

TIES 2001
Teachers in Industry for Education Support

MARKETING TOOLS TO INCREASE REVENUE

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Table of Contents

	<u>Page</u>
Curriculum Unit Overview – narrative	3
Summary Chart	4
Transfer Activities	4
Section One Technology	6
Section Two Sales and Marketing Tools	12
Appendix	18

Marketing Tools to Increase Revenue Curriculum Unit Overview

Summary

The two sections in this unit consist of methods of teaching marketing strategies. The lessons included in this project enable the teacher and students to experience practical business situations. These include starting a business, hiring marketing personnel, and increasing company sales.

Big Picture

The sections are designed to expose students to current technology and marketing practices using software applications, the World Wide Web, and innovative techniques. The projects are designed to simulate actual marketing and business conditions. After completion of these projects, the student will have a realistic concept of marketing strategies and business practices.

Preparation for the Unit

Section One: Technology

The teacher will need to ensure Microsoft Word and Excel are available as well as access to the World Wide Web. Knowledge of search engines will also be required to assist in creating a list of potential customers. Each student should have access to a computer and have the ability to print their results. The computer lab should be set up to promote interaction between the students. Maps, mapping programs, or Internet sites should be available to assist the student in creating a sales route for the potential customer list the student is creating.

Section Two: Sales and Marketing Tools

This section focuses on group activity. A camcorder and VCR will be required to tape and playback a mock interview. In addition, a “do’s and don’ts” interview tape illustrating what should and should not take place in an interview will need to be acquired to show the students. A blank videotape and access to the school library to obtain career text material will also be necessary.

A digital camera and scanner will be required when creating the marketing representative notebook. Photographic paper is recommended for improved print quality.

The teacher will need to establish business contacts to coordinate job-shadowing experiences. The purpose is to expose students to job conditions so they can write job descriptions, job duties, and a company philosophy statement and mission statement.

Overview

On the following page is a summary of the unit, including brief summaries of each Authentic Learning Task (ALT). This table provides an overview of the tasks in the unit sections and shows how the activities in the different teaching areas relate to each other.

Marketing Tools to Increase Revenue Curriculum Unit Summary

Technology	Sales and Marketing Tools
<p>ALT 1 – Create a Business Card with a Company Logo Students will create two cards using a computer and software applications.</p>	<p>ALT 1 – Mock Interview The student will act as the interviewee and interviewer to acquire interviewing skills.</p>
<p>ALT 2 – Create Financial Statements using Excel Students will create two financial statements (income statement and balance sheet). They will use computers and complete an Excel problem to gain valuable experiences.</p>	<p>ALT 2 – Create Marketing Representative Notebook Using a fictitious company, students will work in groups and develop a sales tool. Students will determine the product sold and decide what material should be included in the notebook that would be taken on sales visits.</p>
<p>ALT 3 – Create a Potential Customer List using the WWW and Text Resources The students will use the Internet to locate specific regions to target customers in a particular type of business.</p>	<p>ALT 3 – Entrepreneurship in a Small Business Upon deciding on a business from a list provided by the teacher, students will work in groups and create job descriptions, a philosophy statement, and a mission statement.</p>

Transfer Activities

Section One

Upon completion of the technology section, students will be able to create business cards using their creativity, Microsoft Word and incorporate Word Art. This expertise will give them the knowledge to use Word Art as well as different font types and sizes in other word documents.

Students will also use Microsoft Excel to create an income statement and balance sheet. With this knowledge, students can develop simplified spreadsheets to use in their everyday life.

The third activity requires a student conduct research in developing a potential customer list. In the process of completing this exercise, students will learn how to conduct research using the World Wide Web and text material. After developing the list, they will map a sales route for the marketing representative to use in visiting the potential customers. As a result of this project, students will learn how to conduct research and develop logical thinking skills.

Section Two

The projects in this section expose students to practical applications that take place in the business world. As a result of the mock interview, students will learn interview techniques and be better prepared for conducting or being interviewed. This exercise and the developing a customer list project will prepare the students for researching a company and participating in job interviews.

As a group activity, students create a sales tool that marketing representatives will use when visiting potential customers. This tool involves creating a notebook that contains information about a company. The teacher will supply a list of potential items to be included in the project. However, the actual contents will be at the discretion of the students. Students will be required to use a digital camera, scanner, and a word processing application to complete the assignment. As a result, students will learn how to use a digital camera and scanner and become familiar with a word processing application as well as develop their planning skills.

