

STUDENT NAME(S)

Task	Observations Of Student					
Planning and Presentation	4	3	2	1	0	N/A
Management Project	4	3	2	1	0	N/A
Marketing Project	4	3	2	1	0	N/A
Retailing Presentation	4	3	2	1	0	N/A
Retail Merchandising	4	3	2	1	0	N/A
Presenting/Reporting	4	3	2	1	0	N/A

STANDARD IS 1 IN EACH APPLICABLE TASK

Rating Scale

The student:

4	Exceeds defined outcomes. Plans and solves problems effectively and creatively in a self-directed manner. Tools, materials and/or processes are selected and used efficiently, effectively and with confidence.
3	Meets defined outcomes. Plans and solves problems in a self-directed manner. Tools, materials and/or processes are selected and used efficiently and effectively.
2	Meets defined outcomes. Plans and solves problems with limited assistance. Tools, materials and/or processes are selected and used appropriately.
1	Meets defined outcomes. Follows a guided plan of action. A limited range of tools, materials and/or processes are used appropriately.
0	Has not completed defined outcomes. Tools, materials and/or processes are used inappropriately.

TASK CHECKLIST – criteria for introductory level

The student:

- Preparation and Planning**
 - sets goals and follows instructions accurately
 - responds to directed questions and follows necessary steps to find answers
 - accesses basic in-school/community information sources
 - interprets and organizes information into a logical sequence
 - records information accurately using correct technical terms
 - uses time effectively

MANAGEMENT PROJECT

- Content:**
- relates management concepts of planning, organizing, leading and monitoring to:
 - personal and family life
 - local organizations including schools
 - local business, large and small

MARKETING PROJECT

- Content:**
- lists general characteristics and types of decisions made for each part of the marketing mix including:
 - product
 - price
 - promotion
 - place
 - consumer
 - competition
 - designs a prototype product or
 - selects an existing product
 - designs and carries out a mini market survey of product
 - recommends marketing decisions regarding product
 - shows the connections between assigned task and the marketing decisions made every day in the market place

RETAILING PRESENTATION

- Content:**
- explains the role of retailing in the marketplace
 - outlines the evolution of retailing
 - discusses the role of technology in retailing
 - describes the major functions of retailing:
 - buying
 - selling
 - merchandising

RESPONSES TO RETAIL MERCHANDISING STRATEGIES

- Content:**
- identifies and analyzes a variety of retail merchandising strategies related to:
 - product
 - price
 - place
 - promotion
 - service
 - Presenting/Reporting**
 - demonstrates effective use of one or more communication media
 - e.g., Written: spelling, punctuation, grammar basic format*
 - Oral: voice projection, body language*
 - Audio-visual: techniques, tools*
 - uses correct grammatical convention and technical terms through proofreading/editing
 - provides an introduction that describes the purpose of the project
 - communicates information in a logical sequence
 - states a conclusion based on a summary of facts
 - provides a reference list of three or more basic information sources (e.g., books, interviews, videos)

STUDENT: _____

Observations of Students	CRITERIA
4 3 2 1 0	<p><i>The student:</i></p> <p><input type="checkbox"/> Preparation and Planning</p> <ul style="list-style-type: none"> • sets goals and follows instructions accurately • responds to directed questions and follows necessary steps to find answers • accesses basic in-school/community information sources • interprets and organizes information into a logical sequence • records information accurately using correct technical terms • uses time effectively
4 3 2 1 0	<p>Content of Customer Portfolio</p> <p><input type="checkbox"/> describes target markets including participants, demographics and psychographics for a:</p> <ul style="list-style-type: none"> – product – retailer – service <p><input type="checkbox"/> analyzes a minimum of five advertisements from newspapers and/or magazines and indicate five different buying motives used</p> <p><input type="checkbox"/> identifies three recent purchases made and indicates whether they were:</p> <ul style="list-style-type: none"> – wants or needs and why – factors that influenced each of the purchases <p><input type="checkbox"/> describes the AIDA concept and how it is used to influence purchases</p>
4 3 2 1 0	<p><input type="checkbox"/> Presenting/Reporting</p> <ul style="list-style-type: none"> • demonstrates effective use of one or more communication media: <i>e.g., <u>Written:</u> spelling, punctuation, grammar basic format</i> <i><u>Oral:</u> voice projection, body language</i> <i><u>Audio-visual:</u> techniques, tools</i> • uses correct grammatical convention and technical terms through proofreading/editing • provides an introduction that describes the purpose of the project • communicates information in a logical sequence • states a conclusion based on a summary of facts • provides a reference list of three or more basic information sources (e.g., books, interviews, videos).

