CLASSROOM GUIDE

DECA


# BUSINESS OPERATIONS RESEARCH PROJECT

## ADVISOR GUIDE


DECA

TABLE OF
# Contents




This classroom guide was produced in collaboration with MBA Research, a non profit research and development center.

INTRODUCTION

# About the Business Operations Research Events

Business Operations Research Events provide an opportunity for students to demonstrate knowledge and skills needed by management personnel through the preparation of a detailed written strategic plan and presentation based on the results of a research study.

The guidelines for each of the Business Operations Research Events are consolidated to facilitate the coordination of participant activities in each of the career categories. This means the guidelines will be exactly the same for each career category. However, each career category will be treated separately as a competitive event.

**BOR COMPETITIVE EVENTS:**

Business Services Operations Research (BOR)

Buying and Merchandising Operations Research (BMOR)

Finance Operations Research (FOR)

Hospitality and Tourism Operations Research (HTOR)

Sports and Entertainment Marketing Operations Research (SEOR)

**PARTICIPANTS IN THE BUSINESS OPERATIONS RESEARCH EVENTS WILL:**

**Select** an actual local business operation

**Design** a research study

**Conduct** a research study

**Analyze** the results of the research study

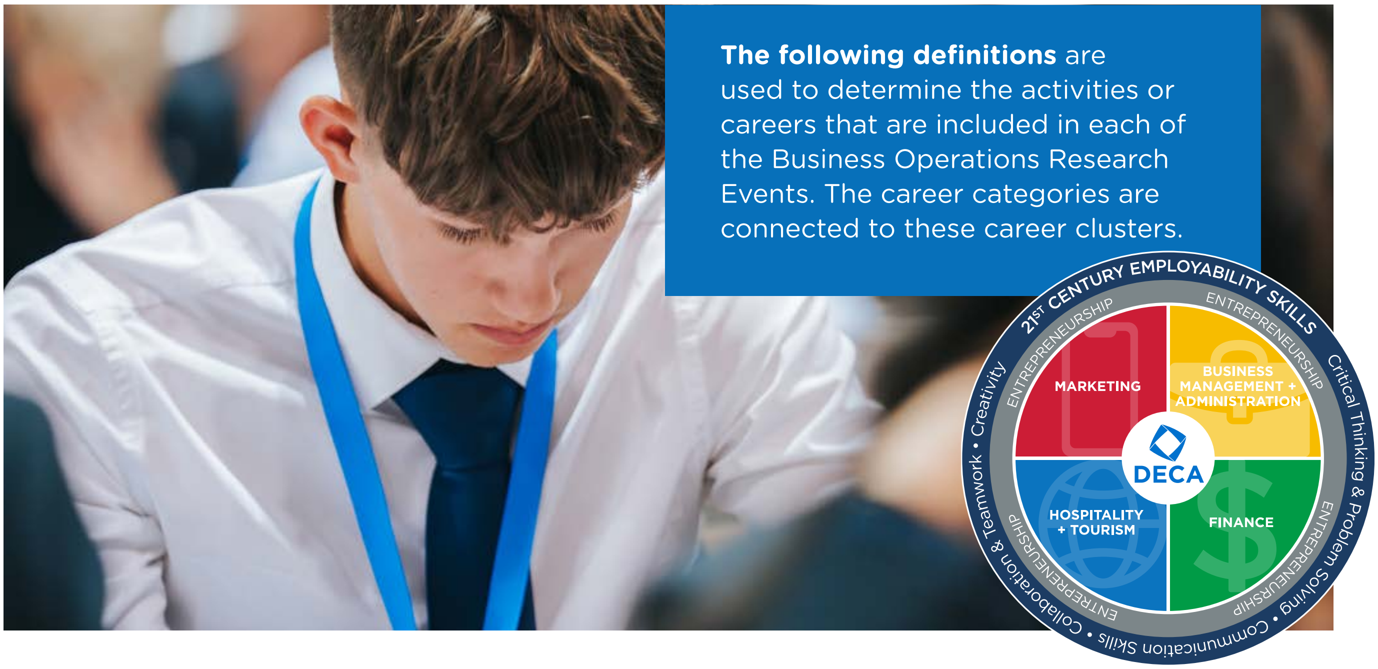
**Prepare** a strategic plan

**Prepare** a proposed budget

**Present the plan** including
- The design of the research study
- The findings and conclusions of the research study
- The proposed strategic plan
- The proposed budget to enact the suggested strategies

INTRODUCTION

# Career Clusters + Definitions




**The following definitions** are used to determine the activities or careers that are included in each of the Business Operations Research Events. The career categories are connected to these career clusters.

## BUSINESS MANAGEMENT + ADMINISTRATION

**Business Services:** Providing services to businesses on a fee or contract basis or providing services to consumers. Examples may include: human resources companies, information technology companies, legal services firms, training and development organizations, health care service providers, libraries, construction companies, real estate firms, landscaping companies, beauty salons, car washes, automotive repair companies, interior decorating, child care services, photography and tutoring services.

## FINANCE

**Finance:** Providing financial services to commercial and retail customers. Examples may include: banks, credit unions, accounting firms, investment companies, and insurance companies.

## HOSPITALITY + TOURISM

**Hospitality and Tourism:** Providing products and services related to event management, lodging, restaurant management and travel and tourism industries. Examples may include: hotels, lodging services, convention services, food and beverage services, restaurants, museums, amusement parks, zoos and other tourism-related businesses.

## MARKETING

**Buying and Merchandising:** Getting the product into the hands of the customer through forecasting, planning, buying, displaying, selling and providing customer service. Examples may include any retail or wholesale business that provides consumer goods: specialty stores, department stores, shopping malls, grocery stores, convenience stores, pharmacies, discount stores, farmers markets and car dealerships.

**Sports and Entertainment Marketing:** Providing products, services or experiences relating to amateur or professional sports or sporting events, entertainment or entertainment events, selling or renting of supplies and equipment (other than vehicles) used for recreational or sporting purposes or products and services related to hobbies, leisure or cultural events. Examples may include: sports teams, movie theaters, waterparks, music venues, concerts, festivals, amateur practice facilities, tournaments, summer camps, outdoor adventure companies and craft/music classes.

INTRODUCTION

# Event Overview

- The **Business Operations Research Events** consist of two major parts: the **written document** and the **oral presentation** by the participants. The written document will account for 60 points and the oral presentation will account for the remaining 40 of the total 100 points.
- Each **Business Operations Research entry** will be composed of **one to three members** of the DECA chapter. All participants must present the project to the judges.
- The body of the **written entry** must be **limited to 20 numbered pages**, including the appendix (if an appendix is attached), but excluding the title page and the table of contents.
- The **Written Event Statement of Assurance and Academic Integrity** must be signed and submitted with the entry. Do not include it in the page numbering.
- The **oral presentation** may be a **maximum 15 minutes** in length, including time for the judge's questions.
- For the presentation, the participants are to assume the role of hired consultants. The judge will assume the role of the owner/manager of the business/organization and will evaluate the presentation, focusing on the effectiveness of public speaking and presentation skills and how well the participants respond to questions that the judge may ask during the presentation.

INTRODUCTION

# About the BOR Project Classroom Guide

This classroom guide is intended to assist DECA advisors in integrating the BOR event into classroom instruction, thereby turning the event into a project that all students would be expected to complete. Translating the research event from the competitive venue to the classroom allows every student to grow essential skills and knowledge while at the same time holding them all to the same high standards as in a competitively judged environment.

More pragmatically, the guide breaks the written project into micro-learning activities that align with daily lessons, rather than simply giving students a set of competitive event guidelines to dissect and interpret. It matches the event's objectives with specific performance indicators and connects learning outcomes to the appropriate sections of the written entry. Equally important, the guide enables teachers to provide students with detailed feedback at each critical point or section of the project. Together, this feedback can help students improve their project as they move forward and prepare their final written entry.

The classroom guide includes **seven distinct units**, with each unit correlating with a key component of the final research project:

1. **Working with a Business**—Students will begin their work by selecting a local business for their project and begin laying the foundations for their upcoming research study.
2. **Designing a Research Study**—Students will design the research study, which includes identifying research objectives, collecting primary and secondary research sources, and planning research methods.
3. **Conducting a Research Study**—Students will execute the research study planned in Unit 2, which includes several forms of primary and secondary research.
4. **Analyzing Results of Research Study**—Students will consider the findings of their research study and how to best present their conclusions based on those findings.
5. **Preparing a Strategic Plan**—Students will develop their strategic plan by considering three elements: objectives and rationales, proposed activities and timelines, and proposed metrics or key performance indicators.
6. **Preparing a Budget Proposal**—Students will create a realistic budget proposal that accounts for each activity and expense involved with implementing their proposed strategic plan.
7. **Preparing a Presentation**—Students will develop a presentation that details the design, findings, and conclusions of their research study, proposed strategic plan, and proposed budget.

INTRODUCTION

# About the BOR Project Classroom Guide

**Each of the seven units within this guide features the following resources:**

**Student Narrative**—A short student text that focuses on the topic of the unit.

**Quick Check**—A formative assessment and corresponding key to help gauge learning based on the student narrative.

**Discussion Questions**—A series of discussion questions that can be used either to prepare students for their work in each unit or to guide student thinking throughout each unit.

**Activities**—A series of optional activities that help cement unit content for students; the final "Capstone" activity leads directly to a BOR project deliverable.

**Rubric**—An analytic rubric to help assess the work done on this unit's project deliverable. Teachers may find it helpful to use this rubric as a teaching tool by making it accessible to students during the drafting process and by allowing groups to revise drafts as needed after receiving teacher feedback.

**Additional Resources**—A collection of online resources (e.g., websites, articles, videos) that can supplement instruction and help students with their work during each unit.

**Additionally, the guide features three supplementary components to help facilitate the BOR project:**

**Pacing Guide**—An instructional guide to help teachers implement the research project into their curriculum.

**Master Glossary**—A glossary featuring key terms from all seven project guide units.

**Project Rubrics**—Two overarching project rubrics for the written entry and oral presentation (in addition to the individual rubrics for each unit).

**Acknowledgment**
Several DECA chapter advisors provided guidance and suggestions during the development of this guide. Their strategies for connecting the BOR events to the curriculum, getting students interested in the project, and overcoming common pitfalls and challenges were invaluable.

INTRODUCTION

# Project Pacing Guide

## SCHEDULING THE BUSINESS OPERATIONS RESEARCH PROJECT IN THE CLASSROOM

While it is ultimately up to each teacher to determine how and when to integrate a Business Operations Research (BOR) project into classroom instruction, DECA advisors generally agree on the following tips for scheduling BOR projects:

**Start early in the school year.** The BOR project takes nearly a full semester to complete, so introduce it early in the semester, have students submit a rough draft of the written entry prior to winter break, and make the final product due by the end of the semester.

**Set aside specific student work days.** Designate certain days of the week for students to work on the project (e.g., every Monday and Friday).

**Align classroom instruction with the project.** Establish a schedule (e.g., every Tuesday, Wednesday, and Thursday) to teach the concepts and skills needed to successfully complete the project work.

**Divide and conquer.** Break the written project work into smaller chunks with specific due dates. Together, these assignments can be developed into the full written entry.

**Dialogue with students about their work.** Provide specific, frequent feedback to students and give them multiple opportunities to improve upon their work.

**Be flexible.** Students may be at slightly different points in the project, depending on how soon and how often they can meet with their partnering business.

INTRODUCTION

# Project Pacing Guide

## RECOMMENDED SEQUENCE OF INSTRUCTION

SEPTEMBER

**Unit 1: Working with a Business** (pp. 16-29)
- Learn about the project
- Form teams
- Select a business
- Contact chosen business
- Collect information about chosen business
- Develop written entry component II. Introduction

**Unit 2: Designing a Research Study** (pp. 30-41)
- Determine research objectives
- Locate research sources
- Plan research methods
- Prepare data collection tools
- Create a timeline for research

OCTOBER

**Unit 3: Conducting a Research Study** (pp. 42-53)
- Conduct primary research
- Conduct secondary research
- Document and organize research findings
- Develop written entry component III. Research Methods

**Unit 4: Analyzing Results of a Research Study** (pp. 54-65)
- Analyze research findings
- Translate research findings into conclusions
- Develop written entry component IV. Findings and Conclusions

NOVEMBER

**Unit 5: Preparing a Strategic Plan** (pp. 66-77)
- Develop objectives of strategic plan
- Determine activities and timelines to support strategic plan
- Identify metrics to measure effectiveness of strategic plan
- Develop written entry component V. Proposed Strategic Plan

DECEMBER

**Unit 6: Preparing a Budget Proposal** (pp. 78-89)
- Forecast income and expenses
- Create a budget to support strategic plan
- Develop written entry component VI. Proposed Budget

Prepare written entry components VII. Bibliography & VIII. Optional Appendix

Write written entry component I. Executive summary

Submit rough draft #1 of full written entry

JANUARY

Prepare rough draft #2 of full written entry

Submit final draft of full written entry

**Unit 7: Preparing a presentation** (pp. 90-103)
- Create presentation outline
- Prepare visual aids
- Develop event presentation

**Tip:** If your members intend to enter the written entry in one of the Business Operations Research Events, verify the submission deadline for the earliest level of competition. Ensure your schedule for instruction and implementation provides adequate time for students to complete the project prior to the entry deadline.

INTRODUCTION

# Master Glossary

**Anticipated ROI:** A metric that uses estimated costs, revenues, and benefits to help justify and allocate a budget for a strategic plan

**Balance sheet:** A financial statement that captures the financial condition of the business at that particular moment

**Body language:** Nonverbal cues such as gestures, facial expression, posture, or any other form of communicating without words

**Budget:** An estimate of income and expenses for a specific time period

**Cash flow statement:** A financial summary with estimates as to when, where, and how much money will flow into and out of a business

**Conclusions:** Interpretations of research findings

**Expense(s):** The money that a business spends

**Experiment**: A data collection method that tests cause and effect; typically involves test-marketing new products or comparing test groups with control groups

**Feasible:** Reasonable; achievable

**Findings:** Objective facts, figures, and statements based on research

**Focus group:** A data collection method in which one or two researchers moderate a group discussion that usually includes anywhere from six to 12 participants (all being members of the target market)

**Income statement:** A summary of a business's income and expenses over a period of time

**Income:** The money received by a business or individual from outside sources

**Inflection:** Change in the pitch of the voice while speaking; used to emphasize certain words or phrases

**Metrics:** Numbers that help measure progress or performance

**Mission statement:** A brief summary of what a business owner wants their business to do

**Nonverbal communication:** Communication that uses body language instead of words or to support words

**Objectives:** Goals to be reached

**Observation:** A data collection method that gathers data by watching consumers

**Opportunity:** Any favorable situation in the environment surrounding a business

**Oral presentation:** A speech that brings an idea to someone's attention

**Personal interview:** A data collection method in which a researcher sits down with a respondent one-on-one to ask questions and record the respondent's answers

**Primary research:** A method of research that involves collecting data firsthand, rather than relying on pre-existing data

**Primary source:** An original, first-hand source of information

**Qualitative data:** Information that is based on thoughts, feelings, experiences, or opinions; descriptive and nonstatistical in nature

**Quantitative data:** Information that is based on numbers, statistics, or hard facts

**Rationale:** Explanations for how identified objectives support the overall goal of the research study

**Research study:** A collection and analysis of data about a specific issue or situation

**Return on investment (ROI):** A profit-oriented pricing objective in which the business bases the amount of profit it wants to earn on the amount of its capital investment

**Secondary research:** A research method that involves collecting existing data from a variety of channels

**Secondary source:** A source that collects, analyzes, or discusses data that was originally presented elsewhere

**Stakeholder(s):** A person or business who has an interest or investment in a project's outcome

**Strategic plan:** A plan based on strategy to help businesses achieve success

**Strength:** Any resource or capability that helps a business gain a competitive advantage

**Survey:** A data collection method that involves asking consumers questions to learn their opinions and the reasons behind those opinions

**SWOT analysis:** A marketing tool that investigates a business's strengths, weaknesses, opportunities, and threats in an organized method

**Target market:** The particular group of customers a business seeks to attract

**Threat**: Any unfavorable situation in the environment surrounding a business

**Tracking:** A data collection method in which marketers monitor customers' behavior, usually online or through store purchases

**Visual aid:** A chart, picture, image, model, etc., that helps make a point or is used to enhance a presentation

**Weakness:** Any limitation or shortcoming that can keep a business from achieving objectives

INTRODUCTION

# Presentation Rubric

| CRITERIA | PROFESSIONAL | EXPERIENCED | DEVELOPING | NOVICE | SCORE |
|---|---|---|---|---|---|
| **Content**<br><br>*60 points* | The presentation is engaging and informative from start to finish, summarizing the key points regarding:<br>• The business partner<br>• Research methods<br>• Findings and conclusions<br>• Proposed strategic plan<br>• Proposed budget | The presentation is informative and generally summarizes the following:<br>• The business partner<br>• Research methods<br>• Findings and conclusions<br>• Proposed strategic plan<br>• Proposed budget | The presentation is missing some of the information needed to fully understand:<br>• The business partner<br>• Research methods<br>• Findings and conclusions<br>• Proposed strategic plan<br>• Proposed budget | The presentation is missing some or all of the following:<br>• The business partner<br>• Research methods<br>• Findings and conclusions<br>• Proposed strategic plan<br>• Proposed budget | |
| **Professionalism**<br><br>*15 points* | All participants demonstrate professional appearance, poise, and confidence throughout the presentation. | Participants mostly demonstrate professional appearance, poise, and confidence throughout the presentation. | Participants somewhat demonstrate professional appearance, poise, and confidence throughout the presentation. | Participants do not demonstrate professional appearance, poise, and confidence throughout the presentation. | |
| **Communication**<br><br>*15 points* | All participants speak clearly and without excessive fillers, avoiding slang, inappropriate jargon, and distracting body language. | Participants speak clearly and for the most part avoid excessive fillers, slang, jargon, and distracting body language. | Participants use occasional fillers, slang, jargon, and/ or body language that detract from the presentation. | Participants are difficult to understand because of excessive fillers, slang, jargon, and/ or distracting body language. | |
| **Adherence to Requirements**<br><br>*10 points* | All participants are involved in the presentation. The presentation is delivered within the allotted time and meets requirements regarding notes and visual aids. | Participants mostly adhere to requirements regarding speaker involvement, time, notes, and visual aids. | Participants somewhat adhere to requirements regarding speaker involvement, time, notes, and visual aids. | Participants do not adhere to requirements regarding speaker involvement, time, notes, and visual aids. | |

| TOTAL POINTS (100) | |
|---|---|

INTRODUCTION

# Written Entry Rubric

| CRITERIA | PROFESSIONAL | EXPERIENCED | DEVELOPING | NOVICE | SCORE |
|---|---|---|---|---|---|
| **Introduction**<br><br>*10 points* | The introduction includes a clear, comprehensive, and logical description of both the organization and its target market, including demographics and psychographics. It also provides valuable contextual information related to relevant business processes. | The introduction includes a clear description of both the organization and its target market, as well as contextual information related to relevant business processes, but some details need clarification. | The business description and information related to business processes within the introduction are difficult to understand and/or key details are vague. | Some or all of the introduction is missing. | |
| **Research Methods Used in the Study**<br><br>*15 points* | The research methods used in the study are specific, logical, realistic, and effectively aligned with the research study's objectives. Both primary and secondary research methods are clearly identified and properly cited, and ample information regarding the process of each method is provided. | The research methods used in the study are fairly specific and aligned with the research study's objectives. Both primary and secondary research methods are identified and cited, and moderate information regarding the process of each method is provided. | The research methods used in the study are imprecise and the connection with the research study's objectives is unclear. Research methods are identified, but information regarding the process of each method is insufficient. | Some or all of the information about the research methods used in the study is missing. | |
| **Findings and Conclusions of the Study**<br><br>*15 points* | Findings are factual, measurable, supported by data, and significant to the research study. Conclusions are logical, free from bias, and clearly based on identified findings. The connection between findings and conclusions in the research study is clear, logical, and supported by visual aids as appropriate. | Findings are mostly factual and significant to the research study. Conclusions are mostly logical, free from bias, and based on identified findings. The connection between findings and conclusions is mostly clear and supported by visual aids as appropriate. | Findings are mostly factual and significant but often vague. Conclusions are somewhat logical and based on identified findings. The connection between findings and conclusions is somewhat clear but often not supported by visual aids. | Some or all of the findings and conclusions of the study are missing. | |
| **Proposed Strategic Plan**<br><br>*25 points* | The strategic plan includes specific and attainable objectives that are supported by research and connected to the focus of the project. It also includes detailed and realistic activity descriptions with well-illustrated timelines, as well as specific and logical metrics or KPIs that provide a clear measurement of plan effectiveness. | The strategic plan includes specific yet ambitious objectives that are mostly supported by research. It also includes fairly realistic activity descriptions with timelines, as well as metrics or KPIs that provide a mostly clear measurement of plan effectiveness. | The strategic plan includes objectives, but their connection to prior research is dubious. It also includes activity descriptions with unrealistic timelines, as well as metrics or KPIs that provide a vague measurement of plan effectiveness. | Some or all of the proposed strategic plan is missing. | |