Starting a business involves numerous concepts. This activity incorporates some of the things a business would encounter when creating a new business or making changes to a current one. These include writing job descriptions, and creating a philosophy statement and mission statement. Business is ever changing resulting in jobs being added and phased out. With that, there is a need to rewrite job descriptions and create and modify company philosophy statements and mission statements. As a result, this exercise is an excellent learning tool that can have practical applications.

Section One: Technology

ALT One: Create a Business Card with a Company Logo

Summary

Students will create two different business cards incorporating a business logo. In the process of developing the card, students will use clip art and word art. The students will develop a business logo.

Competencies

1. Students will create two different business cards using clip art and word art.
2. Students will develop a different company logo for each business.

Time

Creating and printing the two business cards will take the students one class period (55 minutes each) to complete.

Materials

Computer
Paper
Printer
Microsoft Word
Microsoft Clip Art

Instructions

1. The instructor will provide sample business cards created using Microsoft Word, Clip Art, and WordArt.
2. The instructor will demonstrate the creation of a business card using Microsoft Word, Clip Art, and WordArt.
3. The instructor will inform the students the business card is to be evaluated based upon the following criteria:
 - Size of the logo is 1" x 1"
 - Person name and title
 - Business name and address
 - Phone number
 - Fax Number
 - E-mail address
 - No more than two colors may appear on the business card
 - No more than two font type may be used on the business card
4. After completing the business cards, the student will turn in the business card to the teacher for evaluation.

Evaluation/Assessment of Students Competency

1. The instructor will evaluate the business card based on the following criteria:

- Size of the logo is 1" x 1"
- Person name and title
- Business name and address
- Phone Number
- Fax Number
- E-mail address
- No more than two colors may appear on the business card
- No more than two font type may be used on the business card
- Size of the logo is 1" x 1"

Closure

The teacher will display the business cards to the class and the students and teacher will critique each card.

Section One: Technology

ALT Two: Create Financial Statements using Excel

Summary

Students will create two financial statements, an income statement and a balance sheet, using Excel. The teacher will explain the purpose of an income statement and balance sheet and show completed examples of both documents. In addition, the students will be taught how to develop financial computations and formatting features in Excel, and apply these learned skills in developing their own income statement and balance sheet.

Competencies

1. Students will create a balance sheet and income statement using the correct format with 100% accuracy.
2. Students will identify components of the financial statements (i.e. assets, liabilities, revenues, expenses) and explain them with 100% accuracy.
3. Students will develop math computations (add, subtract, divide) while creating the financial statements with 100% accuracy.
4. Students will create professional looking financial statements using Excel formatting features with 90% accuracy.

Time

The teachers lecture and creation of the financial statements will take the students two class periods (55 minutes each) to complete.

Materials

Computer
Microsoft Excel
Paper
Printer
Financial Statement Sample Handouts

Instructions

1. The instructor will teach the students the components and formatting of a balance sheet and income statement and show them samples of each financial statement.
2. Students will be asked to explain the components of the financial statements.
3. The instructor will demonstrate how to create formulas and show where the various formatting functions are located in Excel.
4. Using their figures as a basis to create the financial statements, students will create an income statement and balance sheet incorporating the skills they have learned.

Evaluation/Assessment of Students Competency

1. The instructor will review the income statement, balance sheet and formula reports (shows the formulas used in the spreadsheets) associated with both financial statements to determine if the formulas are correct.

2. The instructor will evaluate the income statement and balance sheet to determine if proper formatting was used according to the sample financial statement handouts.
3. The instructor will evaluate the income statement and balance sheet to determine if proper Excel formatting was used in accordance with the teacher's lecture.
4. Students will be given a brief written assessment to determine their knowledge of the components that appear in the financial statements (i.e. formula's, formatting features).

Closure

Divide class into groups and have them share their financial statements. As a result, the learned skills, Excel formatting features, development of formulas, and the formatting or placement of the components of the financial statements will be reinforced. A brief discussion would take place to discuss the learned concepts.

After the teacher evaluates the papers, they will be returned to the students and when necessary discussed with the students to reinforce any concepts that the student had difficulties in comprehending.

Section One: Technology

ALT Three: Create a Potential Customer List using the World Wide Web and Text Resources

Summary

Students will use the World Wide Web and text resources to identify markets to target their sales efforts. In the process of using the World Wide Web, students will select two search engines and be required to explain the results obtained from each search engine. Once a market is determined, students will identify potential sales contacts and develop a list consisting of the business name, address, phone and fax number, products sold or manufactured, e-mail address, and company executives with their titles and responsibilities. Students will then map the sales route the marketing representative will use to visit the sales contacts.

