California CTE

Marketing, Sales, and Service

Adopted 2013

Knowledge and Performance

1 Academics 1.0

2 Communications 2.0

1. Recognize the elements of communication using a sender–receiver model. 2.1
2. Identify barriers to accurate and appropriate communication. 2.2
3. Interpret verbal and nonverbal communications and respond appropriately. 2.3
4. Demonstrate elements of written and electronic communication such as accurate spelling, grammar, and format. 2.4
5. Communicate information and ideas effectively to multiple audiences using a variety of media and formats. 2.5
6. Advocate and practice safe, legal, and responsible use of digital media information and communications technologies. 2.6

3 Career Planning and Management 3.0

1. Identify personal interests, aptitudes, information, and skills necessary for informed career decision making. 3.1
2. Evaluate personal character traits such as trust, respect, and responsibility and understand the impact they can have on career success. 3.2
3. Explore how information and communication technologies are used in career planning and decision making. 3.3
4. Research the scope of career opportunities available and the requirements for education, training, certification, and licensure. 3.4
5. Integrate changing employment trends, societal needs, and economic conditions into career planning. 3.5
6. Recognize the role and function of professional organizations, industry associations, and organized labor in a productive society. 3.6
7. Recognize the importance of small business in the California and global economies. 3.7
8. Understand how digital media are used by potential employers and postsecondary agencies to evaluate candidates. 3.8
9. Develop a career plan that reflects career interests, pathways, and postsecondary options. 3.9

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4 Technology 4.0

1. Use electronic reference materials to gather information and produce products and services. 4.1
2. Employ Web-based communications responsibly and effectively to explore complex systems and issues. 4.2
3. Use information and communication technologies to synthesize, summarize, compare, and contrast information from multiple sources. 4.3
4. Discern the quality and value of information collected using digital technologies, and recognize bias and intent of the associated sources. 4.4
5. Research past, present, and projected technological advances as they impact a particular pathway. 4.5
6. Assess the value of various information and communication technologies to interact with constituent populations as part of a search of the current literature or in relation to the information task. 4.6

5 Problem Solving and Critical Thinking 5.0

1. Identify and ask significant questions that clarify various points of view to solve problems. 5.1
2. Solve predictable and unpredictable work-related problems using various types of reasoning (inductive, deductive) as appropriate. 5.2
3. Use systems thinking to analyze how various components interact with each other to produce outcomes in a complex work environment. 5.3
4. Interpret information and draw conclusions, based on the best analysis, to make informed decisions. 5.4

6 Health and Safety 6.0

1. Locate and adhere to Material Safety Data Sheet (MSDS) instructions. 6.1
2. Interpret policies, procedures, and regulations for the workplace environment, including employer and employee responsibilities. 6.2
3. Use health and safety practices for storing, cleaning, and maintaining tools, equipment, and supplies. 6.3
4. Practice personal safety when lifting, bending, or moving equipment and supplies. 6.4
5. Demonstrate how to prevent and respond to work-related accidents or injuries; this includes demonstrating an understanding of ergonomics. 6.5
6. Maintain a safe and healthful working environment and practice risk management to ensure security and to prevent loss of property. 6.6
7. Be informed of laws/acts pertaining to the Occupational Safety and Health Administration (OSHA). 6.7

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esponsibility and Flexibility 7.0

1. Recognize how financial management impacts the economy, workforce, and community. 7.1
2. Explain the importance of accountability and responsibility in fulfilling personal, community, and workplace roles. 7.2
3. Understand the need to adapt to changing and varied roles and responsibilities. 7.3
4. Practice time management and efficiency to fulfill responsibilities. 7.4
5. Apply high-quality techniques to product or presentation design and development. 7.5
6. Demonstrate knowledge and practice of responsible financial management. 7.6
7. Demonstrate the qualities and behaviors that constitute a positive and professional work demeanor, including appropriate attire for the profession. 7.7
8. Explore issues of global significance and document the impact on the Marketing, Sales, and Services sector. 7.8

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8 Ethics and Legal Responsibilities 8.0

1. Access, analyze, and implement quality assurance standards of practice. 8.1
2. Identify local, district, state, and federal regulatory agencies, entities, laws, and regulations related to the Marketing, Sales, and Services industry sector. 8.2
3. Demonstrate ethical and legal practices consistent with Marketing, Sales, and Services sector workplace standards. 8.3
4. Demonstrate the importance of truthfulness, honesty, and quality in the Marketing, Sales, and Services sector. 8.4
5. Explain the importance of personal integrity, confidentiality, and ethical behavior in the workplace. 8.5
6. Analyze organizational culture and practices within the workplace environment. 8.6
7. Adhere to copyright and intellectual property laws and regulations, and use and appropriately cite proprietary information. 8.7
8. Conform to rules and regulations regarding sharing of confidential information, as determined by Marketing, Sales, and Services sector laws and practices. 8.8