INTRODUCTION

# Written Entry Rubric

| CRITERIA | PROFESSIONAL | EXPERIENCED | DEVELOPING | NOVICE | SCORE |
| --- | --- | --- | --- | --- | --- |
| **Proposed Budget** *10 points* | The proposed budget clearly aligns with the activities in the strategic plan. The costs associated with the proposed strategies are detailed, realistic, and supported by research. Calculations are correct and easy to follow, and the budget overall is easy to understand, well-described, and supplemented as needed with visual aids. | The proposed budget mostly aligns with the activities in the strategic plan. The costs associated with the proposed strategies are fairly realistic, although sometimes ambitious. Calculations are correct and fairly easy to follow, and the budget overall is supplemented as needed with visual aids. | The proposed budget somewhat aligns with the activities in the strategic plan. The costs associated with the proposed strategies are unrealistic or poorly researched. Calculations are correct but lack specific details and the budget overall lacks clarifying visual components. | Some or all of the proposed budget is missing. | |
| **Executive Summary** *10 points* | The executive summary provides a comprehensive description of the project and includes key details as needed. | The executive summary provides a description of the project and includes some details as needed. | The executive summary provides a vague description of the project. | Some or all of the executive summary is missing. | |
| **Bibliography (& Appendix)** *5 points* | The bibliography includes a robust list of information sources used in the written document and is cleanly formatted. The appendix, if included, effectively exhibits information appropriate to the written entry but not important enough to include in the body. | The bibliography includes a list of information sources used in the written document and is mostly formatted. The appendix, if included, exhibits information appropriate to the written entry but not important enough to include in the body. | The bibliography includes a list of information sources used in the written document but is not formatted. The appendix, if included, exhibits information that is either irrelevant or important enough to include in the body. | Some or all of the bibliography is missing. | |
| **Professionalism** *10 points* | The written entry flows well and is grammatically correct and free of punctuation, spelling, and capitalization errors. It adheres to all formatting instructions laid out by the DECA Written Entry Guidelines. | The written entry flows fairly well and is free of grammar and spelling errors; punctuation and capitalization errors do not limit understanding. | The written entry's spelling and grammatical errors are distracting and impact flow. | The written entry contains so many spelling, grammar, punctuation, and capitalization errors that it is hard to understand. | |

| TOTAL POINTS (100) | |
| --- | --- |

UNIT 1

UNIT 1

# Working with a Business

## INTRODUCTION

In this unit, students begin their work on the Business Operations Research (BOR) project with a few basic—yet crucial—steps: Students will select a local business for their project and begin laying the foundations for their upcoming research study. This entails conducting research and reaching out to local businesses to begin forming a professional relationship, as well as collecting preliminary information about the company in preparation for their research study.

## COMPETITIVE EVENTS CONNECTION

### SUGGESTED TIMELINE

One 90-minute class period and/or two 45-minute class periods.

### PROJECT COMPONENTS

Throughout Unit 1, students will complete the following components of the DECA Business Operation Research Project: Section II. Part A, B, C.

- Description of the business or organization.
- Description of the target market.
- Overview of relevant business processes.

UNIT 1

# Learning Outcomes

Throughout Unit 1, students will learn to:

**Develop strategies for identifying local businesses for the purpose of collaboration.**

- Conduct research on local businesses.
- Identify local businesses that align with their interests.
- Consider logistical factors in collaborating with a business (e.g., accessibility, transportation, modes of communication).
- Select a business for their research project.

**Prepare and execute communications with their chosen businesses.**

- Clearly explain the components and purpose of their research to businesses.
- Demonstrate professional communication skills necessary for speaking with businesses.

**Collect preliminary information about their chosen businesses.**

- Prepare introductory questions to learn about their chosen business.
- Ensure businesses are willing to disclose marketing, sales and operational information.
- Describe the structure and target market of their chosen business.
- Establish a timeline/calendar for future collaboration with their business.

## PERFORMANCE INDICATORS

- Assess personal interests and skills needed for success in business (PQ) PD:013
- Identify tentative occupational interest (CS) PD:023
- Select and utilize appropriate formats for professional writing (CS) CO:088
- Edit and revise written work consistent with professional standards (CS) CO:089
- Write inquiries (CS) CO:040
- Write professional emails (CS) CO:090
- Write business letters (CS) CO:133
- Gain commitment from client (SP) EI:068
- Identify sources that provide relevant, valid written material (PQ) CO:054
- Extract relevant information from written materials (PQ) CO:055
- Obtain needed information efficiently (CS) NF:078
- Acquire knowledge of client's products/brands (CS) SE:360
- Conduct pre-visit research (e.g., customer's markets/products, customer's competitors, and competitors' offerings) (SP) SE:369
- Develop communications plan (SP) CO:198

UNIT 1
# Teaching Tips

**The following** is a collection of tips and advice that teachers may find useful when implementing this unit of the research project.

## 1 Encourage responsible project group selection.

Due to the scope of the BOR project, it is recommended that students work in groups of two or three, rather than individually. Students working alone may find the demands of the project too much for a single person. Furthermore, students should choose their group members responsibly. Being friends and being effective academic partners are not always the same thing. Encourage students to select partners that they believe will help them foster an efficient and sustainable work environment.

## 2 Leverage student interests when selecting a business partner.

Students can sometimes struggle if they are not fully invested in the research project. Encourage students to pursue a business that is interesting or meaningful to them. It is important that students remember the weight of this decision; the business they choose will be their project partner for months. If students can find a business that they are truly passionate about, that usually leads to greater project success in the future.

## 3 Leverage connections when selecting a business partner.

If teachers or students have any connections to businesses, don't hesitate to make use of those as well. Students can reach out to any family, friends, or community members with business connections to inform their selection. Pre-existing relationships may offer students an advantage when it comes to communicating with businesses and collecting business data.

## 4 Account for logistical factors when selecting a business partner.

Remind students they are to select a local business. When deciding on a business to collaborate with, they should account for their own transportation capabilities should the need arise for an in-person meeting with representatives of the business. If virtual meetings are necessary, ensure that students have access to the appropriate teleconferencing services (Zoom, Google Meet, etc.).

## 5 Initiate first contact with students' chosen business partners.

Don't hesitate to be hands-on when students are reaching out to potential business partners. In the past, teachers have found it helpful to contact selected businesses—before their students—to gauge the businesses' interest in participating in the research project. In addition, consider proofing students' first communications with businesses to ensure professionalism and accuracy. This can be done informally or in the form of a small project or activity (see Activities section on page 24). Some teachers also choose to compile a list of potential business partners prior to the start of the project. In this case, teachers can curate their own selection of businesses willing to work with students and subsequently present this list to students to select from.

## 6 Reinforce research skills.

This includes note-taking, organizing and understanding data, and preparing effective questions. Reiterating these skills now will lay the groundwork for later units where research takes center stage.

UNIT 1

# Discussion Questions

**These discussion questions can be used either to prepare students for their work in this unit or to guide student thinking throughout this unit.**

- What businesses are related to your interests and passions?

- Do you know anyone who owns a business? If not, what jobs do some of your family members have?

- What are some local businesses you visit the most? Think restaurants, clothing stores, car washes, banks, museums, movie theaters, etc.

- What are some ways you can research businesses to work with?

- When reaching out to a business, what information should your message include?

- What are some questions you can ask your business when gathering preliminary information?

UNIT 1
# Quick Check


**FORMATIVE ASSESSMENT**
This is a formative assessment and corresponding key to help gauge learning based on the student narrative.

**1. What are three questions you can consider when considering a business to work with?**
Answers will vary, but should include three of the following:
- What are you interested in or passionate about?
- Do you know anyone who owns a business?
- What companies do your parents or family members work for?
- Where do you like to shop, go out to eat, or spend time with friends?
- Have your teachers ever invited businesspeople to speak with your class?
- What businesses are close to where you live?

**2. What should you communicate to your selected business when reaching out?**
In your communication with each business, explain the purpose and goal of your project, detail how you're hoping the business can help, and highlight how it will be beneficial for the business. It is very important to be professional and set clear expectations for the project.

**3. How can you gather preliminary information about your business?**
Gathering preliminary research begins with taking some time to research your business to gain a clear understanding of how it operates—this can include visiting its website, reading its mission statement, and seeing what it has to offer. If possible, visit your business in person, especially if you've never been there! Then, ask your contact questions about the business's values, target market, processes and procedures, and goals and objectives. Consider what can be done to help the business, and what current practices and policies can be refined to help it improve and succeed.

UNIT 1

# Business Idea Quiz

ACTIVITY 1

## Instruct students to take this business idea quiz from Rising Innovator.

When students finish the quiz, they should receive three results of potential business ideas. Examples of results students might receive include magazine or newsletter creator, digital marketer with TikTok, website designer, book author, etc.

Then, instruct students to find a partner and discuss their results. Have them consider the following questions in their discussions:

- Did your results line up with your interests or passions?
- Do you know of any local businesses related to your results?
- What are the target markets for the fields related to your results?

Rising Innovator

UNIT 1
# Business Brainstorm

ACTIVITY 2

## Instruct students to create a list of three or four local businesses they'd potentially be interested in working with for their project.

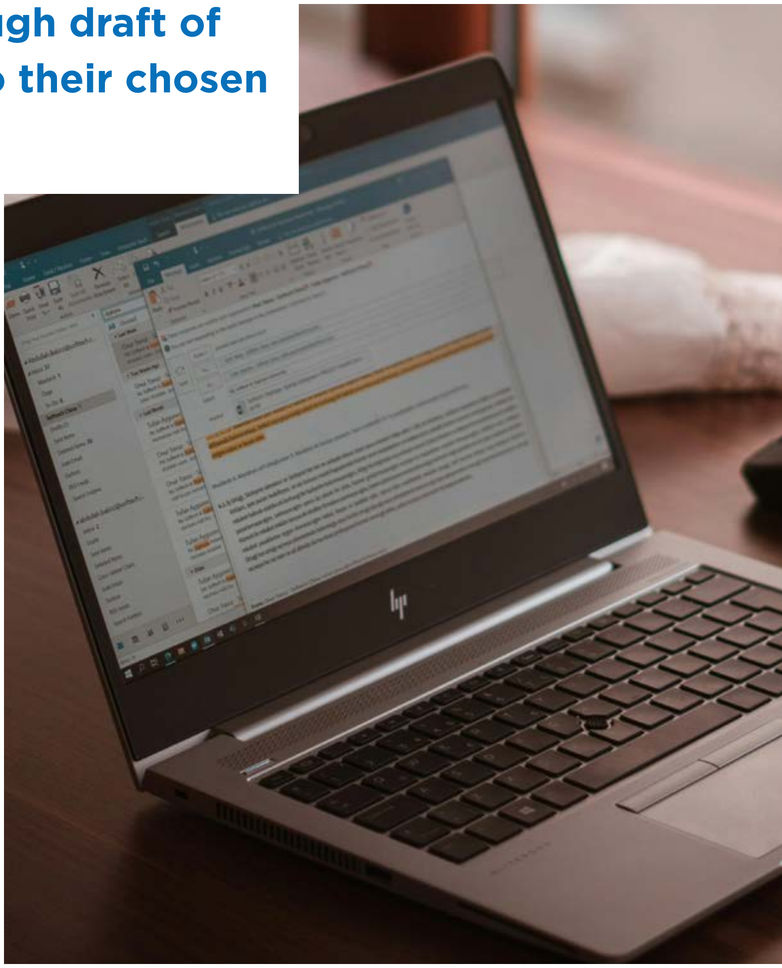
Then, ask students to share their lists with a partner and discuss why they selected those businesses.

Are there any similarities between the two lists?

UNIT 1
# Introductory Email

ACTIVITY 3

## Instruct students to write a rough draft of the email that they will send to their chosen business.



Students should implement what they learned from the article “How to write a Professional Email – A Guide for Students” and the video "How To Write a Professional Email | For Students, By Students" from the Instructional Resources section.

Their email should include an appropriate subject line and formal greeting, be properly formatted, etc. Students should also make sure to include pertinent contextual information so the audience understands the request being made. For example:

- Introduction to DECA
- Introduction to/purpose of the project
- Request of the company
- Specific expectations — such as interviews, feedback or approval of research methods, meetings to discuss findings and access to relevant data

Students will turn in their rough drafts to teachers for review when finished.

CAPSTONE ACTIVITY

UNIT 1

# Introduction of the Business

## After students have communicated with their chosen business and gathered preliminary information, instruct them to synthesize that information into a short introduction of the business.

This introduction should include a description of the business or organization and information about the business's target market (demographics and psychographics).

Students should also include relevant information as necessary, including, but not limited to, the business's history, leadership, company values, financials (e.g., sales, expenses, revenue, yearly growth), data collection practices, recruitment and retention strategies, etc. Students may find it necessary to pose additional questions to their business representative so all relevant questions are answered.

**Note:** This activity is the culmination of their work in Unit 1 and contributes directly toward the following project component(s): Section II (Introduction): Parts A, B and C of the Written Entry.


DECA

UNIT 1 | CAPSTONE ACTIVITY

# Rubric

**Project deliverable:** Section II: Introduction to the Business, Parts A, B and C of the Written Entry.

| CRITERIA | PROFESSIONAL | EXPERIENCED | DEVELOPING | NOVICE | SCORE |
|---|---|---|---|---|---|
| **Description of the business or organization**<br><br>*30 points* | The introduction gives a clear, comprehensive description of the business and includes meaningful details. | The introduction gives a clear description of the business, but some details need clarification. | The business description is difficult to understand and/or key details are vague. | Some or all of the business description is missing. | |
| **Description of the target market**<br><br>*30 points* | The introduction gives a logical, comprehensive description of the business's target market, including both demographics and psychographics. | The introduction describes the business's target market, including both demographics and psychographics, but some items need clarification. | The introduction gives a partial description of the business's target market but key details are vague. | Some or all of the target market description is missing. Overview of relevant business processes. | |
| **Overview of relevant business processes**<br><br>*30 points* | The introduction provides valuable contextual information relevant to the research topic (e.g., existing practices, policies, data collection practices). | The introduction provides some information relevant to the research topic (e.g., existing practices, policies, data collection practices) but details need clarification. | The introduction provides vague or unclear information relevant to the research topic (e.g., existing practices, policies, data collection practices). | Contextual information relevant to the research topic (e.g., existing practices, policies, data collection practices) is missing. | |
| **Communication Skills**<br><br>*10 points* | The introduction flows well and is grammatically correct and free of punctuation, spelling, and capitalization errors. | The introduction flows fairly well and is free of grammar and spelling errors; punctuation and capitalization errors do not limit understanding. | The introduction's spelling and grammatical errors are distracting and impact flow. | The introduction contains so many spelling, grammar, punctuation, and capitalization errors that it is hard to understand. | |

| TOTAL POINTS (100) | |
|---|---|

UNIT 1

# Additional Resources

## FINDING AND WORKING WITH LOCAL BUSINESS PARTNERS

- Below are websites where students can search for businesses in their area:
  - Their community's Chamber of Commerce website. This website typically includes a business directory with contact information for each business, as well as links to their websites. As an example, share the Columbus Chamber of Commerce's "Member Directory" page with students and encourage them to search for businesses.
  - Angi
  - Google Maps
  - Tripadvisor
  - Thumbtack
  - Yelp
- **"DECA Partners"** is a list of corporations, foundations, and associations that have partnerships with DECA. This page may be a good place to start for students when they are looking for a business to partner with.
- **5 Ways to Build Career Connections in High School** is a 3-minute video from Edutopia that shares five ways in which teachers can build bridges between the classroom and the professional world.
- **"7 Simple Ways to Ask for Business Help and Get It"** is an article by Robert Glazer that offers seven tips to use when asking a business or businessperson for help or advice. Students may find this article helpful when reaching out to a business.
- **Community Partners: Making Student Learning Relevant** is a 5-minute video that shows local experts working with students from Hood River Middle School in Oregon. Teachers may find the tips and commentary throughout the video helpful for their instruction, while students may find it useful for their project.
- **"Finding and Choosing the Right Business Partner"** is an Indeed article that offers tips for businesses and business professionals about finding a business partner. Students may find the information in the "How to find a business partner" and "How to choose a business partner" sections useful for their project.
- **"From a Handshake to a Helping Hand: Connecting with Community Professionals"** is a DECA Direct article by Hadley Brown that offers five key steps to help students create long-term connections with local business professionals.
- **"How To Find a Business Partner"** is an article by Sakshi Udavant that details what businesses and business professionals should look for in a business partner. Students may find the information in the "Where and How To Find a Business Partner" section helpful when searching for a business to work with for their project.
- **How to find local businesses using Facebook Search** is a short video that shows how to search for local businesses on Facebook. Students may find this video helpful when they are looking for businesses to work with for their project.
- **"How to Match Your Skills and Interests to Business Opportunities"** is a Benetrends Financial article that outlines ways to match your skills and interests to business opportunities. Students may find this article helpful when they are considering businesses to work with for their project based on their personal interests and skills.
- **"Partner with Purpose: Developing Partnerships for a Stronger DECA"** is a DECA Direct article by Michelle Le that identifies professional partnerships students can pursue, such as partnerships with individual leaders, businesses, and groups and organizations. It also shares tips on how to develop partnerships, such as networking, joining other organizations, and being open.

## COMMUNICATION SKILLS AND PROFESSIONALISM

- **LAP-EI-140—More Than Just Talk** (Effective Communication) is a learning activity package (LAP) containing information, activities, and assessments that may be helpful during this unit. It is available for free in the MBA Research & Curriculum Center online store as part of the Ethical Leadership Course Package.
- **"Eight Things You Can Do To Improve Your Communication Skills"** is an article by Mary Sharp Emerson that outlines eight ways to improve your communication skills, including being clear and concise, preparing ahead of time, and being mindful of nonverbal communication. Students may find this article helpful when communicating with their business.
- **"How to write a professional email – A guide for students"** is an article from The Scholarship System that details how to write a professional email, including tips on how to start the email, craft the body of it, and close it.
- **How To Write a Professional Email for Students by Students** is a short video by the Centre for Teaching and Learning (CTL) that offers tips and tricks for writing a strong professional email.
- **"Professionalism"** is an article from Virginia Tech's Career and Professional Development resources that outlines 12 ways to develop and practice professionalism, including managing your time effectively, taking initiative, and communicating effectively. The article also includes a video.
- **Professional Communication Skills** [BUSINESS COMMUNICATION PRO] is a 10-minute video by Adriana Girdler that discusses how to improve communication skills in professional environments. The final minute of this video features an advertisement.

UNIT 2

UNIT 2

# Designing a Research Study

## INTRODUCTION

In this unit, students begin their work on the first core element of the Business Operations Research (BOR) project—the research study. Unit 2 covers designing the research study, including identifying research objectives, collecting primary and secondary research sources, and planning research methods. This work will lay the groundwork for the subsequent units: Unit 3 (Conducting a Research Study) and Unit 4 (Analyzing Results of a Research Study).

## COMPETITIVE EVENTS CONNECTION

### SUGGESTED TIMELINE

Two 90-minute class periods and/or four 45-minute class periods.

### PROJECT COMPONENTS

Throughout Unit 2, students will complete the following components of the DECA Business Operation Research Project.

- Section III, Part A: Description and rationale of research methodologies selected to conduct the research study

UNIT 2

# Learning Outcomes

Throughout Unit 2, students will learn to:

**Determine research objectives.**

- Identify potential questions or problems within the chosen business.
- Develop goal(s) to resolve identified issue(s).
- Provide rationale for setting chosen objectives.

