cannot be hired when any other individual is on temporary layoff, with the clear possibility of recall, from the same or equivalent job OR if the employer has terminated the employment of any regular employee, or otherwise reduced the workforce, with the intention of filling the vacancy created with a youth apprentice. Local bargaining units should determine the status of youth apprentices already working in the facility in the event of a layoff. Youth apprentices may be laid off or transferred to work areas to take the place of laid off workers. Child labor laws prohibit youth apprentices from working in a company where a strike or lockout is in active progress.

### **Collective Bargaining Agreements –**

The youth apprenticeship program should not impair existing contracts for services or collective bargaining agreements. Any youth apprenticeship program that would be inconsistent with the terms of a collective bargaining agreement shall be approved only with the written concurrence of the labor organization and employer involved.

# Appendix B

## Marketing Youth Apprenticeship Program Implementation Guide for Employers

### BENEFITS TO THE EMPLOYER

Marketing is a multi-faceted, critical business function that is under-girded by such social sciences as economics, psychology, and sociology. Its successful performance depends on the application of mathematics and English principles, the use of scientific problem solving, and the application of technology to marketing situations and problems.

The pace at which marketing activities are changing has accelerated due to environmental shifts taking place in the business world: downsizing, outsourcing, off-shoring, mergers, global competition, world markets, and technological innovations. These changes impact the skills, attitudes, and abilities needed for success in today's workplace.

By working with the Marketing Youth Apprenticeship Program, you make an investment in the young people in your community. You will have a dependable recruitment pipeline to an entry level workforce that can be used to increase workforce diversity and provide supervisory opportunity for staff. You will be directly involved in the economic development efforts of your community as well as become a part of the creation of highly skilled workers, an excellent point in any public relations marketing campaign.

A unique opportunity and added incentive for participation in the Marketing Youth Apprenticeship Program for both the employer and the student is that the competencies are directly aligned with national occupational skill standards recognized by the National States' Career Cluster Skill Standards in Marketing , <https://careertech.org/career-clusters>, the Secretary's Commission on Achieving Necessary Skills (SCANS), the Marketing and Business Administration Research & Curriculum Center, <https://www.mbaresearch.org>, and the Assessment of Skills and Knowledge for Business (A\*S\*K) Business Institute certification program, <http://www.askinstitute.org/>.

Employers also play an active role in improving the quality of the future workforce by helping develop skill standards geared to Marketing needs, reducing employee turnover by hiring program graduates, supporting program graduates as they continue their education in post-secondary settings, raising the interest of other employees in education and training, and increasing the potential for teamwork and flexibility in work sharing. One employer noted, "Youth Apprenticeship has been valuable to our company because participating in apprenticeship training allows you to develop employees who are not only trained to this particular industry's standards but who also understand your specific workplace."<sup>1</sup>

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<sup>1</sup> Employer comments taken from June 2007 Youth Apprenticeship survey distributed through 34 state of Wisconsin consortiums under a Department of Workforce Development Grant, June 2007 – December 2007, University of Oshkosh-Center for Career Development & Employability Training, Oshkosh, WI.

## ROLE OF THE EMPLOYER

The work-based learning component of the Youth Apprenticeship Program is the **primary** method for teaching the required competencies. The local business becomes an extension of the classroom for the youth apprentice. The related classroom instruction is intended to *support* the work-based learning experience by providing theoretical knowledge and, when needed, providing appropriate skill development. The work-based learning component is designed to provide an on-the-job learning environment for students by being “apprenticed” to an experienced mentor.

As an employer of a youth apprentice, you will be responsible for the following:

### **Student Selection**

Review employment applications, interview candidates, and select the student(s) they want to hire. New Employee Orientation is provided by you according to your facility’s Human Resources policies.

### **Wages**

Youth apprentices must receive minimum wage or higher. A pay schedule is agreed upon with the employer, local YA coordinator and the student. Most employers grant periodic raises dependent upon performance or length of employment.

### **Workers Compensation**

Once a youth apprentice becomes a paid employee they must be covered by the workers' compensation coverage of their employer. Other benefits may be provided at the discretion of the employer.

### **Education/Training Agreement (ETA)**

Employers must sign and comply with the requirements in the ETA, and have a copy on file. See *Appendix A “Work Contracts, Employment of Minors Laws, Liability & Insurance”* for more detail.

### **Work Permits**

See *Appendix A “Work Contracts, Employment of Minors Laws, Liability & Insurance”* for more detail.

### **Employment of Minors Laws**

Employers must ensure that the work of any student at their worksite is allowed by Employment of Minors Laws and is under the direct and close supervision of a qualified and experienced person. Students must be provided with adequate safety training both in the school and at the worksite. All Marketing Youth Apprenticeship skill standards **competencies** have been reviewed by the Wisconsin Department of Workforce Developments Labor Standards Bureau and are in compliance with the laws for the employment of minors.

### **Unemployment Insurance Benefits**

YA students are typically not eligible for unemployment insurance benefits from the employer. See *Appendix A “Work Contracts, Employment of Minors Laws, Liability & Insurance”* for more detail.

## **Job Performance**

Employers review, evaluate, and report on the youth apprentice's job performance approximately every nine weeks to ensure they are learning the required competencies. Mentors are expected to participate in progress reviews with the apprentice, school staff and/or Youth Apprenticeship instructors, and parent(s)/guardian(s).

## **Worksite Hours**

Employers must provide for the youth apprentice to meet the following work requirements:

Youth Apprentices in a Level Two (2-year) program must complete a *minimum* of **900 hours** of work-based learning while they are enrolled in the program. At least 500 hours of the required minimum work-based learning hours must take place when related classes are being held, so that classroom instruction can be integrated with worksite learning.

Youth apprentices in a Level One (1 year) program must complete a *minimum* of **450 hours** of work based learning while they are enrolled in the program. At least 250 hours of the required minimum work-based learning hours must take place when related classes are being held, so that classroom instruction can be integrated with worksite learning.

Youth apprentices may work *more* than the required minimum hours throughout the program as long as they do not exceed the daily or weekly hours allowable under the child labor laws.

## **Training to Competencies**

The employer is responsible for providing the worksite training required to meet the skills standard competencies specified in the applicable Marketing Area. This requirement means that while the youth apprentice may be hired under one particular job function, he/she must be allowed to rotate and perform other functions in other departments to meet competencies if some of them are not normally a part of that job function.

## **Mentors**

Employers assign worksite mentors to supervise and train youth apprentices. They also allow the mentors to attend special training classes provided by the local YA consortium to become successful mentors of high school apprentices.

See "Role of Mentors" below for more detail.

## **Organized Labor**

Usually the Marketing Youth Apprenticeship is considered an educational activity rather than a job classification/position status. However, the Youth Apprenticeship program should not impair existing contracts for services or collective bargaining agreements. Any Youth Apprenticeship program that would be inconsistent with the terms of a collective bargaining agreement shall be approved only with the written concurrence of the labor organization and employer involved. If youth apprentices will be working in areas covered by labor agreements, organized labor must be involved to approve the program at the worksite.

**See Appendix A "Work Contracts, Employment of Minors Laws, Liability & Insurance" for more detail.**

## **ROLE OF THE MENTOR**

Workplace mentors are one of the most critical elements which often determine the success of a youth apprenticeship. One mentor may work with more than one youth apprentice at a worksite, and the mentor may assign multiple “trainers” to instruct the youth apprentice while they rotate among various departments.

### **Effective Mentor Qualifications**

- Experience working with adolescence either on the job, through family, or through outside activities.
- Effective teaching/training skills with adults and/or youth.
- Highly skilled in the area in which the youth apprentices will be trained.
- Good communication skills in the workplace.
- Knowledge of and commitment to the Marketing Youth Apprenticeship program.

### **Mentor Responsibilities**

- Develop a cooperative training schedule for the youth apprentice to ensure performance of the required work-based skills.
- Work with instructors to coordinate the application of classroom learning objectives to the worksite.
- Communicate regularly with the school, YA coordinator, and the instructor to ensure work-based learning objectives are being met.
- Demonstrate tasks to youth apprentices and explain their importance.
- Identify other trainers appropriate to train youth in the required competencies.
- Evaluate the youth apprentice’s progress on a regular basis and document achievements and skills.
- Meet with the student, the student’s parent(s)/guardian(s), and school staff and/or YA instructor at least once each grading period to review and update them on the student’s progress.
- Provide encouragement, support, and direction about the work site culture and skills.
- Help the youth apprentice build self-confidence and self-esteem.
- Be alert to personal problems that may affect the apprentice’s work performance and guide them to seek help from appropriate sources.
- Attend mentor training workshops and mentor meetings.

Obtain additional resources for mentoring guidance from your YA coordinator.



## **CHECKLIST FOR PROGRAM PARTICIPATION**

The following checklist will help you to participate in a Youth Apprenticeship (YA) Program. Youth Apprenticeship coordinators are available to meet at your location to facilitate any phase of the YA program.

- Discuss the YA program with the local partnership that offers Youth Apprenticeship Programs.
- Consult with the management team of your organization and union officials, if applicable.
- Obtain approval from appropriate organization officials to hire youth apprentices.
- Identify mentors and arrange for mentor training through your local YA Coordinator.
- Interview YA candidates for the program.
- Select and hire youth apprentice(s).
- Sign YA Education/Training Agreement (ETA).
- Orient your new youth apprentice to the workplace according to your organization's Human Resources policies.

## **CHECKLIST FOR PROGRAM OPERATION**

The following checklist will help ensure continued operation of the Youth Apprenticeship (YA) Program.

- Provide worksite training according to the Marketing Youth Apprenticeship Area curriculum.
- Participate in progress reviews with youth apprentices, school staff and/or YA instructors, and parents/guardians.
- Meet regularly with the youth apprentices to discuss their performance and any other issues.
- Employ youth apprentices during school breaks, either part-time or full-time.
- Participate in recognition events organized by the school for youth apprenticeship graduates.

## FREQUENTLY ASKED QUESTIONS

For questions not addressed here, do not hesitate to call your local youth apprenticeship coordinator or visit the [Department of Workforce Development Youth Apprenticeship website \(http://ya.wi.gov\)](http://ya.wi.gov).

### ***How does this program differ from other work-based programs like coop education?***

Skilled Certified Coop Education and Youth Apprenticeship are similar in that they are both components of Wisconsin's overall school to work transition programs. An important difference, however, is that Youth Apprenticeship students are exposed to an occupational cluster versus a specific job. Additionally, the skills the student learns are developed in association with the American Marketing Association, industry personnel, Wisconsin technical college faculty, YA consortium coordinators, and school district coordinators and instructors. The curriculum is standardized throughout the state.

### ***Will the mentor have to spend his/her entire time at work teaching the student?***

No. Apprentices need to be supervised, but you are not required to "shadow" them at all times. However, someone should be available for guidance as necessary. One mentor may work with more than one youth apprentice at a worksite, and the mentor may assign multiple "trainers" to instruct the youth apprentice while they rotate among various departments.

### ***Will the student do productive work?***

Yes. After appropriate training, youth apprentices can become productive employees of the facility. However, since they are often rotated through different departments they will require more training time than employees who stay in the same department. It is important to remember that this is a training program. Upon completion of the probationary period, students are expected to meet the requirements of the position.

### ***Will there be a lot of paperwork for me to complete?***

Prior to the program, employers are required to sign the YA Education/Training Agreement (ETA) and maintain it. During the program, employers are expected to verify the youth apprentice's skills on the job and provide input during grading periods. Mentors must complete and maintain a simple "Skill Standards Checklist" as the student completes their competencies.

### ***What happens if I cannot provide all of the required competencies at my facility?***

In order to successfully complete the program and receive a Certificate of Occupational Proficiency, the youth apprentice must demonstrate proficiency in all areas required on the Skill Standards Checklist. If your facility does not provide the full range of services needed for competency mastery, the local youth apprenticeship coordinator may be able to arrange for the missing skills to be provided by another company. This arrangement should be discussed with the coordinator before you hire the youth apprentice.

### ***What costs will my business incur and will I be reimbursed?***

Primary costs to the employers are the wages paid to the youth apprentice and mentor during the training period.

***Will I have to treat the youth apprentice differently than my other employees?***

It is important to remember youth apprentices are placed in your facility to learn. Patience and guidance are required while they learn responsible work habits as well as the required skills. However, they are expected to follow your facility's work rules, e.g., dress code, behavior, discipline, etc., and to become a productive member of the Marketing team.

***What is the typical time frame for activities over the course of a youth apprentice's stay with a facility?***

Most program activities follow a one-year or two-year cycle depending on the offerings within your company. There may be variance in the timing of learning activities to accommodate local and seasonal needs including trainer availability.

# Appendix C

## RECOMMENDATIONS FOR RELATED TECHNICAL CLASSROOM INSTRUCTION FOR MARKETING YOUTH APPRENTICESHIP PROGRAM

These recommendations are intended to be used by the Local YA Consortium when determining appropriate related technical instruction for Marketing YA. It is not all inclusive but should be used to assist the partnership with identification and/or development of course work that supports the work-based competencies as identified in the Skill Standards Checklist. As with all YA programs the consortium must ensure that the related instruction meets with the approval of their administration and school board.