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9 Leadership and Teamwork 9.0

1. Define leadership and identify the responsibilities, competencies, and behaviors of successful leaders. 9.1
2. Identify the characteristics of successful teams, including leadership, cooperation, collaboration, and effective decision-making skills as applied in groups, teams, and career technical student organization activities. 9.2
3. Understand the characteristics and benefits of teamwork, leadership, and citizenship in the school, community, and workplace setting. 9.3

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4 Explain how professional associations and organizations and associated leadership development and competitive career development activities enhance academic preparation, promote career choices, and contribute to employment opportunities. 9.4

5 Understand that the modern world is an international community and requires an expanded global view. 9.5

6 Respect individual and cultural differences and recognize the importance of diversity in the workplace. 9.6

7 Participate in interactive teamwork to solve real Marketing, Sales, and Services sector issues and problems. 9.7

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10 Technical Knowledge and Skills 10.0

1 Interpret and explain terminology and practices specific to the Marketing, Sales, and Services sector. 10.1

2 Comply with the rules, regulations, and expectations of all aspects of the Marketing, Sales, and Services sector. 10.2

3 Construct projects and products specific to the Marketing, Sales, and Services sector requirements and expectations. 10.3

4 Collaborate with industry experts for specific technical knowledge and skills. 10.4

5 Integrate the marketing information management concepts, systems, and tools needed to obtain, evaluate, and disseminate information for use in making marketing decisions. 10.5

6 Employ the financial concepts used in making marketing decisions. 10.6

7 Assess the product and service management concepts and processes needed to obtain, develop, maintain, and improve a product or service mix in response to market opportunities. 10.7

8 Understand how promotion concepts and strategies including advertising, sales promotion, public relations, and personal selling, are used to communicate information about products, services, images, and ideas to achieve a desired outcome. 10.8

9 Illustrate the methods used to determine client needs and desires and respond with selling concepts including planned, personalized communication that influences purchase decisions and enhances future business opportunities. 10.9

10 Compare the distribution concepts and processes needed to move, store, locate, and transfer ownership of goods or services. 10.10

11 Apply the pricing concepts and strategies used to maximize return and meet customers' perceptions of value. 10.11

12 Identify city, county, and state certificates and licensures required to conduct business. 10.12

13 Identify the techniques and strategies used to foster positive, ongoing relationships with customers and the importance of customer service to the business' bottom line. 10.13

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14 Employ the concepts, processes, and skills associated with identifying new ideas, opportunities, and methods and with creating or starting a new project or venture. 10.14

15 Communicate the economic principles and concepts fundamental to business operations and the importance of marketing in a global economy. (Economics) 10.15

11 Demonstration and Application 11.0

1 Utilize work-based/workplace learning experiences to demonstrate and expand upon knowledge and skills gained during classroom instruction and laboratory practices specific to the Marketing, Sales, and Services sector program of study. 11.1

2 Demonstrate proficiency in a career technical pathway that leads to certification, licensure, and/or continued learning at the postsecondary level. 11.2

3 Demonstrate entrepreneurship skills and knowledge of self-employment options and innovative ventures. 11.3

4 Employ entrepreneurial practices and behaviors appropriate to Marketing, Sales, and Services sector opportunities. 11.4

5 Create a portfolio, or similar collection of work, that offers evidence through assessment and evaluation of skills and knowledge competency as contained in the anchor standards, pathway standards, and performance indicators. 11.5

Pathway Standards

A. Marketing

1 Demonstrate an understanding of business fundamentals, uses and application of technologies, communications, and basic management functions. A1.0

1 Describe current business and marketing trends. A1.1

2 Describe tools, techniques, systems used to plan, staff, lead and organize in human resources. A1.2

3 Explain the role of business and society. A1.3

4 Compare and contrast advantages and disadvantages of business ownership. A1.4

5 Evaluate governmental and trade regulations affecting business and marketing efforts. A1.5

6 Explore ways technology impacts business competitiveness. A1.6

7 Examine management styles and the role of management in marketing. A1.7

8 Assess the importance of leadership and management in the multicultural environment. A1.8

9 Use digital and graphic design in creation of advertising. A1.9

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2 Demonstrate an understanding of basic economic concepts, economic systems, cost-profit relationships, economic indicators and trends, as well as international concepts. A2.0