**Locate research sources.**

- Incorporate primary research into the study (e.g., interviews, surveys, focus groups).
- Incorporate secondary research into the study (e.g., literature review, competitor investigation, research of key terminology).

**Plan research methods.**

- Determine and organize communications with target audience (e.g., Zoom call, online survey, in-person meeting, questionnaire).
- Prepare materials for primary research (e.g., write survey/interview questions, determine the number of responses needed).
- Prepare materials for secondary research (e.g., arrange an annotated bibliography, secure internet access).

**Create a timeline for research and developing research study.**

## PERFORMANCE INDICATORS

- Explain the nature of marketing research (SP) IM:010
- Discuss the nature of marketing research problems/issues (SP) IM:282
- Describe methods used to design marketing research studies (i.e., descriptive, exploratory, and causal) (SP) IM:284
- Describe options businesses use to obtain marketing research data (i.e., primary and secondary research) (SP) IM:281
- Discuss the nature of sampling plans (i.e., who, how many, how chosen) (SP) IM:285
- Describe data-collection methods (e.g., observations, mail, diaries, telephone, Internet, discussion groups, interviews, scanners, tracking tools) (SP) IM:289
- Explain characteristics of effective data-collection instruments (SP) IM:418
- Explain the nature of actionable research (SP) IM:359
- Identify the marketing-research problem/issue (MN) IM:367
- Translate business problems/challenges into research objectives (MN) IM:476
- Determine appropriate level and depth of information needed for decision-making (MN) IM:477
- Select research method appropriate for the research problem (i.e., exploratory, descriptive, or causal) (MN) IM:398
- Determine research approaches (e.g., observation, survey, experiment; quantitative or qualitative) appropriate to the research problem (MN) IM:339
- Select data-collection methods (e.g., observations, mail, telephone, Internet, online communities, social media, virtual platforms, discussion groups, interviews, case studies, text analyses, scanners) (MN) IM:399
- Plan marketing research study (MN) IM:446
- Determine questions to ask to elicit needed data for marketing research problem/issue (MN) IM:447
- Create simple questionnaires (e.g., types of questions, question wording, routing, sequencing, length, layout) (MN) IM:332
- Use time-management skills (SP) PD:019
- Manage project schedule (SP) PJ:010

UNIT 2
# Teaching Tips

**The following** is a collection of tips and advice that teachers may find useful when implementing this unit of the research project.

## 1 Reiterate responsible time management.

Because Unit 2 kicks off the foundational elements of the BOR project, it is especially important that responsible time management is implemented at the outset. Encourage students to develop their work schedule as they design the research study. This includes creating a daily and/or weekly schedule, keeping a time log, or incorporating other time management strategies such as the Eisenhower Matrix.

## 2 Focus on research, not strategic planning.

Students sometimes get ahead of themselves and begin the strategic planning phase prematurely. A comprehensive research study should be completed before they begin working on the strategic plan. The research they conduct now will lay the foundation for the strategic plan. Remind students not to rush or "phone in" the research design in anticipation of future units. A robust and detailed research plan will yield dividends down the road.

## 3 Oversee survey development.

While administering a survey or focus group is not a required element of the BOR project's research study, groups may choose either as a source of primary research. If that is the case, this process will require increased involvement from teachers.

Teachers who have led the BOR project in the past stressed the necessity for students to rely on outside resources to construct their surveys. There is a wealth of online resources for creating surveys—students can take inspiration from past surveys conducted by businesses and online templates from sites such as SurveyMonkey.

As groups are constructing surveys, review their questions for any possible bias. Watch for leading questions, question order bias, loaded questions, and vague questions. In addition, watch for sampling bias when groups are selecting participants in a survey or focus group. Refer to the Additional Resources section for recommended online literature about writing survey questions and checking for bias.

Previous groups have found it helpful to contrast good and bad survey questions. If groups are interested in an activity along the same lines, see Activity #3 in the Activities section.

## 4 Ensure consent and respect confidentiality.

Whether it be interviews, focus groups, surveys, or observations, students need to receive consent from every participant. Depending on the research method, different forms of consent may be required. When possible, offer participants a consent form to ensure permission.

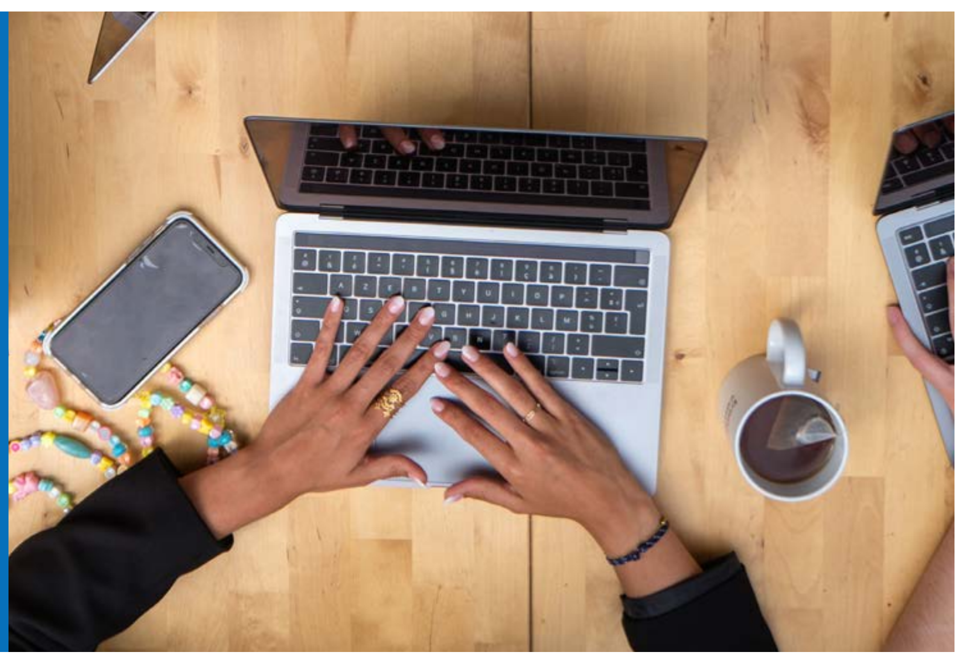
When administering online surveys, remind students to respect the confidentiality of participants. Information collected may contain personal information (e.g., contact information, personal interests, city/state of residence); therefore, groups must handle survey results responsibly and keep any accumulated data secure and private.

UNIT 2

# Discussion Questions

**These discussion questions can be used either to prepare students for their work in this unit or to guide student thinking throughout this unit.**

- What is the purpose of a research study?
- Which of the four types of research objectives (explore, define, test, predict) do you think would be most useful to businesses conducting research studies? Which do you think would be most useful to you?
- Why is it important to prioritize primary sources in your research study?
- What are some other ways to incorporate secondary sources into your research study?
- What are several important considerations (e.g., skills, personal presentation, materials) when preparing for an interview with business professionals?
- Brainstorm different methods for distributing a survey to customers.



UNIT 2

# Quick Check

**FORMATIVE ASSESSMENT**

This is a formative assessment and corresponding key to help gauge learning based on the student narrative.

1. **What is a research study?**
   A research study is a collection and analysis of data about a specific issue or situation.

2. **What are the three steps of designing a research study?**
   The three steps of designing a research study are:
   - Set research objectives
   - Locate sources for research
   - Plan research methods.

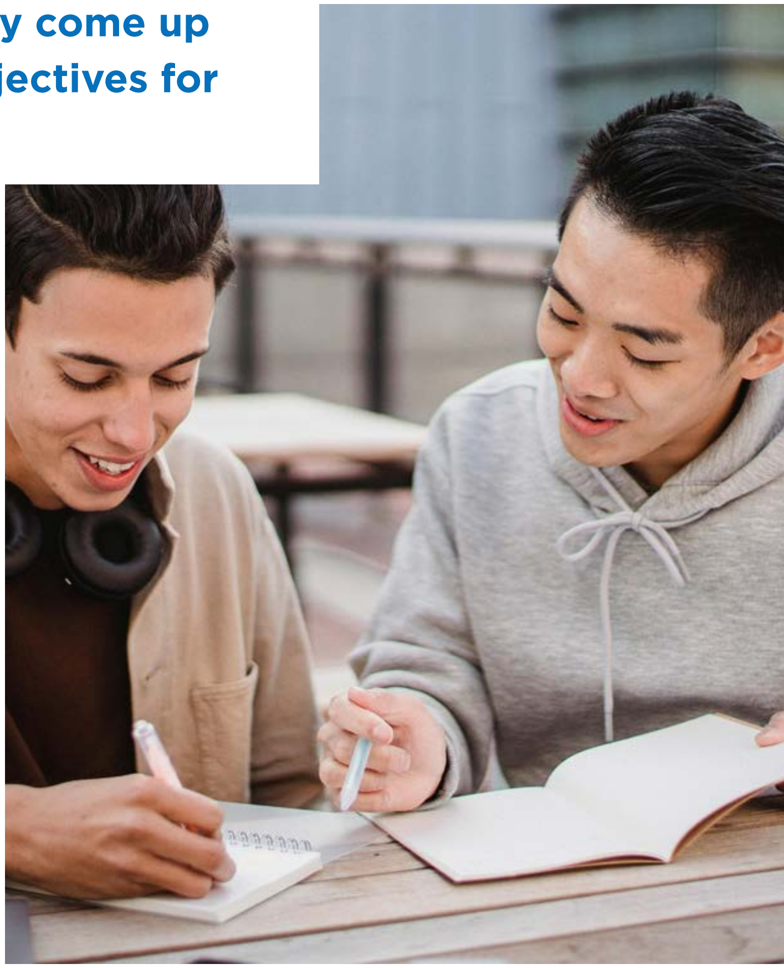
3. **What is the purpose of exploratory research?**
   Rather than answer a question or solve an issue, exploratory research seeks to uncover a question or issue that had been previously unknown.

4. **Explain the difference between primary and secondary sources.**
   Primary sources are original, first-hand sources of information. A secondary source is a source that collects, analyzes, or discusses data that was originally presented elsewhere.

UNIT 2
# Research Objectives

ACTIVITY 1

## Instruct students to individually come up with four possible research objectives for their chosen business.



This should entail one objective and rationale for each objective category:

- explore
- define
- test
- predict

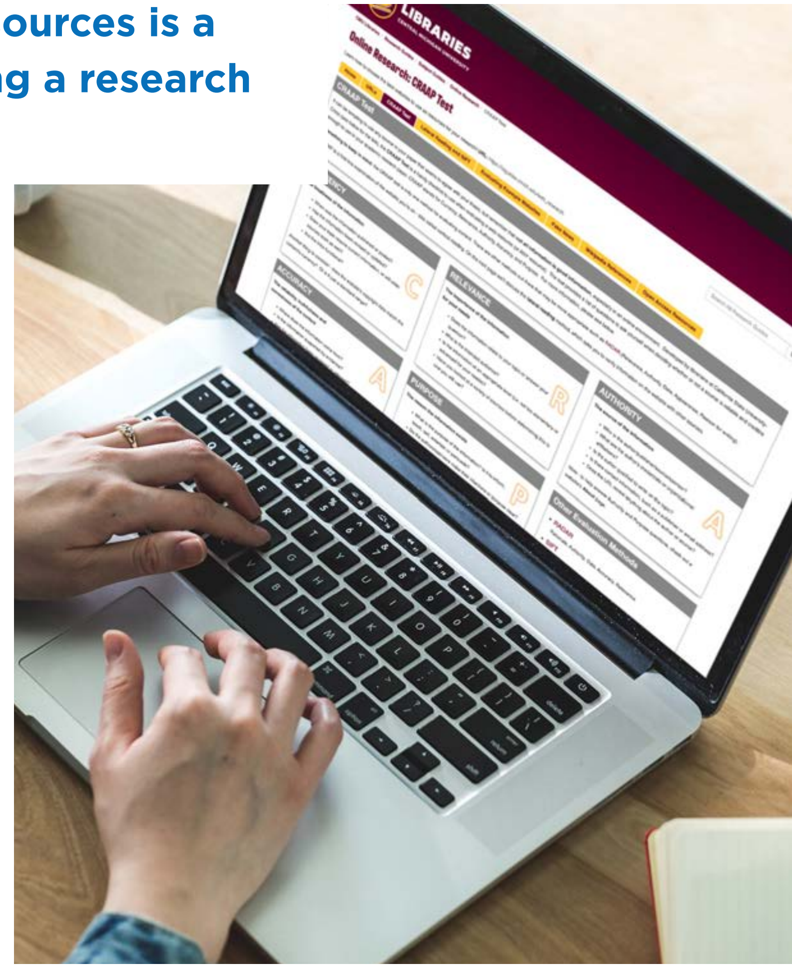
Next, ask students to compare their objectives with those developed by their group members. Groups should then use the individual lists to develop a group list, refining as needed.

UNIT 2

# Check Your Sources

ACTIVITY 2

## Finding reliable and relevant sources is a crucial component of designing a research study.



A popular way to evaluate the reliability of a resource is the **CRAAP Test.** Ask students to form groups and research the CRAAP Test. After conducting research, instruct them to create an infographic explaining the components of the test.

**Optional add-on to this activity:** After groups have made their infographics, provide them with several online resources on a certain topic, selected by the teacher. Select a topic or subject that has an abundance of online resources (e.g., World War II, baseball, the Grand Canyon). Some of the resources should be reliable, while others should unreliable. Groups can apply their knowledge of the CRAAP Test to these articles by evaluating each resource and ranking them in terms of reliability.

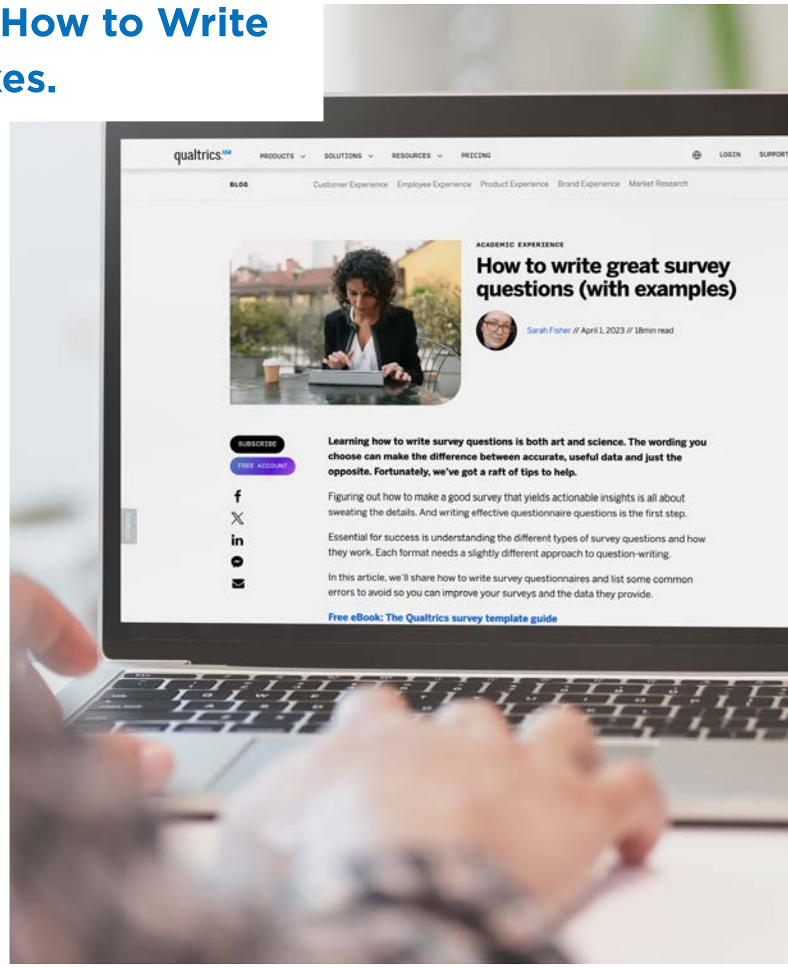
CRAAP Test

UNIT 2

# Good vs. Bad Survey Questions

ACTIVITY 3

## Read Great Survey Questions: How to Write Them & Avoid Common Mistakes.




After students have read the article, instruct them to define a research goal and individually write ten sample survey questions. Five of these questions should be examples of **effective survey questions**, and five should be examples of **ineffective survey questions.**

Divide the class into pairs and have each student review their partner's questions and try to guess which questions were meant to be good, and which were meant to be bad. When students are done, they should share their responses with their partners and review how many they correctly evaluated.

Great Survey Questions

CAPSTONE ACTIVITY

UNIT 2

# Defend Your Research Method

**After groups have identified their research objectives and methods, instruct each group to create a deliverable defending their chosen research methods, tying each method and source back to their stated research objectives.**

The deliverable can be an infographic, a brief report, or another short-form piece of content.

The focus of this deliverable should be on describing and rationalizing the group's research methods for their study. How will their research work toward achieving their research objectives? Furthermore, how will their research benefit their chosen business?

After groups have completed the activity, review their work and provide them feedback before they convert their deliverable to the written entry of the BOR project.

UNIT 2 | CAPSTONE ACTIVITY

# Rubric

**Project deliverable:** Part A of the Written Entry's Research Methods Used in the Study (Part III).

| CRITERIA | PROFESSIONAL | EXPERIENCED | DEVELOPING | NOVICE | SCORE |
|---|---|---|---|---|---|
| **Research study objectives**<br><br>*30 points* | The objectives of the research study are specific, attainable, and supported by research. | The research objectives are specific and supported by research, although at times they seem ambitious. | The research objectives are based on research but are difficult to understand. | Research study objectives are missing. | |
| **Identification of sources**<br><br>*30 points* | Research study includes reputable and relevant primary and secondary sources. Research sources are credited and each serves a clear purpose within the research study and overall project. | Research study includes reputable and relevant primary and secondary sources. Sources are credited but one or more do not have a clear purpose within the research study. | Research study includes primary and secondary sources, but one or more have questionable validity. | Research sources are not credited or are missing entirely from the project. | |
| **Proposed research methods**<br><br>*30 points* | The proposed research methods are specific, logical, realistic, and aligned with the research study's objectives. | The proposed research methods are specific and logical. Some research methods may seem a bit unrealistic or may require elaboration, but there is still a clear connection to the research study's objectives. | The proposed research methods are difficult to understand or entirely unrealistic. Connection to research objectives is vague. | Proposed research methods are missing from the research study. | |
| **Grammar and language skills**<br><br>*10 points* | The research design flows well and is grammatically correct and free of punctuation, spelling, and capitalization errors. | The research design flows fairly well and is free of grammar and spelling errors; punctuation and capitalization errors do not limit understanding. | The design of the research study has spelling and grammatical errors that are distracting and impact flow. | The design of the research study contains so many spelling, grammar, punctuation, and capitalization errors that it is hard to understand. | |

| TOTAL POINTS (100) | |
|---|---|

UNIT 2
# Additional Resources

## PLANNING RESEARCH METHODS

- **LAP-IM-281—What's the Source? (Obtaining Marketing-Research Data)** is a Learning Activity Package (LAP) containing information, activities, and assessments that may be helpful during this unit. It is available in the MBA Research & Curriculum Center online store.
- **LAP-PD-019—About Time (Time Management)** is a LAP containing information, activities, and assessments that may be helpful when planning research methods, especially when scheduling the research process. It is available for free in the MBA Research & Curriculum Center online store.
- **"Writing Survey Questions"** is an article from Pew Research Center that offers a detailed introduction to writing survey questions, including the different types of questions, how to word survey questions, and best practices for ordering questions within the actual survey.
- **"Survey Bias Types That Researchers Need to Know About"** from Qualtrics provides an in-depth explanation of different survey biases. This includes the main categories of bias—selection bias, response bias, and interviewer bias.
- **"Primary Market Research Methods"** is an article from Research Optimus that explains the importance of primary research for research studies. It describes the purpose and types of primary research, as well as how to conduct primary research such as focus groups and interviews.
- **"What is a Focus Group | Step-by-Step Guide & Examples"** is a comprehensive description of focus groups and how to conduct them. The article provides a step-by-step guide for conducting focus groups, including question ideas, types of sampling, ethical considerations, and the advantages and disadvantages of focus groups as a research method.