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REFLECTIONS/COMMENTS

STUDENT: _____

TRAINING SITE: _____

Observations of Student	CRITERIA
4 3 2 1 0	<p><u>The student:</u></p> <p><u>Shows Up for Work</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> shows up for scheduled work shifts <input type="checkbox"/> arrives early in order to organize self and store
4 3 2 1 0	<p><u>Provides Quality Customer Service</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> shows knowledge of products in store <input type="checkbox"/> completes opening and closing procedures <input type="checkbox"/> greets customers in an appropriate manner <input type="checkbox"/> acts friendly and helpful during the sale <input type="checkbox"/> handles customer complaints <input type="checkbox"/> takes leave of customers in an appropriate manner
4 3 2 1 0	<p><u>Performs Non-Selling Duties</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> follows store policy and procedures <input type="checkbox"/> maintains well-stocked shelves <input type="checkbox"/> contributes to the general upkeep and maintenance of the store <input type="checkbox"/> assists in visual merchandising (stock on shelves, in-store displays, window displays) <input type="checkbox"/> assists in the preparation of promotional campaigns (creating advertisements, posters, etc.)
4 3 2 1 0	<p><u>Works Collaboratively</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> gets along with other co-workers <input type="checkbox"/> helps fellow co-workers when necessary to help balance workload <input type="checkbox"/> contributes to problem solving and decision making
4 3 2 1 0	<p><u>Presents Personal Characteristics</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> dresses appropriately work for work situation <input type="checkbox"/> demonstrates reliability and dependability <input type="checkbox"/> acts eager, enthusiastic and confident <input type="checkbox"/> makes a commitment to quality customer service

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TRAINING SITE: _____

Observations of Student	CRITERIA
	<i>The student:</i>
	<u>Sets Up the Cash Register</u>
4	<input type="checkbox"/> counts and confirms the accuracy of the float
3	<input type="checkbox"/> ensures cash drawer is properly organized
2	<input type="checkbox"/> verifies total sales and customer count has been cleared to zero
1	<input type="checkbox"/> identifies appropriate clerk key to use and code name into terminal if possible
0	<input type="checkbox"/> checks to ensure there is sufficient journal and receipt tape
	<u>Serves Customers</u>
4	<input type="checkbox"/> greets customers in an appropriate manner
3	<input type="checkbox"/> acts friendly and helpful during the sale
2	<input type="checkbox"/> bags the merchandise properly
1	<input type="checkbox"/> takes leave of the customer in an appropriate manner
0	
	<u>Rings in Sales</u>
4	<input type="checkbox"/> enters sales accurately (minimum five items in each sale)
3	<input type="checkbox"/> handles money tendered properly
2	<input type="checkbox"/> makes change using least amount of coins and bill possible
1	<input type="checkbox"/> counts change back to customers from the amount of the sale to amount tendered
0	
	<u>Completes Cash Register/Terminal Closing Procedures</u>
4	<input type="checkbox"/> clears terminal of daily sales and customers
3	<input type="checkbox"/> generates a detailed audit tape of daily sales
2	<input type="checkbox"/> removes journal tape and rethreads tape in machine
1	<input type="checkbox"/> sets up cash float and removes daily sales
0	
	<u>Completes Cash Reconciliation</u>
4	<input type="checkbox"/> counts money and completes cash out reports
3	<input type="checkbox"/> completes a deposit slip for daily sales
2	<input type="checkbox"/> organizes cash for deposit (coins and bills)
1	
0	

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<p>REFLECTIONS/COMMENTS</p>

STUDENT: _____

Observations of Student	CRITERIA
	<i>The student:</i>
	<u>Communicates on the Telephone</u>
4	<input type="checkbox"/> answers phone promptly (before third ring)
	<input type="checkbox"/> identifies business and/or self
3	<input type="checkbox"/> makes callers comfortable through use of
	– voice (friendly, unhurried)
2	– language (professional, does not use slang)
	– tone (interested attitude)
1	<input type="checkbox"/> listens attentively
	<input type="checkbox"/> transfers call if necessary
0	<input type="checkbox"/> handles a variety of situations appropriately; e.g., caller on hold, complaints, persistent
	<input type="checkbox"/> takes accurate messages
	<u>Communicates Face to Face</u>
4	<input type="checkbox"/> demonstrates a genuinely helpful attitude
	<input type="checkbox"/> offers a pleasant friendly smile and makes eye contact
3	<input type="checkbox"/> gives a cheerful greeting to visitors/customers/clients
	<input type="checkbox"/> remembers names and recognizes visitors/customers/clients
2	<input type="checkbox"/> uses proper protocol for given situation; e.g., use of last names, first names, titles
1	<input type="checkbox"/> dresses appropriately for given situation
	<input type="checkbox"/> shows courtesy, understanding and respect
0	<input type="checkbox"/> demonstrates competence for given situation
	<input type="checkbox"/> handles a variety of situations appropriately; e.g., introductions, greeting visitors/customers/clients, difficult/awkward situations

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