1 Describe the nature of current economic problems and challenges. A2.1

2 Explain the concept of economic resources. A2.2

3 Explain the principles of supply and demand. A2.3

4 Explain the role of profit as an incentive in a market economy. A2.4

5 Determine forms of economic utility created by marketing activities. A2.5

6 Determine factors affecting business risk. A2.6

7 Examine the causal relationship between scarcity and choices. A2.7

8 Distinguish between economic goods and services. A2.8

9 Explore the relationship of government and business. A2.9

10 Compare and contrast various economic systems. A2.10

11 Analyze the impact of organized labor and/or divisions of labor on productivity. A2.11

12 Measure current economic conditions. A2.12

13 Assess the impact of cultural and social environments on world trade and marketing. A2.13

3 Demonstrate the importance of legal, ethical and financial issues in business marketing decisions. A3.0

1 Describe sources for financing businesses. A3.1

2 Describe the use of technology in the financing function. A3.2

3 Define the significance of ethical behavior in the workplace. A3.3

4 Explain the nature and scope of financing. A3.4

5 Identify and analyze the risks associated with obtaining business credit. A3.5

6 Examine legal issues affecting business such as trade, environmental, personnel, truth in advertising, and workplace regulations. A3.6

7 Analyze the critical relationships between the banking and marketing industries. A3.7

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4 Implement the concepts, systems, and tools needed to gather, access, synthesize, evaluate, and disseminate information for use in making business marketing decisions. A4.0

1 Identify considerations in planning and implementing marketing strategies. A4.1

2 Demonstrate the role of technology in marketing information systems. A4.2

3 Explain the nature of sales forecasting. A4.3

4 Explain why beginning with quality market research is more likely to ensure success. A4.4

5 Assess marketing information needs. A4.5

6 Compare and contrast tools for conducting and analyzing marketing research. A4.6

7 Analyze the role of ethics as it relates to marketing information management. A4.7

8 Assess global trends and opportunities. A4.8

9 Conduct competitive analysis. A4.9

10 Set a marketing budget. A4.10

11 Develop a marketing campaign and write a marketing plan. A4.11

5 Demonstrate an understanding of the nature and scope of the product/service management function, quality assurance, product mix, positioning, and other market product considerations. A5.0

1 Explain the nature and scope of product/service management. A5.1

2 Demonstrate an understanding of the importance of ensuring quality of products and services. A5.2

3 Assess the needs of product/service management. A5.3

4 Evaluate the types of product/service management. A5.4

5 Evaluate the importance of the product mix. A5.5

6 Analyze factors marketers use to position products and businesses such as branding, packaging, labeling, legal considerations, product life cycle and management techniques for each level of the life cycle, purchasing functions. A5.6

7 Analyze how creativity, compelling communication and design, positioning, and target marketing effectively reach customers. A5.7

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6 Demonstrate an understanding of the concepts and processes needed to move, store, locate, and/or transfer ownership of goods and services. A6.0

1 Recognize the logistics of product delivery and importing and exporting products and services. A6.1

2 Determine the uses of information systems in the order fulfillment process. A6.2

3 Determine the effects of government regulations on stock handling techniques and warehousing. A6.3

4 Explore the functions of the shipping and receiving process in the success of the distribution function. A6.4

5 Explain the nature of channel member relationships. A6.5

6 Evaluate legal and ethical considerations in the distribution process. A6.6

7 Evaluate the types of inventory controls. A6.7

8 Predict how customer service relationships can affect the distribution process. A6.8

7 Demonstrate an understanding of product and institutional promotion through advertising, publicity/public relations, promotional sales, and e-commerce, using product, services, images, and ideas to achieve a desired outcome. A7.0

1 Describe the types of promotion. A7.1

2 Recognize legal and ethical considerations in promotion. A7.2

3 Understand important promotional strategies for communicating information about products, services, images, and ideas in an e-commerce environment. A7.3

4 Explain the role of promotion. A7.4

5 Explain the importance of public relations. A7.5

6 Summarize the effectiveness of different types of advertising media. A7.6

7 Coordinate activities in the promotional plan. A7.7

8 Differentiate between publicity, public relations and advertising. A7.8

9 Discern between the major types of sales promotion. A7.9

10 Assess the importance of and differences between the creative processes and the management processes involved in marketing. A7.10