### OPERATIONAL NOTES

- Related Technical Classroom Instruction maybe offered by the employer, within the school district, at another school district, at a Wisconsin Technical College, and/or at a Community College or University by instructors qualified according to the Youth Apprenticeship Program Operations Manual. Commercial programs, such as the American Marketing Association's Professional Certified Marketer (<https://www.ama.org>), the Assessment of Skills and Knowledge For Business (A\*S\*K) Business Institute, [Fundamentals of Marketing Concepts \(www.askinstitute.org\)](http://www.askinstitute.org), or Google's AdWords certification (<https://support.google.com>). Employer provided classroom certification programs are also appropriate provided that the student receives high school credit towards graduation for the class work.
- Learning Objectives are the foundation of related technical classroom instruction. **Appendix E** – Curriculum will provide a course overview for the recommended related instruction. Consortiums may teach using locally developed coursework, however, statewide advanced standing and/or transcribed agreements may not apply. It is recommended then that local agreements with technical colleges be pursued. Statewide advanced standing and/or transcribed credit will be based on this Recommended Instruction list.
- A minimum of 180 hours (2 semesters) of related technical instruction is required for each one year YA program. The student must also receive high school credit towards graduation for this instruction, no matter the provider.
- It is suggested that an Introduction to Business Marketing class be provided as a pre-requisite for students interested in this youth apprenticeship. Additionally, students should complete a job shadow prior to enrollment in the Marketing YA program.
- Courses chosen should coincide as much as possible to occupational program requirements if the student intends to continue in the Wisconsin Technical College System.
- Recommendations for this Appendix were obtained from Employer and YA Consortium/School District Coordinator input during the YA Marketing Program Survey and YA Regional Meetings, December 2016 through April 2017, and through the States' Career Clusters recommendations at <http://www.careertech.org>



# Marketing Youth Apprenticeship (YA)

NAME: \_\_\_\_\_ DATE: \_\_\_\_\_

The Marketing YA Pathway Units and Related Technical Instruction course selection and delivery are entirely within local consortium control. The recommendations listed below are only a suggested path of YA career planning and should be individualized to meet each learner's educational and career goals. All plans should meet high school graduation requirements, as well as, college entrance requirements. For more specific pathway plans of study, visit <https://careertech.org/marketing>

## HIGHLY Recommended for ALL Marketing YA students

EDUCATION LEVELS	GRADE	English/ Language Arts	Math	Science	Social Studies/ Sciences	Other Required Courses Other Electives Recommended Electives Learner Activities	*Career and Technical Courses and/ or Degree Major Courses for Marketing, Sales and Service	SAMPLE Occupations Relating to This Career Cluster
<b>ECODARY</b>	9	English/ Language Arts I	Algebra I or Geometry	Earth or Life or Physical Science or Biology	State History Geography	All plans of study should meet local and state high school graduation requirements and college entrance requirements. Certain local student organization activities are also important including public speaking, record keeping and work-based experiences.	**Business Essentials **Business Technology Applications	<ul style="list-style-type: none"> <li>▶ Copywriter/Designer</li> <li>▶ E-Commerce Director</li> <li>▶ Entrepreneur</li> <li>▶ Field Marketing Representative</li> <li>▶ Forecasting Manager</li> <li>▶ Interactive Media Specialist</li> <li>▶ Inventory Manager/Analyst</li> <li>▶ Logistics Manager</li> <li>▶ Merchandise Buyer</li> <li>▶ On-line Market Researcher</li> <li>▶ Public Relations Manager</li> <li>▶ Promotions Manager</li> <li>▶ Retail Marketing Coordinator</li> <li>▶ Sales Executive</li> <li>▶ Shipping/Receiving Clerk</li> <li>▶ Telemarketer</li> <li>▶ Trade Show Manager</li> <li>▶ Warehouse Manager</li> <li>▶ Webmaster</li> </ul>
	10	English/ Language Arts II	Geometry or Algebra II	Biology or Chemistry	U.S. History		**Marketing Principles	
	11	English/ Language Arts III	Pre-Calculus or Algebra II	Chemistry or Physics	World History Psychology		Continue courses pertinent to the pathway selected. **Advertising **Sales **Social Media Marketing	
	College Placement Assessments-Academic/Career Advisement Provided							
	12	English/ Language Arts IV	Pre-Calculus or Calculus or Trigonometry or Statistics	Physics or other science course	Government Economics			
Articulation/Dual Credit Transcribed-Postsecondary courses may be taken/moved to the secondary level for articulation/dual credit purposes.								
<b>POSTSECONDARY</b>	Year 13	English Composition English Literature	Algebra or Calculus	Lab Science	Economics Psychology	All plans of study need to meet learners' career goals with regard to required degrees, licenses, certifications or journey worker status. Certain local student organization activities may also be important to include.	Continue courses pertinent to the pathway selected.	
	Year 14	Speech/ Oral Communication Technical Writing			Sociology Public Policy			
	Year 15	Continue courses in the area of specialization.						
	Year 16							

# Career Opportunities

The chart below shows examples of career ladders organized by pathway.

For additional career cluster information, visit <https://careertech.org/career-clusters>.

For additional career information on a specific occupation, visit [www.careercruising.com](http://www.careercruising.com).

<b>Sample Career Specialties/Occupations</b>	<ul style="list-style-type: none"> <li>• Entrepreneurs</li> <li>• Owners</li> <li>• Small Business Owners</li> <li>• Presidents</li> <li>• Chief Executive Officers</li> <li>• Principals</li> <li>• Partners</li> <li>• Proprietors</li> <li>• Franchisees</li> <li>• Independent X's (e.g., distributor)</li> <li>• Customer Service Representatives</li> <li>• Administrative Support Representatives (e.g., human resources, clerical, finance, technical)</li> </ul>	<ul style="list-style-type: none"> <li>• Inbound Call Managers</li> <li>• Channel Sales Managers</li> <li>• Regional Sales Managers</li> <li>• Client Relationship Managers</li> <li>• Business Development Managers</li> <li>• Territory Representatives /Managers</li> <li>• Key Account Managers</li> <li>• National Account Managers</li> <li>• Account Executives</li> <li>• Sales Engineers</li> <li>• Sales Executives</li> <li>• Technical Sales Specialists</li> <li>• Retail Sales Specialists (big ticket)</li> <li>• Outside Sales Representatives</li> <li>• Industrial Sales Representatives</li> <li>• Manufacturer's Representatives</li> <li>• Salespersons</li> <li>• Field Marketing Representatives</li> <li>• Brokers</li> <li>• Agents</li> <li>• Field Representatives</li> <li>• Solutions Advisors</li> <li>• Sales/Marketing Associates</li> <li>• Telemarketers/Inside Sales Representatives</li> <li>• Customer Service Representatives</li> <li>• Administrative Support Representatives (e.g., human resources, clerical, finance, technical)</li> </ul>	<ul style="list-style-type: none"> <li>• Store Managers</li> <li>• Retail Marketing Coordinators</li> <li>• Merchandising Managers</li> <li>• Merchandise Buyers</li> <li>• Operations Managers</li> <li>• Visual Merchandise Managers</li> <li>• Sales Managers</li> <li>• Department Managers</li> <li>• Sales Associates</li> <li>• Customer Service Representatives</li> <li>• Clerks (e.g., stock, receiving, etc.)</li> <li>• Administrative Support Representatives (e.g., human resources, clerical, finance, technical)</li> </ul>	<ul style="list-style-type: none"> <li>• Advertising Managers</li> <li>• Public Relations Managers</li> <li>• Public Information Directors</li> <li>• Sales Promotion Managers</li> <li>• Co-op Managers</li> <li>• Trade Show Managers</li> <li>• Circulation Managers</li> <li>• Promotions Managers</li> <li>• Art/Graphics Directors</li> <li>• Creative Directors</li> <li>• Account Executives</li> <li>• Account Supervisors</li> <li>• Sales Representatives</li> <li>• Marketing Associates</li> <li>• Media Buyers/Planners</li> <li>• Interactive Media Specialists</li> <li>• Analysts</li> <li>• Contract Administrators</li> <li>• Copywriters</li> <li>• Research Specialists</li> <li>• Research Assistants</li> <li>• Customer Service Representatives</li> <li>• Administrative Support Representatives (e.g., human resources, clerical, finance, technical)</li> </ul>	<ul style="list-style-type: none"> <li>• Database Managers</li> <li>• Research Specialists / Managers</li> <li>• Brand Managers</li> <li>• Marketing Services Managers</li> <li>• Customer Satisfaction Managers</li> <li>• (Research) Project Managers</li> <li>• CRM Managers</li> <li>• Forecasting Managers</li> <li>• Strategic Planners, Marketing</li> <li>• Product Planners</li> <li>• Planning Analysts</li> <li>• Directors of Market Development</li> <li>• Database Analysts</li> <li>• Analysts</li> <li>• Research Associates</li> <li>• Frequency Marketing Specialists</li> <li>• Knowledge Management Specialists</li> <li>• Interviewers</li> <li>• Customer Service Representatives</li> <li>• Administrative Support Representatives (e.g., human resources, clerical, finance, technical)</li> </ul>
<b>Pathway</b>	<b>Marketing Management</b>	<b>Professional Sales</b>	<b>Merchandising</b>	<b>Marketing Communications</b>	<b>Marketing Research</b>
<b>CCTC/Career Ready</b>	<p>The Common Career Technical Core (CCTC) includes a set of standards for each of the 16 Career Clusters™ and their corresponding Career Pathways that define what students should know and be able to do after completing instruction in a program of study. The CCTC also includes an overarching set of Career Ready Practices that apply to all programs of study. The Career Ready Practices include 12 statements that address the knowledge, skills and dispositions that are important to becoming career ready.</p>				

SOURCES: The States' Career Clusters Initiative, 2017, [www.careertech.org/career-clusters](http://www.careertech.org/career-clusters)

# Appendix D

## MARKETING YOUTH APPRENTICESHIP PROGRAM

### WISCONSIN INSTRUCTIONAL DESIGN SYSTEM (WIDS) FORMAT AND YOUTH APPRENTICESHIP PROGRAM GUIDE TERMS

#### **WIDS/YA Program DOCUMENTS:**

##### **Course Outcome Summary (COS)**

The list of *competencies* and corresponding *performance standard criteria, conditions, and Learning Objectives* required for competency mastery.

##### **Marketing YA Program Guide**

Description of the Marketing YA Program. The appendices contain program information; and competencies with their corresponding performance standards and learning objectives by unit. This is similar to the Program Outcome Summary (POS) in WIDS.

##### **Skill Standards Checklist**

Listing of ALL the competencies in ALL of the Industry-wide and Industry-specific skill areas. The checklist provides the overall documentation for DWD of the skill achievement levels for the competencies in the specific units.

#### **WIDS TERMS:**

##### **Competency**

The major skill or outcome stated in observable, measurable terms telling learners what they must be **able to do** AFTER a learning experience.

##### **Performance Standards**

Specifications by which performance of a competency will be evaluated (criteria) and the circumstances/situation (condition) in which the competency will be evaluated. This is what the employer should look for when assessing the student's skills, as applicable to that worksite.

##### **Core Skills**

Competencies that address the abilities, values, and attitudes required for productive and successful employment.

##### **Learning Objective**

The background knowledge that is needed to master the competency; the related technical classroom instruction information needed by the learner to master the competency.

# APPENDIX E

## MARKETING YOUTH APPRENTICESHIP PROGRAM USE AND DISTRIBUTION OF THE CURRICULUM

**New and current employers** should be given at least one set of the complete curriculum package. The [curriculum package](#) includes a copy of the **Program Guide**, [Skill Standards Checklist](#), and the **Course Outcome Summary (COS)**. The performance standards on the COS should be highlighted with the employer mentor(s) so that they know HOW to assess the learner for competency evaluation.

All related technical classroom **instructors** will need to be provided with the **Course Outcome Summary (COS)** to see the learning objectives for the related technical classroom instruction. The local Marketing Youth Apprenticeship advisory group should determine the requirements and delivery of the required related technical classroom instruction prior to offering this YA program in the local consortium area. The advisory group should ensure that each learning objective is being taught either at the employer facility, school, and/or technical college.

**Recommended Related instruction:** Students enrolled into the Marketing Youth Apprenticeship are encouraged to register for the following Wisconsin Technical College System (WTCS) courses while enrolled in the Youth Apprenticeship program: **Marketing Principles (3 credits) 10-104-102.**

Additionally, students may elect to take a traditional high school Marketing course if the course content closely aligns to the following recommended course outline from WI Department of Public Instruction (DPI).



# 10-104-3 Marketing

## Technical Skills Attainment (TSA) Summative Assessment

### Crosswalk to Wisconsin Standards for Marketing, Management, and Entrepreneurship (MME)

*This crosswalk showcases the knowledge, skills, and dispositions related to marketing program outcomes. There is an understanding that this crosswalk illustrates the continuum of learning from K – 12 to post-secondary education. In cases where there is an articulation agreement there will be elements of a one to one match of standards.*

Criteria	WI Standards for MME Content Area	Performance Indicator	Page #
<b>A. Develop strategies to anticipate and satisfy market needs</b>			
A.1 Conduct a situational analysis	<b>Market Planning</b>	<b>MC1.c.2.m:</b> List the importance of the situational analysis data. <b>MC1.c.6.h:</b> Explain the role of situational analysis in the marketing planning process.	<b>81</b>
A.2 Evaluate the product/service mix, distribution, and pricing strategies	<b>Product Service Management</b>	<b>MC5.j.8.h:</b> Evaluate product mix.	<b>94</b>
	<b>Channel Management</b>	<b>MC3.b.7.h:</b> Select and evaluate channels of distribution.	<b>86</b>
	<b>Pricing</b>	<b>MC6.d.4.h:</b> Evaluate pricing decisions.	<b>98</b>
A.3 Select target markets	<b>Market Planning</b>	<b>MC1.b.6.h:</b> Select target market.	<b>81</b>
A.4 Identify marketing objectives along with related financial requirements	<b>Strategic Management</b>	<b>MGT7.b.3.h:</b> Monitor achievement of marketing objectives in a school-based enterprise.	<b>116</b>
	<b>Operations</b>	<b>MF10.c.8.h:</b> Set financial goals for a marketing or business initiative/project.	<b>78</b>
A.5 Develop marketing strategies and tactics to meet established goals	<b>Strategic Management</b>	<b>MGT7.b.8.h:</b> Modify marketing strategies based on performance results.	<b>116</b>
A.6 Identify evaluation methods of marketing plan effectiveness	<b>Market Planning</b>	<b>MC1.d.13.h:</b> Monitor and evaluate performance of marketing plan.	<b>82</b>
A.7 Present marketing plan	<b>Introduction to Marketing</b>	<b>MF1.d.6.h:</b> Defend the importance of a comprehensive promotional plan and marketing plan to the success of a business.	<b>59</b>
<b>B. Promote products, services, images, and/or ideas to achieve a desired outcome</b>			

B.1 Establish promotional objectives	Promotion	MC7.m.10.h: Select word-of-mouth strategies appropriate for promotional objectives.	104
B.2 Determine target market for a promotional plan	Market Planning	MC1.b.6.h: Select target market.	81
	Product Service Management	MC5.a.4.m: Define target market and identify market for selected product.	90
B.3 Develop a positioning strategy	Product Service Management	MC5.h.6.h: Explain the role of customer service in positioning/image.  MC5.h.8.h: Develop positioning concept/statement for a new product idea.  MC5.i.5.m: Discuss and describe corporate brand positioning strategies.	93
B.4 Determine promotional mix components to fulfill promotional objectives	Promotion	MC7.b.3.m: Identify the components of the promotional mix.	99
B.5 Create the elements of a promotional mix	Promotion	MC7.b.6.h: Coordinate activities in the promotional mix.	99
B.6 Measure the effectiveness of a promotional plan	Promotion	MC7.b.4.m: Identify ways to assess results of promotional efforts.  MC7.b.7.h: Evaluate results of promotional efforts in a school-based enterprise.  MC7.b.11.h: Measure success of promotional efforts.	99

<b>C. Evaluate information through the market research process to make business decisions</b>			
C.1 Formulate the market research problem	<b>Marketing-Information Management</b>	<p><b>MC2.b:</b> Describe the nature and scope of marketing-research and evaluate its appropriateness for the research problem/issue.</p> <p><b>MC2.b.7.h:</b> Determine the marketing-research problem/issue.</p>	<b>83</b>
C.2 Apply marketing research design methodology	<b>Marketing-Information Management</b>	<b>MC2.c:</b> Design and apply a marketing -research study to ensure appropriateness of data-collection efforts.	<b>84</b>
C.3 Collect primary and/or secondary market data	<b>Marketing-Information Management</b>	<p><b>MC2.c.2.e:</b> Collect student opinion data.</p> <p><b>MC2.c.4.m:</b> Collect data using surveys.</p> <p><b>MC2.c.6.h:</b> Obtain information from customer databases.</p>	<b>84</b>
C.4 Evaluate market research data	<b>Marketing-Information Management</b>	<p><b>MC2.c.12.h:</b> Analyze consumer behavior (e.g., media-consumption, buying, etc.).</p> <p><b>MC2.c.16.h:</b> Interpret qualitative research findings.</p> <p><b>MC2.d.1.h:</b> Analyze information from suppliers.</p> <p><b>MC2.d.3.h:</b> Analyze competitors' offerings.</p>	<p><b>84</b></p> <p><b>85</b></p> <p><b>85</b></p> <p><b>85</b></p>
C.5 Present market research findings, conclusions, and recommendations	<b>Market Planning</b>	<b>MC1.c.8.h:</b> Present the findings from a competitive analysis.	<b>82</b>