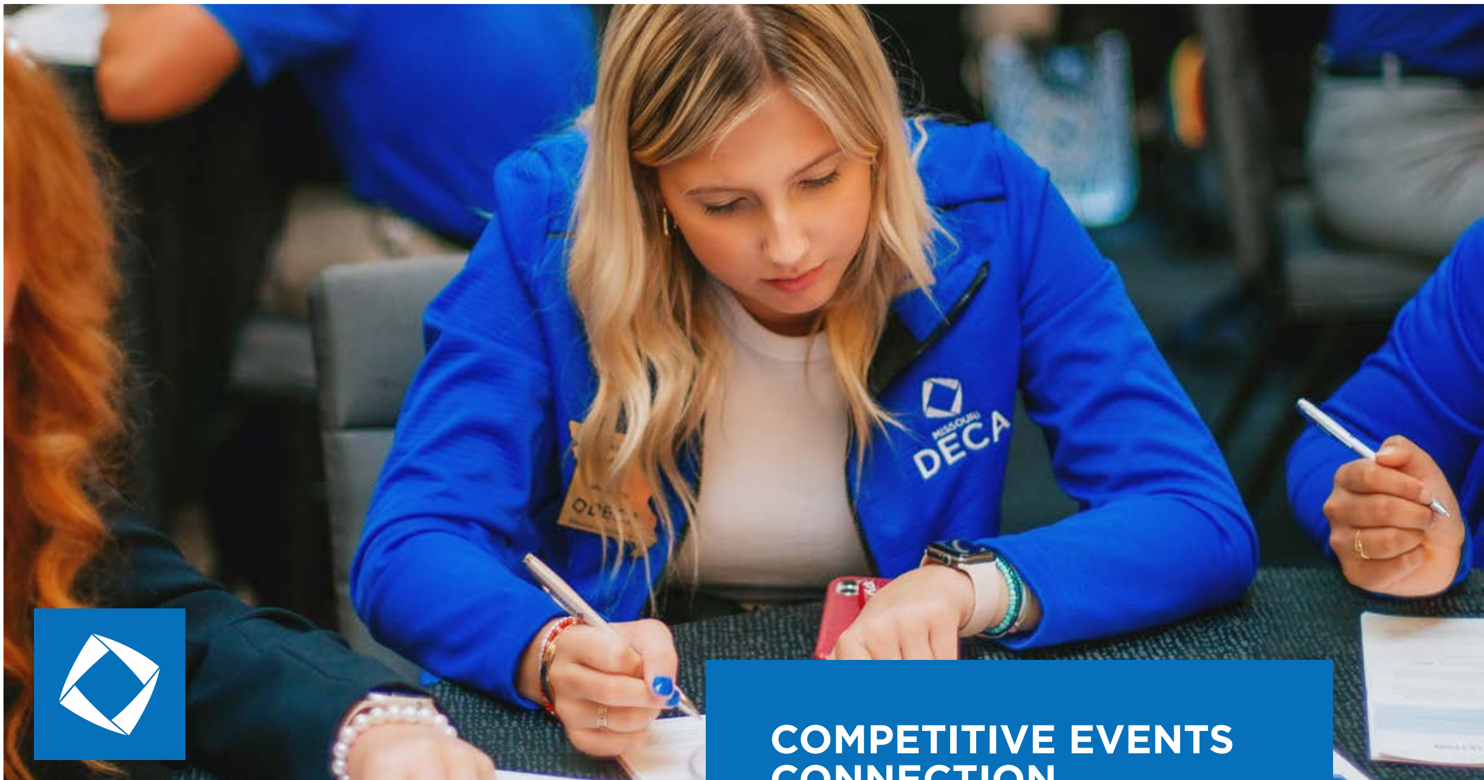
## SETTING RESEARCH OBJECTIVES

- **"Research Objectives: Definition and How To Write Them"** is an article from Indeed that provides an introduction to writing research objectives. The article offers additional tips and delves into the importance of incorporating the SMART format to your research goals.
- **LAP-IM-010—Seek and Find (Marketing Research)** is a LAP containing information, activities, and assessments that may be helpful during this unit. It is available in the MBA Research & Curriculum Center online store.
- **LAP-IM-282—What's the Problem? (Marketing Research Problems)** is a LAP containing information, activities, and assessments that may be helpful during this unit. It is available in the MBA Research & Curriculum Center online store.

## LOCATING RESEARCH SOURCES

- **Google Scholar** is a search engine database that offers access to scholarly literature for virtually any subject.
- **"Evaluating Sources"** is an article and video from Benedictine University that explains how to use the CRAAP Test when evaluating the reliability of sources.
- **"What Is the Difference Between a Primary and Secondary Source?"** is an article from Western Governors University that discusses the differences between primary and secondary sources, including the functions and attributes of each.

UNIT 3




UNIT 3

# Conducting a Research Study

## INTRODUCTION

In this unit, students continue their work on the Business Operations Research (BOR) project with the second element of their Research Methods section: the research study. In Unit 3, students will execute the research study planned in Unit 2, which includes several forms of primary and secondary research. This research will be the source of data and information students will use to complete Unit 4 (Analyze Results of a Research Study) as well as prepare for subsequent units where they create their strategic plan.

## COMPETITIVE EVENTS CONNECTION

**SUGGESTED TIMELINE**

One 90-minute class period and/or two 45-minute class periods.

**PROJECT COMPONENTS**

Throughout Unit 3, students will complete the following components of the DECA Business Operation Research Project.

- Process used to conduct the selected research methods.

UNIT 3

# Learning Outcomes

Throughout Unit 3, students will learn to:

**Conduct primary research.**

- Implement qualitative and quantitative research methods (e.g., interview, focus group, survey).
- Effectively communicate questions and prompts to research participants.

**Conduct secondary research.**

- Verify the authenticity and trustworthiness of scholarly articles.
- Create a bibliography that cites secondary sources.

**Document and organize research findings efficiently.**

- Record data in a spreadsheet (e.g., Excel, Google Sheets).
- Transcribe qualitative data accurately.

## PERFORMANCE INDICATORS

- Explain the nature of marketing research (SP) IM:010
- Describe options businesses use to obtain marketing research data (i.e., primary and secondary research) (SP) IM:281
- Describe data-collection methods (e.g., observations, mail, diaries, telephone, Internet, discussion groups, interviews, scanners, tracking tools) (SP) IM:289
- Obtain marketing information from online sources (e.g., search engines, online databases, blogs, forums, listserves, web analytics, social media, geolocation services, etc.) (SP) IM:382
- Administer questionnaires (SP) IM:297
- Conduct experiments (e.g., lab and field experiments) (MN) IM:319
- Conduct focus groups (MN) IM:320
- Conduct in-depth interviews (SP) IM:322
- Determine research approaches (e.g., observation, survey, experiment; quantitative or qualitative) appropriate to the research problem (MN) IM:339
- Select data-collection methods (e.g., observations, mail, telephone, Internet, online communities, social media, virtual platforms, discussion groups, interviews, case studies, text analyses, scanners) (MN) IM:399
- Transcribe conversations/interviews (SP) IM:452
- Demonstrate basic spreadsheet applications (PQ) NF:010
- Use analytical tracking tools (SP) NF:205
- Identify sources that provide relevant, valid written material (PQ) CO:054
- Organize information (CS) CO:086

UNIT 3
# Teaching Tips

**The following** is a collection of tips and advice that instrcutors may find useful when implementing this unit of the research project.

## 1 Be mindful of group dynamics.

Unit 3 is a pivotal unit in the project, as it marks the first stage where groups transition from project planning to project implementation. This demands group-wide involvement as conducting a research study with multiple research methods is likely too intensive a task for one student.

With that in mind, it is recommended that teachers monitor group dynamics during this project stage. Is the bulk of the research being conducted by one student? Is a certain student completely uninvolved in the research study, either of their own volition or as directed by their groupmates? Is there a student—or group of students—within the group that is being too assertive or controlling? If the answer is "yes" to any of these questions, it may be necessary for a instrcutor to step in. In this sense, Unit 3 can act as a litmus test for future units, to evaluate how the group is operating as a whole. If an issue presents itself, it can be addressed at this stage before the project has progressed too far along.

## 2 Oversee survey implementation.

While administering a survey or focus group is not a required element of the project's research study, groups may choose either as a source of primary research. If that is the case, this process may require increased involvement from instrcutors.

Because a survey or focus group often requires many moving pieces, teachers are encouraged to offer their services in the planning and implementation of such a study. This may be as simple as groups rehearsing their focus group questions with a instrcutor, or the teacher sitting in on the actual focus group to provide assistance, should the need arise. Teachers may request teams to submit their research tools for teacher review.

With that being said, it is also important for teachers to balance their involvement with group independence. Conducting this research study is one of the most crucial elements of the project, and students are responsible for taking their research in the direction of their choosing. At the end of the day, instructional support should be the groups' guide rails to keep them on track, and should not be the tracks themselves.

## 3 Familiarize students with spreadsheet tools.

Spreadsheet software applications—such as Microsoft Excel, Google Sheets, and Apple Numbers—are incredibly useful tools for organizing and analyzing sets of data. It is recommended that groups incorporate one of these tools into their research study, especially if their study intends to yield larger data sets (from a public survey, for example).

In addition to more effectively sorting data, spreadsheets can also help groups present their data in a more polished, creative way through the use of graphs or charts. If groups deem it necessary, these illustrations can even be copied or reproduced directly in their written entry.

If students are not familiar with spreadsheet tools, there are numerous free tutorials online (see the Additional Resources section of this unit) in both article and video form. Providing groups class time to hone their spreadsheet expertise—or creating an assignment to encourage practicing with spreadsheets—is recommended.

UNIT 3

# Discussion Questions

**These discussion questions can be used either to prepare students for their work in this unit or to guide student thinking throughout this unit.**

What interpersonal skills do you think are necessary to conduct an interview or focus group?

What is a potential advantage of observation, as opposed to an interview or focus group?

Why do you think it is important that the wording of survey questions is precise and unbiased?

Why do you think customer consent is important when tracking for research purposes?

Consider the definition of an experiment. Have you ever conducted an experiment outside of a scientific context? How did that experiment go?

Consider your own project. Which do you think will be more useful to your research study: qualitative or quantitative research methods? Why?

UNIT 3

# Quick Check

**FORMATIVE ASSESSMENT**

This is a formative assessment and corresponding key to help gauge learning based on the student narrative.

1. **Explain the difference between qualitative and quantitative data.**
Qualitative data is information that is descriptive and nonstatistical in nature. Quantitative data is the opposite—they are comprised of numbers and statistics.

2. **Describe two qualitative research methods.**
Answers will vary:

a. Interviews. In the personal-interview method for gathering qualitative data, a researcher sits down with a respondent one-on-one to ask questions and record the respondent's answers.

b. Focus Groups. In this method, one or two researchers moderate a group discussion that usually includes anywhere from six to 12 participants (all being members of the target market). Focus groups are often used to gauge reactions to new products or marketing ideas.

c. Observations. The observation method of obtaining qualitative data requires researchers to watch people perform certain activities, usually in a natural setting.

3. **Describe two quantitative research methods.**
Answers will vary:

a. Surveys. A survey captures information from respondents through a research instrument (usually a questionnaire). Surveys may be self-administered (respondent fills it out on their own) or administered by a researcher.

b. Tracking. There are several ways that researchers can track and collect quantitative data. A great deal of tracking takes place online, in stores, or via other marketing tools like loyalty cards or apps.

c. Experiments. Experiments are any time you manipulate (control or change) one variable to see how it affects another. One experiment that market researchers may undertake is test-marketing products, which means offering a product in a limited sample to see how potential customers respond to it.

UNIT 3
# Find a Research Study

ACTIVITY 1

## Instruct students to find a research study conducted by a real business or organization.

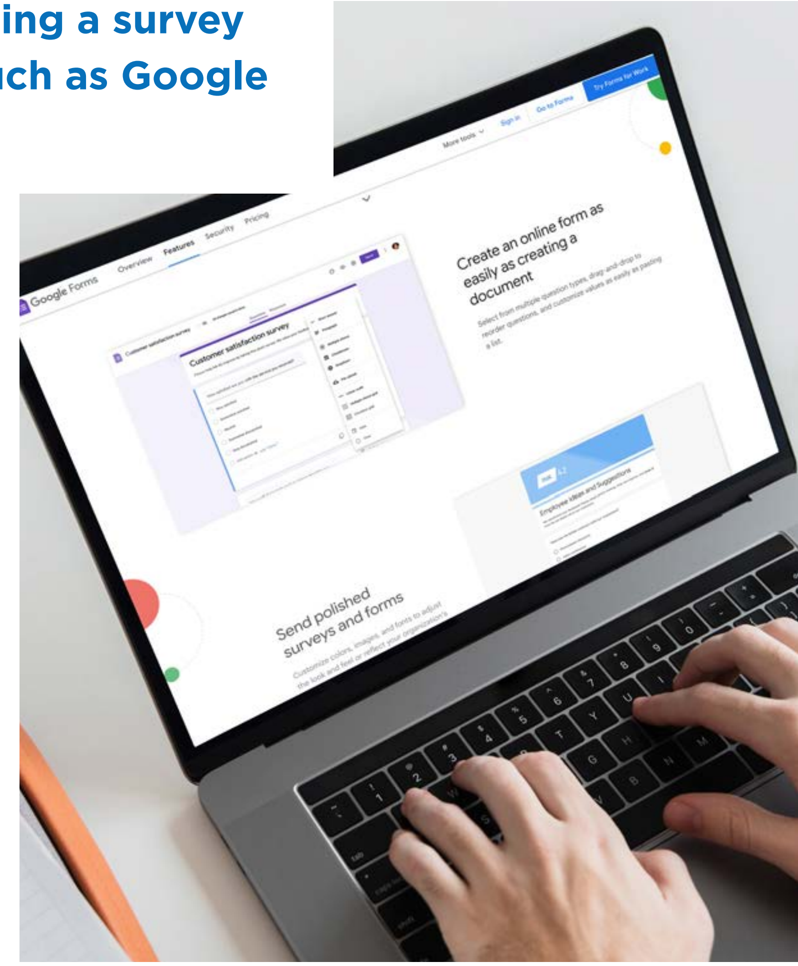
Have students identify what type of research this study conducted (qualitative or quantitative, as well as the type of research study [survey, focus group, experiment, etc.]). Then, have students develop a digital presentation on their chosen research study. The presentation should summarize the goals and strategies of their chosen research study and identify components of the study that could help inform their own study for their BOR project. Students can present in peer groups and share their insights in a whole class discussion to follow.

UNIT 3

# Conduct a Research Study

ACTIVITY 2

## Have groups practice conducting a survey using an online survey tool, such as Google Forms or SurveyMonkey.




Each group should create five to 10 survey questions regarding regarding an assigned topic. Some example topics include school bell schedule, proposed new classes, plans after high school, preferred classroom instruction, etc. These topics are clear in purpose and all students should have experiences and opinions to inform the researcher. Questions should be specific, unbiased, and yield quantifiable data. Students should get their survey topic—as well as their survey questions—approved by the teacher before finalizing.

After groups have completed their surveys, they should post them in a communal space such as a Google Doc or their school's learning management platform. Instruct students to fill out the surveys created by other groups, allowing the class to act as the "target market" for each group.

UNIT 3

# Find a Credible Source

ACTIVITY 3

**After groups have identified the objective(s) of their secondary research, instruct each group member to find one credible source that contributes to the group's research study.**

Instruct the group members to "swap" sources so that each student has a different source than the one they found. Students should then review their new source, evaluating its credibility and checking for any potential bias. Students' reviews should be simple but demonstrate the relevance to the research study to illustrate the value.

Once students have reviewed their new source, have them "swap" sources again, making sure that each student, again, has a source they have not yet seen. Students should now review the source in terms of its value to their BOR project's research study. Is this source relevant and up to date? What is its potential role in your group's research study? This second round of reviews should also be one to two paragraphs.

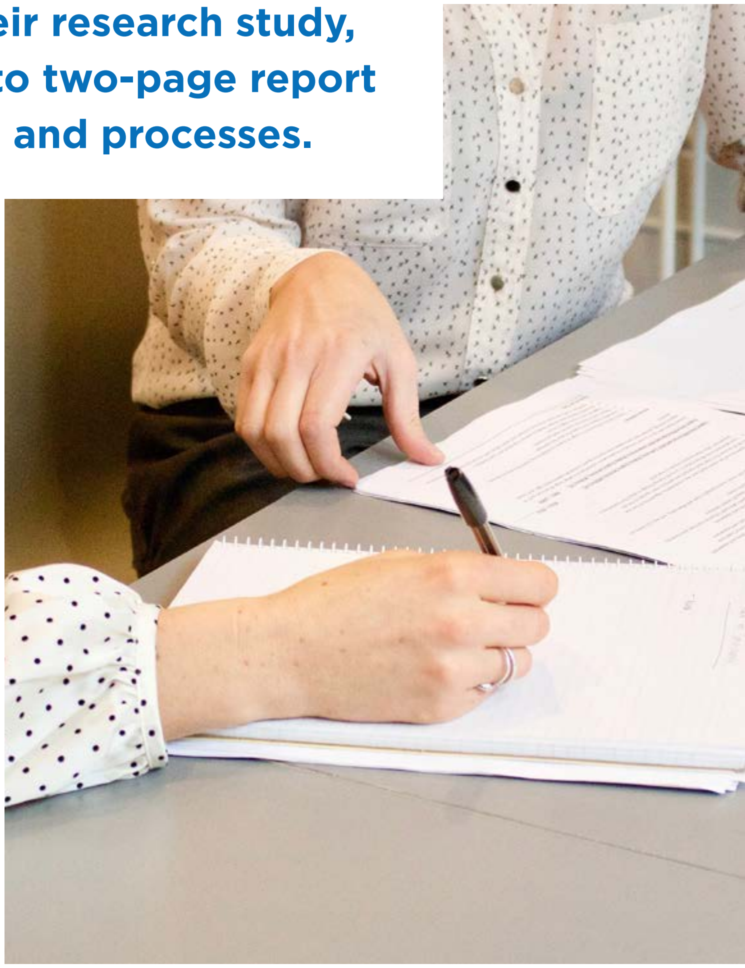
When this second round of reviewing is over, students should review all sources as a group and decide on if/how each source should be used in their research study.

CAPSTONE ACTIVITY

UNIT 3

# Research Study Summary

**After groups have conducted their research study, instruct them to prepare a one- to two-page report detailing their research methods and processes.**



This report should include all primary and secondary research conducted by the group and provide an explanation of how the group implemented each research method. These explanations will vary based on the methods chosen, but some examples of basic requirements are listed below:

- **For interviews:** List key questions asked to guide the research study. Who was the interviewee? What is their job title? How are they relevant to your research project? Was the interview in-person or virtual? How long was the meeting?

- **For surveys:** List key questions asked to guide the research study. Who was your target market for this survey? How was the survey distributed to your target market?

- **For literature reviews/article research:** What was the goal of this secondary research? Where did you find your sources? How did you verify the credibility of your sources?

After groups have completed the report, review their work and provide them feedback before they convert this deliverable to the written entry of the BOR project.

**Note:** This activity is the culmination of their work in Unit 3 and contributes directly toward the following project component(s): Section III, Part B: Research Methods Used to Conduct the Study of the Written Entry.