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8. Demonstrate an understanding of the process of establishing and communicating the value or cost of goods and services, the nature and scope of pricing concepts, and the strategies and outcomes of pricing. A8.0
    1. Understand the nature, scope and factors affecting the pricing function. A8.1
    2. Develop a foundational knowledge of pricing to understand its role in the marketing. A8.2
    3. Explain the role of business ethics and legal considerations in pricing as well as the importance of a reputation for honesty in communication and for quality products. A8.3
    4. Connect the use of technology in the pricing function. A8.4
    5. Employ pricing strategies to determine prices. A8.5

B. Professional Sales

1. Understand the interrelationships between economic and marketing concepts and selling. B1.0
    1. Define the role of selling in the national economy. B1.1
    2. Determine economic indicators that affect selling. B1.2
    3. Evaluate the impact of the international economic climate and international trade on selling. B1.3
2. Analyze and evaluate legal, moral, and ethical issues affecting selling and sales management. B2.0
    1. Identify legal aspects of sales contracts and warranties. B2.1
    2. Recognize legal aspects of standardization, grading, and labeling options. B2.2
    3. Understand legal aspects pertaining to advertising and pricing. B2.3
    4. Analyze ethical responsibilities in relationships with sales personnel, customer/clients, competitors, and vendors. B2.4
3. Analyze customer/client behavior in the selling process. B3.0
    1. Define and predict buying motives in the customer's decision-making process. B3.1
    2. Differentiate between each stage of the customer buying process. B3.2
    3. Explain the importance of customer service and explain communication techniques. B3.3
    4. Respond thoughtfully to diverse perspectives; synthesize comments, claims, and evidence made on all sides of an issue. B3.4
    5. Resolve contradictions when possible. B3.5
    6. Determine what additional information and/or research is required to deepen the investigation or complete the task. B3.6
    7. Defend why quality customer service translates into a competitive edge in marketing efforts. B3.7

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4. Understand the nature and scope of the functions associated with personal and business sales strategies, product knowledge, support activities, and management of selling techniques. B4.0
    1. Explain the main characteristics of a successful salesperson including; listening, verbal and written communication skills, product knowledge, customer connection, trust worthiness, and power of persuasion. B4.1
    2. Demonstrate steps of sales and techniques used in the selling process. B4.2
    3. Apply techniques used by salespeople to enhance selling potential and customer satisfaction. B4.3
    4. Compare and contrast selling strategies for wholesale and retail environments. B4.4
    5. Differentiate between each stage of the customer buying process. B4.5
    6. Obtain and analyze product and service information to facilitate the selling process. B4.6
5. Examine different types of sales pathways. B5.0
    1. Compare retail and wholesale sales methods. B5.1
    2. Discuss telemarketing sales techniques. B5.2
    3. Examine Internet sales. B5.3
6. Analyze the support activities of sales staff and management. B6.0
    1. Assess the responsibilities of building, training, and evaluating a sales staff. B6.1
    2. Examine methods of compensation for a sales staff. B6.2
7. Complete a strategic plan that includes establishing individual and company sales goals to guide the activities of the sales staff. B7.0
    1. Apply methods for motivating and evaluating sales staff. B7.1
    2. Practice various approaches for organizing a sales staff and leading a sales force to maximize effectiveness. B7.2
    3. Track sales figures, and prepare sales reports to analyze sales in relation to a sales plan. B7.3
8. Access and use marketing information to enhance sales opportunities and activities. B8.0
    1. Identify sources of demographic data for sales and business planning. B8.1
    2. Use personal sales information to guide business activities. B8.2
    3. Analyze and use data to identify potential customers and locations for business expansion. B8.3
    4. Track consumer spending trends, and analyze data to forecast sales, predict economic conditions, and guide business activities. B8.4
    5. Research consumers' needs and wants to identify product/service gaps and to develop, maintain, and improve, products and services. B8.5

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C. Entrepreneurship/Self-Employment