D. Prepare selling strategies			
D.1 Analyze customer profiles to meet current and anticipated needs	<b>Market Planning</b>	<b>MC1.b.5.h:</b> Develop customer/client profiles (demographics, geographics, psychographics, behavioral, etc.).	<b>81</b>
D.2 Develop continuous improvement strategies to enhance customer relationships	<b>Selling and Customer Relations</b>	<p><b>MF6.d:</b> Explain the nature of customer relationship management to show its contributions to a company.</p> <p><b>MF7.d:</b> Employ sales processes and techniques to enhance customer relationships and to increase the likelihood of making sales.</p>	
D.3 Demonstrate sales techniques	<b>Selling and Customer Relations</b>	<p><b>MF7.c.10.h:</b> Determine sales strategies.</p> <p><b>MF7.c.13.h:</b> Develop a sales demonstration that uses technology.</p> <p><b>MF7.b:</b> Acquire product knowledge to communicate product features and benefits to ensure customer satisfaction.</p> <p><b>MF7.b.5.m:</b> Identify product/service features and benefits.</p> <p><b>MF7.b.7.h:</b> Use acquired product information in a sales situation.</p> <p><b>MF7.b.9.h:</b> Show and tell the main features and benefits of a product/service.</p> <p><b>MF7.d.2.e:</b> Explain the difference between a customer/client excuse and an objection.</p> <p><b>MF7.d.7.m:</b> Generate feedback to overcome objections.</p> <p><b>MF7.d.17.h</b> Close the sale.</p> <p><b>MF7.f.2.h:</b> Provide post-sales service.</p> <p><b>MF7.d.3.e:</b> Explain the importance of suggestion selling.</p>	<b>69 – 70</b>

<b>Week</b>	<b>Performance Indicators</b>
1	Course Orientation Review of marketing and its importance (MK:001) [p. 5-3] Marketing Functions (MK:002) [p. 5-5]
2	Marketing Functions (MK:002) [p. 5-5] (cont'd) Employment Opportunities in Marketing (PD:024) [p. 5-7] Analysis of Company Resources (CO:057) [p. 5-9]
3	Marketing Strategies (MP:001) [p. 5-11] Market Identification (MP:003) [p. 5-13]
4	Need for Marketing Data (IM:012) [p. 5-15] Data Monitored for Marketing Decision-making (IM:184) [p. 5-17]
5	Writing Business Letters (CO:133) [p. 5-19] Nature and Scope of Selling (SE:017) [p. 5-21] Role of Customer Service in Selling (SE:076) [p. 5-23]
6	Role of Customer Service in Selling (SE:076) [p. 5-23] (cont'd) Customer-service Mindset (CR:004) [p. 5-25] Service Orientation Through Communication (CR:005) [p. 5-27]
7	Adapting Communication to Social/Cultural Differences of Clients (CR:019) [p. 5-29] Customer Inquiries (CR:006) [p. 5-31] Company Selling Policies (SE:932) [p. 5-33]
8	Interpreting Business Policies (CR:007) [p. 5-35] Handling Difficult Customers (CR:009) [p. 5-36] Handling Customer Complaints (CR:010) [p. 5-38]
9	Grades and Standards (PM:019) [p. 5-40] Warranties and Guarantees (PM:020) [p. 5-42]
10	Brand Promise (CR:001) [p. 5-44] Reinforcing Company Image (CR:002) [p. 5-46]
11	Acquiring Product Information (SE:062) [p. 5-48] Analyzing Product Information for Features and Benefits (SE:109) [p. 5-50]
12	Selling Process (SE:048) [p. 5-52] Establishing Customer Relationship (SE:110) [p. 5-54]
13	Determining Customer Needs (SE:111) [p. 5-56] Recommending Specific Product (SE:114) [p. 5-58]
14	Calculating Miscellaneous Charges (SE:116) [p. 5-60] Processing Special Orders (SE:009) [p. 5-62] Processing Telephone Orders (SE:835) [p. 5-64]
15	Nature and Scope of Product/Service Management (PM:001) [p. 5-66] Product Life Cycles (PM:024) [p. 5-68]
16	Product Life Cycles (PM:024) [p. 5-68] (cont'd) Technology in Product/Service Management (PM:039) [p. 5-70] Ethics in Product/Service Management (PM:040) [p. 5-72]
17	Consumer Protection (PM:017) [p. 5-74] Product Mix (PM:003) [p. 5-76]
18	Factors Used to Position Products (PM:042) [p. 5-78] Product Branding (PM:021) [p. 5-80]
19	Corporate Branding (PM:206) [p. 5-83] Nature and Scope of Pricing (PI:001) [p. 5-85]
20	Ethics in Pricing (PI:015) [p. 5-87] Technology in Pricing (PI:016) [p. 5-89] Legal Considerations in Pricing (PI:017) [p. 5-91]
21	Factors Affecting Pricing Decisions (PI:002) [p. 5-93] Nature and Scope of Channel Management (CM:001) [p. 5-95]
22	Customer Service and Channel Management (CM:002) [p. 5-97] Channels of Distribution (CM:003) [p. 5-99]

23	Technology in Channel Management (CM:004) [p. 5-101] Legal Considerations in Channel Management (CM:005) [p. 5-103] Ethical Considerations in Channel Management (CM:006) [p. 5-105]
24	Writing Informational Messages (CO:039) [p. 5-107] Role of Promotion (PR:001) [p. 5-109]
25	Types of Promotion (PR:002) [p. 5-111] Promotional Mix (PR:003) [p. 5-113]
26	Ethics in Promotion (PR:099) [p. 5-115] Technology in Promotion (PR:100) [p. 5-117] Regulation of Promotion (PR:101) [p. 5-119]
27	Types of Advertising Media (PR:007) [p. 5-121] Word of Mouth Channels (PR:247) [p. 5-123] Direct Marketing Channels (PR:089) [p. 5-125]
28	Sales Promotion Channels (PR:249) [p. 5-127] Public-relations Channels (PR:250) [p. 5-129]
29	Writing Inquiries (CO:040) [p. 5-131] Nature and Scope of Marketing-information Management (IM:001) [p. 5-133]
30	Ethics in Marketing-Information Management (IM:025) [p. 5-135] Technology in Marketing-Information Management (IM:183) [p. 5-137] Regulation of Marketing-Information Management (IM:419) [p. 5-139]
31	Nature of Marketing Research (IM:010) [p. 5-141] Nature of Marketing Research Problems/Issues (IM:282) [p. 5-144]
32	Marketing Research Design Methods (IM:284) [p. 5-146] Options for Obtaining Marketing-research Data (IM:281) [p. 5-148]
33	Nature of Sampling Plans (IM:285) [p. 5-150] Data-collection Methods (IM:289) [p. 5-152]
34	Characteristics of Effective Data-collection Instruments (IM:418) [p. 5-153] Types of Rating Scales (IM:286) [p. 5-156]
35	Factors in Building a Clientele (SE:828) [p. 5-158] Ethics in Selling (SE:106) [p. 5-160]
36	Technology in Selling (SE:107) [p. 5-162] Selling Regulations (SE:108) [p. 5-164] Course Evaluation

Additional related dual credit-courses should also be considered for related technical instruction. Note: Not all WTCS schools offer the same marketing coursework and articulation opportunities.

<b>Name Course</b>	<b>Aligned Pathway</b>
Advanced Marketing 10-104-160	Marketing Management, Multiple
Apparel Marketing 10-104-124	Merchandising
Brand Development 10-104-182	Marketing Communications, Research
Event Marketing 10-104-125	Multiple
Fashion Analysis 10-104-140	Merchandising
Principles of Interior Design 10-304-100	Merchandising
Principles of Sales 10-104-154	Professional Sales
Retailing 10-104-127T	Merchandising, Research
Social Media Campaigns 10-104-124	Marketing Communications
Sports and Event Marketing 10-104-109T	Multiple

At the beginning of the Marketing YA program, **student learners** should receive a copy of the [Skill Standards Checklist](#) and the applicable pages from the **Course Outcome Summary (COS)** to review with their instructor(s) **and** worksite mentor(s). This is the opportunity for instructors and mentors to highlight the worksite experiences, related technical classroom instruction, and assessments that will occur. In a performance-based curriculum successful learning is enhanced when the learners have the opportunity to review what will be expected of them in advance of the lessons.

It is recommended that a portfolio be prepared for EACH learner. The learner should be given the responsibility for maintaining this documentation and making it available to the instructor and/or worksite mentor for recording performance assessments.

When the performance criteria are completed successfully, the learner achievement level information must be recorded on the [Skill Standards Checklist](#). The completed Skill Standards Checklist is the piece of documentation required by DWD to issue the Certification of Occupational Proficiency.

# Appendix F

## POST-SECONDARY CREDITS

### Wisconsin Technical College System

Wisconsin Technical College System Graduates of one-year or two-year Marketing Youth Apprenticeship programs may be awarded credits in Wisconsin Technical College programs. Each Technical College may grant credit through specific local articulation agreements. Contact the local technical college to determine the number and type of articulated credits available for Marketing YA. The credits may be taken as technical college courses within Youth Apprenticeship programs or may be granted through advanced standing agreements when students enroll in the technical college.

If a student is enrolled into a Dual credit course identified in Appendix E they will earn the appropriate amount of credit at both their high school and the local technical college with the dual credit agreement.

In addition, YA students should request a credit evaluation of their YA classroom and work experiences upon admission to the local technical college under the Wisconsin Technical College System "Credit for Prior Learning Policy". For a list of technical college programs in which two-year Youth Apprenticeship graduates may receive credit see the WTCS Colleges & Careers, Youth Apprenticeship web page at <http://www.wistechcolleges.org/preparing-college/college-credit-high-school/youth-apprenticeship>.

**WTCS Programs Offering Credit to Two-Year Youth Apprenticeship Graduates**  
[http://www.wistechcolleges.org/sites/default/files/ya\\_programs\\_05.pdf](http://www.wistechcolleges.org/sites/default/files/ya_programs_05.pdf)

**UW Institutions Credits for Admission** – Admission Credits for the Marketing Youth Apprenticeship Program are yet TO BE DETERMINED.

**Two-Year Marketing YA Graduates who have completed the YA programs listed below *may be eligible for advanced standing credits from the technical college programs.***

Marketing Principles (3 credits) 10-104-102

Written Communication (3 credits) 10-801-195

Excel (1 credit) 10-103-133

Word (1 credit) 10-103-137

PowerPoint (1 credit) 10-104-143

Selling Principles (3 credits) 10-104-104

Leadership Ethics (3 credits) 10-104-113

Additional courses could be considered, reference **Appendix E** for more approved courses.



# Appendix G

## GRANDFATHER CLAUSE – PROGRAM TRANSITION GUIDELINES

### For NEW and CONTINUING Marketing Youth Apprenticeship Students

General Rule: if the student **begins** Marketing YA program using the Draft version of the Marketing checklist, then the student must complete the YA program using the Draft checklist. The appropriate Level One or Level Two Certificate of Occupational Proficiency from the Wisconsin Department of Workforce Development (DWD) will be awarded.

- Senior graduating in 2017 Level One YA: The youth apprentice may complete either the Draft checklist OR use the revised checklist for Marketing YA. The appropriate Level One Certificate of Occupational Proficiency from the Wisconsin Department of Workforce Development (DWD) will be awarded.
- Senior graduating in 2018 Level Two YA: The youth apprentice completes the Draft checklist for the year 2 curriculum for Marketing YA. An appropriate Level Two Certificate of Occupational Proficiency from the Wisconsin Department of Workforce Development (DWD) will be awarded.
- Sophomore applying for the Marketing YA Program for 2017-2018: New youth apprentices must use the revised Marketing YA checklist **by the 2018-19** school year. A Certificate of Occupational Proficiency will not be issued to students who submit the draft checklist.

Additionally, Youth Apprenticeship students must maintain good academic standing and be on track for graduation to be eligible for a Certificate of Occupational Proficiency from the Department of Workforce Development.

- 
- Starting in 2017-2018, all new YA students must use the new Marketing skill standards checklist.
  - Starting in 2018-19, all YA students must use the 2017-18 Marketing AFNR skill standards checklist.

Additionally, Youth Apprenticeship students must maintain good academic standing and be on track for graduation to be eligible for a Certificate of Occupational Proficiency from the Department of Workforce Development.

# Appendix H

## MARKETING YOUTH APPRENTICESHIP PROGRAM SKILL STANDARDS CHECKLIST

(DOWNLOAD MOST CURRENT)

[http://dwd.wisconsin.gov/dwd/forms/dws/deta\\_18347\\_e.htm](http://dwd.wisconsin.gov/dwd/forms/dws/deta_18347_e.htm)

# **Appendix I**

## **MARKETING YOUTH APPRENTICESHIP PROGRAM**

### **COURSE OUTCOME SUMMARY: OVERVIEW AND TABLE OF CONTENTS**

# Marketing Youth Apprenticeship Program

## Course Outcome Summary

### Course Information

Organization: Dane County School Consortium and Wisconsin Dept. of Public Instruction (DPI)  
Developers: Josh Fassl, Dane County School Consortium and Tim Fandek, WI DPI  
Development Date: June 2017

**Description:** Marketing is a multi-faceted, critical business function that is under-girded by such social sciences as economics, psychology, and sociology. Its successful performance depends on the application of mathematics and English principles, the use of scientific problem solving, and the application of technology to marketing situations and problems.

The pace at which marketing activities are changing has accelerated due to environmental shifts taking place in the business world: downsizing, outsourcing, off-shoring, mergers, global competition, world markets, and technological innovations. These changes impact the skills, attitudes, and abilities needed for success in today's workplace.

The annual Challenger, Gray & Christmas, Inc. survey of human resource professionals suggests that new college graduates with the best chance of landing a career are in Business Administration (36.8%), Accounting/Finance, and Marketing. In Wisconsin, 5 of the Top 15 **Occupations with the Most Openings** are Marketing cluster related, including: #1: Retail Salespersons, #3: Cashiers, #5: Customer Service Representatives, #8: Office Clerks, and #14: Sales Representatives.

Level One students must complete the require skills that include Core Skills, Safety and Security, and the Marketing Core Foundations plus one pathway unit. Level Two students must complete the requirements of Level I plus one additional pathway Unit.