Competencies

1. Students will identify customer markets using the World Wide Web and text resources.
2. Students will make a list of ten potential customers using the World Wide Web and text resources.
3. Students will identify two search engines, print the results of the search, and identify the differences and/or similarities of the results.
4. After identifying the ten sales contacts, students will map the sales route (determine the order in which the contacts should be visited).

Time

Identifying the customer market, selection of ten potential customers, identifying and printing results of the search engines, and mapping the sales route will take the students three class periods (55 minutes each) to complete.

Materials

Computer

Paper

Printer

Access to the World Wide Web

Marketing text resource material (see Marketing Reference Section)

Maps, mapping programs, or World Wide Web resources (i. e. MapQuest)

Instructions

1. The instructor will teach the students how to use and locate search engines.
2. Students will be required to identify at least two search engines and use them to assist in developing a sales market and ten potential customers to target the sales effort.
3. Students will be required to print results of a search using two different search engines and explain the similarities and differences of each.
4. After identifying the ten sales contacts, students will map the sales route and develop a list consisting of the businesses name, address, phone and fax number, products sold or

manufactured, e-mail address, and company executives, with their titles and responsibilities. Students will also be required to list their sources for the information and document it.

Evaluation/Assessment of Students Competency

1. The instructor will evaluate the World Wide Web search engine print outs and the similarities/differences of the search engines.
2. The instructor will evaluate the listing of the ten potential customer information and mapping of the sales route.

Closure

The teacher will call upon the students to share the differences and similarities they found in using the two search engines and explain where they found the information used to develop the list of ten potential customers. Students will also be asked to share the rationale used in mapping their sales route.

Section Two: Sales and Marketing Tools

ALT One: Mock Interview

Summary

The teacher will discuss the interview process with the students that will include such things as appropriate dress, career/company research, and where to locate reference material. Students will conduct a mock interview acting as both the interviewer and interviewee. The teacher will show a videotape of a sample interview and discuss the do's and don'ts of the interview. Student's in-groups of two will select a career from a list provided by the teacher, research the career, answer the following questions, and provide a written response to the teacher.

- What are the education requirements?
- What is the salary range?
- What are the working conditions?
- What are the physical requirements?
- In what part of the country are the jobs available?

Each group of students will have the same career. Interview questions as an interviewer and interviewee, associated with the chosen career, will be developed by the students. The interview will be video taped and critiqued by the teacher and students.

Competencies

1. Students will select a career, from a list provided by the teacher, and conduct research so he or she can display their knowledge about the field by answering the following questions
 - What are the education requirements?
 - What is the salary range?
 - What are the working conditions?
 - What are the physical requirements?
 - In what part of the country are the jobs available?
2. Students will demonstrate how to compose quality interviewer and interviewee questions.
3. Students will be able to demonstrate the correct way of conducting an interview as an interviewer and interviewee.

Time

Time will be needed to view the interview video tape, conduct the career research, develop interviewer and interviewee questions, and video tape and critique the student interviews will take five class periods (55 minutes each).

Materials

Computer
Access to the World Wide Web
Paper
Printer
List of careers
Interview videotape
Blank videotape

Camcorder
VCR
Camcorder Stand
Career text material – access to the school library

Instructions

1. The teacher will discuss the interview process with the students. The lecture will include viewing an interview and critiquing it, proper dress, career choices, and where to locate career and company information.
2. The teacher will provide a list of careers to the students.
3. Each group (2) of students will select a career and conduct research using the World Wide Web and text material provided by the teacher or available at the school library so the following questions can be answered
 - What are the education requirements?
 - What is the salary range?
 - What are the working conditions?
 - What are the physical requirements?
 - In what part of the country are the jobs available?
4. Each student will develop twenty interview questions, ten as an interviewer and ten as an interviewee.
5. The teacher will video tape the student interviews, replay the tapes after each interview and the class will critique them.

Evaluation/Assessment of Students Competency

1. The instructor will evaluate the assigned questions for student effort based on completeness and quality of the answer.
2. The instructor will evaluate the interview/interviewer questions to determine if they are appropriate.
3. The instructor will critique the taped interview based upon predetermined guidelines.

Closure

The teacher and students will discuss the do's and don'ts of an interview, review the taped interviews, and discuss what was learned from the assignment.