1. Define the role the entrepreneur plays in the free-enterprise system. C1.0
    1. Understand the role and importance of entrepreneurship and small business in the economy. C1.1
    2. Understand the part government plays in the free-enterprise system and its impact on small businesses. C1.2
    3. Know how scarcity and allocation affect small businesses. C1.3
    4. Demonstrate the relationship between supply and demand and pricing and production. C1.4
    5. Evaluate the importance of economic measurements and the factors used to calculate it. C1.5
    6. Explore the impact of cultural and social environments on global trade. C1.6
2. Analyze the development of successful personal entrepreneurial traits. C2.0
    1. Define and identify the following entrepreneurial characteristics: adaptability, competitiveness, confidence, discipline, perseverance, vision and risk taking. C2.1
    2. Analyze strengths and weaknesses of self in terms of entrepreneurial success. C2.2
    3. Deconstruct the reasons for success of key entrepreneurs. C2.3
    4. Explore the rationale of why, historically, the United States and California have been leaders in innovation and small-business ventures. C2.4
3. Understand the basic aspects of entrepreneurship. C3.0
    1. Know the risk management principles associated with small-business ownership. C3.1
    2. Compare the different types of business ownership and the advantages and disadvantages of owning and managing a small business. C3.2
    3. Understand differentiation and creating a unique product/service. C3.3
    4. Examine current trends that provide both domestic and global opportunities for entrepreneurs. C3.4
    5. Identify and analyze ethical and social responsibilities of a successful small business. C3.5
    6. Analyze a proposed business situation and its potential market. C3.6
    7. Compare and contrast starting a new business versus buying an existing business. C3.7

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4. Develop creative and innovative thinking skills that apply to entrepreneurship and the products/services created. C4.0
    1. Define terms to develop the creative process such as originality, flexibility, brain storming, modification, associative and metaphorical thinking. C4.1
    2. Develop creative thinking in order to stimulate curiosity and promote divergence. C4.2
    3. Defend why failure is an opportunity to learn and to understand that creativity and innovation are a long-term and cyclical process of successes and mistakes. C4.3
    4. Explore recognized creative-minded individuals and their products and services. C4.4
    5. Defend why competitiveness depends on innovation. C4.5
    6. Create and design potential innovative twenty-first-century products and services. C4.6
5. Evaluate leadership styles and management functions for the small business. C5.0
    1. Describe how cultural/ethnic/generational differences affect interpersonal interactions/communications within a business structure. C5.1
    2. Define the four management functions: planning, organizing, staffing, and controlling. C5.2
    3. Compare and contrast leadership styles and characteristics. C5.3
    4. Distinguish the roles of support staff, supervisors, and managers in achieving financial goals. C5.4
6. Demonstrate an understanding of the elements and purpose of business and strategic planning in entrepreneurship. C6.0
    1. Identify and explain the components of a business plan. C6.1
    2. Define terms necessary for creating a business plan such as return on investment, target markets, and demographics. C6.2
    3. Conduct market research by using a variety of methods. C6.3
    4. Compare and contrast sample business plans, identifying strengths and weaknesses. C6.4
    5. Synthesize all elements into an original business plan. C6.5
7. Identify strategies for business startup and growth. C7.0
    1. Identify mission and purpose. C7.1
    2. Identify factors for business expansion. C7.2
    3. Develop core values. C7.3
    4. Develop a vision statement. C7.4
    5. Evaluate advantages and disadvantages of business locations. C7.5
    6. Assess barriers to startup. C7.6
    7. Create an exit strategy. C7.7

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8 Understand financial planning, reports, and projections. C8.0

1 Identify startup costs. C8.1

2 Understand the relationship between supply and demand and pricing and production. C8.2

3 Research sources of capital. C8.3

4 Formulate pricing strategies for goods and services for a small business. C8.4

5 Project annual and monthly business income and expenses. C8.5

6 Calculate financial projection sales, income, expenses, and taxes. C8.6

6 Construct a financial plan. C8.6

9 Understand effective marketing of a small business. C9.0

1 Identify target markets, competition, and customer profiles. C9.1

2 Know the components of a promotional plan (e.g., advertising, public relations, sales promotion) and how the plan is used to achieve a stated outcome. C9.2

3 Identify the selling techniques used to aid customers and clients in making buying decisions. C9.3

4 Understand how products and services are conceived, developed, maintained, and improved. C9.4

5 Use market research to develop strategies for marketing products or services in a small business. C9.5

6 Create an effective marketing plan including current social media, viral marketing, and other technologies. C9.6

10 Identify and evaluate technology used by entrepreneurs. C10.0

1 Examine the effect of technology in a small business for a multichannel approach. C10.1

2 Explore technology related to global commerce—cultural differences, foreign currencies, and logistics. C10.2

11 Understand the role of human resources in a successful small business. C11.0

1 Identify the role of human resources in selection, training, and evaluation of employees. C11.1

2 Identify government regulations (federal, state, and local) that affect small business. C11.2

3 Recognize various types of taxes that affect a small business. C11.3

4 Understand policies and laws regarding harassment, nondiscrimination, and safety. C11.4

5 Develop job descriptions. C11.5

6 Plan compensation and benefit options. C11.6