UNIT 3 | CAPSTONE ACTIVITY

# Rubric

**Project deliverable:** Part B of the Written Entry's Research Methods Used in the Study (Part III).

| CRITERIA | PROFESSIONAL | EXPERIENCED | DEVELOPING | NOVICE | SCORE |
|---|---|---|---|---|---|
| **Primary Research Methods**<br><br>*45 points* | The primary research methods are clearly identified, and ample information regarding the process of each method is provided. | The primary research methods are clearly identified, and some information regarding the process of each method is provided. | The primary research methods are identified, but there is no information regarding the process of each method. | The primary research methods are not identified or explained. | |
| **Secondary Research Methods**<br><br>*45 points* | The secondary research methods are clearly identified, and ample information regarding the process of each method is provided. | The secondary research methods are clearly identified, and some information regarding the process of each method is provided. | The secondary research methods are identified, but there is no information regarding the process of each method. | The secondary research methods are not identified or explained. | |
| **Communication Skills**<br><br>*10 points* | The research study flows well and is grammatically correct and free of punctuation, spelling, and capitalization errors. | The research study flows fairly well and is free of grammar and spelling errors; punctuation and capitalization errors do not limit understanding. | The research study's spelling and grammatical errors are distracting and impact flow. | The research study contains so many spelling, grammar, punctuation, and capitalization errors that it is hard to understand. | |

| TOTAL POINTS (100) | |
|---|---|

UNIT 3

# Additional Resources

## CONDUCTING PRIMARY RESEARCH

- **"Primary Research"** from QuestionPro provides different methods of primary research and explains the different factors researchers should consider when planning their primary research. The article also explains scenarios where secondary research may be more or less effective than primary research.
- **"Conducting Effective Surveys – 'Rules of the Road'"** is an instructional article from Penn State University that provides essential information regarding surveys. The article details the essential questions of creating a survey and some tips for conducting a successful survey.
- **"What is a Focus Group"** is an article from Scribbr that offers a detailed, step-by-step guide to planning and running a focus group. The article includes example questions, an explanation of different types of focus groups, and the pros and cons of focus groups in comparison to other research methods.
- **"What is a Research Interview (And How To Conduct One)"** is an article from Indeed that explains the research interview process. The article includes a definition and explanation of different types of research interviews, as well as example interview questions and the steps to conducting your own research interview.
- **LAP-IM-010—Seek and Find (Marketing Research)** is a Learning Activity Package (LAP) containing information, activities, and assessments that may be helpful during this unit. It is available in the MBA Research & Curriculum Center online store.
- **LAP-IM-281—What's the Source? (Obtaining Marketing-Research Data)** is a LAP containing information, activities, and assessments that may be helpful during this unit. It is available in the MBA Research & Curriculum Center online store.

## CONDUCTING SECONDARY RESEARCH

- **"Secondary Research"** from Qualtrics explains the purpose of secondary research and its practical applications within a greater research project or study.
- **How To Write a Literature Review: 3 Minute Step-by-Step Guide** is a three-minute video from Scribbr that gives a high-level explanation of literature reviews and the steps to creating one for a research project.

## DOCUMENTING FINDINGS

- **"How to Use Google Sheets: A Complete Guide"** is a Zapier article by Shea Stevens that provides basic information about the spreadsheet tool Google Sheets. If groups are looking to leverage spreadsheet tools for their research study, this article can serve as a basic tutorial for a free and easily-accessible program.
- **"The 10 Best Spreadsheet Software of 2024"** is an article by Ankit Vora that identifies the 10 best options for spreadsheet tools available today. The article provides a deep-dive into all ten options, including a pros and cons list.

UNIT 4


UNIT 4

# Analyzing Results of a Research Study

## INTRODUCTION

In this unit, students continue their work on the Business Operations Research (BOR) Project by analyzing the results of their research study. During this stage of the research project, students must consider both the findings of their research study and how best to present their conclusions based on those findings. This work will be based on previous units, during which students designed and conducted a research study.

## COMPETITIVE EVENTS CONNECTION

### SUGGESTED TIMELINE

One 90-minute class period and/or two 45-minute class periods.

### PROJECT COMPONENTS

Throughout Unit 4, students will complete the following components of the DECA Business Operation Research Project.

- Findings of the research study
- Conclusions based on the findings

UNIT 4

# Learning Outcomes

Throughout Unit 4, students will learn to:

**Analyze the results of their research study.**

- Sort, organize, and review research study results.
- Identify the most relevant and significant data.
- Connect findings back to original research objective(s).

**Translate research findings into conclusions.**

- Distinguish between a finding and a conclusion.
- Draw meaning from the research study results.
- Conduct a SWOT analysis.
- Support claims with research and data.

**Determine how best to present research study findings and conclusions.**

- Focus on the most relevant and significant results.
- Supplement presentation with visual tools.

## PERFORMANCE INDICATORS

- Explain the principles of data analysis (SP) NF:139
- Organize information (CS) CO:086
- Analyze narrative text (e.g., sorting, classifying/categorizing, identifying patterns, interpreting, selecting mechanical analysis approaches) (SP) IM:304
- Interpret qualitative research findings (SP) IM:371
- Interpret statistical findings (SP) NF:093
- Conduct an organizational SWOT (ON) SM:010
- Draw conclusions based on information analysis (CS) NF:278
- Translate research findings into actionable business recommendations (SP) NF:216
- Use data visualization techniques (e.g., infographics, heat-maps, dynamic model outputs) (SP) CO:204

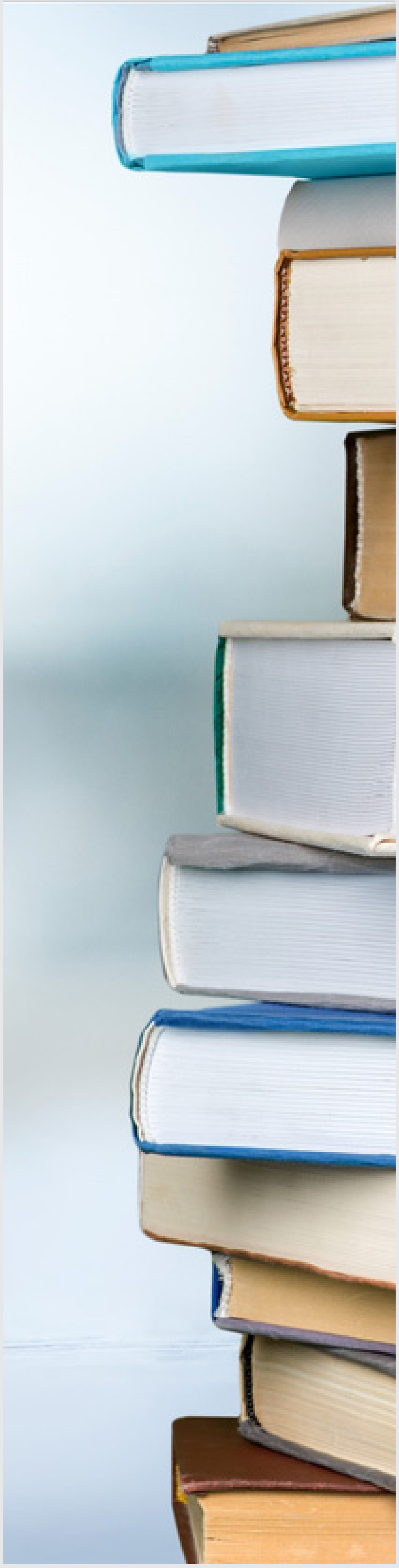
UNIT 4

# Teaching Tips

**The following** is a collection of tips and advice that teachers may find useful when implementing this unit of the research project.

## 1 Don't rush the research.

Once students have conducted their research study, it's very tempting to hop into the data and begin making recommendations for their strategic plan. Encourage them to avoid this! It's important not to rush the research—this is when students have the chance to practice (and show off) their analytical skills. Instead, students should take their time and slowly sift through the data, making note of connections and patterns that might serve them well in the "drawing conclusions" stage.



## 2 Present the important stuff.

Depending on the scope of their collected research, there's a good chance that groups won't be able to present all of their research findings—and that's OK! Instead of bombarding the audience with a laundry list of results (which may or may not connect back to the original research objectives), students should focus on the most relevant and significant results. This means students may only present three or four significant findings.

## 3 Consider a SWOT analysis.

Many groups find it helpful to conduct a SWOT analysis during this stage of the research project, where they analyze an organization's Strengths, Weaknesses, Opportunities, and Threats. This can be a helpful, action-oriented way to organize and present their research findings and conclusions. While not a required component of the BOR Project, a SWOT analysis may be something students consider in their analysis of their research study.

## 4 Back up all claims with research.

It might seem obvious, but when presenting the findings and conclusions of their research study, groups need to make sure that all claims are supported by research. It can be easy to drift into opinion territory—instead, groups should make sure they focus on facts and what the data are telling them (rather than what they're hoping to see).

## 5 Help the audience understand.

The findings and conclusions section of the BOR Project can be information-heavy. Students should remember that audience members will need help walking through the data and making connections between findings and conclusions. It's important that groups avoid dumping a laundry list of data on their readers and expecting them to make their own meaning from it. Instead, students should walk their audience through the research and help them understand connections and patterns. Visual tools (e.g., charts, infographics, icons) are a crucial part of this process.

UNIT 4

# Discussion Questions

**These discussion questions can be used either to prepare students for their work in this unit or to guide student thinking throughout this unit.**

What makes a finding relevant or significant?

Why is it important that research findings and conclusions connect back to the original research objective(s)?

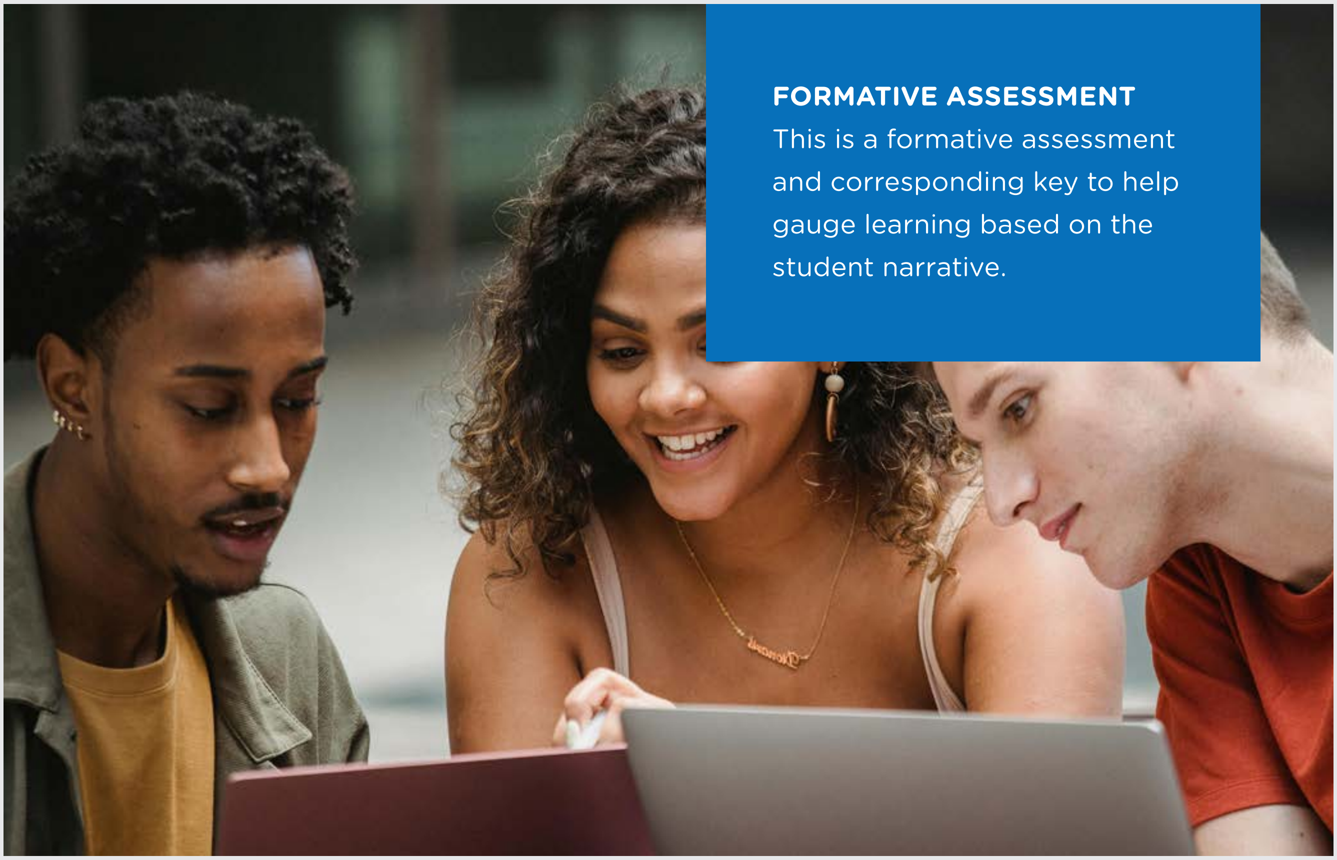
How can you ensure your conclusions are logical and unbiased?

How do businesses benefit from conducting SWOT analyses?

Consider the four factors investigated in a SWOT analysis (strengths, weaknesses, opportunities, and threats). Is one more important than the others? Why or why not?

How is analyzing research findings and drawing conclusions similar to storytelling?

UNIT 4
# Quick Check



**FORMATIVE ASSESSMENT**
This is a formative assessment and corresponding key to help gauge learning based on the student narrative.

1. **One of the first steps in analyzing research findings is to sift through all of the data.**

2. **When drawing conclusions, your interpretations should be logical and unbiased.**

3. **What are the four business factors a SWOT analysis investigates?**
   A SWOT analysis investigates a business's strengths, weaknesses, opportunities, and threats.

4. **Name two ways to present findings and conclusions from a research study.**
   Answers will vary; findings and conclusions can be presented through text, charts, infographics, icons, etc.

UNIT 4

# 20 Questions

ACTIVITY 1

## Help students practice drawing conclusions from facts by playing the game 20 Questions.

Divide the class into small groups or pairs. One student will become the Question Master, and the other student(s) will act as the Guesser, who is responsible for drawing conclusions.

First, the Question Master identifies the thing to be guessed. It could be a person, animal, object, etc. They should know enough about this thing to answer questions about it. Next, the Guesser asks the Question Master a series of Yes or No questions about the mystery thing. (If there is more than one Guesser, then they take turns.)

As Guessers accumulate answers (or findings) to their questions, they should begin to draw a conclusion about what the thing could be. Groups should play until they reach 20 questions or someone gives the right answer. When a Guesser is ready to guess the answer, they should phrase their guess as a conclusion. For example: *"Because the mystery thing is smaller than a microwave, walks on four legs, has fur, and is a common household pet... I conclude that it is a cat."*

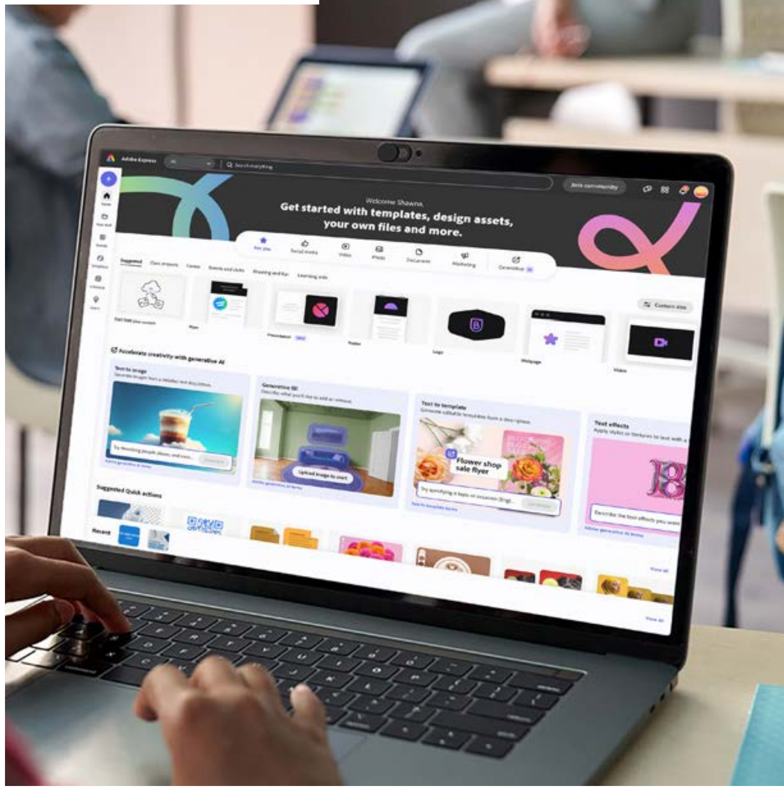
Groups should continue to play until everyone has had a chance to be the Question Master.

UNIT 4

# Infographics

ACTIVITY 2

## Instruct students to develop infographics to support their work by using the graphic design platform Adobe Express.




*Note: Advisors may need to activate Adobe Express for Education.*

Once on the site, groups should peruse the elements available, making note of what might work well for their purposes:

- What charts best summarize and display their findings?
- What elements illustrates their conclusions?
- What template provides a layout that meets the team's needs?

Groups should also consider visual elements like color, font, and overall layout.

Adobe Express

UNIT 4

# BOR Review

ACTIVITY 3

## In small groups or as a class, review the Sample BOR DECA Written Entry from 2024.

Navigate to Part D of the Executive Summary on page 1 about Findings & Conclusions. Discuss the quality of this section together.

- Are the conclusions logical?
- Are they clearly tied to research findings?
- Do they ultimately connect back to the original research problem?
- What, if anything, should be changed to make this section even more effective?


[Sample BOR DECA Written Entry]

UNIT 4
# Findings & Conclusions

CAPSTONE ACTIVITY

**After groups have discussed the findings and conclusions of their research study, instruct each group to develop a written summary of their findings that includes visuals.**

The written summary should use infographics to illustrate the key findings of the study, explain the resulting conclusions, and describe how the presented information connects back to the original research objective(s).

After each group completes their written summary, groups should swap their summaries and provide feedback using the provided rubric.

**Note:** This activity is the culmination of their work in Unit 4 and contributes directly toward the following project component: Part IV: Findings and Conclusions of the Study of the Written Entry.

UNIT 4 | CAPSTONE ACTIVITY

# Rubric

**Project deliverable: Written Entry's Findings and Conclusions of the Study (Part IV).**

| CRITERIA | PROFESSIONAL | EXPERIENCED | DEVELOPING | NOVICE | SCORE |
|---|---|---|---|---|---|
| **Findings of the research study**<br><br>*40 points* | Findings are factual, measurable, and supported by data. All findings presented are both relevant and significant to the research study. | Findings are mostly factual, measurable, and supported by data. Some findings presented are both relevant and significant to the research study. | Findings are sometimes factual, measurable, and supported by data but often vague. A few findings presented are relevant or significant to the research study. | Findings of the research study are missing. | |
| **Conclusions based on findings**<br><br>*40 points* | Conclusions are logical, free from bias, and clearly based on identified findings. All conclusions reasonably interpret findings and demonstrate critical thinking. | Conclusions are mostly logical, free from bias, and based on identified findings. Some conclusions reasonably interpret findings and demonstrate critical thinking. | Conclusions are sometimes logical, free from bias, and based on identified findings but often vague. A few conclusions demonstrate critical thinking. | Conclusions of the research study are missing. | |
| **Presentation of information**<br><br>*10 points* | The connection between findings and conclusions in the research study is clear, logical, and supported by visual aids (e.g., charts, infographics, icons). | The connection between findings and conclusions in the research study is mostly clear, logical, and sometimes supported by visual aids (e.g., charts, infographics, icons). | The connection between findings and conclusions in the research study is somewhat clear, although not often logical or supported by visual aids (e.g., charts, infographics, icons). | The connection between findings and conclusions in the research study is missing. | |
| **Communication Skills**<br><br>*10 points* | The Findings & Conclusions section flows well and is grammatically correct and free of punctuation, spelling, and capitalization errors. | The Findings & Conclusions section flows fairly well and is free of grammar and spelling errors; punctuation and capitalization errors do not limit understanding. | The Findings & Conclusions section's spelling and grammatical errors are distracting and impact flow. | The Findings & Conclusions section contains so many spelling, grammar, punctuation, and capitalization errors that it is hard to understand. | |

| TOTAL POINTS (100) | |
|---|---|

UNIT 4

# Additional Resources

## ANALYZING RESEARCH FINDINGS

- "**How to Analyze Data in 7 Simple Steps: A Definitive Guide**" is an Indeed article that outlines seven steps to analyze data as well as types and benefits of data analysis. The outlined steps include establishing a goal, determining the type of data analytics to use, determining a plan to produce the data, collecting the data, cleaning the data, evaluating the data, and visualizing the data.
- **Correlation vs Causation (Statistics)** is a 2-minute video that explains the difference between correlation and causation. Teachers may find the first half of the video most helpful.

## DRAWING CONCLUSIONS

- **LAP-MP-010—Analyze This! (SWOT Analysis)** is a Learning Activity Package (LAP) containing information, activities, and assessments that may be helpful during this unit. It is available in the MBA Research & Curriculum Center online store.
- "**Differences Between a Finding, a Conclusion, and a Recommendation: Examples**" is an article from EvalCommunity that provides tips for distinguishing between findings, conclusions, and recommendations, as well as strategies for effectively communicating all three.