Section Two: Sales and Marketing Tools

ALT Two: Create Marketing Representative Notebook

Summary

Students will create a marketing representative's display. Students will be divided in groups of two and will choose a fictitious company from a list provided by the teacher. The teacher will also provide a description of the company. The student's will determine the type of products sold in the business and will act as marketing representative's and be required to create a notebook to use when visiting potential customers.

Competencies

1. Students will learn how to create a marketing sales tool.
2. Students will learn how to use a digital camera.
3. Students will learn how to work in a team.

Time

Ten class periods (two weeks), at 55 minutes each would be needed to create the notebook.

Materials

Computer
Access to the World Wide Web
Paper (recommend photographic)
Printer
Digital Camera
Scanner

Instructions

1. The teacher will provide a list of companies and a description of the companies to the students.
2. The students will select a company from the list and determine the type of products to sell.
3. The teacher will provide a list of ideas that could be contained in the notebook. These ideas could consist of:
 - Title page – Name and address of the company, phone and fax number, and e-mail address
 - List of satisfied customers
 - Pictures of the products
 - Letters of recognition
 - Picture of the facility
 - Description of job positions
 - Pictures of the employees
4. Students will be divided in groups as determined by the teacher.
5. Through brainstorming techniques the students will determine the contents of the notebook.

Evaluation/Assessment of Students Competency

1. The instructor will evaluate the notebook for content, quality, creativity, and presentation.
2. The instructor will evaluate how technology is incorporated in the notebook. This technology could include the use of the digital camera, the World Wide Web, music, and other forms of technology.

Closure

The instructor will display the notebooks to the class. The projects can be displayed in a central location for the whole school to view.

Section Two: Sales and Marketing Tools

ALT Three: Entrepreneurship in a Small Business

Summary

The teacher will provide the students with a list and description of businesses. Students will be divided in groups. The size of each group is to be determined by the teacher. Each group will select a business and “create” it by incorporating job descriptions, job duties, a company philosophy statement, and a mission statement. The teacher will instruct the students in what to look for in determining and writing a job description, a philosophy statement and a mission statement. The teacher will also arrange to have each group job shadow a business to learn the employee’s job responsibilities. The teacher will schedule representatives from businesses to talk to the class about the operations of their business.

Competencies

1. Students will learn how to create multi-task jobs by solving the problem assigned by the teacher.
2. Students will learn to identify and write job descriptions using the information from the class lecture and the job shadowing experience.
3. Students will create a philosophy statement and a mission statement using the information from the class lecture and the job shadowing experience.
4. Students will learn how to overcome a business problem using brainstorming techniques.

Time

Ten class periods (two weeks), at 55 minutes each would be needed to listen to the speakers, job shadow, write a paper about their job shadowing experience, and create job descriptions, job duties, a philosophy statement and a mission statement.

Materials

Computer

Paper

Printer

Lecture notes relating to job descriptions, philosophy statements, and mission statements

List of job shadowing visits

Digital camera

Instructions

1. The teacher will provide a list and description of businesses.
2. Students will select a business.
3. The teacher will arrange for businesses to make presentations to the class about their business focusing on creation of job descriptions and philosophy and mission statements.
4. Each group will participate in a job shadowing experience.
5. Each group will write a one page paper explaining their job shadowing experience identifying what employees would do differently if they owned the company.
6. Each group will write a job description, a philosophy statement and a mission statement.

7. The teacher will introduce a “problem” to each group. The problem will consist of an increase in sales and workload for each employee, but no increase in manpower. Students will be asked to evaluate how each employee’s job would be affected and to determine if any job responsibilities would change.

Evaluation/Assessment of Students Competency

1. The instructor will evaluate the groups one page analysis of the job shadowing experience based on structure and content.
2. The instructor will evaluate the groups job descriptions, philosophy statement and mission statement.
3. The instructor will evaluate how each group solved the personnel assignment problem.

Closure

After the exercise the teacher will lead a discussion focusing on the students desire to own or manage a small business. In addition, the advantages and disadvantages of a small business versus a corporation will also be reviewed.

Appendix

The following is a list of supplemental resources that can be used in implementing the lesson plans.

- The Standard Directory of Advertising Agencies
- Standard & Poor's Register of Corporations, Directors, and Executives
- Director of Corporate Affiliations
- Moody's Industrial Manual
- Harris Infosource
- Industrial PinPointer
- Lexus-Nexus
- Dayton Montgomery County Public Library
- Thomas Register
- Keirsey Temperament Sorter
- Personal Power Portfolio
- www.Jobs4Sales
- Ohio Manufacturers Directory
- U.S. Public Companies
- Hanover's Book of American Companies