While not required, the **Management/Leadership unit** should be completed either as a second Pathway for a senior in Level II who has previously completed coursework for other pathway units.

#### Pathway Units:

- Professional Sales Unit
- Merchandising Unit
- Marketing Communication Unit
- Marketing Research / Competitive Intelligence Unit
- Marketing Management / Leadership Unit

**EACH competency** (work site skill) is listed with its corresponding Performance Standards and Learning Objectives. The **Performance Standards** describe the behaviors, **as applicable**, that employers should look for in order to evaluate the competency. The **Learning Objectives** suggest classroom learning activities for the required related technical instruction. **NOTE:** Switching between pathways is allowable.

## Curriculum Sources

- American Marketing Association – Professional Certified Marketer. Accessed January 2017, from <https://www.ama.org/events-training/Certification/Pages/us-pcm.aspx>.
- Assessment of Skills and Knowledge For Business (A\*S\*K) Institute Principles of Marketing Certification performance indicators. Accessed September 2016, from <http://www.askinstitute.org/>.
- Marketing and Business Administration (MBA) Research and Curriculum Center. Accessed September 2016, from <https://mbaresearch.org/>.
- *Marketing Essentials*, Farese, L., Kimbrell, G., and Woloszyk, C. (2016). Glencoe/McGraw-Hill. Woodland Hills, CA.
- National Career Technical Education Foundation, States' Career Clusters Initiative. Accessed August 2016, from <https://careertech.org/career-clusters>.
- National Occupational Competency Testing Institute (NOCTI) Job Ready Student Assessment Blueprints for Advertising and Design, Retail Merchandising. Accessed January 2017 from <http://www.nocti.org/BlueprintCategoryLinks.cfm?category=Marketing>.
- U.S. Department of Labor, Employment and Training Administration, Industry-Based Competency Model for the Marketing Industry. O\*NET Online. Accessed June 2017, from [www.onetonline.org](http://www.onetonline.org).
- Wisconsin Department of Workforce Development, Labor Market Projections 2014-2024. Accessed January 2017, from <http://wisconsinjobcenter.org/labormarketinfo/>.
- Wisconsin Department of Marketing Management and Entrepreneurship, Business Management and Information Technology Advisory Committee (2016, July). For the purpose of developing the Marketing Youth Apprenticeship curriculum.
- Wisconsin Department of Public Instruction, WI Standards for Marketing, Management and Entrepreneurship. Accessed from <https://dpi.wi.gov/mmee/standards>.
- Wisconsin's Worknet Occupation Task Lists for Sales Representatives, Retail Salespersons, First Line Managers/Supervisors, Public Relations, and Meeting/Convention Planners. Accessed February 2016, from <http://worknet.wisconsin.gov/worknet/default.aspx>.

This curriculum was developed through a partnership with the Wisconsin Department of Workforce Development, Wisconsin Department of Public instruction and the Dane County School Consortium.

# Marketing Youth Apprenticeship

## Table of Contents

### APPENDIX J: REQUIRED SKILLS

#### Unit 1: Core Skills

1. Defend decisions by employing critical thinking skills
2. Communicate effectively using verbal and non-verbal language
3. Use interpersonal skills to resolve conflicts with others in an ethical manner
4. Demonstrate effective decision-making, problem solving and goal setting
5. Demonstrate positive work behaviors and personal qualities
6. Develop positive relationships with others
7. Exhibit professional traits for retaining employment
8. Work effectively with diverse individuals and adapt to company culture
9. Apply data and information to communicate ideas and create new opportunities
10. Adopt workplace tools to increase personal and organizational productivity
11. Employ teamwork skills to achieve collective goals

#### Unit 2: Safety and Security

1. Maintain a safe and healthful work environment
2. Follow risk management procedures
3. Demonstrate professional role in an emergency
4. Follow security procedures

#### Unit 3: Marketing Core Foundations

1. Facilitate business to customer relationships/interactions
2. Identify a company's unique selling proposition
3. Analyze cost/profit relationships to guide business decision making
4. Apply marketing information to meet customer needs
5. Use order-fulfillment processes to move product through the supply chain
6. Position products/services to acquire business image
7. Understand pricing strategies to determine products optimal price
8. Manage promotional activities to maximize return on promotional efforts
9. Identify ways that technology impacts business

# MARKETING PATHWAYS

## **APPENDIX K: Professional Sales Unit**

1. Reinforce company's image to exhibit the company's brand promise
2. Apply customer relationship management to show its contributions to the company
3. Utilize digital communication in the selling process
4. Plan sales activities to increase sales efficiency and effectiveness
5. Acquire product knowledge to communicate product features and benefits to ensure customer satisfaction
6. Perform pre-sales activities to facilitate sales presentations
7. Employ sales processes and techniques to enhance customer relationships and to increase the likelihood of making sales
8. Process the sale and collect payment to complete the exchange
9. Conduct post-sales follow-up activities to foster ongoing relationships with customers

## **APPENDIX L: Merchandising Unit**

1. Employ product-mix strategies to meet customer expectations
2. Plan product/service management activities to facilitate product development
3. Assist to develop merchandise plans (budgets) to guide selection of retail products
4. Employ visual merchandising techniques to increase interest in product offerings
5. Implement display techniques to attract customers and increase sales potential
6. Follow merchandise security procedures to minimize inventory loss
7. Follow inventory control and management methods to maintain appropriate levels of stock/supplies
8. Prepare Register/terminal for sales operations
9. Utilize stock-handling procedures to process incoming inventory

## **APPENDIX M: Marketing Communications Unit**

1. Utilize promotional channels used to communicate with targeted audiences
2. Execute an advertising campaign to achieve marketing objectives within budget
3. Apply design principles to be able to communicate needs to designers
4. Use information-technology tools to manage and perform marketing communications responsibilities
5. Manage media planning and placement to enhance return on marketing investment
6. Use publicity/public-relations activities to create goodwill with stakeholders
7. Employ sales-promotion activities to inform or remind customers of business/product
8. Manage communications efforts to protect brand viability
9. Maintain technology security to protect customer information and company image
10. Develop content for use in marketing communications to create interest in product/business/idea

## **APPENDIX N: Marketing Research/Competitive Intelligence Unit**

1. Monitor business data that impact business decision-making
2. Evaluate the need for analytics based marketing research
3. Analyze who and how many respondents are needed for marketing research
4. Select method to obtain needed data to address general business problem
5. Facilitate data-collection process
6. Collect marketing-research data from variety of sources
7. Process analytical data to translate marketing information
8. Apply statistical methods and software systems to aid in competitive intelligence
9. Report findings to communicate research information to others
10. Assess quality of marketing-research activities to determine needed improvements

## **APPENDIX O: Marketing Management/Leadership Unit**

1. Understand human-resource laws and regulations to facilitate business operations
2. Develop personal organizational skills to lead others
3. Supervise and train fundamental work skills
4. Use teamwork to increase workplace efficiency and effectiveness
5. Use information-technology tools to manage work and customer relationships
6. Maintain business records to facilitate business operations
7. Assist with strategic planning to guide business decision-making
8. Identify potential business threats and opportunities to protect a business's financial well-being
9. Use project-management skills to improve return on investment (ROI)
10. Manage business relationships to foster positive interactions



# Appendix J

## MARKETING YOUTH APPRENTICESHIP PROGRAM

### REQUIRED SKILLS CURRICULUM UNITS 1-3

## Unit 1: Required Skills

### Core Skills

#### Competency

##### 1. Defend decisions by employing critical thinking skills

#### Performance Standard Condition

##### **Competence will be demonstrated**

- at the worksite
- while assisting a worksite professional

#### Performance Standard Criteria

##### **Performance will be successful when the learner:**

- Determines the best resolution for a problem, decision or opportunity based on given criteria
- Defends an action taken or a decision implemented
- Applies past experience to develop a course of action for a new situation.
- Uses existing knowledge to develop a resolution for a new situation, problem or opportunity

#### Learning Objectives

- Determine the information needed to address an identified problem
- Contrast the benefits and drawbacks of various proposed resolutions to a given situation
- Predict how an action could result in unintended consequences, both positive and negative
- Analyze the impact of a decision using systems thinking model

#### Comments:

## **Unit 1: Required Skills**

### **Core Skills**

Competency

#### **2. Communicate effectively using verbal and non-verbal language**

Performance Standard Condition

**Competence will be demonstrated**

- at the worksite

Performance Standard Criteria

**Performance will be successful when the learner:**

- Implements effective listening skills in resolving a situation
- Organizes messages/information in a logical and helpful manner
- Develops a mutually acceptable response to a question or problem
- Demonstrates the use of various tools to communicate effectively with an individual or a group
- Asks appropriate questions for clarity
- Speaks clearly and writes legibly

Learning Objectives

- Utilize effective listening skills in creating consensus in a group
- Distinguish between what a person says and what their expressions and body language indicate
- Communicate effectively in the presence of a language barrier.
- Demonstrate the use of various tools to communicate effectively with an individual or a group
- Participate in group processes to generate consensus
- Lead group processes to generate consensus

**Comments:**

## **Unit 1: Required Skills**

### **Core Skills**

Competency

#### **3. Use interpersonal skills to resolve conflicts with others in an ethical manner.**

Performance Standard Condition

##### **Competence will be demonstrated**

- at the worksite
- while assisting a worksite professional

Performance Standard Criteria

##### **Performance will be successful when the learner:**

- Models behaviors to show active listening
- Uses effective listening skills to solve a problem
- Resolves conflicts productively with individuals as they arise
- Defends personal ethics applied to common conflicts that arise during group interactions and team activities

Learning Objectives

- List possible solutions on how to handle difficult customers
- Resolve a conflict with another person with assistance
- Contribute to resolving conflicts that occur within a team or group
- Lead a team or group through a conflict resolution process to reach a productive outcome
- Explore the ethical considerations of a current or historical action or decision

**Comments:**

## Unit 1: Required Skills

### Core Skills

#### Competency

#### 4. Demonstrate effective decision-making, problem solving and goal setting

#### Performance Standard Condition

##### **Competence will be demonstrated**

- at the worksite
- while assisting a worksite professional

#### Performance Standard Criteria

##### **Performance will be successful when the learner:**

- Identifies the workplace issue
- Understands everyone's interests and perspectives
- Uses a decision-making and problem-solving model
- Evaluates the options
- Selects an option or options
- Sets work-related goals that align with the organization's mission
- Identifies strategies to reach goals
- Develops an action plan to set and achieve realistic goals
- Reflects on goal progress to regularly evaluate and modify goals

#### Learning Objectives

- Identify workplace issues
- Understand everyone's interests and perspectives
- Use a decision-making and problem-solving model
- List the possible solutions (options)
- Evaluate the options
- Select an option or options
- Define a goal and describe why it is important to have goals
- Develop effective coping skills for dealing with problems

#### Comments:

## Unit 1: Required Skills

### Core Skills

Competency

#### 5. Demonstrate positive work behaviors and personal qualities

Performance Standard Condition

##### **Competence will be demonstrated**

- at the worksite
- while assisting a worksite professional

Performance Standard Criteria

##### **Performance will be successful when the learner:**

- Demonstrates self-discipline, self-worth, positive attitude and integrity
- Demonstrates flexibility and willingness to learn new knowledge and skills
- Uses positive work-qualities typically desired in each of the career cluster's pathways
- Manages work roles and responsibilities to balance them with other life roles and responsibilities

Learning Objectives

- Identify positive work-qualities typically desired in each of the career cluster's pathways
- Evaluate how self-discipline, self-worth, positive attitude and integrity displayed in a work situation affect employment status
- Assess how flexibility and willingness to learn new knowledge and skills affect employment status
- Identify communication strategies when adapting to a culturally diverse environment

**Comments:**

## **Unit 1: Required Skills**

### **Core Skills**

Competency

#### **6. Develop positive relationships with others**

Performance Standard Condition

##### **Competence will be demonstrated**

- at the worksite
- while assisting a worksite professional

Performance Standard Criteria

##### **Performance will be successful when the learner:**

- Interacts with others in a respectful and non-judgmental manner
- Responds to others in an appropriate and non-offensive manner
- Helps co-workers and peers accomplish tasks or goals
- Shares responsibility for collaborative work and decision making
- Evaluates the best method to assist co-workers in accomplishing goals and tasks
- Applies problem-solving strategies to improve relations with others

Learning Objectives

- Participate in co-curricular and community activities to enhance the school experience
- Examine the skills required to enable students to successfully transition to post-secondary opportunities
- Use a systematic approach to academic and career planning for students to achieve their learning, socio-cultural and work goals

**Comments:**

## Unit 1: Required Skills

### Core Skills

Competency

#### 7. Exhibit professional traits for retaining employment

Performance Standard Condition

**Competence will be demonstrated**

- at the worksite
- while assisting a worksite professional

Performance Standard Criteria

**Performance will be successful when the learner:**

- Models behaviors that demonstrate self-discipline, reliability and dependability
- Maintains appropriate dress and behavior for the job to contribute to a safe and effective workplace/jobsite
- Takes personal responsibility to correct problems
- Acts in a respectful, professional, and non-offensive manner while under pressure
- Carries out responsibilities in an ethical, legal, and confidential manner
- Adheres to worksite regulations and practices

Learning Objectives

- Complete required employment forms and documentation
- Summarize key activities necessary to retain a job in an industry

**Comments:**



## Unit 1: Required Skills

### Core Skills

Competency

#### 8. Work effectively with diverse individuals and adapt to company culture

Performance Standard Condition

##### **Competence will be demonstrated**

- at the worksite
- while assisting a worksite professional

Performance Standard Criteria

##### **Performance will be successful when the learner:**

- Demonstrates mutual respect and open dialogue with individuals representing diverse cultures, beliefs and lifestyles
- Collaborates with others in the presence of language, personality and cultural differences
- Adjusts the communication approach for the target audience, purpose, and situation to maximize impact
- Works effectively in teams with people of diverse backgrounds regardless of sex, race, ethnicity, nationality, sexuality, religion, political views, and abilities
- Uses the problem-solving process to work through differences of opinion in a constructive manner to achieve a reasonable compromise

Learning Objectives

- Explain how people differ in the way they see the world and their experiences
- Describe ways to collaborate in the presence of language, personality and cultural differences
- Collaborate with diverse individuals to accomplish tasks in personal, school, work and community contexts

**Comments:**

## Unit 1: Required Skills

### Core Skills

#### Competency

#### **9. Apply data and information to communicate ideas and create new opportunities**

#### Performance Standard Condition

##### **Competence will be demonstrated**

- at the worksite
- while assisting a worksite professional

#### Performance Standard Criteria

##### **Performance will be successful when the learner:**

- Applies technology effectively in the workplace
- Accesses and evaluates information on the job
- Accesses training manuals, websites, or other media related to the job
- Defends a proposal for a new product or service based on data and information analysis
- Seeks out ways to increase customer satisfaction
- Synthesizes data and information from multiple sources to identify new trends

#### Learning Objectives

- Demonstrate how information analysis can be used to identify entrepreneurial opportunities
- Incorporate information from multiple sources to communicate a new idea or support an argument
- Apply a system for tracking and accessing data and information from multiple sources
- Manage and share stored data and information for a specific purpose