## PRESENTING INFORMATION

- "**How to Use 6 Basic Charts to Create Effective Reports**" is an article from Survey Monkey that examines six different types of charts: vertical bar charts, horizontal bar charts, pie charts, line charts, scatter plots, and histograms.
- "**Color Choices in Data Visualizations: Importance and How To**" is an Indeed article that explains the importance of color in data visualization and several steps to consider when choosing colors for data visualizations: analyze collected data insights, evaluate other visualizations, limit color variations, group together similar data, consider the type of color palette, assign colors to values, highlight important data points, determine the background-color, and use online resources and tools.

UNIT 5

UNIT 5

# Preparing a Strategic Plan

## INTRODUCTION

In this unit, students continue their work on the Business Operations Research (BOR) Project by preparing a strategic plan. In their development of the strategic plan, students must consider and include three key elements: objectives and corresponding rationales, proposed activities and timelines, and proposed metrics or key performance indicators to measure plan effectiveness. This work will be based on previous units, during which students designed and conducted a research study.

## COMPETITIVE EVENTS CONNECTION

**SUGGESTED TIMELINE**
Two to three 90-minute class periods or five to six 45-minute class periods.

**PROJECT COMPONENTS**
Throughout Unit 5, students will complete the following components of the DECA Business Operation Research Project.

- Objectives and rationale of the proposed strategic plan
- Proposed activities and timelines
- Proposed metrics or key performance indicators to measure plan effectiveness

UNIT 5
# Learning Outcomes

Throughout Unit 5, students will learn to:

**Develop strategic plan objectives based on research findings.**

- Consider overall goal of the research project.
- Leverage findings and conclusions from research study.
- Support objectives with relevant and well-reasoned rationales.

**Support strategic plan with activities and timelines.**

- Outline actionable steps based on plan objectives.
- Consider feasibility of proposed activities and timelines.
- Explain how identified activities support proposed objectives.

**Support strategic plan with metrics or key performance indicators.**

- Identify several relevant metrics to measure anticipated success.
- Explain how identified metrics measure effectiveness of proposed plan.

## PERFORMANCE INDICATORS

- Describe the strategic planning process in an organization (MN) SM:040
- Translate research findings into actionable business recommendations (SP) NF:216
- Develop processes that can be used to improve business results (MN) SM:045
- Manage project schedule (SP) PJ:010
- Select metrics for measuring success (MN) SM:024
- Identify and benchmark key performance indicators (e.g., dashboards, scorecards, etc.) (MN) SM:027
- Write analytical reports (i.e., reports that examine a problem/issue and recommend an action) (SP) CO:185
- Use data visualization techniques (e.g., infographics, heat-maps, dynamic model outputs) (SP) CO:204

UNIT 5

# Teaching Tips

**The following** is a collection of tips and advice that teachers may find useful when implementing this unit of the research project.

## 1 Get S.M.A.R.T.

Encourage students to make sure their objectives and supporting details (activities, timelines, metrics, etc.) fit SMART criteria. SMART goals are those that help you identify exactly what it is you want to achieve—and then know for sure when you've achieved it. SMART stands for Specific, Measurable, Attainable, Results-Oriented, and Time-Bound. Give students a heads-up that there are actually a few different versions of the SMART acronym, but they all contain important information about setting goals.

## 2 Quality over quantity.

Students will be tempted to demonstrate their knowledge by developing a host of objectives, activities, and metrics. Encourage them to avoid doing so. It's more important to have a few key components that are well fleshed-out than a laundry list too lengthy to have substance. Students shouldn't try to do everything.

## 3 Meet readers where they are.

Remind students that they are the experts—and their readers/the judges may not be. It's easy to assume that their audience will bring a great deal of knowledge to the strategic plan, but this may not be the case. Groups should make sure to explain necessary details and realistically consider the information the audience needs (or already has).

## 4 Distinguish strategic plans with memorable titles.

Many projects use a relevant acronym or catchphrase to title the strategic plan or its objectives. (E.g., The P.L.A.Y. Initiative—Personalized experience, Loyalty program, Artificial intelligence implementation, Youthful representation.) This format makes the plan feel more coordinated and intentional. However, don't force it. It's more important to provide accurate and straightforward titles than flowery but ultimately unhelpful ones.

## 5 Go beyond numbers for metrics.

Numbers are the foundation of the metrics or key performance indicators section of the proposed strategic plan, but encourage students to go further. Ask students to explain why the identified metrics were chosen, what their purpose is, and how they intend to calculate those metrics and determine the threshold of success. This helps students ensure their metrics are relevant and well-reasoned, as well as demonstrates to the audience the effectiveness and feasibility of their plan.

## 6 Don't neglect visual components.

While the key elements of the strategic plan—objectives and rationales, activities and timelines, metrics or key performance indicators—will likely be expressed in a predominantly text-based format, don't forget that visual tools can be extremely helpful in illustrating these elements. For example, ask students to consider incorporating a chart of some kind to illustrate the relationship between plan objectives and rationales (e.g., a T-chart). Other example uses of visual aids may include timelines, steps in which the plan is executed, social media posts or media calendars.

UNIT 5

# Discussion Questions

**These discussion questions can be used either to prepare students for their work in this unit or to guide student thinking throughout this unit.**

How do you know if identified objectives support the overall goal of the research study?

What are the benefits and risks of different scheduling strategies (e.g., concurrent vs. sequential scheduling)?

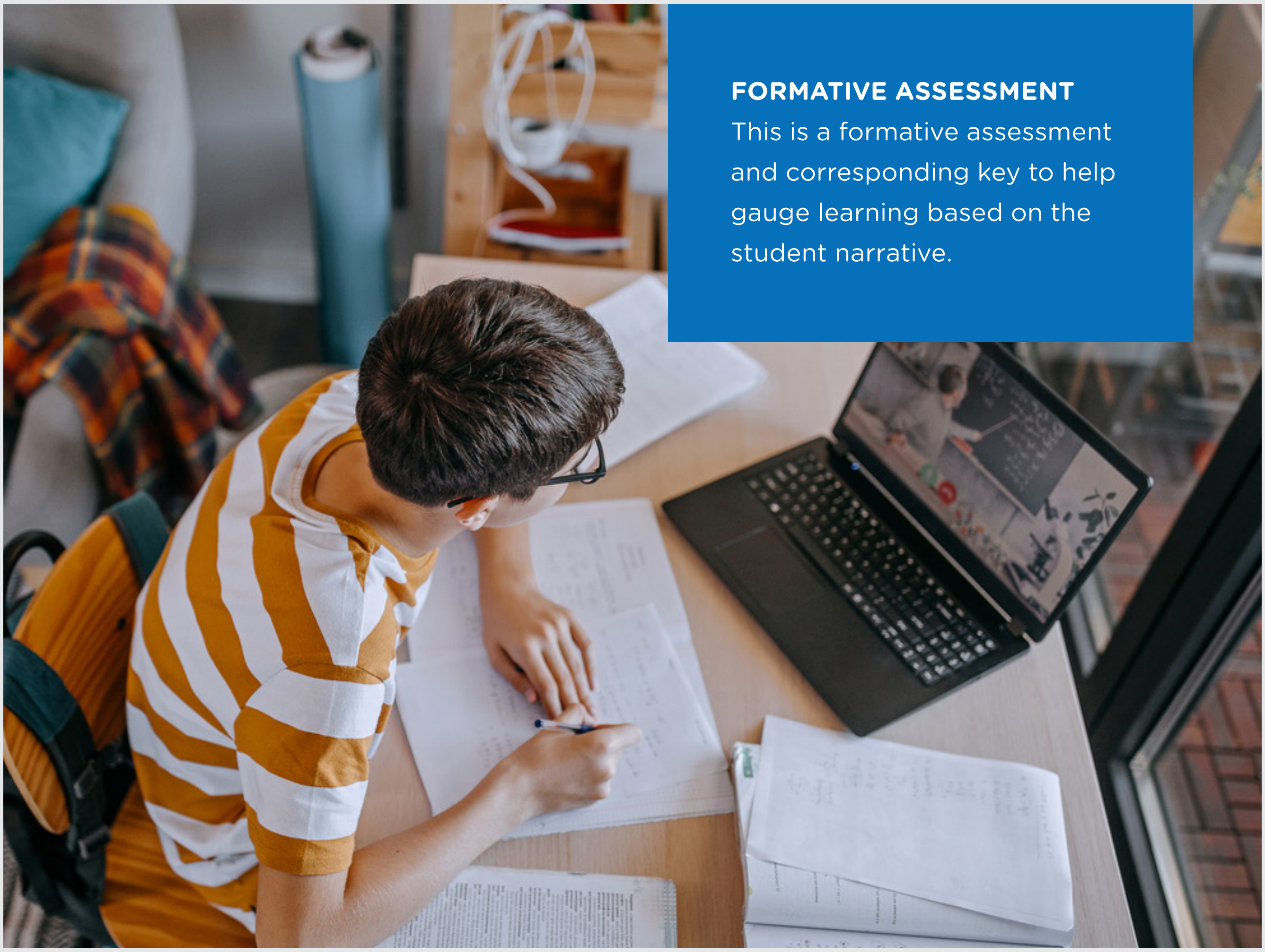
Is any one component of the strategic plan (e.g., objectives/rationales, activities/timelines, metrics/key performance indicators) more important than another?

What is the purpose of a strategic plan?

What makes an effective strategic plan?

How do you determine an appropriate metric for success?

UNIT 5
# Quick Check



**FORMATIVE ASSESSMENT**
This is a formative assessment and corresponding key to help gauge learning based on the student narrative.

1. **What are three key elements to a strategic plan?**
   Three key elements to any strategic plan are objectives, activities, and metrics.

2. **Objectives are the goals of your strategic plan.**

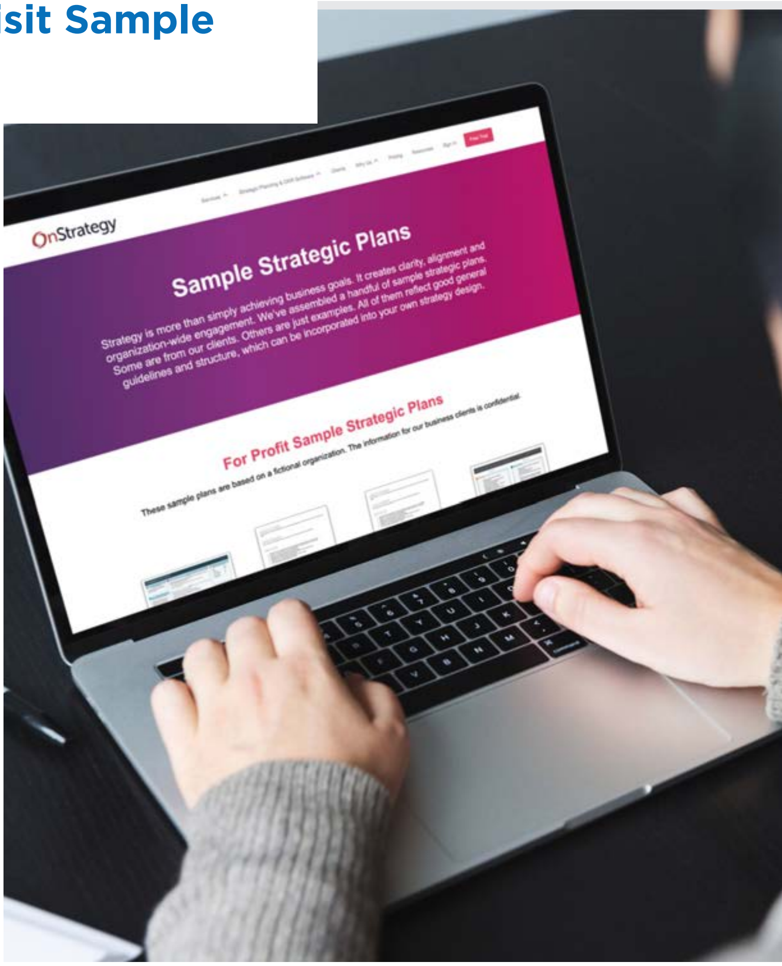
3. **Activities are the actionable steps that lead to accomplishing objectives.**

4. **Metrics are the numbers that help you measure progress.**

UNIT 5
# Strategic Plans

ACTIVITY 1

## In small groups or as a class, visit Sample Strategic Plans.




Select a few to review, aiming to diversify your selections. (If possible, teachers may instead choose to share BOR Strategic Plan examples from previous years.) Then, make a T-chart:

- **On the left side,** list characteristics of effective strategic plans. What works well? What do groups want to emulate in their own projects?

- **On the right side,** list characteristics of ineffective strategic plans. What doesn't work as well? What do groups want to avoid including?

Make sure students consider that the strategic plans developed for the BOR event will likely look different than those provided in the link above. In what way(s) are they different, and how will this knowledge inform each group's work?

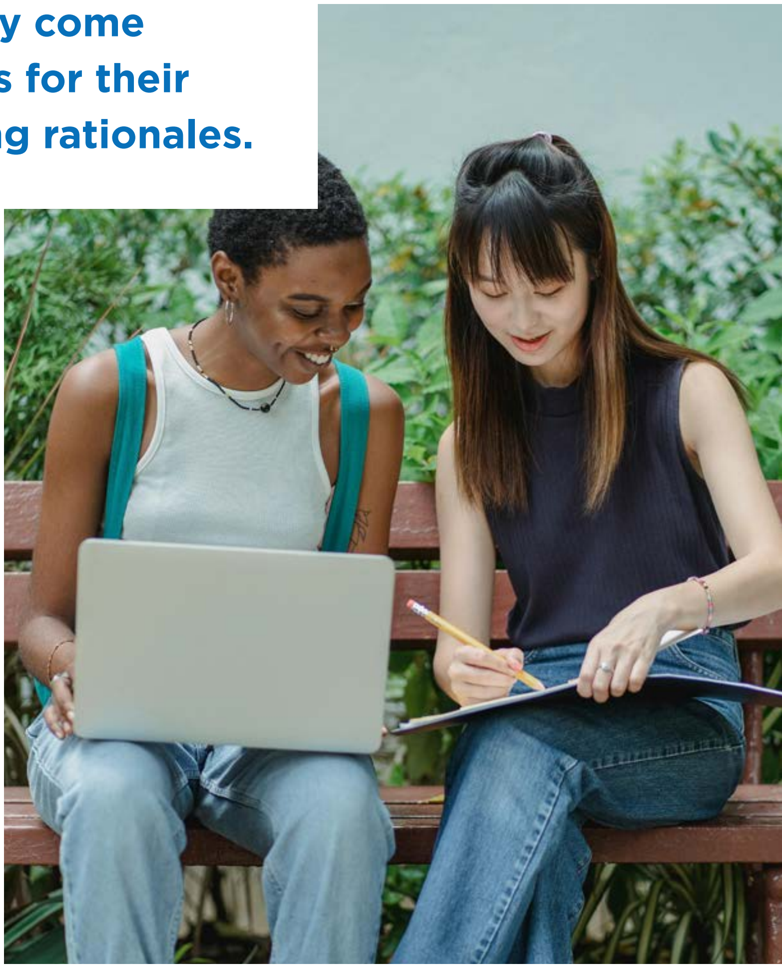
Sample Strategic Plans

UNIT 5

# Strategic Plan Objectives

ACTIVITY 2

## Instruct students to individually come up with two or three objectives for their group's strategic plan, including rationales.



What objectives would best serve the organization and its goals? How so?

Next, ask students to share their lists with the other group members. Groups should then use the individual lists to develop a group list, refining as needed.

UNIT 5

# Develop a Timeline

ACTIVITY 3

## Provide each group with a stack of Post-it Notes or sticky notes.

Next, instruct students to write their proposed activities on the sticky notes, one per note.

Students should then work in their groups to assemble their notes into a timeline chart, mapping (and remapping) their strategic plan chronologically. While doing so, students should consider whether activities will happen sequentially or concurrently (or both). Groups should also make sure each of the notes will support or contribute in some way to the overall BOR project.

If possible, provide students with sticky notes of different colors and sizes. Teachers may also allow students to construct their timelines digitally on sites like Mural or Gantt.

mural.co

gantt.com

CAPSTONE ACTIVITY

UNIT 5

# S.M.A.R.T. Peer Review

## After groups have written a first draft of their strategic plan, instruct each group to trade their draft with another group (or two) for review.


While reviewing the traded strategic plan(s), groups should look for areas of strength and areas of improvement, using the rubric on the next page as a guide.

Specifically, groups should review the plan's objectives and supporting details (activities, timelines, metrics) and make sure they align with S.M.A.R.T. criteria:

- **Specific—**Clearly defined, with no room for misinterpretation
- **Measurable—**Able to be measured, often expressed in terms of time, distance, etc.
- **Attainable—**Able to be reached, realistic
- **Results-Oriented—**Focused on the outcome and necessary performance
- **Time-Bound—**Connected to a set time limit

After their review, instruct groups to sit down with the authors of their traded drafts and share their feedback regarding what's working well and what could be improved, again using the rubric as a guide. Based on their received feedback, each group should make revisions to their strategic plan before submitting to their teacher for additional review.

**Note:** This activity is the culmination of their work in Unit 5 and contributes directly toward the following project component(s): **Written Entry's Proposed Strategic Plan (Part V).**

UNIT 5 | CAPSTONE ACTIVITY

# Rubric

**Project deliverable:** Written Entry's Proposed Strategic Plan (Part V).

| CRITERIA | PROFESSIONAL | EXPERIENCED | DEVELOPING | NOVICE | SCORE |
|---|---|---|---|---|---|
| **Objectives and rationale of proposed strategic plan**<br>*30 points* | The objectives of the strategic plan are specific, attainable, and supported by research. The rationale clearly and logically explains how each objective supports the focus of the project. | The objectives of the strategic plan are specific and supported by research, although at times they seem aggressive. The rationale explains how each objective is related to the focus of the project. | The objectives of the strategic plan are based on research but are often difficult to understand. Key details of the rationale are vague and require clarification. | Objectives and rationale of the proposed strategic plan are missing. | |
| **Proposed activities and timelines**<br>*30 points* | The proposed activity descriptions are detailed, straightforward, and clearly aligned with company objectives. Associated timelines are realistic and well-illustrated. | The proposed activity descriptions are detailed, straightforward, and mostly aligned with company objectives. Associated timelines are fairly realistic. | The proposed activity descriptions aren't always clear and require some clarification. Associated timelines are often unrealistic. | Proposed activities and associated timelines are missing from the strategic plan. | |
| **Proposed metrics or key performance indicators (KPIs)**<br>*30 points* | The proposed metrics or KPIs are specific, logical, realistic, and aligned with company objectives. They provide a clear measurement of plan effectiveness. | The proposed metrics or KPIs are specific, logical, and realistic. Connection to company objectives is sometimes unclear, but the metrics provide a solid measurement of plan effectiveness. | The proposed metrics or KPIs are difficult to understand. Connection to company objectives and measurement of plan effectiveness is vague. | Proposed metrics or KPIs are missing from the strategic plan. | |
| **Communication Skills**<br>*10 points* | The strategic plan flows well and is grammatically correct and free of punctuation, spelling, and capitalization errors. | The strategic plan flows fairly well and is free of grammar and spelling errors; punctuation and capitalization errors do not limit understanding. | The strategic plan's spelling and grammatical errors are distracting and impact flow. | The strategic plan contains so many spelling, grammar, punctuation, and capitalization errors that it is hard to understand. | |

| TOTAL POINTS (100) | |
|---|---|

UNIT 5

# Additional Resources

## DEVELOPING PROJECT OBJECTIVES

- **LAP-PD-918—Go for the Goal (Goal Setting)** is a learning activity package (LAP) containing information, activities, and assessments that may be helpful during this unit. It is available for free in the MBA Research & Curriculum Center online store as part of the Ethical Leadership Course Package.
- **"How to Write Effective Project Objectives Every Time"** is a Project Manager article describing what project objectives are, why they're important, and how to meet S.M.A.R.T. criteria.
- **"How to Write an Effective Project Objective, With Examples"** is an article from Asana that describes effective project objectives and provides examples of good and bad project objectives.
- **What are SMART Objectives?** is a 3-minute video from Professional Academy that discusses S.M.A.R.T. criteria and provides examples.

## DEVELOPING ACTIVITIES & TIMELINES

- **"How to Sequence Activities in a Project"** is an article from Project Manager that describes sequential activities and how to sequence activities for a given project.
- **"How to Create a Project Timeline in 8 Easy Steps"** is an Indeed article that describes the benefits and best practices of using a project timeline. While this article likely goes into further detail than will be necessary for the BOR strategic plan, students may find the high-level concepts in this article helpful.

## DEVELOPING METRICS & KPIS

- **"How Do I Develop Key Performance Indicators?"** is an article from Small Business Chron that describes the importance of key performance indicators (KPIs) matching company needs. It also lists examples of financial and non-financial KPIs.
- **"5 Key Project Management Metrics"** is an article from Villanova University that explains how to choose project metrics and identifies five key project metrics that cover the most important measurements: productivity, scope of work, quality and satisfaction, cost, and gross margin.
- **"A Guide to Project Management Metrics (With Examples)"** is an article from Indeed that defines project management metrics, explains why they're important, and identifies three steps for choosing effective project management metrics: determine the project scope, figure out success factors, and establish fulfillment measures.

UNIT 6

UNIT 6

# Preparing a Budget Proposal

## INTRODUCTION

In this unit, students continue their work on the Business Operations Research (BOR) Project by preparing a proposed budget. With their strategic plan finished, students must create a realistic budget proposal that accounts for each activity and expense involved with implementing their proposed strategic plan. This work will be based heavily on the previous unit, during which students developed a strategic plan.

## COMPETITIVE EVENTS CONNECTION

**SUGGESTED TIMELINE**

One 90-minute class period and/or two 45-minute class periods.

**PROJECT COMPONENTS**

Throughout Unit 6, students will complete the following components of the DECA Business Operation Research Project.

- Costs associated with proposed strategies.

UNIT 6
# Learning Outcomes

Throughout Unit 6, students will learn to:

**Describe the nature of budgets.**

- Define the term "budget."
- Differentiate between income and expenses.

**Discuss key considerations when developing a budget.**

- Determine costs to consider with the implementation of the strategic plan.
- Discuss the importance of reviewing historical data, researching industry standards, analyzing competition, and gaining internal stakeholder input.
- Explain Anticipated Return on Investment.
- Explain the importance of a realistic and specific budget.

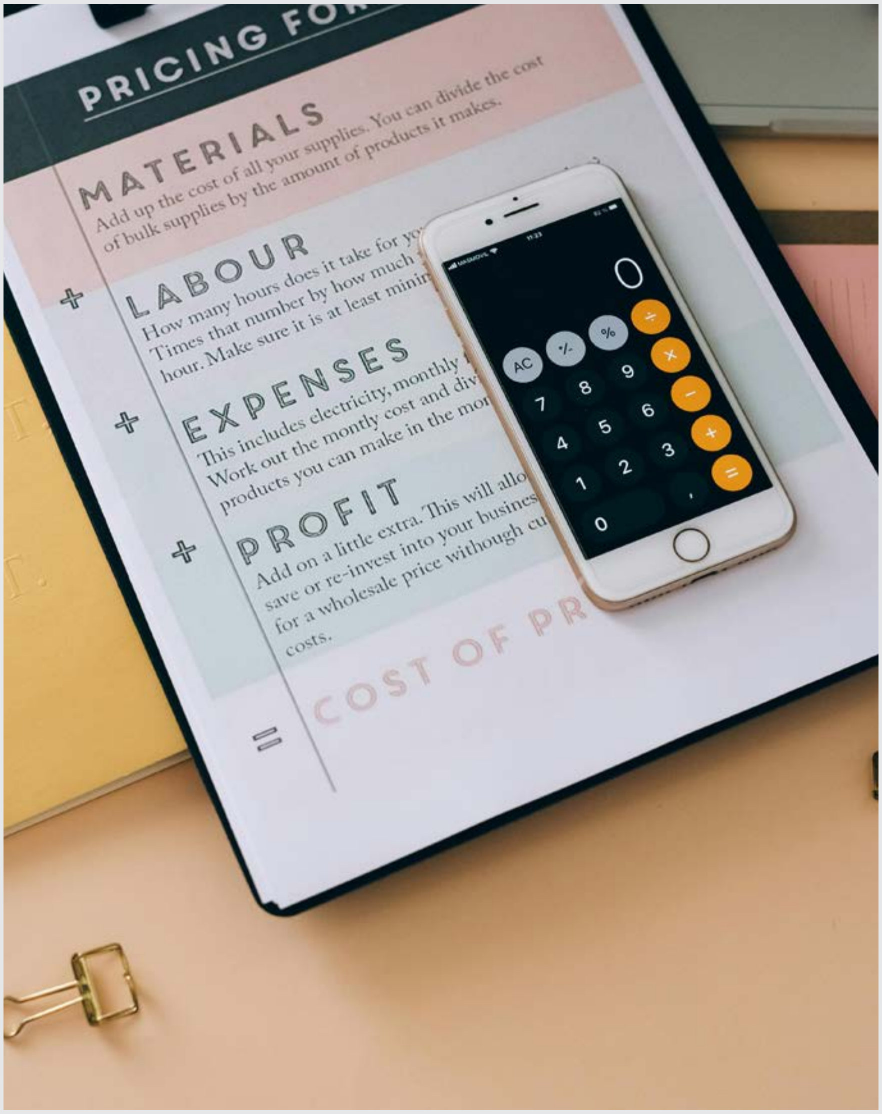
**Outline steps to create a budget.**

## PERFORMANCE INDICATORS

- Describe the nature of budgets (SP) FI:106
- Project future revenues and expenses (SP) FI:394
- Estimate project costs (MN) FI:323
- Calculate return on investment (ROI) (MN) FI:647
- Develop company's/department's budget (MN) FI:099
- Demonstrate budgeting applications (SP) FM:013

UNIT 6
# Teaching Tips

**The following** is a collection of tips and advice that instrcutors may find useful when implementing this unit of the research project.




## 1 Provide examples.

Consider sharing a budget template for students to use as a reference point. That way, students will have an idea of what their budgets can and should look like. It will also give students an idea of where to start and will help them determine how to satisfy requirements outlined in the instruction sheet or rubric.

## 2 Remind students to consider "hidden" costs.

It can be easy for students to only focus on the bigger costs associated with their proposed strategic plans. However, it is important that students also account for smaller costs that might not immediately come to mind. These can include transportation costs, employee wages and training, delivery costs for materials or products, opportunity costs, etc.

## 3 Back estimates by data.

It is important for students to rely on the data they've gathered from their business and their research when estimating for their proposed budget. This can include historical data, old company budgets, industry standards, data on competing businesses, and company financial records. Remind students not to rush their proposed budget. A specific, realistic, and detailed budget will only improve the overall strength of their strategic plans.

## 4 Consider the budget early in the process.

Although developing a proposed budget is one of the final components of the written entry, students should not wait until the end to start their budgets. The budget should be a key consideration from the start and should be a topic of conversation in their first couple meetings with their business. Students should be drafting, tweaking, and refining their budget throughout the entire process.

## 5 Encourage the use of spreadsheet programs and websites.

Students may find spreadsheet programs or websites such as Microsoft Excel or Google Sheets helpful when developing their proposed budgets. Encourage students to use these programs and offer guidance and advice to students on how to use them.

UNIT 6

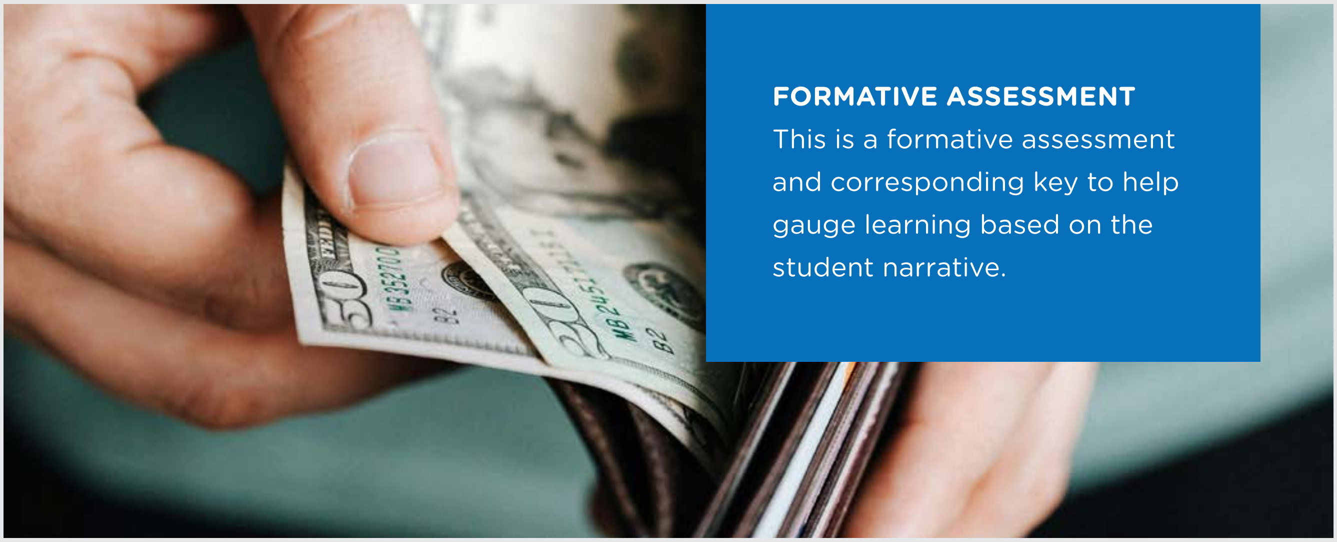
# Discussion Questions

**These discussion questions can be used either to prepare students for their work in this unit or to guide student thinking throughout this unit.**

- Have you ever used a budget in your personal life? If so, what was your experience like?
- What are some common sources of income for businesses? What are some common expenses businesses pay?
- What are the benefits of creating a budget? What are the challenges?
- What costs should you consider when budgeting for your proposed strategic plan?
- What methods would you find most helpful when developing your budget?
- Why is it important for your budget to be realistic and specific?
- What types of programs or websites may be helpful when creating a budget? (Microsoft Excel, Google Sheets, Goodbudget, etc.)
- How can budgets be used to gain client approval of the strategic plan?
- Why should you review your budget?

UNIT 6

# Quick Check



**FORMATIVE ASSESSMENT**

This is a formative assessment and corresponding key to help gauge learning based on the student narrative.

1. **What is a budget?**
   A budget is an estimate of income and expenses for a specific time period.

2. **Income refers to the money going into a business, while expenses refer to money that a business spends.**

3. **Identify three costs you may consider when developing your budget.**
   Answers will vary, but should include three of the following: costs for each activity in your proposed strategic plan, target marketing costs, promotional costs, employee wages, transportation costs, and employee training.

4. **Identify three methods you may use when estimating your budget.**
   Answers will vary, but should include three of the following: review the company's historical data, research industry standards, analyze competition, seek input from the company's key stakeholders, and calculate anticipated Return on Investment (ROI).

5. **List six steps to create a budget.**
   The steps to create a budget are:
   1. Gather financial data
   2. Analyze the data
   3. Estimate future revenue
   4. Determine expenses
   5. Make your budget
   6. Review and update your budget as needed

UNIT 6

# Budget Review

ACTIVITY 1

## This activity can be done in small groups or as a class. Instruct students to review the proposed budget on page 3 of the Sample BOR DECA Written Entry from 2022.


Then, students should discuss the quality of the budget and consider the following questions:

- Is it realistic?
- Is it specific?
- Is the proposed budget clearly aligned with the activities of the strategic plan?
- Consider how the sample uses a table and graph—what are the pros and cons of illustrating budgetary information like this?
- What, if anything, should be changed to make the proposed budget more effective?

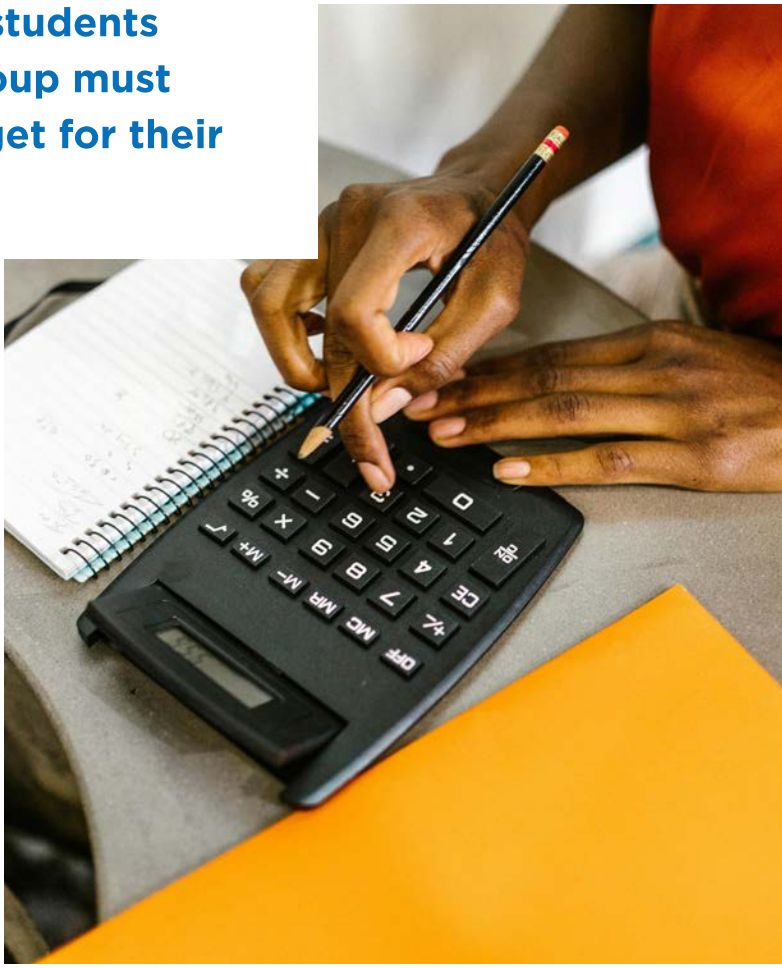
Sample BOR DECA Written Entry

UNIT 6

# Develop a Cost List

ACTIVITY 2

## Working individually, instruct students to make a list of costs their group must consider when creating a budget for their proposed strategic plan.



These may include target marketing costs, employee training, transportation costs, promotional costs, etc. Then, students will convene with their group members and share their lists with each other.

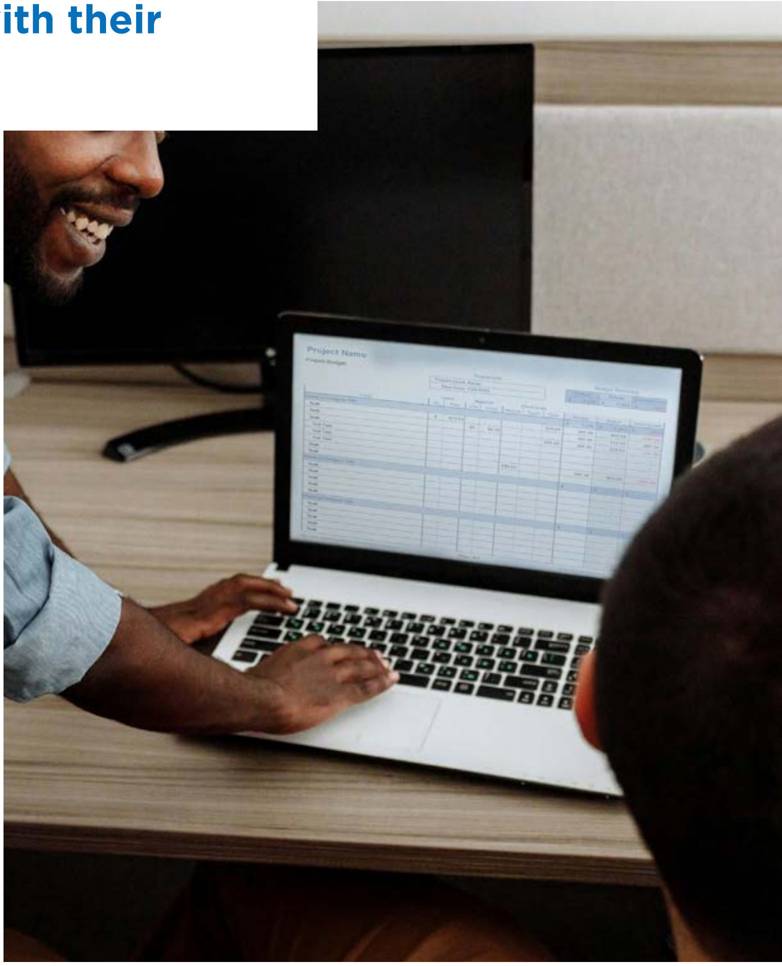
After discussing each group member's list, students will make a group list of costs to include on their budget. If time allows, encourage groups to categorize those costs per activity involved in their strategic plan.

UNIT 6

# Create a Budget

ACTIVITY 3

## Instruct students to convene with their group members.



Tell groups to create a digital template for their proposed budget using Microsoft Excel, Google Sheets, or another program or website.

Groups should first determine the structure of their budget. Then, groups should list and categorize the costs associated with each activity for their strategic plans. Although students won't need to insert the actual numbers yet, each budget should also include a column where they will input the cost and and a column where they will input the anticipated revenue (where applicable) for each activity, as well as the total cost and revenue of the strategic plan. When finished, groups should submit the template to their teacher for feedback.

UNIT 6

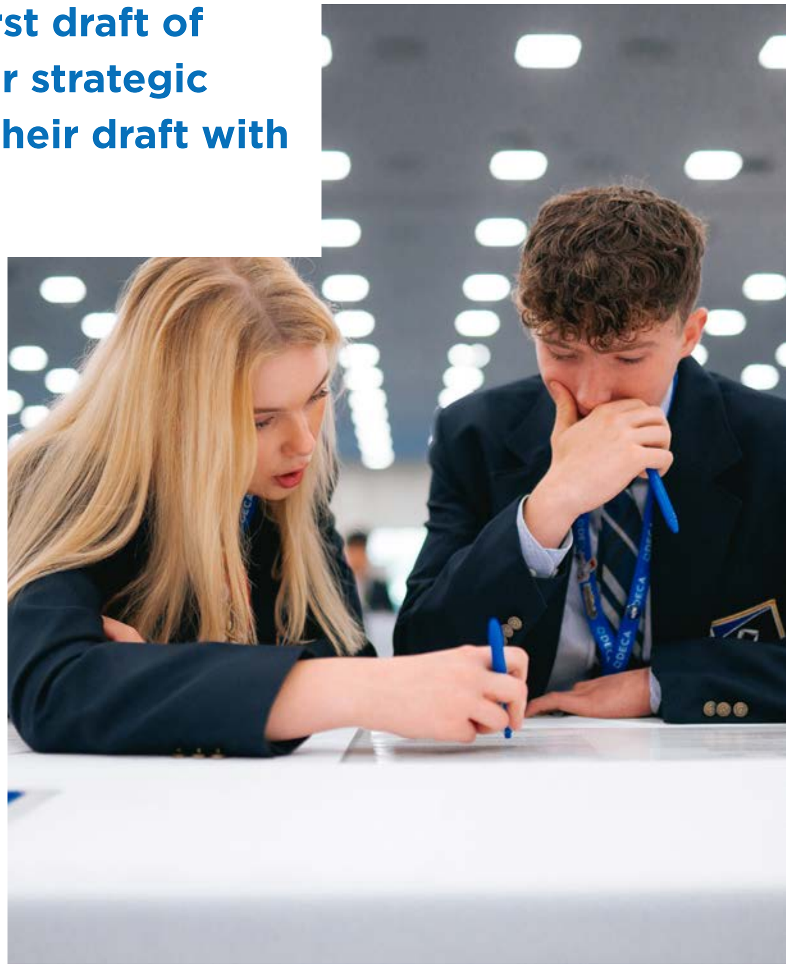
# Budget Review

CAPSTONE ACTIVITY

## After groups have created a first draft of their proposed budget for their strategic plan, tell each group to trade their draft with another group for review.