#### **Comments:**

## Unit 1: Required Skills

### Core Skills

#### Competency

#### **10. Adopt workplace tools to increase personal and organizational productivity**

#### Performance Standard Condition

##### **Competence will be demonstrated**

- at the worksite
- while assisting a worksite professional

#### Performance Standard Criteria

##### **Performance will be successful when the learner:**

- Uses equipment, technology, and work strategies to improve workflow
- Demonstrates the ability to use electronic communication technology
- Applies the use of technological tools for managing calendars, schedules and work flow
- Adapts and refines technology to continuously improve management of data in daily activity
- Performs calculations accurately

#### Learning Objectives

- Explain how technology can detract from personal and organizational productivity
- Integrate technological tools to efficiently create and manage correspondence in daily activity
- Adapt and refine technology to continuously improve personal and organizational productivity
- Manage use of technology to reduce negative impacts on productivity

#### **Comments:**

## Unit 1: Required Skills

### Core Skills

Competency

#### 11. Employ teamwork skills to achieve collective goals

Performance Standard Condition

##### **Competence will be demonstrated**

- at the worksite
- while assisting a worksite professional

Performance Standard Criteria

##### **Performance will be successful when the learner:**

- Demonstrates a positive attitude and a commitment toward achieving team goals
- Applies conflict management skills to help facilitate solutions
- Avoids contributing to unproductive group conflict
- Demonstrates the ability to negotiate and adapt effectively to changes in projects and work activities to meet timelines
- Shows support for organizational goals and principles by own personal actions
- Shares information and carries out responsibilities in a timely manner

Learning Objectives

- Demonstrate teamwork skills through working cooperatively with group members, group leader and others, both in the school and in the community, to achieve group objective
- Capitalize on team members' individual talents and skills in a project
- Evaluate and apply teamwork processes that provide team building, consensus, continuous improvement, respect for the opinions of others, cooperation, adaptability and conflict resolution

**Comments:**

## Unit 2: Required Skills

### Safety and Security

#### Competency

##### 1. Maintain a safe and healthful work environment

#### Performance Standard Condition

##### **Competence will be demonstrated**

- at the worksite
- while assisting a worksite professional

#### Performance Standard Criteria

##### **Performance will be successful when the learner:**

- Participates in all required safety training
- Follows all worksite guidelines for personal safety
- Complies with posted safety warnings and symbols
- Helps maintain a clean and safe working environment free of debris and obstacles
- Reports any exposures, injuries, or accidents, personal or to others, immediately (if applicable)
- Handles and disposes of any hazardous materials appropriately (if applicable)
- Operates only equipment that he/she is trained on
- Adheres to equipment safety standards
- Visually inspects equipment to ensure safety compliance and function before operation
- Wears the required Personal Protective Equipment (PPE) at all times as required by the worksite for specific tasks

#### Learning Objectives

- Explain the origin of rules and laws to promote health and safety in school and work
- Identify the relationships between school and community conditions with regard to personal and environmental health and safety
- Recognize and use systems in school and in the community, that protects and enhances personal, environmental health and safety
- Discuss the regulatory purpose and responsibility of the Occupational Safety and Health Administration (OSHA)
- Explain the procedure to follow in case of an exposure, injury, or accident to self or to another
- Describe safe and unsafe work habits and their implications
- List safety hazards common in the workplace
- Discuss the procedures and potential hazards associated with hazardous materials and bloodborne pathogens
- Explain the ergonomic impact of work techniques
- Define the Personal Protective Equipment (PPE) required for specific tasks on the job
- Explain the use of safety equipment such as eyeball washers and chemical safety showers and when you would use them
- Demonstrate safe use of equipment you will commonly use

#### Comments:

## **Unit 2: Required Skills**

### **Safety and Security**

Competency

#### **2. Follow risk management procedures**

Performance Standard Condition

##### **Competence will be demonstrated**

- at the worksite
- while assisting a worksite professional

Performance Standard Criteria

##### **Performance will be successful when the learner:**

- Reviews workplace strategies to minimize business risks
- Communicates risk management plan to other constituents in the workplace
- Implements workplace tasks according to pre-established risk management plans
- Documents and evaluates outcomes of risk management plans
- Articulates the value of risk management

Learning Objectives

- Discuss the nature of risk management
- Identify marketing and business risks
- Explain the role of ethics in risk management
- Identify techniques for reducing or eliminating risks
- Describe ways employees or customers may get hurt or sick in a business
- Describe the use of technology in risk management
- Discuss legal considerations affecting risk management
- Describe the health and safety regulations in business
- Describe insurance as it relates to minimizing the threat of financial risk to a business
- Compare and contrast types of business insurance coverage and their function

**Comments:**

## Unit 2: Required Skills

### Safety and Security

#### Competency

#### 3. Demonstrate professional role in an emergency

#### Performance Standard Condition

##### **Competence will be demonstrated**

- at the worksite
- while assisting a worksite professional

#### Performance Standard Criteria

##### **Performance will be successful when the learner:**

- Participates in emergency safety simulations and drills
- Outlines the company's policy and procedure for worksite incidents, accidents, electrical, fire, tornado, bomb threats, robbery, hostage situations, and other emergency situations
- Identifies the closest fire alarms and emergency exits in the assigned worksite area
- Identifies the fire extinguishers in the assigned worksite area
- Identifies appropriate alarms and procedures for using alarms
- Contacts emergency personnel according to company requirements in the event of an emergency
- Documents any emergency incidents according to company requirements

#### Learning Objectives

- Describe the procedures in your company to report an emergency
- Review your company procedures for responding to exposures, injuries, accidents, spills, fire, tornado, bomb threat, robbery, hostage situations, etc.
- Demonstrate how to use the fire extinguisher
- Explain the evacuation plan for the worksite
- Indicate the demeanor necessary during an emergency
- Identify methods to cope with emergency situations
- Name the resources for assistance in crimes or accidents
- Locate and explain use of first aid emergency care kits
- Detail steps to use in medical emergencies requiring First Aid, CPR, and/or Heimlich maneuver
- Explain who in your facility can give first aid care in the event of an emergency
- Detail how to access help in a robbery or terrorist situation
- Explain the local protocols in place with local law enforcement

#### Comments:

## Unit 2: Required Skills

### Safety and Security

Competency

#### 4. Follow security procedures

Performance Standard Condition

**Competence will be demonstrated**

- at the worksite
- while assisting a worksite professional

Performance Standard Criteria

**Performance will be successful when the learner:**

- Follows facility measures to protect confidential data
- Maintains customer and employee security procedures
- Implements security countermeasures as required
- Documents any security procedures taken

Learning Objectives

- Describe potential security threats to information systems
- Define basic security measures for ensuring data integrity, accidental data disclosure, unauthorized access and inappropriate use
- Describe how user identity is checked for access
- Identify the range of security needs and the problems that can occur due to security lapses
- Outline how access to hardware and data is controlled
- Define a virus, Trojan, worm, etc.
- Explain the use of virus/computer protection strategy
- Discuss security procedures and their impact on business ethics
- Identify sources of security risk
- Describe your facilities security system of surveillance cameras, personnel, lighting
- List the function of security equipment

**Comments:**



## **Unit 3: Required Skills**

### **Marketing Core Foundations**

#### Competency

#### **1. Facilitate business to customer relationships/interactions**

#### Performance Standard Condition

##### **Competence will be demonstrated**

- at the worksite
- while assisting a worksite professional

#### Performance Standard Criteria

##### **Performance will be successful when the learner:**

- Reinforces service orientation through communication
- Responds to customer inquiries
- Adapts communication to the cultural and social differences among clients
- Interprets business policies to customers/clients

#### Learning Objectives

- Define marketing and the role it plays in our daily lives
- Explain the significance of marketing in the United States economy
- Explain marketing and its importance in a global economy
- Explain the relationship between customer service and sales
- Demonstrate a customer-service mindset in a sales activity
- Evaluate the impact of positive customer relations on a real sales activity
- Explain the need to adapt communication to the cultural and social differences among clients
- Demonstrate a customer-service mindset in a school-based enterprise
- Explain management's role in customer relations

#### **Comments:**

## **Unit 3: Required Skills**

### **Marketing Core Foundations**

Competency

#### **2. Identify a company's unique selling proposition**

Performance Standard Condition

**Competence will be demonstrated**

- at the worksite
- while assisting a worksite professional

Performance Standard Criteria

**Performance will be successful when the learner:**

- Demonstrates company's brand promise and positioning in the workplace
- Assists with the company's branding and communication strategies

Learning Objectives

- Develop a product or service appropriate to a target audience
- Explain how positive customer service can impact sales
- Illustrate how different products and services meet the needs of consumers
- Identify a business that illustrates outstanding customer service
- Identify company's unique selling proposition
- Research companies that implement excellent internal and external service standards

**Comments:**

## Unit 3: Required Skills

### Marketing Core Foundations

Competency

#### 3. Analyze cost/profit relationships to guide business decision making

Performance Standard Condition

**Competence will be demonstrated**

- at the worksite
- while assisting a worksite professional

Performance Standard Criteria

**Performance will be successful when the learner:**

- Assists with how the company determines their product (goods and services) mix
- Reviews analytical data illustrating the impact of strategic communications, promotions, and/or product sales
- Assists with calculating product profitability

Learning Objectives

- Conduct a cost/benefit analysis with the product mix in a school-based enterprise
- Illustrate the relationship among total revenue, marginal revenue, output, and profit in a school-based enterprise
- Set marketing budget
- Calculate return on marketing investment (ROMI)
- Explain the nature of sales forecasts
- Calculate financial ratios for a school-based enterprise
- Interpret financial statements

**Comments:**

## Unit 3: Required Skills

### Marketing Core Foundations

Competency

#### 4. Apply marketing information to meet customer needs

Performance Standard Condition

**Competence will be demonstrated**

- at the worksite
- while assisting a worksite professional

Performance Standard Criteria

**Performance will be successful when the learner:**

- Determines customer demand for company's products
- Identifies market segments
- Develops customer/client profiles (demographics, geographics, psychographics, behavioral, etc.)
- Selects target market
- Identifies and analyzes cultural factors; such as, human needs, values, ideals, and public policies that affect company's product sales

Learning Objectives

- Explain how a business predicts customer demand
- Determine and evaluate market needs and opportunities
- Explain the role of situational analysis in the marketing planning process
- Analyze the data from a market analysis (market size, area, potential, etc.)
- Present the findings from a competitive analysis
- Identify and analyze cultural factors; such as, human needs, values, ideals, and public policies that affect global marketing

**Comments:**

## **Unit 3: Required Skills**

### **Marketing Core Foundations**

Competency

#### **5. Use order-fulfillment processes to move product through the supply chain**

Performance Standard Condition

##### **Competence will be demonstrated**

- at the worksite
- while assisting a worksite professional

Performance Standard Criteria

##### **Performance will be successful when the learner:**

- Counts and verifies the contents in an order.
- Uses technology in the channel management function
- Analyzes capabilities of electronic workplace systems to facilitate order fulfillment
- Compares and contrasts the packing slip with the contents of an order
- Processes incoming merchandise (if applicable)
- Resolves problems with incoming shipments
- Coordinates channel management with other marketing activities

Learning Objectives

- Explain the relationship between customer service and distribution
- Explain how to fulfill orders
- Analyze capabilities of electronic business systems to facilitate order fulfillment
- Explain why a business checks accuracy of orders shipped to them
- Explain the receiving process
- Explain stock-handling techniques used in receiving deliveries

**Comments:**

## **Unit 3: Required Skills**

### **Marketing Core Foundations**

Competency

#### **6. Position products/services to acquire business image**

Performance Standard Condition

##### **Competence will be demonstrated**

- at the worksite
- while assisting a worksite professional

Performance Standard Criteria

##### **Performance will be successful when the learner:**

- Assists with developing strategies to position products/services
- Develops positioning concept/statement for a new product idea
- Communicates core values of product/service
- Describes merchandise and explains use, operation, and care of merchandise to customers
- Reviews the impact of strategic promotions/discounts on specific products/services

Learning Objectives

- Describe factors used by marketers to position products/services
- Explain the nature of product/service branding
- Explain the role of customer service in positioning/image
- Compare and contrast product/service's competitive advantages
- Identify product's/service's competitive advantage

**Comments:**

## **Unit 3: Required Skills**

### **Marketing Core Foundations**

Competency

#### **7. Understand pricing strategies to determine products optimal prices**

Performance Standard Condition

**Competence will be demonstrated**

- at the worksite
- while assisting a worksite professional

Performance Standard Criteria

**Performance will be successful when the learner:**

- Determines cost of product (breakeven, ROI, markup)
- Calculates sales discounts
- Calculates changes in prices
- Calculates base price (cost, demand, competition)
- Calculates break-even point
- Adjusts and interprets price data to maximize profitability
- Analyzes discounts and allowances offered in the workplace

Learning Objectives

- Discuss the importance of calculating breakeven point
- Analyze the product cost calculations (breakeven, ROI, markup)
- Determine discounts and allowances that can be used to adjust base prices

**Comments:**

### **Unit 3: Required Skills**

#### **Marketing Core Foundations**

Competency

#### **8. Manage promotional activities to maximize return on promotional efforts**

Performance Standard Condition

**Competence will be demonstrated**

- at the worksite and classroom

Performance Standard Criteria

**Performance will be successful when the learner:**

- Assists with coordinating activities in the promotional mix
- Assists with developing a promotional calendar
- Assists with planning/scheduling displays/themes
- Assists with measuring success of promotional efforts

Learning Objectives

- Explain the purpose of a promotional plan
- Identify the components of the promotional mix
- Identify ways to assess results of promotional efforts
- Explain the nature of a promotional plan
- Evaluate results of promotional efforts in a school-based enterprise

**Comments:**



## **Unit 3: Required Skills**

### **Marketing Core Foundations**

Competency

#### **9. Identify ways that technology impacts business**

Performance Standard Condition

**Competence will be demonstrated**

- at the worksite and classroom

Performance Standard Criteria

**Performance will be successful when the learner:**

- Analyzes the impact of technology on marketing in the workplace
- Utilizes information-technology tools to manage and perform work responsibilities
- Integrates technological tools to efficiently create and manage correspondence in the workplace
- Uses communication and information technology to effectively solve a given problem
- Maintains security of marketing data

Learning Objectives

- Discuss the impact of technology on marketing
- Explain how communication and information technology could help address a current national or global problem
- Discuss considerations in using mobile technology for promotional activities
- Compare and contrast how businesses strategically use technology within their business
- Asses the use of communication and information technology to create new opportunities

**Comments:**

# **Appendix K**

## **MARKETING YOUTH APPRENTICESHIP PROGRAM**

### **PROFESSIONAL SALES UNIT 4**

## Unit 4: Professional Sales Unit

### Competency

#### 1. Reinforce company's image to exhibit the company's brand promise

### Performance Standard Condition

#### **Competence will be demonstrated**

- at the worksite
- while assisting a worksite professional

### Performance Standard Criteria

#### **Performance will be successful when the learner:**

- Identifies the company's brand promise
- Demonstrates the company's customer service policies
- Communicates the brand promise, strategies, and tactics to customers and internal employees
- Coordinates with team members to develop communication strategies that support and drive the company's mission, vision, values, brand, and products