While reviewing the other group's proposed budget, groups should identify areas of strength and areas of weakness in the budget. Groups may find it helpful to use the rubric on the next page as a guide when reviewing.

After reviewing, instruct groups to share feedback of each other's budgets with each other. When giving feedback about the budget, groups should explain what worked well, what didn't work as well, and what could be done to improve it. Each group should use the feedback they received to revise their proposed budget before submitting it to their teacher for final review.



**Note:** This activity is the culmination of their work in Unit 6 and contributes directly toward the following project component(s): **Written Entry's Proposed Budget (Part VI)**

UNIT 6 | CAPSTONE ACTIVITY

# Rubric

**Project deliverable:** Written Entry's Proposed Budget (Part VI)

| CRITERIA | PROFESSIONAL | EXPERIENCED | DEVELOPING | NOVICE | SCORE |
|---|---|---|---|---|---|
| **Costs associated with proposed strategies**<br>*40 points* | The costs associated with proposed strategies are detailed, realistic, and supported by research. Calculations are correct and easy to follow. | The costs associated with proposed strategies are detailed and supported by research, although at times they seem ambitious. Calculations are correct and fairly easy to follow. | The costs associated with proposed strategies are supported by research, but they are often difficult to understand and require clarification. | The costs associated with proposed strategies are missing. | |
| **Alignment with strategic plan**<br>*30 points* | The proposed budget clearly aligns with the activities in the proposed strategic plan. | The proposed budget aligns with most of the activities in the proposed strategic plan. | The proposed budget somewhat aligns with the activities in the proposed strategic plan but lacks specific details. | The proposed budget does not align with the activities in the proposed strategic plan or is missing. | |
| **Presentation of information**<br>*20 points* | The proposed budget is easy to understand, well-described, and supplemented as needed with visual components. | The proposed budget is fairly easy to understand and supplemented as needed with visual components. | The proposed budget is understandable but lacks necessary description and clarifying visual components. | The proposed budget is difficult to understand and lacks visual components of any nature. | |
| **Grammar and language skills**<br>*10 points* | The proposed budget flows well and is grammatically correct and free of punctuation, spelling, and capitalization errors. | The proposed budget flows fairly well and is free of grammar and spelling errors; punctuation and capitalization errors do not limit understanding. | The proposed budget's spelling and grammatical errors are distracting and impact flow. | The proposed budget contains so many spelling, grammar, punctuation, and capitalization errors that it is hard to understand. | |

| | |
|---|---|
| TOTAL POINTS (100) | |

UNIT 6
# Additional Resources

## NATURE OF BUDGETS

- **LAP-FI-106—Money Tracks (Nature of Budgets)** is a Learning Activity Package (LAP) containing information, activities, and assessments that may be helpful during this unit. It is available in the MBA Research & Curriculum Center online store.
- **LAP-FI-099—Build Your Game Plan (Developing a Company/Department Budget)** is a LAP containing information, activities, and assessments that may be helpful during this unit. It is available in the MBA Research & Curriculum Center online store.

## KEY CONSIDERATIONS WHEN DEVELOPING A BUDGET

- **"A How-To Guide for Creating a Business Budget"** is an article by Amanda Smith that describes what a business budget is, details what makes a good business budget, offers key considerations when creating a budget, and lists several online budget templates.
- **"How to Calculate ROI to Justify a Project"** is a Harvard Business School Online article by Tim Stobierski that describes Return on Investment and details how to calculate it. This article includes a video. Students may find this article helpful if they choose to use ROI when creating their proposed budget.
- **"16 Key Factors to Consider When Budgeting and Forecasting for the Upcoming Year"** is a Forbes article that outlines several important factors that should be considered when creating a business budget, including historical performance, unforeseen circumstances, and past financial and operational data.

## STEPS TO CREATE A BUDGET

- **"6 Steps to a Better Business Budget"** is an Investopedia article and video by Brian Beers that offers tips and factors to consider when creating a budget, including making a spreadsheet and checking industry standards.
- **"How to Create a Business Budget for Your Small Business"** is a NerdWallet article by Meredith Turits and Hillary Crawford that highlights how budgets work, the importance of business budgets, and steps you can follow to create a business budget.
- **Business Budgeting in 4 Easy Steps** is a short video by Practical Business Skills that offers four steps you can follow to create a business budget. Students may find this video helpful before they create their proposed budget.

UNIT 7


UNIT 7

# Preparing a Presentation

## INTRODUCTION

In this unit, students will start their work on the presentation component of the Business Operations Research (BOR) project. With the bulk of their work complete, students will put together a presentation that details the design, findings, and conclusions of their research study as well as their proposed strategic plan and budget. During the event, students will be presenting, as hired consultants while the judge(s) will assume the role of a business owner/manager.

## COMPETITIVE EVENTS CONNECTION

### SUGGESTED TIMELINE

One 90-minute class period and/or two 45-minute class periods.

### PROJECT COMPONENTS

Throughout Unit 7, students will complete the following components of the DECA Business Operation Research Project.

- Opening presentation
- Description of the plan
- Organization, clarity and effectiveness of the presentation

UNIT 7
# Learning Outcomes

Throughout Unit 7, students will learn to:

**Develop the oral presentation.**

- Synthesize the most important information in the project.
- Create an outline for their presentation.
- Ensure the presentation addresses the required components in the rubric.

**Describe their research study and proposed strategic plan when presenting.**

- Grab the audience's attention with a strong opening statement.
- Clearly state the purpose of the presentation.
- Cover all the necessary components of the presentation guidelines.
- Speak clearly at a good pace and volume.
- Use visual aids effectively.

**Use effective nonverbal communication when presenting.**

- Maintain eye contact with audience.
- Demonstrate good body language (e.g., good posture, positive facial expressions, hand gestures)

**Conclude a presentation.**

- Restate the purpose of the presentation.
- Summarize the main points.
- Field questions from the audience.

**Plan ahead for their oral presentation.**

- Ensure their presentation stays within allotted time.
- Practice their presentation several times.

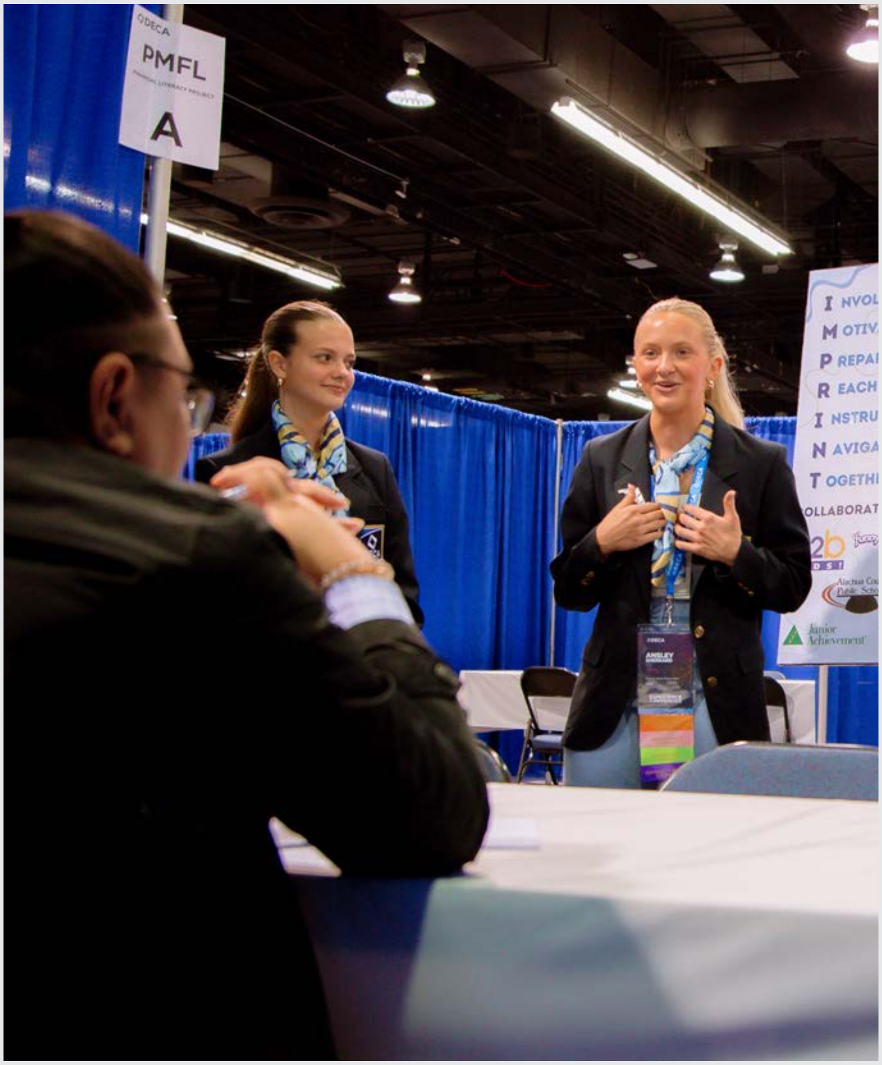
## PERFORMANCE INDICATORS

- Explain the nature of effective verbal communications (PQ) CO:147
- Use data visualization techniques (e.g., infographics, heat-maps, dynamic model outputs) (SP) CO:204
- Prepare and use presentation software to support reports (SP) IM:386
- Make oral presentations (SP) CO:025
- Make client presentations (includes strategies and research findings) (SP) CO:174
- Provide legitimate responses to inquiries (PQ) CO:060

UNIT 7

# Teaching Tips

**The following** is a collection of tips and advice that instrcutors may find useful when implementing this unit of the research project.




## 1 Remind students what to strive for in their presentations.

Remind students that their presentations should include several important elements—a strong opening statement; a detailed, organized, and clear description of their study and plan; and effective use of visual aids and nonverbal communication. In addition, remind students that their presentations should include contributions from each group member.

## 2 Ensure students hit each key point from their written report.

Students may struggle to summarize the content from their written report into a timed presentation. Focusing too much on a small or unimportant detail can cut into their time describing key elements of their project. Conversely, not providing enough information about the key elements can hurt their overall presentation. Encourage students to detail only the key points of their written report while also satisfying the requirements from the presentation instruction sheet or rubric.

## 3 Provide examples.

Consider sharing a simple presentation template to follow. That way, students will know where to start, understand what key points they need to touch on, and determine how to satisfy requirements outlined in the instruction sheet or rubric. This may allow students to focus more on practicing their presentations and working on their look and feel—rather than spending too much time on the structure.

## 4 Encourage practice.

Remind students to practice their presentation multiple times before they present. Allow groups to get together during class to practice going over their presentations. In addition, encourage students to practice outside of school—in front of the mirror, together at a group member's home, in front of friends or family members, etc. It's especially helpful for students to practice their presentation in front of an audience unfamiliar with the project.

## 5 Present to class ahead of time.

Allow groups to give their presentations to the class. Doing so will give groups a practice run of their presentation in front of an audience and may also quell some stress or anxiety that comes with giving a presentation. Students can hear feedback from the instrcutor and their classmates and then adjust their presentations based on this feedback. It will also give groups the opportunity to answer questions from the audience about their presentation.

UNIT 7

# Discussion Questions

**These discussion questions can be used either to prepare students for their work in this unit or to guide student thinking throughout this unit.**

- What can you do to prepare for your presentation?
- What are some benefits of giving an oral presentation? What are some challenges?
- How does nonverbal communication impact your presentation?
- How can you use visual aids to enhance your presentation?
- What are some common mistakes you should avoid when presenting?
- What are some tips to help you field questions after your presentation?

UNIT 7
# Quick Check


**FORMATIVE ASSESSMENT**
This is a formative assessment and corresponding key to help gauge learning based on the student narrative.

1. **What are three ways you can plan ahead for your presentation?**
   Answers will vary but should include three of the following: create an outline for your presentation, make sure the presentation stays within the allotted time, practice your presentation several times, and make note cards or cue cards.

2. **What should you do to effectively describe your research study and strategic plan?**
   After delivering a strong opening statement, clearly state the purpose of the presentation and offer a brief overview before detailing your research study. When describing the study and strategic plan, it is vital to hit all the necessary components of the instruction sheet, describe similar key points of your written report, and highlight the benefits for the business. All points should be ordered in a logical way, and everyone in the group should contribute to the presentation. When presenting, be sure to speak clearly at a good pace and volume, and to use inflection in your voice to emphasize statements.

3. **What are two ways you can use effective nonverbal communication when presenting?**
   Answers will vary but should include two of the following: maintain eye contact with the audience, demonstrate effective body language, have good posture, use positive facial expressions, and use hand gestures.

4. **What should you do after concluding your presentation?**
   After concluding your presentation, invite the audience to ask questions. Be clear and concise with your answers and clarify anything as necessary. Thank the audience after the final question.

UNIT 7

# Presentation Practice

ACTIVITY 1

## Instruct students to find a partner that is not in their project group.

Then, each student should briefly present their group's research study and strategic plan to their partner in 3-5 minutes. This is an informal presentation, where students will have a chance to talk through their materials in a low-stakes situation. When describing their group's research study and plan, students should state the purpose of their study, share the design and findings of their study, and describe their strategic plan. When both students are finished, students should discuss the following questions with their partner:

- Did the presentations accurately describe your group's research study and strategic plan?
- What worked well in your presentations?
- What can be improved? In what way(s)?

UNIT 7

# Develop Visual Aids

ACTIVITY 2

## Instruct each student to make a list of five potential visual aids their group can use for their presentations (charts, graphs, pictures, poster, PowerPoint slides, etc.).

When students are finished with their lists, have them convene with their group members to share and discuss their lists. Based off each group member's list, groups should discuss how certain visual aids can be used and how they can enhance their presentations. By the end of the discussion, students should determine which type(s) of visual aid(s) they will use for their presentation and have a plan on how to create them.

UNIT 7

# Body Language Skills Quiz

ACTIVITY 3

## Instruct students to individually take the “Body Language Skills Quiz.”

This quiz features 10 multiple choice questions, and each question has one correct answer. When students are finished, tell them to turn to a partner and discuss the following questions:

- What did you learn about body language from this quiz?
- How can body language enhance a presentation?
- How can body language negatively impact a presentation?
- What can you do to improve your body language when presenting?


[Body Language Skills Quiz]

UNIT 7
# Presentation Outline

CAPSTONE ACTIVITY

## After groups have completed their written report, instruct them to use that information to create an outline for their presentation.

This outline should include an introduction, the key points about the design and findings of their research study, their proposed strategic plan and budget, the benefits for the business, and a conclusion. Groups can also identify on their outlines which group members will present certain sections. Groups will turn in their outlines to their teachers when finished.

**Note:** This activity is the culmination of their work in Unit 7 and contributes directly toward the following project component(s): **Presentation**


DECA

UNIT 7 | CAPSTONE ACTIVITY

# Rubric

**Project deliverable:** Presentation.

| CRITERIA | PROFESSIONAL | EXPERIENCED | DEVELOPING | NOVICE | SCORE |
|---|---|---|---|---|---|
| **Opening**<br><br>*10 points* | The opening of the presentation gives a clear and organized description of the plan. | The opening of the presentation gives a clear description of the plan, but some details need clarification. | The opening of the presentation is difficult to understand and/or key details are vague. | The opening of the presentation does not include an effective description of the plan. | |
| **Description of research study design**<br><br>*20 points* | The description of methods used for the study and the research design are clear, effective, and comprehensive. | The description of methods used for the study and the research design are clear, but some details need clarification. | The description of methods used for the study and the research design are difficult to understand and/or key details are vague. | Some or all of the description about methods used for the study and the research design are missing. | |
| **Interpretation of research data**<br><br>*20 points* | The presentation effectively interprets research data into information for decision-making. | The presentation interprets research data into information for decision-making, but some details are vague. | The presentation's interpretation of research data is difficult to understand and/or key details are vague. | The presentation does not interpret research data into information for decision-making. | |
| **Description of strategies for change**<br><br>*20 points* | The presentation clearly, logically, and effectively describes strategies and approaches for leading change. | The presentation logically describes strategies and approaches for leading change, but some details are vague. | The presentation's strategies and approaches for leading change are difficult to understand and/or key details are vague. | Some or all of the description of strategies and approaches for leading change are missing. | |
| **Description of budget/budget proposal**<br><br>*20 points* | The description of the budget proposal is clear, comprehensive, and realistic. | The description of the budget proposal is clear, but some details need clarification. | The description of the budget is difficult to understand and/or key details are vague. | Some or all of the description of the budget proposal is missing. | |
| **Professional standards**<br><br>*10 points* | Each presenter contributes, dresses professionally, and demonstrates poise, confidence, and effective presentation techniques. | Each presenter contributes and dresses professionally, but poise, confidence, and effective presentation techniques could improve. | Each presenter contributes, but professional attire, poise, confidence, and effective presentation technique could improve. | Presenters do not meet professional standards when presenting (e.g., appearance, poise, confidence). | |

| | |
|---|---|
| TOTAL POINTS (100) | |

UNIT 7

# Additional Resources

## DELIVERING A PRESENTATION

- **LAP-CO-025 Well Said! (Making Oral Presentations)** is a learning activity package (LAP) containing information, activities, and assessments that may be helpful during this unit. It is available for free in the MBA Research & Curriculum Center online store as part of the Ethical Leadership Course Package.
- **"4 Presentation Tips to Help You Wow Your Judge"** is a DECA Direct article by Jake Jardine that shares four tips to help students wow their judge when presenting in a competition. Tips include smiling, telling a story, having a visual, and staying in character.
- **"11 Tips for Delivering an Effective Presentation"** is an article by Kathy Staples that outlines 11 tips to help you deliver a strong presentation, such as knowing your topic, practicing, making eye contact, moving around, and using hand gestures.
- **"Effective Presentation Skills Tutorial"** is a tutorial from Northern Illinois University that covers six major topics related to developing and delivering effective presentations: preparing for the presentation, organizing the presentation, designing effective presentation materials, rehearsing the presentation, delivering the presentation, and handling questions and answers. The tutorial includes articles and video examples throughout.
- **"How to deliver a presentation in 8 steps (benefits and tips)"** is an Indeed article that details how to deliver a presentation, shares benefits of learning how to give effective presentations, and offers additional tips for giving presentations.
- **"How to Plan a Presentation"** is an article by Christopher Taylor that offers detailed steps and tips to help with planning a presentation. The article is broken up into three parts: assembling your best material, finding a trajectory for the presentation, and practicing your presentation.
- **"Presentation Anxiety and How to Overcome It"** is a DECA Direct article that offers advice for overcoming presentation anxiety. The tips in this article—such as making a good first impression and knowing your materials and content better than anyone—may help students who stress over public speaking.
- **Public Speaking Anxiety Tips** is a 6-minute video by Communication Coach Alex Lyon that offers mindset realizations and practical tips for dealing with presentation stress and anxiety. This video may be helpful for students who don't like public speaking.
- **The 3 Magic Ingredients of Amazing Presentations | Phil WAKNELL | TEDxSaclay** is a 14-minute TED Talk from Phil Waknell that outlines three ingredients for successful presentations and shares simple but powerful techniques to formulate your objectives and ideas into a compelling narrative.

## BODY LANGUAGE AND OTHER TIPS

- **4 essential body language tips from a world champion public speaker** is a short video from Insider Business where 2014 Toastmasters International world champion of public speaking Dananjaya Hettiarachchi reveals his four best tips for public speaking.
- "**10 Body Language Tips for Presentations**" is an article by Josef Essberger that lists 10 tips on how to effectively use body language when giving a presentation. Examples of tips include dressing appropriately, smiling, and making eye contact.
- **Body Language for Presentations** is a 5-minute video where Communication Coach Alex Lyon shares three ways you can improve your nonverbal body language when presenting. These tips cover eye contact and smiling, posture and gestures, and pausing and nodding after key ideas.
- "**How do you use posture and movement to convey confidence and professionalism in a presentation?**" is a short LinkedIn article that highlights the importance of nonverbal communication when giving a presentation.
- **How To Answer Difficult Questions From The Audience** is a 3-minute video from Expert Academy that offers advice and tactics to help deal with difficult questions smoothly and effectively.
- "**Visual Aids In Presentations: The Complete Guide**" is an article by Danish Dhamani that defines visual aids, explains their importance in presentations, lists different types of visual aids, and details how to use them. This article also features several videos and examples throughout.

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