### Learning Objectives

- Explain why a company develops a brand promise
- Compare and contrast strategic company brand promise examples
- Describe how the company brand promise can be evident through all components of a business (staff, products, store, etc.)
- Determine ways of reinforcing the company's image through employee performance

### Comments:

## Unit 4: Professional Sales Unit

### Competency

#### 2. Apply customer relationship management to show its contributions to the company

### Performance Standard Condition

#### **Competence will be demonstrated**

- at the worksite
- while assisting a worksite professional

### Performance Standard Criteria

#### **Performance will be successful when the learner:**

- Uses customer relationship management (CRM) technology
- Confers with customers by telephone or in person to provide information about products or services, take or enter orders, cancel accounts, or obtain details of complaints
- Keeps records of customer interactions or transactions, recording details of inquiries, complaints, or comments as well as actions taken
- Determines charges for products/services requested, collect deposits or payments, or arrange for billing

### Learning Objectives

- Discuss the nature of customer relationship management (CRM)
- Explain the role of ethics in customer relationship management (CRM)
- Describe the use of technology in customer relationship management (CRM)
- Explain the use of databases in customer relationship management (CRM)

### Comments:

## Unit 4: Professional Sales Unit

Competency

### 3. Utilize digital communication in the selling process

Performance Standard Condition

**Competence will be demonstrated**

- at the worksite
- while assisting a worksite professional

Performance Standard Criteria

**Performance will be successful when the learner:**

- Analyzes the company's digital sales communication strategies (mobile application, website, social media platforms, in-store, etc.)
- Assists to maintaining/developing digital sales communication strategies that would positively impact sales
- Assists to analyzing the overall impact of the digital sales communication strategies on overall sales

Learning Objectives

- Compare and contrast how businesses and different industries use digital communication in the selling process
- Identify how businesses can track and utilize customer online/in-store shopping habits
- Research technology tools used in the selling process (i.e. Sales Force Automation, Marketing Automation, Predictive Dialer, and Quote & Proposal Systems)
- Incorporate digital communication strategies within the school-based enterprise

**Comments:**

## Unit 4: Professional Sales Unit

### Competency

#### 4. Plan sales activities to increase sales efficiency and effectiveness

### Performance Standard Condition

#### **Competence will be demonstrated**

- at the worksite
- while assisting a worksite professional

### Performance Standard Criteria

#### **Performance will be successful when the learner:**

- Writes down sales activity goals (i.e. calls/customers per day, proposals per month, referrals per call/customer, etc.)
- Sets sales goals (i.e. sales per month, amount per sale, etc.) to measure your progress
- Assists with planning strategies for meeting sales quotas
- Assists with developing strategies to win back former customers

### Learning Objectives

- Define the sales management process
- Compare and contrast different company's sales strategies
- Determine factors that might impact a company's sales
- Write down sales activity goals (i.e. calls/customers per day, proposals per month, referrals per call/customer, etc.) for the school-based enterprise
- Set sales goals (i.e. sales per month, amount per sale, etc.) to measure your progress for the school-based enterprise

### Comments:

## Unit 4: Professional Sales Unit

### Competency

#### **5. Acquire product knowledge to communicate product features and benefits to ensure customer satisfaction**

### Performance Standard Condition

#### **Competence will be demonstrated**

- at the worksite
- while assisting a worksite professional

### Performance Standard Criteria

#### **Performance will be successful when the learner:**

- Acquires product information for use in selling
- Uses acquired product information in a sales situation
- Books appointments with prospective clients
- Prepares sales presentation
- Prepares and/or assemble sales materials
- Shows and tells the main features and benefits of a product/service

### Learning Objectives

- Discuss how the brand of a product impacts the customer's perception
- Identify product/service features and benefits
- Identify the current popular technology products and services
- Explain the use of brand names in selling.
- Differentiate between consumer and organizational buying behavior
- Identify emerging trends for use in selling

### Comments:

## Unit 4: Professional Sales Unit

Competency

### 6. Perform pre-sales activities to facilitate sales presentations

Performance Standard Condition

#### **Competence will be demonstrated**

- at the worksite
- while assisting a worksite professional

Performance Standard Criteria

#### **Performance will be successful when the learner:**

- Prospects for customers
- Qualifies customers/clients
- Implements sales strategies
- Presents a sales presentation
- Develops a sales demonstration that uses technology

Learning Objectives

- Explain the use of marketing-research information in professional selling
- Conduct pre-visit research (e.g., customer's markets/products, customer's competitors, and competitors' offerings)
- Identify ways to communicate to prospective clients
- Determine sales strategies
- Prepare a sales presentation
- Develop a sales demonstration that uses technology

**Comments:**



## Unit 4: Professional Sales Unit

### Competency

#### **7. Employ sales processes and techniques to enhance customer relationships and to increase the likelihood of making sales**

### Performance Standard Condition

#### **Competence will be demonstrated**

- at the worksite
- while assisting a worksite professional

### Performance Standard Criteria

#### **Performance will be successful when the learner:**

- Assesses product/service needs of individual personalities
- Qualifies customer's buying motives for use in selling
- Facilitates customer/client buying decisions
- Recommends specific product/service
- Demonstrates product
- Prescribes solution to customer/client needs
- Converts customer/client objections into selling points
- Closes the sale
- Demonstrates suggestion selling
- Identifies additional products/services that could be added to the purchase
- Maintains sales standards

### Learning Objectives

- Identify the difference between needs and wants
- Explain the difference between a customer/client excuse and an objection
- Explain the importance of suggestion selling
- Identify reasons why a customer makes purchases
- Identify negotiation tactics
- Describe different ways to successfully complete the sale
- Explain the value and importance of suggestion selling

### Comments:

## Unit 4: Professional Sales Unit

Competency

### 8. Process the sale and collect payment to complete the exchange

Performance Standard Condition

#### **Competence will be demonstrated**

- at the worksite
- while assisting a worksite professional

Performance Standard Criteria

#### **Performance will be successful when the learner:**

- Processes the sale using various payment methods
- Demonstrates superior customer service/communication skills while closing the sale
- Plans follow-up strategies for use in selling
- Prepares sales reports

Learning Objectives

- Identify various point-of-sale systems available
- Explain the various payment methods used in processing a sale
- Describe how a point-of-sale system operates and benefits a business
- Explain how to calculate, process, and document orders

**Comments:**

## Unit 4: Professional Sales Unit

### Competency

#### 9. Conduct post-sales follow-up activities to foster ongoing relationships with customers

### Performance Standard Condition

#### **Competence will be demonstrated**

- at the worksite
- while assisting a worksite professional

### Performance Standard Criteria

#### **Performance will be successful when the learner:**

- Provides post-sales service
- Processes returns/exchanges
- Conducts self-assessment of sales performance

### Learning Objectives

- Discuss methods used to improve customer service
- Identify methods to obtain customer/client feedback to improve service
- Explain the purpose and value of conducting post-sales follow-up activities
- Describe how businesses can strategically generate repeat customers
- Implement post-sales follow-up activities in the school-based enterprise to improve the overall customer experience

### Comments:

# **Appendix L**

## **MARKETING YOUTH APPRENTICESHIP PROGRAM**

### **MERCHANDISING UNIT 5**

## Unit 5: Merchandising Unit

### Competency

#### 1. Employ product-mix strategies to meet customer expectations

### Performance Standard Condition

#### **Competence will be demonstrated**

- at the worksite
- while assisting a worksite professional

### Performance Standard Criteria

#### **Performance will be successful when the learner:**

- Reviews examples of product bundling
- Identifies components of the product mix
- Greets customers and ascertains what each customer wants or needs
- Identifies product to fill customer need
- Determines services to provide customers
- Answers questions regarding the store and its merchandise
- Analyzes product needs and opportunities

### Learning Objectives

- Define product width and depth
- Analyze the products and services at a local business
- Determine a product or service that could be sold at school
- Develop alternative uses for products or services
- Explain the concept of product mix
- Describe the nature of product bundling
- Explain the nature of product extension in services marketing

### Comments:

## Unit 5: Merchandising Unit

Competency

### 2. Plan product/service management activities to facilitate product development

Performance Standard Condition

#### **Competence will be demonstrated**

- at the worksite
- while assisting a worksite professional

Performance Standard Criteria

#### **Performance will be successful when the learner:**

- Assists with planning/managing product/brand lifecycle
- Attends training sessions to obtain new ideas for product launches
- Assists with coordinating product launches
- Arranges delivery of goods or services
- Explains technical product or service information to customers
- Recommends, selects, and helps locate or obtain merchandise based on customer needs and desires

Learning Objectives

- Discuss and identify company brands
- Classify generic vs. brand name product
- Recognize historical product inventions and trends of products
- Develop new-product launch plan
- Compare and contrast successful company product launches
- Review how digital information has impacted the awareness/education of technical product or service information

**Comments:**

## Unit 5: Merchandising Unit

### Competency

#### 3. Assist to develop merchandise plans (budgets) to guide selection of retail products

### Performance Standard Condition

#### **Competence will be demonstrated**

- at the worksite
- while assisting a worksite professional

### Performance Standard Criteria

#### **Performance will be successful when the learner:**

- Calculates costs of goods and services
- Estimates costs or terms of sales
- Calculates open-to-buy
- Identifies emerging trends
- Understands inventory ratios
- Understands plan reductions (e.g., anticipated markdowns, employee/other discounts, stock shortages)
- Assists with planning purchases

### Learning Objectives

- Explain the nature of merchandise plans
- Calculate open-to-buy
- Plan stock (school-based enterprise)
- Plan reductions (e.g., anticipated markdowns, employee/other discounts, stock shortages) (school-based enterprise)
- Identify emerging trends (school-based enterprise)

### Comments:

## Unit 5: Merchandising Unit

Competency

### 4. Employ visual merchandising techniques to increase interest in product offerings

Performance Standard Condition

#### **Competence will be demonstrated**

- at the worksite
- While assisting a worksite professional

Performance Standard Criteria

#### **Performance will be successful when the learner:**

- Assists with designing visual merchandising at worksite
- Sets up merchandise displays
- Places merchandise for impact
- Determines on-floor assortments
- Reads/Implements planograms
- Assists with creating planograms

Learning Objectives

- Explain the use of visual merchandising in retailing
- Distinguish between visual merchandising and display
- Define planograms
- Design visual merchandising at school-based enterprise
- Evaluate visual merchandising and displays at local businesses

**Comments:**



## Unit 5: Merchandising Unit

Competency

### 5. Implement display techniques to attract customers and increase sales potential

Performance Standard Condition

#### **Competence will be demonstrated**

- at the worksite
- while assisting a worksite professional

Performance Standard Criteria

#### **Performance will be successful when the learner:**

- Identifies types of display arrangements at worksite
- Maintains displays
- Dismantles/Stores displays/display fixtures/forms
- Selects and uses display fixtures/forms
- Uses lighting to highlight products
- Sets up point-of-sale displays and handouts
- Creates displays

Learning Objectives

- Explain types of display arrangements
- Describe how lighting impacts the product presentation
- Compare and contrast types of display arrangements at a local business
- Describe the purpose of endcap displays and point-of-sale items
- Set up point-of-sale displays and handouts (school-based enterprise)
- Create displays (school-based enterprise)

**Comments:**

## Unit 5: Merchandising Unit

### Competency

#### 6. Follow merchandise security procedures to minimize inventory loss

### Performance Standard Condition

#### **Competence will be demonstrated**

- at the worksite
- while assisting a worksite professional

### Performance Standard Criteria

#### **Performance will be successful when the learner:**

- Reviews laws/regulations/company policies to maintain professional knowledge
- Maintains knowledge of current sales and promotions, policies regarding payment and exchanges, and security practices
- Watches for and recognize security risks and thefts and know how to prevent/handle these situations
- Monitors work areas to provide security

### Learning Objectives

- Explain the importance of security in a retail business
- Analyze the cost-effectiveness of a security system
- Review laws/regulations/company policies to maintain professional knowledge (school-based enterprise)
- Explain the negative impact of inventory loss on the business and customers
- Research technology and security options to monitor customers
- Monitor work areas to provide security (school-based enterprise)

### Comments:

## Unit 5: Merchandising Unit

### Competency

#### **7. Follow inventory control and management methods to maintain appropriate levels of stock/supplies**

### Performance Standard Condition

#### **Competence will be demonstrated**

- at the worksite
- While assisting a worksite professional

### Performance Standard Criteria

#### **Performance will be successful when the learner:**

- Stamps, attaches, or changes price tags on merchandise, referring to price list
- Conducts a merchandising sweep of the sales floor (with technology or by hand) moving all products to their “home” location
- Conducts a backroom sweep and moves the necessary products from the backroom to the sales floor
- Organizes the inventory, with technology or by hand, of specific product lines or sections of the store
- Checks accuracy by randomly selecting SKU's
- Conducts second counts on any SKU's that deviate from the ledger

### Learning Objectives

- Define inventory
- Identify methods of inventory control
- Discuss types of inventory
- Explain methods of inventory control
- Explain how to use technology to track inventory (Point of Sale, Barcodes, RFID, etc.)
- Understand target inventory levels
- Explain the tradeoffs between purchasing too much and too little
- Count and organize school-based-enterprise inventory (school-based enterprise)

### Comments:

## Unit 5: Merchandising Unit

### Competency

#### 8. Prepare register/terminal for sales operations

### Performance Standard Condition

#### **Competence will be demonstrated**

- at the worksite
- while assisting a worksite professional

### Performance Standard Criteria

#### **Performance will be successful when the learner:**

- Prepares cash drawers/banks
- Opens/Closes register/terminal (if applicable)
  - Counting money
  - Separating charge slips, coupons, and vouchers
  - Balancing cash drawers
  - Making deposits
  - Reconciling records of sales or other financial transactions
- Itemizes and totals customer merchandise selection at checkout counter, using cash register, and accept cash or charge card for purchases
- Cleans work areas

### Learning Objectives

- Explain the use of cash drawers in business
- Identify strategies for protecting business's online sales transactions
- Research the impact of technology on cash registers
- Open/Close register/terminal (school-based enterprise)
  - Counting money
  - Separating charge slips, coupons, and vouchers
  - Balancing cash drawers
  - Making deposits
  - Reconciling records of sales or other financial transactions
- Itemize and total customer merchandise selection at checkout counter, using cash register, and accept cash or charge card for purchases (school-based enterprise)
- Clean work areas (school-based enterprise)

### Comments:

## Unit 5: Merchandising Unit

### Competency

#### 9. Utilize stock-handling procedures to process incoming inventory

### Performance Standard Condition

#### **Competence will be demonstrated**

- at the worksite
- while assisting a worksite professional

### Performance Standard Criteria

#### **Performance will be successful when the learner:**

- Compares merchandise invoices to items actually received to ensure that shipments are correct
- Receives, open, unpack and issue sales floor merchandise
- Attaches source and anti-theft tags
- Prices mark merchandise
- Makes and records price changes
- Identifies hang-tag needs
- Assigns codes to each product item
- Routes stock to sales floor
- Rotates stock
- Processes returned/damaged product
- Transfers stock to/from branches
- Enters product descriptions into a POS system

### Learning Objectives

- Describe the receiving process
- Explain stock handling techniques used in receiving deliveries
- Review different methods to verify quantity and condition of merchandise (i.e. blind check, direct check, spot check and quality check)
- Describe the process of providing effective inventory management
- Explain the types of inventory control systems
- Discuss the relationship between customer service and distribution
- Compare merchandise invoices to items actually received to ensure that shipments are correct (school-based enterprise)
- Receive, open, unpack and issue sales floor merchandise (school-based enterprise)

### Comments:

# Appendix M

## MARKETING YOUTH APPRENTICESHIP PROGRAM

### MARKETING COMMUNICATIONS UNIT 6

## Unit 6: Marketing Communications Unit

### Competency

#### 1. Utilize promotional channels used to communicate with targeted audiences

### Performance Standard Condition

#### **Competence will be demonstrated**

- at the worksite
- while assisting a worksite professional

### Performance Standard Criteria

#### **Performance will be successful when the learner:**

- Evaluates new emerging media or technologies and makes recommendations for their application within Internet marketing or search marketing campaigns
- Assists with responding to requests for information about employers' activities or status
- Assists with updating and maintaining content posted on web and mobile application (if applicable)

### Learning Objectives

- Research examples of word of mouth promotions
- Identify types of marketing channels
- Explain why companies offer sales promotions
- Distinguish the difference between public relations and advertising
- Explain types of advertising media
- Describe word of mouth channels used to communicate with targeted audiences
- Explain the nature of direct marketing channels
- Identify communications channels used in sales promotion
- Explain communication channels used in public relations activities

### Comments:

## Unit 6: Marketing Communications Unit

### Competency

#### 2. Execute an advertising campaign to achieve marketing objectives within budget

### Performance Standard Condition

#### **Competence will be demonstrated**

- at the worksite
- while assisting a worksite professional

### Performance Standard Criteria

#### **Performance will be successful when the learner:**

- Assists with advertising campaign objectives
- Assists with selecting advertising strategies for campaign
- Conducts advertising research
- Assists with reviewing the campaign budget
- Assists with developing a media plan (includes budget, media allocation, and timing of ads)
- Assists with conducting online marketing initiatives, such as, paid ad placement, affiliate programs, sponsorship programs, email promotions, or viral marketing campaigns on social media websites

### Learning Objectives

- Explain the term advertising campaign
- Review examples of advertising campaigns
- Define advertising research
- Prepare budget

### Comments:



## Unit 6: Marketing Communications Unit

Competency

### 3. Describe design principles to be able to communicate needs to designers

Performance Standard Condition

#### **Competence will be demonstrated**

- at the worksite
- while assisting a worksite professional

Performance Standard Criteria

#### **Performance will be successful when the learner:**

- Assists with checking advertising proofs
- Assists with evaluating storyboards for broadcast advertisements
- Assists with assessing collateral pieces for direct marketing
- Assists with critiquing the main components of advertisements

Learning Objectives

- Identify types of technology used in designing advertising
- Explain the use of illustrations in advertisements
- List different types of advertising layouts
- Compare and contrast advertisements with color versus without the use of color
- Describe what makes an effective advertisement
- Explain purpose of storyboards
- Describe the elements of design
- Evaluate illustrations in advertisements
- Describe effective advertising layouts
- Describe purpose of color in advertisements

**Comments:**

## Unit 6: Marketing Communications Unit

### Competency

#### 4. Use information-technology tools to manage and perform marketing communications responsibilities

### Performance Standard Condition

#### **Competence will be demonstrated**

- at the worksite
- while assisting a worksite professional

### Performance Standard Criteria

#### **Performance will be successful when the learner:**

- Collects and analyzes Web metrics, such as visits, time on site, page views per visit, transaction volume and revenue, traffic mix, click-through rates, conversion rates, cost per acquisition, or cost per click
- Creates promotional materials with current software applications
- Demonstrates proficient desktop publishing functions to prepare promotional materials
- Demonstrates effective use of audiovisual aids
- Maintains databases of information for marketing communications
- Mines databases for information useful in marketing communications

### Learning Objectives

- Review applications that provide web metrics (see above)
- Create promotional materials with current software applications
- Demonstrate proficient desktop publishing functions to prepare promotional materials
- Explain ways that technology impacts marketing communications
- Compare and contrast current ways to communicate through technology
- Explain the capabilities of tools used in web-site creation
- Discuss considerations in using mobile technology for promotional activities
- Demonstrate effective use of audiovisual aids
- Describe considerations in using databases in marketing communications
- Design and evaluate promotional materials with current software applications for a school-based enterprise

### Comments:

## Unit 6: Marketing Communications Unit

### Competency

#### 5. Manage media planning and placement to enhance return on marketing investment

### Performance Standard Condition

#### **Competence will be demonstrated**

- at the worksite
- while assisting a worksite professional

### Performance Standard Criteria

#### **Performance will be successful when the learner:**

- Confers with other managers to identify trends, key group interests, concerns, or to provide advice on business decisions
- Identify factors that determine media selection
- Assist with determining advertising reach of media
- Reads media schedule
- Assists with calculating media costs
- Assists with selecting advertising media
- Assists with executing or managing banner, video, or non-text link ad campaigns
- Assists with choosing appropriate media outlets
- Assists with scheduling ads and commercials (if appropriate)
- Assists with selecting placement of advertisements (if appropriate)

### Learning Objectives

- Define reach in terms of advertising
- Describe the purpose of a media schedule
- Explain the basics of media costs
- Identify characteristics of different types of media
- Identify factors that determine media selection
- Describe the factors of various time slots
- Determine advertising reach of media
- Read media schedule
- Calculate media costs
- Select advertising media
- Choose appropriate media outlets
- Schedule ads and commercials
- Select placement of advertisements
- Identify techniques to increase ad response time

### Comments:

## Unit 6: Marketing Communications Unit

### Competency

#### 6. Use publicity/public-relations activities to create goodwill with stakeholders

### Performance Standard Condition

#### **Competence will be demonstrated**

- at the worksite
- while assisting a worksite professional

### Performance Standard Criteria

#### **Performance will be successful when the learner:**

- Studies the objectives, promotional policies, or needs of organizations to develop public relations strategies that will influence public opinion or promote ideas, products, or services
- Identifies main client groups and audiences, determine the best way to communicate publicity information to them, and develop and implement a communication plan
- Establishes or maintain cooperative relationships with representatives of community, consumer, employee, or public interest groups
- Analyzes costs/benefits of community outreach activities
- Assists with writing interesting and effective press releases, prepares information for media kits, and develops and maintains company internet or intranet web pages
- Assists with creating a public-service announcement
- Assists with creating a public-relations campaign

### Learning Objectives

- Define public relations
- Explain the importance of company involvement in community activities
- Identify public relations activities
- Define press release
- Describe the purpose of public service announcements
- Examine components of a press kit
- Participate in community outreach activities
- Propose community issues for company involvement
- Analyze costs/benefits of community outreach activities
- Explain current issues/trends in public relations
- Describe the use of crisis management in public relations
- Write a press release
- Create a public-service announcement
- Create a press kit
- Create a public-relations campaign

### Comments:

## Unit 6: Marketing Communications Unit

### Competency

#### 7. Employ sales-promotion activities to inform or remind customers of business/product

### Performance Standard Condition

#### **Competence will be demonstrated**

- at the worksite
- while assisting a worksite professional

### Performance Standard Criteria

#### **Performance will be successful when the learner:**

- Collaborates in the design of slogans/taglines
- Assists with developing and maintaining the company's corporate image and identity, which includes the use of the logos and signage
- Develops frequency/loyalty marketing strategy (if applicable)
- Analyzes use of specialty promotions
- Participates in the design of collateral materials to promote the business or special event
- Develops strategy for creating a special event (if applicable)
- Assists with set up cross-promotions
- Participates in trade shows/expositions (if applicable)
- Assists with developing a sales-promotion plan

### Learning Objectives

- Create promotional poster for a sales activity
- Review examples of slogans/taglines
- Explain why companies use brand identifiers (i.e. marks, characters, etc.)
- Identify local businesses that offer loyalty marketing programs
- Summarize different types of specialty promotions
- Define cross promotion
- Collaborate in the design of slogans/taglines
- Set and develop strategy for brand identifiers for a product/service in the school-based enterprise
- Explain considerations in designing a frequency/loyalty marketing program
- Develop frequency/loyalty marketing strategy (school-based enterprise)
- Analyze use of specialty promotions
- Develop a sales-promotion plan

### Comments:

## Unit 6: Marketing Communications Unit

### Competency

#### 8. Manage communications efforts to protect brand viability

### Performance Standard Condition

#### **Competence will be demonstrated**

- at the worksite
- while assisting a worksite professional

### Performance Standard Criteria

#### **Performance will be successful when the learner:**

- Assists with optimizing digital assets, such as text, graphics, or multimedia assets, for search engine optimization (SEO) or for display and usability on internet-connected devices
- Assists with establishing credibility with internet-connected/mobile-device (if applicable) customers
- Assists with maintaining a consistent brand voice in social content
- Assists with developing social media content to enhance customer post-sales experience
- Develops communications plan
- Implements a communications plan
- Monitors communications plan
- Adjusts communications plan

### Learning Objectives

- Explain the nature of communications plans
- Evaluate example business communication plans
- Describe the nature of effective Internet ad copy
- Evaluate the impact of mobile-device capabilities and usage patterns on social-media effectiveness
- Explain how to effectively incorporate video into multimedia

### Comments:

## Unit 6: Marketing Communications Unit

### Competency

#### 9. Maintain technology security to protect customer information and company image

### Performance Standard Condition

#### **Competence will be demonstrated**

- at the worksite
- while assisting a worksite professional

### Performance Standard Criteria

#### **Performance will be successful when the learner:**

- Assists with maintaining marketing communications data security
- Assists with developing strategies to combat digital negative customer feedback

### Learning Objectives

- Explain security considerations in marketing communications
- Identify strategies for protecting business's digital assets (e.g., website, social media, email, etc.)
- Identify strategies to protect digital customer data (e.g., information about customers, customers' credit-card numbers, passwords, customer transactions)
- Evaluate strategic examples of companies overcoming digital negative customer feedback

### Comments:

## Unit 6: Marketing Communications Unit

### Competency

#### **10. Develop content for use in marketing communications to create interest in product/business/idea**

### Performance Standard Condition

#### **Competence will be demonstrated**

- at the worksite
- while assisting a worksite professional

### Performance Standard Criteria

#### **Performance will be successful when the learner:**

- Assists with writing copy for advertisements (if applicable)
- Assists with writing direct-mail letters (if applicable)
- Assists with writing e-mail marketing copy (if applicable)
- Assists with executing targeted emails
- Assists with writing content for use on the website (if applicable)
- Assists with writing content for use in social media (if applicable)
- Assists with maintaining a consistent brand voice in social content (if applicable)
- Assists with developing and packaging content for social distribution
- Assists with writing mobile marketing content (if applicable)
- Assesses marketing promotional content in digital media
- Reviews content marketing strategy
- Assists with measuring content marketing results

### Learning Objectives

- Identify effective advertising headlines
- Explain the use of storytelling in marketing
- Describe the nature of copy strategies
- Write copy for advertisements
- Critique ad copy
- Discuss the nature of effective direct-mail copy
- Write direct-mail letters
- Critique direct mail copy
- Describe the nature of effective Internet ad copy
- Write e-mail marketing copy
- Execute targeted emails
- Explain the nature of effective mobile ad copy

### **Comments:**



# **Appendix N**

## **MARKETING YOUTH APPRENTICESHIP PROGRAM**

### **MARKETING RESEARCH/COMPETITIVE INTELLIGENCE UNIT 7**

## Unit 7: Marketing Research/Competitive Intelligence Unit

### Competency

#### 1. Monitor business data that impact business decision-making

#### Performance Standard Condition

##### **Competence will be demonstrated**

- at the worksite
- while assisting a worksite professional

#### Performance Standard Criteria

##### **Performance will be successful when the learner:**

- Obtains information from customer databases
- Assists with maintaining information on marketing partners' activities (e.g., vendors, others in supply/distribution channels)
- Collects Web metrics, such as visits, time on site, page views per visit, transaction volume and revenue, traffic mix, click-through rates, conversion rates, cost per acquisition, or cost per click
- Obtains marketing information from publications (e.g., trade journals--current trends, regulations, consumer issues)
- Collects product quality data (e.g., customer complaints, returns, quality control)
- Tracks environmental changes that impact a business (e.g., technological changes, consumer trends, economic changes, regulatory changes, etc.)
- Monitors and mines sales data (by volume, product, territory, channel, time period, etc.)
- Identifies transactional data through electronic means (e.g., bar coding, optical scanners, automatic replenishment systems, electronic data interchange [EDI], and reader-sorters) (if applicable)
- Analyzes competitive market strategies through analysis of related product, market, or share trends
- Develops insights using trends occurring in other industries

#### Learning Objectives

- Evaluate the value of the data from Web metrics, such as visits, time on site, page views per visit, transaction volume and revenue, traffic mix, click-through rates, conversion rates, cost per acquisition, or cost per click
- Obtain marketing information from publications (e.g., trade journals--current trends, regulations, consumer issues)
- Track environmental changes that impact a business (e.g., technological changes, consumer trends, economic changes, regulatory changes, etc.)
- Develop insights using trends occurring in other industries

#### Comments:

## Unit 7: Marketing Research/Competitive Intelligence Unit

### Competency

#### 2. Evaluate the need for analytics based marketing research

#### Performance Standard Condition

##### **Competence will be demonstrated**

- at the worksite
- while assisting a worksite professional

#### Performance Standard Criteria

##### **Performance will be successful when the learner:**

- Compares business objectives with the expected use of the marketing-research outcomes
- Identifies the marketing-research problem/issue
- Translates business problems/challenges into research objectives
- Evaluates the relationship between the research purpose and the marketing research objectives
- Estimates the value of the research information
- Determines appropriate level and depth of information needed for decision-making
- Selects research method appropriate for the research problem (i.e., exploratory, descriptive, or causal)
- Determines research approaches (e.g., observation, survey, experiment; quantitative or qualitative) appropriate to the research problem

#### Learning Objectives

- Explain the nature of actionable research
- Compare business objectives with the expected use of the marketing-research outcomes
- Identify the marketing-research problem/issue
- Estimate the value of the research information
- Determine appropriate level and depth of information needed for decision-making
- Select research method appropriate for the research problem (i.e., exploratory, descriptive, or causal)
- Determine research approaches (e.g., observation, survey, experiment; quantitative or qualitative) appropriate to the research problem

#### Comments:

## Unit 7: Marketing Research/Competitive Intelligence Unit

### Competency

#### 3. Analyze who and how many respondents are needed for marketing research

### Performance Standard Condition

#### **Competence will be demonstrated**

- at the worksite
- while assisting a worksite professional

### Performance Standard Criteria

#### **Performance will be successful when the learner:**

- Selects sample sources in marketing research
- Minimize threats to validity
- Determines how to improve response rates
- Assists with setting up or optimizing analytics tools for tracking responses
- Selects methods to compensate for non-response
- Selects sampling technique
- Designs sample for qualitative marketing-research study
- Executes sampling process

### Learning Objectives

- Explain the nature of the sampling design process
- Explain the nature of sample sources (e.g., MR sampling companies, general list brokers, customer lists)
- Select sample sources in marketing research
- Discuss sampling issues with international marketing research projects
- Discuss sampling techniques and issues associated with Internet sampling
- Describe statistical concepts associated with sampling

### Comments:

## Unit 7: Marketing Research/Competitive Intelligence Unit

### Competency

#### 4. Select method to obtain needed data to address general business problem

### Performance Standard Condition

#### **Competence will be demonstrated**

- at the worksite
- while assisting a worksite professional

### Performance Standard Criteria

#### **Performance will be successful when the learner:**

- Selects data-collection methods (e.g., observations, mail, telephone, Internet, online communities, social media, virtual platforms, discussion groups, interviews, case studies, text analyses, scanners)
- Selects measurement scales (i.e., nominal, ordinal, interval, ratio)
- Plans marketing research study
- Writes marketing research proposals

### Learning Objectives

- Compare and contrast the different types of data-collection methods
- Explain the importance of well-defined measurement scales when collecting marketing research
- Review marketing research sample studies
- Write marketing research proposal for school-related topic

### Comments:

## Unit 7: Marketing Research/Competitive Intelligence Unit

### Competency

#### 5. Facilitate data-collection process

#### Performance Standard Condition

##### **Competence will be demonstrated**

- at the worksite
- while assisting a worksite professional

#### Performance Standard Criteria

##### **Performance will be successful when the learner:**

- Devises and evaluates methods and procedures for collecting data, such as surveys, opinion polls, or questionnaires, or arrange to obtain existing data
- Assists with developing rating scales (including Likert scales, semantic differential scales, behavior intention scales, etc.)
- Determines questions to ask to elicit needed data for marketing research problem/issue
- Creates simple questionnaires (e.g., types of questions, question wording, routing, sequencing, length, layout)
- Tests questionnaire prior to full implementation

#### Learning Objectives

- Describe types of rating scales (including Likert scales, semantic differential scales, behavior intention scales, etc.)
- Determine questions to ask to elicit needed data for marketing research problem/issue
- Identify questionnaire design issues for international marketing research projects
- Create simple questionnaires (e.g., types of questions, question wording, routing, sequencing, length, layout)
- Test questionnaire prior to full implementation
- Control sources of error and bias in data-collection instrument (e.g., response errors, interviewer errors, sample design)

#### Comments:

## Unit 7: Marketing Research/Competitive Intelligence Unit

### Competency

#### 6. Collect marketing-research data from a variety of sources

### Performance Standard Condition

#### **Competence will be demonstrated**

- at the worksite
- while assisting a worksite professional

### Performance Standard Criteria

#### **Performance will be successful when the learner:**

- Conducts market research analysis to identify search query trends, real-time search and news media activity, popular social media topics, electronic commerce trends, market opportunities, or competitor performance
- Applies approaches to increase participant cooperation with data collection
- Analyzes technology trends to identify markets for future product development or to improve sales of existing products
- Collects, interprets, and communicates industry, competitive, and market trends
- Tests alternatives (e.g., web pages, ads, appeals, etc.)
- Collects marketing-research data through a variety of methods (if applicable)

### Learning Objectives

- Apply approaches to increase participant cooperation with data collection
- Administer questionnaires
- Conduct telephone interviews
- Employ techniques to assess ongoing behavior (e.g., business records; manual record sheets; electronic recording devices for telephone, personal, and computer interviewing; smart cards; video recording)
- Test alternatives (e.g., web pages, ads, appeals, etc.)
- Collect marketing-research data through (if applicable): in-depth interviews, focus groups, continuous panel research, test markets, experiments (e.g., lab and field experiments)

### Comments:

## Unit 7: Marketing Research/Competitive Intelligence Unit

### Competency

#### 7. Process analytical data to translate marketing information

#### Performance Standard Condition

##### **Competence will be demonstrated**

- at the worksite
- while assisting a worksite professional

#### Performance Standard Criteria

##### **Performance will be successful when the learner:**

- Analyzes business information in timely and comprehensive manner, and provides analysis of on the results
- Assists with analyzing Web metrics
- Tabulates data
- Analyzes narrative text (e.g., sorting, classifying/categorizing, identifying patterns, interpreting, selecting mechanical analysis approaches) (if applicable)

#### Learning Objectives

- Review the process of interpreting analytical data
- Evaluate the value of the data from Web metrics, such as visits, time on site, page views per visit, transaction volume and revenue, traffic mix, click-through rates, conversion rates, cost per acquisition, or cost per click
- Explain the value and purpose of the following steps: editing/cleaning research data; coding research data; treating missing data; detecting/editing error routines; transcribing conversations/interviews; tabulating data; and creating data matrix
- Analyze narrative text (e.g., sorting, classifying/categorizing, identifying patterns, interpreting, selecting mechanical analysis approaches)
- Process analytical school-based data

#### Comments:



## Unit 7: Marketing Research/Competitive Intelligence Unit

### Competency

#### 8. Apply statistical methods and software systems to aid in competitive intelligence

### Performance Standard Condition

#### **Competence will be demonstrated**

- at the worksite
- while assisting a worksite professional

### Performance Standard Criteria

#### **Performance will be successful when the learner:**

- Analyzes data from surveys, old records, or case studies, using statistical software
- Uses statistical inferences to make estimates or to test hypotheses
- Applies mathematical modeling techniques
- Interprets descriptive statistics for marketing decision making
- Interprets correlations
- Develops actionable analysis and recommendations based on market related events

### Learning Objectives

- Compare and contrast software systems that provide statistical analysis
- Review different types of statistical methods to interpret data
- Interpret school-based marketing research data by completing the following steps: setting confidence levels; testing for relationships; testing for associations; testing for significant differences; making/testing hypotheses; applying mathematical modeling techniques; interpreting descriptive statistics; interpreting correlations; and translating findings

### Comments:

## Unit 7: Marketing Research/Competitive Intelligence Unit

### Competency

#### 9. Report findings to communicate research information to others

### Performance Standard Condition

#### **Competence will be demonstrated**

- at the worksite
- while assisting a worksite professional

### Performance Standard Criteria

#### **Performance will be successful when the learner:**

- Prepares and presents summaries and analyses of survey data, including tables, graphs, and fact sheets that describe survey techniques and results
- Presents findings orally
- Provides competitor and market segment profiles and industry reviews
- Delivers competitive intelligence to business leaders and stakeholders across a variety of mediums

### Learning Objectives

- Prepare and present summaries and analyses of survey data, including tables, graphs, and fact sheets that describe survey techniques and results
- Write executive summary of research report
- Prepare and use presentation software to support reports
- Present findings orally
- Prepare written reports for decision-making
- Post marketing research results electronically

### Comments:

## Unit 7: Marketing Research/Competitive Intelligence Unit

### Competency

#### 10. Assess quality of marketing-research activities to determine needed improvements

### Performance Standard Condition

#### **Competence will be demonstrated**

- at the worksite
- while assisting a worksite professional

### Performance Standard Criteria

#### **Performance will be successful when the learner:**

- Devises or evaluates methods and procedures for collecting data, such as surveys, opinion polls, and questionnaires
- Measures the impact of marketing research
- Suggests improvements to marketing-research activities
- Performs other market/competitive intelligence tasks as needed

### Learning Objectives

- Evaluate quality of marketing research studies (e.g., sampling, validity/reliability, bias, etc.)
- Evaluate the appropriateness of the research design for the research problem, issue, or opportunity
- Suggest improvements to marketing-research activities

### Comments:

# Appendix O

## MARKETING YOUTH APPRENTICESHIP PROGRAM

### MARKETING MANAGEMENT/LEADERSHIP UNIT 8

## Unit 8: Marketing Management/Leadership Unit

### Competency

#### 1. Understand human-resource laws and regulations to facilitate business operations

### Performance Standard Condition

#### **Competence will be demonstrated**

- at the worksite
- while assisting a worksite professional

### Performance Standard Criteria

#### **Performance will be successful when the learner:**

- Reviews workplace factors that impact human resources management (e.g., availability of qualified employees, employment laws/regulations, company policies/procedures, compensation and benefit programs, staff diversity, etc.)
- Follows workplace human resource policies and procedures

### Learning Objectives

- Describe the role of human resources
- Explain why companies have human resource policies
- Explain the role of ethics in human resources management
- Describe the use of technology in human resources management
- Explain the importance of workplace regulations (including OSHA, ADA)

### Comments:

## Unit 8: Marketing Management/Leadership Unit

Competency

### 2. Develop organizational skills to lead others

Performance Standard Condition

#### **Competence will be demonstrated**

- at the worksite
- while assisting a worksite professional

Performance Standard Criteria

#### **Performance will be successful when the learner:**

- Assists employees with prioritizing work responsibilities
- Delegates work to others
- Coordinates efforts of cross-functional teams to achieve project/company goals
- Manages collaborative efforts

Learning Objectives

- Identify and prioritize work responsibilities
- Discuss ways business can delegate work
- Discuss why companies would use cross-functional teams to complete tasks
- Explain effective collaboration
- Assist employees with prioritizing work responsibilities (school based enterprise)
- Coordinate efforts of cross-functional teams to achieve project/company goals
- Harmonize tasks, projects, and employees in the context of business priorities

**Comments:**

## Unit 8: Marketing Management/Leadership Unit

Competency

### 3. Supervise and train fundamental work skills

Performance Standard Condition

**Competence will be demonstrated**

- at the worksite
- while assisting a worksite professional

Performance Standard Criteria

**Performance will be successful when the learner:**

- Assists with orienting new employees (management's role)
- Ensures staff knowledge of responsibilities, duties, functions, and authority levels
- Assists with coaching employees
- Fosters welcoming work environment for employees
- Promotes innovation
- Assists with supervising staff (if applicable)
- Assists with assessing employee performance

Learning Objectives

- Orient new employees (management's role) -- school based enterprise
- Explain the role of training and human resources development
- Explain the nature of management/supervisory training
- Develop skills to coach employees
- Develop an employee recognition program
- Maintain ongoing discussion of issues related to compensation
- Discuss strategies for employee performance evaluation
- Review equitable employment opportunities

**Comments:**

## Unit 8: Marketing Management/Leadership Unit

Competency

### 4. Use teamwork to increase workplace efficiency and effectiveness

Performance Standard Condition

#### **Competence will be demonstrated**

- at the worksite
- while assisting a worksite professional

Performance Standard Criteria

#### **Performance will be successful when the learner:**

- Inspires, engages, and motivates others to be part of a team
- Communicates a clear vision and brings people together around a common task
- Works effectively with multiple points of view
- Demonstrates concern for the task at hand and the people involved
- Manages conflict among team members

Learning Objectives

- Inspires, engages, and motivates others to be part of a team
- Communicates a clear vision and brings people together around a common task
- Helps team members identify their strengths and utilize their skills
- Demonstrates concern for the task at hand and the people involved
- Understand how to manage conflict among team members

**Comments:**



## Unit 8: Marketing Management/Leadership Unit

### Competency

#### 5. Use information-technology tools to manage work and customer relationships

### Performance Standard Condition

#### **Competence will be demonstrated**

- at the worksite
- while assisting a worksite professional

### Performance Standard Criteria

#### **Performance will be successful when the learner:**

- Employs an integrated business software application package to improve customer relationship management
- Demonstrates collaborative/groupware applications
- Creates and posts online communication
- Uses technology for marketing research
- Demonstrates fundamental skills within database applications

### Learning Objectives

- Use collaborative/groupware applications
- Use technology for marketing research
- Review types of technology needed by company/agency
- Develop fundamental skills within database applications

### Comments:

## Unit 8: Marketing Management/Leadership Unit

Competency

### 6. Maintain business records to facilitate business operations

Performance Standard Condition

#### **Competence will be demonstrated**

- at the worksite
- while assisting a worksite professional

Performance Standard Criteria

#### **Performance will be successful when the learner:**

- Maintains customer records
- Tracks sales
- Conducts an inventory analysis
- Assists with forecasting future sales

Learning Objectives

- Learn how to conduct sales and inventory reports
- Explain examples of information found within business records
- Describe the nature of business records
- Utilize reports to plan future business operations

**Comments:**

## Unit 8: Marketing Management/Leadership Unit

### Competency

#### 7. Assist with strategic planning to guide business decision-making

### Performance Standard Condition

#### **Competence will be demonstrated**

- at the worksite
- while assisting a worksite professional

### Performance Standard Criteria

#### **Performance will be successful when the learner:**

- Provides input into strategic planning
- Assists with conducting a gap analysis to determine organization's capability

### Learning Objectives

- Explain the value of aligning marketing activities with business objectives
- Understand the importance and components of strategic planning
- Define gap analysis
- Compare and contrast industry organization structures

### Comments:

## Unit 8: Marketing Management/Leadership Unit

### Competency

#### **8. Identify potential business threats and opportunities to protect a business's financial well-being**

### Performance Standard Condition

#### **Competence will be demonstrated**

- at the worksite
- while assisting a worksite professional

### Performance Standard Criteria

#### **Performance will be successful when the learner:**

- Manages marketing and business risks
- Assists with helping maintain a business brand image

### Learning Objectives

- Explain the impact of risk on business
- Describe insurance as it relates to minimizing the threat of financial risk to a business
- Describe types of business insurance coverage and their function
- Describe strategy to minimize business risks
- Identify and analyze marketing and business risks

### Comments:

## Unit 8: Marketing Management/Leadership Unit

### Competency

#### 9. Use project-management skills to improve return on investment (ROI)

### Performance Standard Condition

#### **Competence will be demonstrated**

- at the worksite
- while assisting a worksite professional

### Performance Standard Criteria

#### **Performance will be successful when the learner:**

- Uses resources needed for project
- Develops project plan
- Evaluates project results

### Learning Objectives

- Identify resources needed for project
- Explain the nature of project management
- Use resources needed for project
- Develop project plan
- Evaluate project results

### Comments:

## Unit 8: Marketing Management/Leadership Unit

### Competency

#### 10. Manage business relationships to foster positive interactions

### Performance Standard Condition

#### **Competence will be demonstrated**

- at the worksite
- while assisting a worksite professional

### Performance Standard Criteria

#### **Performance will be successful when the learner:**

- Treats others fairly at work
- Fosters positive working relationships
- Maintains collaborative partnerships with colleagues

### Learning Objectives

- Explain the impact of political relationships within an organization
- Explain the nature of organizational culture
- Interpret and learn how to adapt to a business's culture

### Comments: