



# BUSINESS OPERATIONS RESEARCH PROJECT

STUDENT WORKBOOK



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## 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



## 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.

## UNIT 1



## Learning Outcomes

### 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.

## UNIT 1

# Working with a Business

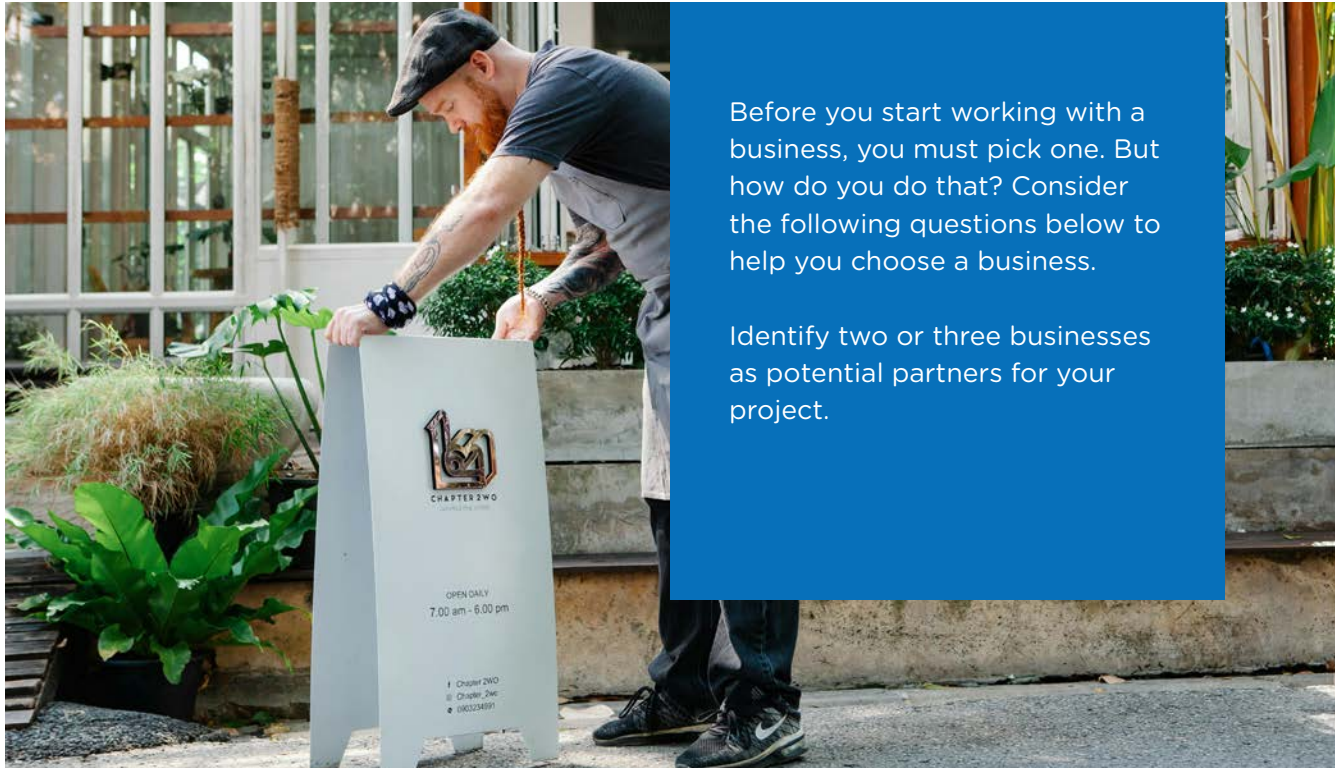
**Working with a business for a research project can be a very rewarding experience.**

It will provide you an opportunity to gain insights into real-world business practices and contribute to the success of a business.

Let's look at some tips to help you begin your work with a business!

## STEP 1

# Identify a Business



Before you start working with a business, you must pick one. But how do you do that? Consider the following questions below to help you choose a business.

Identify two or three businesses as potential partners for your project.

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?

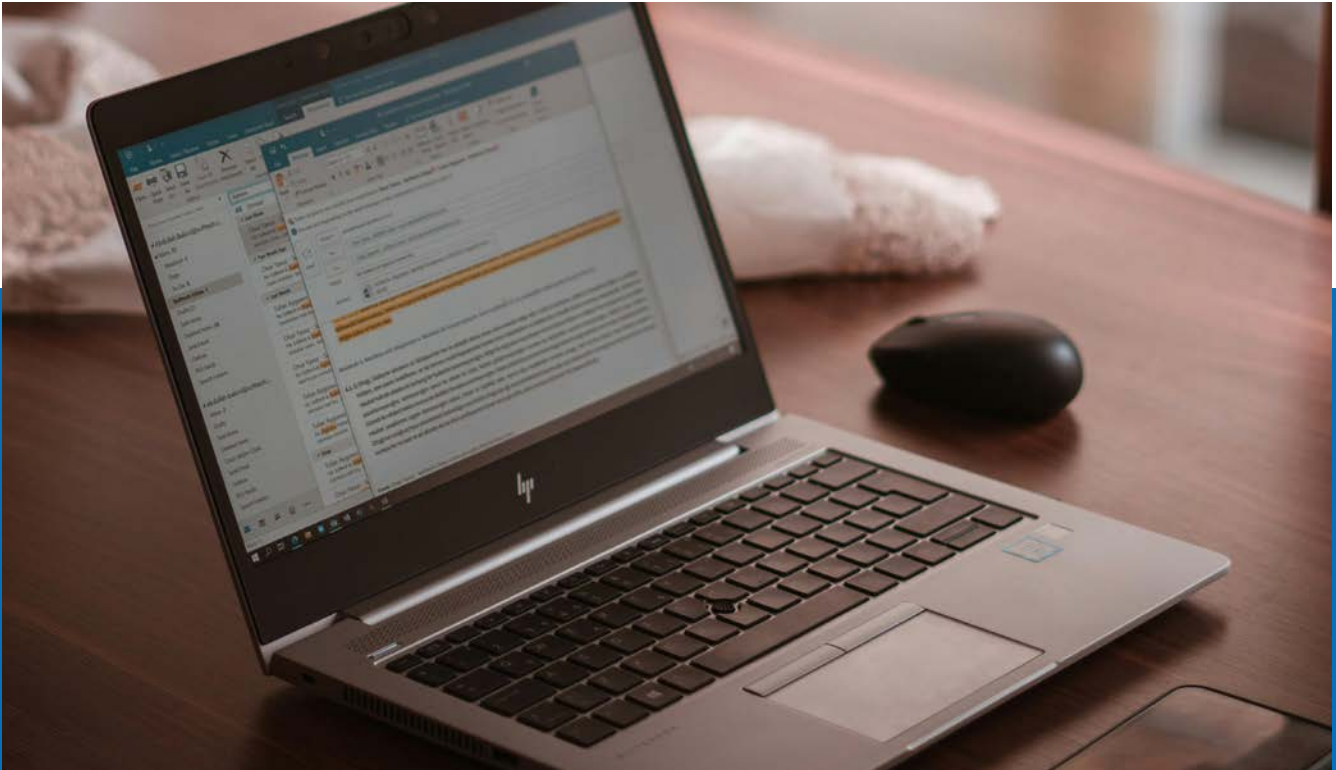
Where do you like to shop, go out to eat, or spend time with friends?

Have your teachers ever invited businesspeople to speak with your class?

What businesses are close to where you live?

## STEP 2

# Make Contact



Now it's time to get in touch with your chosen businesses. With the help of your teacher, email a contact at your selected businesses asking if they will partner with you for the project.

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.

If a business responds affirmatively to your request, congrats! You have a partner to work with. If you receive multiple affirmative responses, you will need to decide which business is the best fit. If your contacted businesses are unable to work with you at this time, return to your earlier brainstorming and make contact with new businesses.

## STEP 3

# Gather Preliminary Information



Take time to research your partner business to gain a clear understanding of how it operates—visit its website, read its **mission statement**, and see 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. Collecting this preliminary information will help ensure that your research is relevant, and the results are actionable.

During the course of your early communications with your chosen business, don't forget to establish a schedule for future collaboration with the business as well. Remember, your contacts within your chosen business are taking time out of their day to partner with you. Be respectful of their time by being flexible and organized when arranging future interactions.



UNIT 1

# Quick Check



What are three questions you can consider when considering a business to work with?

What should you communicate to your selected business when reaching out?

How can you gather preliminary information about your business?

UNIT 1 | ACTIVITY 1

# Business Idea Quiz



1. Take this business idea quiz from Rising Innovator at [www.risinginnovator.com/quiz](http://www.risinginnovator.com/quiz).
2. Once you've completed the quiz, record your three potential business idea results below.
3. Find a partner to discuss and answer the below questions.

**BUSINESS IDEA 1:**

**BUSINESS IDEA 2:**

**BUSINESS IDEA 3:**



Did your results line up with your interests or passions?

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Do you know of any local businesses related to your results?

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What are the target markets for the fields related to your results?

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## UNIT 1 | ACTIVITY 2

# Business Brainstorm



Create a list of three or four local businesses you'd potentially be interested in working with for your project. Then, share your list with a partner and discuss why you selected those businesses. Are there any similarities between the two lists?

**BUSINESS****WHY YOU CHOSE****BUSINESS****WHY YOU CHOSE****BUSINESS****WHY YOU CHOSE****BUSINESS****WHY YOU CHOSE**





## UNIT 1 | CAPSTONE ACTIVITY

# Rubric



**Project deliverable:** Parts A, B, and C of the Written Entry's Introduction (Part II).

CRITERIA	PROFESSIONAL	EXPERIENCED	DEVELOPING	NOVICE	SCORE
<b>Description of the business or organization</b>  <i>30 points</i>	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.	
<b>Description of the target market</b>  <i>30 points</i>	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.	
<b>Overview of relevant business processes</b>  <i>30 points</i>	The introduction provides valuable contextual information related to relevant business processes (e.g., recruitment procedures, data collection practices).	The introduction provides some information related to relevant business processes (e.g., recruitment procedures, data collection practices) but details need clarification.	The introduction provides vague or unclear information about relevant business processes (e.g., recruitment procedures, data collection practices).	Contextual information about relevant business processes (e.g., recruitment procedures, data collection practices) is missing.	
<b>Communication Skills</b>  <i>10 points</i>	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 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.

## UNIT 2

# Designing a Research Study

**To keep up with changing trends and evolving customer demand, businesses need lots of information.** That's why research studies can be valuable sources of insight. A research study is a collection and analysis of data about a specific issue or situation. Research studies are used to solve specific problems as well as to identify problems that may or may not be readily apparent.

Business professionals use research studies to make decisions about what products to offer, what prices to charge, which channels of distribution to use, where to offer products, and what forms of promotion work best. Research studies also help businesses gauge the effectiveness of elements of an existing business plan or project.

Before diving into a research study, you have to first lay the groundwork for success! Designing an organized and effective research study is step number one—and priority number one—of the research process. So how is it done? The design and planning process should follow these basic steps.

## STEP 1

# Determine Research Objectives



The first step in designing a research study should be to set specific objectives, or goals, for the study. Research objectives typically fall into one (or more) of the following categories based on the reason for the research:

**Explore.** Exploratory research can be conducted before a business even knows what they are looking for. Rather than answer a question or solve an issue, exploratory research seeks to uncover a question or issue that had been previously unknown. If this is an objective of your research study, you will likely be collecting more qualitative data rather than empirical data. This might be as simple as surveying customers to learn their opinions or feelings toward a new or existing product.

**Test.** Research studies often test the impact one item or entity has on another—otherwise known as cause-and-effect relationships. Research studies can evaluate existing relationships or experiment with new relationships.

**Define.** Research studies can also be used to gather specific data related to an identified research problem. Examples of such data include the specific characteristics of a target market, economic data directly affecting the business, or information about competitors.

**Predict.** Businesses can also use predictive research to help them forecast future business developments, such as estimating future sales, predicting the growth or decline of a market, or projecting consumer tastes.



## STEP 2

# Locate Sources for Research



Every research study needs a variety of sources and data to provide businesses with accurate and comprehensive information. Data should be collected from both primary and secondary sources.

**Primary sources** are original, first-hand sources of information. When conducting a research study, this is the preferred type of source because it is usually more up-to-date and relevant than secondary sources. An example of a primary source for a research study might be an interview with the CFO of the target business or a survey of current customers.

**A secondary source** is a source that collects, analyzes, or discusses data that was originally presented elsewhere. While primary sources may be preferred, secondary sources can still be incredibly useful for a research study. They can offer outside perspectives on a company or its products, provide helpful syntheses or interpretations of data, and bolster a study with supplemental research, such as information about competitors or explanations of concepts essential to the research study.

STEP 3

# Plan Research Methods



You have your objectives. You have your sources. The next step is to prepare and organize the methodologies you plan to use for the research study. Every research study should have a different plan and be catered to the sources you have identified.

If part of the study involves interviewing industry professionals or surveying customers, you need to prepare pertinent questions and consider logistical factors.

When and where will interviews be conducted?

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How will customers be selected for surveying?

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If the study involves secondary research (such as investigating competitors or defining key terms), how will your findings be incorporated into the research study?

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Once you've completed these three steps, you are ready to conduct your research study. However, as you are implementing your study, don't forget to return to your original design for reference and the occasional fine-tuning. A research plan doesn't have to be set in stone! Your plan should always inform your work, but sometimes your work can inform your plan as well.

## UNIT 2

# Quick Check



What is a research study?

What are the three steps of designing a research study?

What is the purpose of exploratory research?

Explain the difference between primary and secondary sources.

UNIT 2 | ACTIVITY 1

# Research Objectives



Come up with four possible research objectives for your chosen business. This should entail one objective and rationale for each objective category:

**EXPLORE:**

**DEFINE:**

**TEST:**

**PREDICT:**

Next, compare your objectives with those developed by your group members. Use your individual lists to develop a group list, refining as needed.

**EXPLORE:**

**DEFINE:**

**TEST:**

**PREDICT:**

## UNIT 2 | ACTIVITY 2

# Check Your Sources

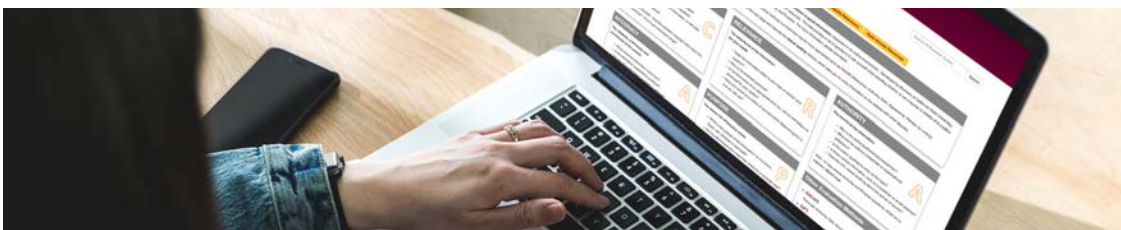


Finding reliable and relevant sources is a crucial component of designing a research study. A popular way to evaluate the reliability of a resource is the CRAAP Test.

**Step 1:** Form groups and research the CRAAP Test.

**Step 2:** After conducting research, create an infographic explaining the components of the test.

**Infographic:**



[CRAAP Test](#)

UNIT 2 | ACTIVITY 3

# Good vs. Bad Survey Questions

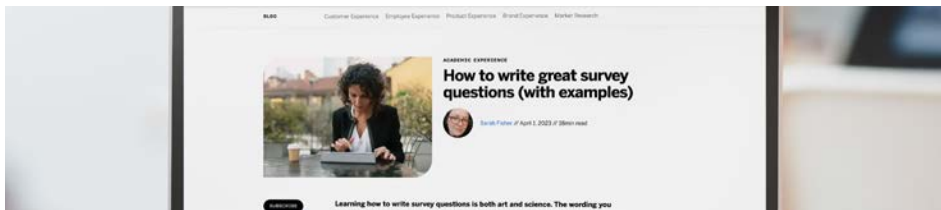


**Step 1:** Read Great Survey Questions: How to Write Them & Avoid Common Mistakes.

**Step 2:** 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](#).

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**Step 3:** Find a partner and try to guess which of their questions were meant to be good, and which were meant to be bad. When finished, share your guesses with your partner and review how many you correctly evaluated.



[Great Survey Questions](#)

UNIT 2 | CAPSTONE ACTIVITY

# Defend Your Research Method



**Step 1:** Identify your research objectives and methods.

**Step 2:** Create a deliverable defending your chosen research methods, tying each method and source back to your 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 your research methods for the study.

How will your research work toward achieving research objectives?

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Furthermore, how will your research benefit your chosen business?

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**Step 3:** After completing the activity, review your work with an instructor before converting this 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
<b>Research study objectives</b>  <i>30 points</i>	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.	
<b>Identification of sources</b>  <i>30 points</i>	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.	
<b>Proposed research methods</b>  <i>30 points</i>	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.	
<b>Grammar and language skills</b>  <i>10 points</i>	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 3



## Learning Outcomes

### 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.

## UNIT 3

# Conducting a Research Study

There are several methods you can use when conducting a research study. Data-collection methods are divided into two categories: qualitative and quantitative. Qualitative data is information that is descriptive and nonstatistical in nature. Quantitative data is the opposite—they are comprised of numbers and statistics. Both types of data can be useful to a research study.

## UNIT 3

# Qualitative Methods



**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. Personal interviews are immensely helpful to researchers because they can cover a lot of ground. Researchers are able to discuss issues with respondents in depth, ask follow-up questions, dig for greater detail, observe nonverbal cues, etc. Personal interviews also tend to bring forth very accurate and reliable data.

**Focus groups.** Conducting focus groups is a popular way for businesses to collect useful qualitative data. 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. Having a number of respondents present, rather than just one, tends to stimulate more in-depth discussion and to generate additional thoughts and ideas. Focus groups are also beneficial to researchers because they are flexible in nature and can be conducted fairly quickly.

**Observations.** The observation method of obtaining qualitative data requires researchers to watch people perform certain activities, usually in a natural setting. They may observe as people shop, watch TV, or go about their daily activities. Observation can be advantageous to researchers because it reduces their own potential bias.

## UNIT 3

# Quantitative Methods



**Survey.** Surveys are excellent tools for collecting quantitative data because they are simple, reliable, and easy to analyze. 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. Surveys can be administered in person, over the phone, or online.

**Tracking.** There are several ways that researchers can track and collect quantitative data about customer behavior for marketing research. A great deal of tracking takes place online—businesses can count website hits, monitor online orders, use cookies to follow web users' activities, etc. Other types of tracking take place in stores—the point-of-purchase scanners

used at cash registers to total up customers' purchases are a great example of in-store tracking. Other examples include customer loyalty cards and retailers' smartphone apps.

**Experiments.** Experiments aren't just performed by scientists in white lab coats. In fact, you are experimenting any time you manipulate (control or change) one variable to see how it affects another. Experiments that market researchers may undertake include test-marketing products. Test-marketing a product means offering it to a sample of the target market to see how potential customers respond to it and how well it sells.

UNIT 3

# Quick Check



Explain the difference between qualitative and quantitative data.

Describe two qualitative research methods.

Describe two quantitative research methods.



UNIT 3 | ACTIVITY 2

# Conduct a Research Study

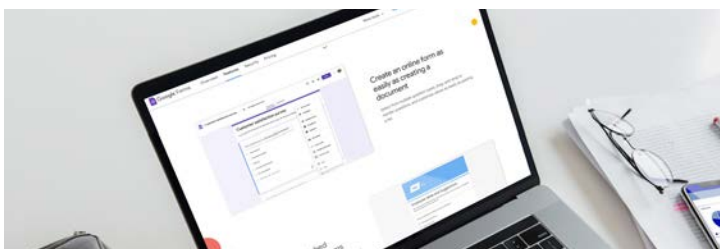


**Step 1:** Practice conducting a survey using an online survey tool, such as Google Forms or SurveyMonkey. You should create five to ten survey questions regarding a topic of your choice. Questions should be specific, unbiased, and yield quantifiable data. Make sure you get your survey topic—as well as your survey questions—approved by your instructor before finalizing.

**Potential Questions:**

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**Step 2:** After completing your surveys, post them in a communal space such as a Google Doc or your school’s learning management platform. Fill out the surveys created by other groups, allowing the class to act as the “target market” for your group.



[google.com/forms](https://google.com/forms)



[surveymonkey.com](https://surveymonkey.com)

## UNIT 3 | ACTIVITY 3

# Find a Credible Source



**Step 1:** After identifying the objective(s) of your secondary research, find one credible source that contributes to your research study.

**Source:**

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**Step 2:** “Swap” sources so that each group member has a different source than the one they found.

**New Source:**

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**Step 3:** Each group member should then review their new source, evaluating its credibility and checking for any potential bias. Your reviews should be one to two paragraphs.

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**Step 4:** Once each group member has reviewed their new source, “swap” sources again, making sure that each of you, again, has a source you have not yet seen.

**New Source:**

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**Step 5:** Review the source in terms of its value to your 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.

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

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## UNIT 3 | CAPSTONE ACTIVITY

# Research Study Summary



After conducting your research study, prepare a one- to two-page report detailing your research methods and processes. This report should include all primary and secondary research conducted, and provide an explanation of how you implemented each research method. These explanations will vary based on the methods chosen, but some examples of basic requirements are listed below:

- **For interviews:** 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:** How many questions are on the survey? What did those questions cover? 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 completing the report, review your work with an instructor and receive feedback before converting this deliverable to the written entry of the BOR project.

## 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
<b>Primary Research Methods</b>  <i>45 points</i>	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.	
<b>Secondary Research Methods</b>  <i>45 points</i>	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.	
<b>Communication Skills</b>  <i>10 points</i>	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 4



# Learning Outcomes

## 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.

## UNIT 4

# Analyzing Results of a Research Study

**After being collected, data must be analyzed to be useful.** After all, data by themselves are just a collection of facts and figures! To truly be helpful, data must be evaluated. Data that are interpreted and transformed into a useful form become information. Without this important step, businesspeople and researchers might suffer from data overload and not know which data are meaningful. For any research study, it's important to analyze your findings and turn them into conclusions.

## UNIT 4

# Analyzing Findings



**Findings** are objective facts, figures, and statements based on research. When you conduct research—whether it’s using primary sources like interviews and surveys or secondary sources like literature reviews—you will end up with findings, or the results of this research. For example: “In a recent survey, 45% of respondents reported they were satisfied with their training experience.”

To analyze findings, you must first sift through all of the data. Many times, in trying to answer a research question or solve a problem, we end

up with a ton of findings! In that case, we need to review and organize the data, making note of patterns and what might ultimately be the most useful for our original research objective(s).

Many people use technology to help them with this process. Data analysis software and statistical programs are especially useful when determining what raw data really mean. These computer programs accept survey data, tally them, and report on how people answered each question much more quickly than humans could.

## UNIT 4

# Drawing Conclusions



**Conclusions** are interpretations of findings. Essentially, they explain what a finding means. For example: “Based on the low level of satisfaction reported by recent trainees, it can be concluded that our current training program is ineffective and in need of improvement(s).” The low level of satisfaction reported by recent trainees was the finding; the conclusion is that the current training program needs to change.

Think of drawing conclusions as a form of storytelling. You explain the meaning behind the findings and create a narrative for how to interpret them. Your interpretations should be logical and unbiased.

Many research projects use a SWOT analysis to organize their findings and conclusions. A **SWOT analysis** is a marketing tool that investigates the following:

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

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

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

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

A SWOT analysis can be a helpful framework for organizing all of the data collected during a research study. It can also provide a natural and eye-catching way to visually present conclusions. There are many different ways to present findings and conclusions: text, charts, infographics, icons, etc. The best presentation strategy will depend on the project, but it’s likely to include multiple elements, such as a text-based description accompanying a visual tool that illustrates key points.



## UNIT 4

# Quick Check



One of the first steps in analyzing research findings is to \_\_\_\_\_  
\_\_\_\_\_.

When drawing conclusions, your interpretations should be \_\_\_\_\_  
and \_\_\_\_\_.

What are the four business factors a SWOT analysis investigates?

Name two ways to present findings and conclusions from a research study.

UNIT 4 | ACTIVITY 1

# 20 Questions



In small groups or pairs, play the game 20 Questions. (Your instructor will go over the rules.) As you play, make sure you phrase your guesses 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.”* Play until everyone in your group has had a chance to be the Question Master.

**Potential Questions:**

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UNIT 4 | ACTIVITY 2

# Infographics



Develop infographics to support your work by using Adobe Express. Once on the site, peruse the templates available and make note of what might work well for your purposes:

What template best summarizes your findings?

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What best illustrates your conclusions?

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How can you show the connection between the two?

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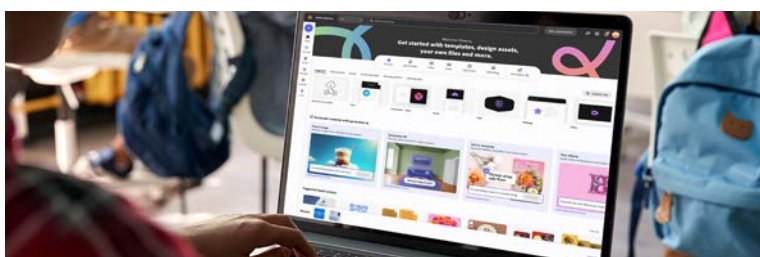
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[Adobe Express](#)

Make sure you consider visual elements like color, font, and overall layout.

UNIT 4 | ACTIVITY 3

# BOR Review



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 with your small group or as a whole class.

Are the conclusions logical?

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Are they clearly tied to research findings?

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Do they ultimately connect back to the original research problem?

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What, if anything, should be changed to make this section even more effective?

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[Sample  
BOR DECA  
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
<b>Findings of the research study</b>  <i>40 points</i>	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.	
<b>Conclusions based on findings</b>  <i>40 points</i>	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.	
<b>Presentation of information</b>  <i>10 points</i>	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.	
<b>Communication Skills</b>  <i>10 points</i>	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 5



## Learning Outcomes

### 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.

## UNIT 5

## Preparing a Strategic Plan

A strategic plan is just what it sounds like: a plan based on strategy to help businesses achieve success. It says, “Here’s what we want to accomplish—and here’s how we’re going to do it.”

Preparing a strategic plan can be one of the most exciting parts of any project or endeavor. This is when you turn all of your research and hard work into actionable steps! The strategic plan is an opportunity to showcase your creativity, analysis, and problem-solving skills.

The strategic planning process and the strategic plan itself will vary from organization to organization. However, there are three key elements to any strategic plan: objectives, activities, and metrics.

## UNIT 5

# Preparing a Strategic Plan



## Step 1: Objectives

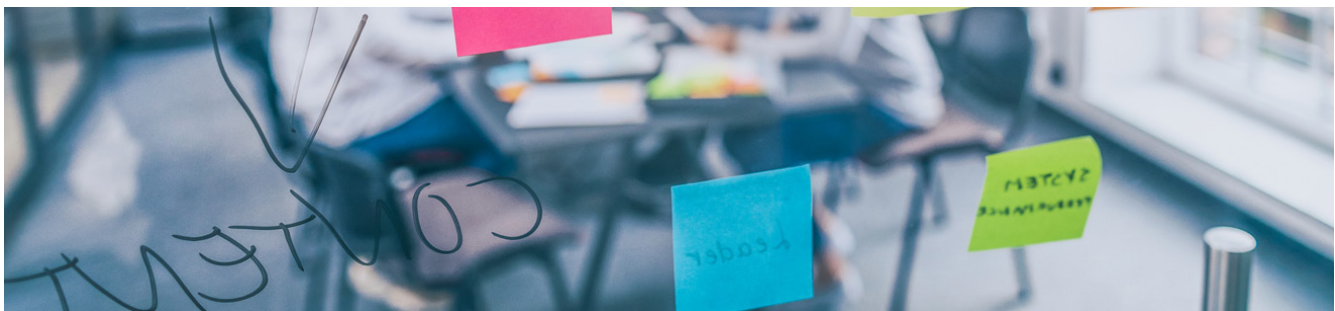
**Objectives** are the specific goals of your strategic plan. Think of them like a compass, guiding your plan toward its destination. When developing objectives, you need to consider the business's current position based on the research and analyses you've conducted so far—as well as what you can actually control. The number of objectives per project can vary, although three to five is typical.

It's also important to include rationales behind each objective. Rationales help explain how identified objectives support the overall goal of the research study. If you're having a hard time connecting an objective to the focus of the project, then you might need to revise.

## Step 2: Activities

If objectives are the “Here's what we want to accomplish” portion of the strategic plan, then **activities** are the “Here's how we're going to do it” part. Activities are the actionable steps that lead to accomplishing objectives. Think of them like the road map of your strategic plan, helping you get to your destination.

When describing activities, it's also important to include timelines. Some activities might occur at the same time, while others may need to be staggered. Including timeline information with your activities not only gives you a step-by-step plan—it also shows your audience that your plan is feasible and logically scheduled.



## Step 3: Metrics

**Metrics** are the numbers that help you measure progress. They're the mile markers of your strategic plan, making sure you're staying on track and hitting the threshold of success. Metrics are the difference between “We want to increase X” and “We want to increase X by Y%.” See how one of those is much easier to measure than the other? That's the power—and importance—of metrics.

UNIT 5

# Quick Check



What are three key elements to a strategic plan?

Objectives are the \_\_\_\_\_ of your strategic plan.

Activities are the actionable steps that lead to \_\_\_\_\_.

Metrics are the numbers that help you \_\_\_\_\_.

UNIT 5 | ACTIVITY 1

# Strategic Plans



**Step 1:** In your small group or as a whole class, review sample strategic plans.

**Step 2:** Make a T-Chart.

List characteristics of **effective** strategic plans:

- What works well?
- What do you want to emulate in your own project?

List characteristics of **ineffective** strategic plans:

- What doesn't work as well?
- What do you want to avoid including?

Use this discussion to inform the development of your own project.



Sample  
Strategic Plans

UNIT 5 | ACTIVITY 2

# Strategic Plan Objectives



**Step 1:** On your own, come up with two or three objectives for your group's strategic plan, including rationales.

Objective 1:

Objective 2:

Objective 3:

What objectives would best serve the organization and its goals?

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How so?

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**Step 2:** Share your list with your group members. Together, use the individual lists to develop a group list, refining as needed.

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UNIT 5 | ACTIVITY 3

# Develop a Timeline



**Step 1:** Write your proposed activities on the provided sticky notes, one per note.

**Step 2:** Work with your group members to assemble your notes into a timeline chart that chronologically outlines your strategic plan.

While doing so, consider whether activities will happen sequentially or concurrently (or both). Make sure each of your notes supports or contributes in some way to your BOR project.

If Post-it notes or sticky notes are unavailable, construct your timelines digitally on sites like Mural or Gantt.



[mural.co](https://mural.co)



[gantt.com](https://gantt.com)



## UNIT 5 | CAPSTONE ACTIVITY

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



After you have written a first draft of your strategic plan, trade your draft with another group (or two) for review. While reviewing the traded strategic plan(s), look for areas of strength and areas of improvement using a rubric provided by your instructor.

Specifically, review each strategic plan's objectives and supporting details (activities, timeline, 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 your review, sit down with the other group and share your feedback. Based on the feedback you receive about your own project, make revisions to your strategic plan before submitting it to your instructor.

## UNIT 5 | CAPSTONE ACTIVITY

# Rubric



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

CRITERIA	PROFESSIONAL	EXPERIENCED	DEVELOPING	NOVICE	SCORE
<b>Objectives and rationale of proposed strategic plan</b>  <i>30 points</i>	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.	
<b>Proposed activities and timelines</b>  <i>30 points</i>	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.	
<b>Proposed metrics or key performance indicators (KPIs)</b>  <i>30 points</i>	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.	
<b>Communication Skills</b>  <i>10 points</i>	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 6



## Learning Outcomes

### 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.

## UNIT 6

# Preparing a Budget Proposal

A **budget** is an estimate of income and expenses for a specific time period. **Income** refers to the money going into a business, while **expenses** refer to money that a business spends. Businesses use budgets to help track spending, make informed financial decisions, and achieve financial goals.

No strategic plan is complete without a well-planned, realistic, clear, and flexible budget that outlines how the plan (and its activities) will be executed.

## STEP 1

# Key Considerations When Creating a Budget



The look and structure of your budget will depend on your strategic plan, the type and size of the business you're working with, and the activities needed to execute the strategic plan.

When developing your budget, it is important to allocate a cost to each activity in your proposed strategic plan and consider the costs associated with the implementation of your plan—including target marketing costs, promotional costs, employee wages, transportation costs, and employee training, to name a few. While making your projections, be sure to ask the business to share information about its average monthly and yearly income, as well as regular expenses it pays.

It is also important to consider the company's historical data when estimating your budget. Analyzing previous expenses, looking for trends and patterns, and reviewing past budgets can inform your estimates and help you make more accurate projections. In addition, researching industry standards, analyzing competition, and seeking input from the company's key **stakeholders** are other methods that can offer key insights into budgetary considerations.

When estimating your budget, you may find it helpful to use the metric **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. **Anticipated ROI** is calculated before the start of a strategic plan and is used to determine if the plan makes sense to pursue. It uses estimated costs, revenues, and benefits to help justify and allocate a budget.

You will find it beneficial to use a combination of these methods and metrics (and others) when determining a realistic and specific budget for your plan. No matter how you choose to estimate your budget, you should be able to clearly justify the size of the budget you propose. The budget should be as specific as possible about where the money is going while also offering flexibility for the business to make adjustments, if needed. Lastly, you may find it helpful to supplement your budget with visual components (such as graphs, charts, or tables) to help break down the financial information.

## STEP 2

# Steps to Create a Budget



Now that you know the costs to consider and methods you can use to determine a budget, it's time to create one! Here are some quick steps you can follow when drafting your budget:

- 1. Gather financial data**—This includes the business's recent income statements, balance sheets, cash flow statements, past budgets, and other historical financial data.
- 2. Analyze the data**—This will help with identifying trends and patterns with the business's income and expenses.
- 3. Estimate future revenue**—This is typically the most challenging part of creating a budget. Be sure to be as realistic and specific as possible, and consider factors such as the business's sales history, industry trends, market research costs, and marketing plans.
- 4. Determine expenses**—List and categorize all of the expenses involved with implementing and executing your plan.
- 5. Make your budget**—Formulate your budget into a spreadsheet and subtract your expenses from your anticipated revenue. If you have a negative net income, you'll need to make adjustments to your budget. If you have a positive net income, you can reinvest the money into the plan.
- 6. Review and update your budget as needed**—It's important to review your budget one final time before submitting your written report. This will ensure that everything is accurate and aligns with your strategic plan.



UNIT 6

# Quick Check



What is a budget?

\_\_\_\_\_ refer(s) to the money going into a business, while \_\_\_\_\_ refer(s) to money that a business spends.

Identify three costs you may consider when developing your budget.

Identify three methods you may use when estimating your budget.

List six steps to create a budget.

UNIT 6 | ACTIVITY 1

# Budget Review



In small groups or as a class, review the proposed budget on page 3 of the Sample BOR DECA Written Entry from 2022. Discuss the quality of the budget together.

Is it realistic?

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Is it specific?

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Is the proposed budget clearly aligned with the activities of the strategic plan?

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Consider how the sample uses a table and graph—what are the pros and cons of illustrating budgetary information like this?

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What, if anything, should be changed to make the proposed budget more effective?

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[Sample BOR DECA Written Entry](#)

## UNIT 6 | ACTIVITY 2

# Develop A Cost List



**Step 1:** Working individually, make a list of costs your group must consider when creating a budget for your proposed strategic plan (e.g., target marketing costs, employee training, transportation costs, promotional costs).

Activity	Amount

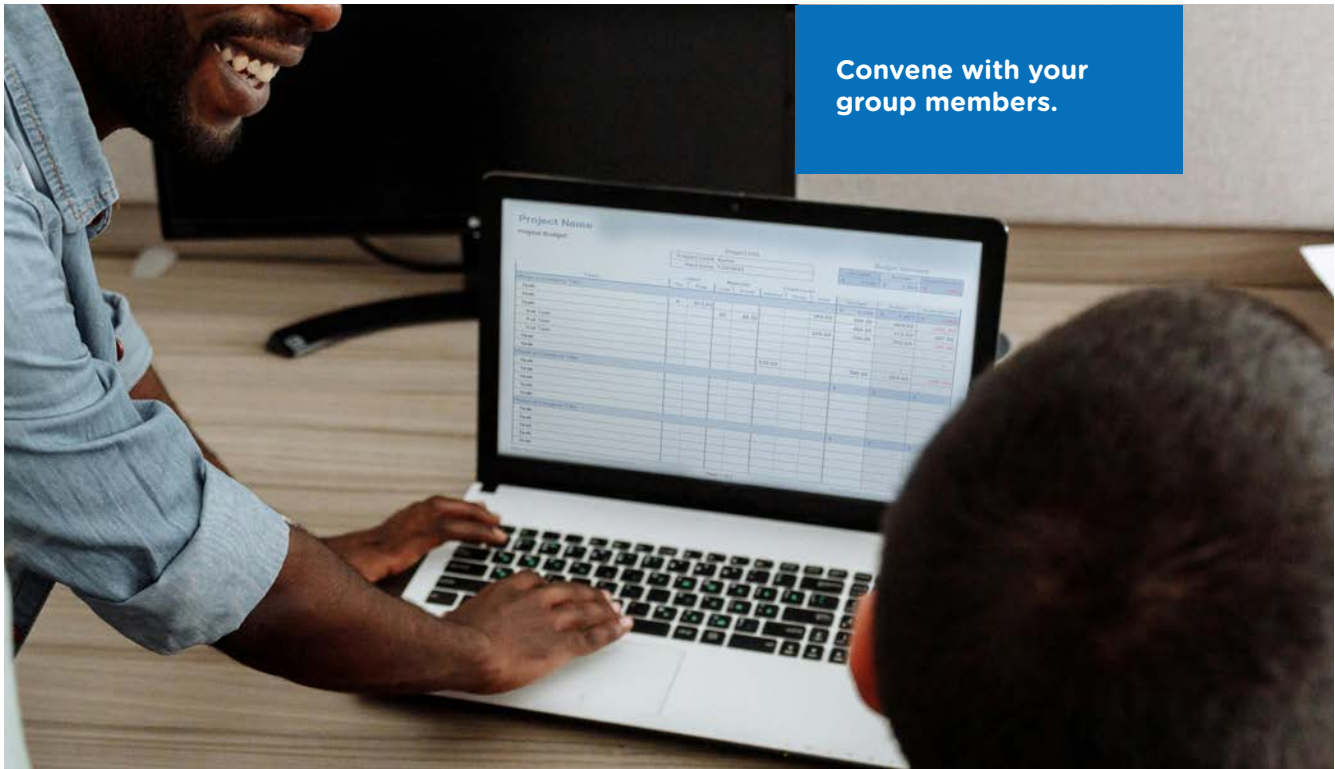
**Step 2:** Convene with your group members and share your list with them.

**Step 3:** After discussing each group member's list, make a group list of costs to include on your budget. If time allows, categorize the costs per activity involved in your strategic plan.

Activity	Category	Amount

## UNIT 6 | ACTIVITY 3

# Create a Budget



**Step 1:** Create a digital template for your proposed budget using Microsoft Excel, Google Sheets, or another program or website.

**Step 2:** Determine the structure of your budget.

**Step 3:** List and categorize the costs associated with each activity for your strategic plan. Although you don't need to insert the actual numbers yet, your budget should include a column where you will input the cost for each activity as well as the total cost of your strategic plan.

When finished, submit the template to your instructor for feedback.

UNIT 6 | CAPSTONE ACTIVITY

# Budget Review



**Step 1:** After creating a first draft of a proposed budget for your strategic plan, trade your draft with another group for review.

**Step 2:** While reviewing the other group’s proposed budget, identify areas of strength and areas of weakness in the budget. You may find it helpful to use the rubric on the next page as a guide when reviewing.

**Strengths:**

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**Weaknesses:**

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**Step 3:** Share your feedback of the budget with the other group. When giving feedback about the budget, be sure to explain what worked well, what didn’t work as well, and what could be done to improve it. Your group should use the feedback you receive to revise your proposed budget before submitting it to your instructor for final review.



## UNIT 6 | CAPSTONE ACTIVITY

# Rubric



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

CRITERIA	PROFESSIONAL	EXPERIENCED	DEVELOPING	NOVICE	SCORE
<b>Costs associated with proposed strategies</b>  <i>40 points</i>	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.	
<b>Alignment with strategic plan</b>  <i>30 points</i>	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.	
<b>Presentation of information</b>  <i>20 points</i>	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.	
<b>Grammar and language skills</b>  <i>10 points</i>	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 7



# Learning Outcomes

## 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.

## UNIT 7

# Preparing a Presentation

Now that you've done all the work to conduct your research study and develop a strategic plan, it's time to present it!

It is important to craft a strong **oral presentation** that will impress the judges while accurately and effectively describing your work.

## UNIT 7

# Tips for delivering a strong presentation



**Plan ahead**—Create an outline of your presentation and practice it several times, making sure the length of the presentation stays within the allotted time. Make note cards or bring a copy of your written entry to help guide you through the presentation.

**Make a good first impression**—You'll never have a second chance to make a good first impression. If you want the judges to take you seriously, dress professionally. When it is time to present, calmly approach the stage or podium, then grab the audience's attention with a strong opening statement.

**Describe plan**—Clearly state the purpose of the presentation and offer a brief overview before detailing your research study. When describing your 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 use inflection in your voice to emphasize certain statements.

**Use visual aids effectively**—Your presentation should use visual aids such as charts, graphs, pictures, or presentation slides. Use them in a smooth and non-distracting way to keep the focus on your plan. Visual aids should enhance your presentation, not take it over.

**Use effective nonverbal communication**—Nonverbal communication is just as important as (if not more than) verbal communication. Maintaining eye contact with the audience and demonstrating effective body language such as good posture, positive facial expressions, and hand gestures can go a long way.

**Conclude and field questions**—Finish your talk by reiterating the purpose of the presentation and summarizing your main points. 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.

Even if you feel the presentation didn't go as well as you would have liked, recognize you've done a difficult thing and congratulate yourself. Take note of what worked well and what didn't and consider what could have improved.

UNIT 7

# Quick Check



What are three ways you can plan ahead for your presentation?

What should you do to effectively describe your research study and strategic plan?

What are two ways you can use effective nonverbal communication when presenting?

What should you do after concluding your presentation?

UNIT 7 | ACTIVITY 1

# Presentation Practice



**Step 1:** Find a partner that is not in your project group.

**Step 2:** Briefly present your group’s research study and strategic plan to your partner in 3-5 minutes. When describing your group’s research study and plan, be sure to state the purpose of your study, share the design and findings of your study, and describe your strategic plan. When you both are finished sharing, discuss the following questions:

Did the presentations accurately describe your group’s research study and strategic plan?

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What worked well in your presentations?

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What can be improved? In what way(s)?

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UNIT 7 | ACTIVITY 2

# Develop Visual Aids



**Step 1:** Make a list of five potential visual aids your group can use for your presentation (charts, graphs, pictures, poster, PowerPoint slides, etc.).

- 1.
- 2.
- 3.
- 4.
- 5.

**Step 2:** Convene with your group members to share and discuss your lists. Based off each group member's list, your group should discuss how certain visual aids can be used and how they can enhance your presentation.

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By the end of the discussion, your group should determine which type(s) of visual aid(s) you will use for your presentation and have a plan on how to create them.

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UNIT 7 | ACTIVITY 3

# Body Language Skills Quiz



**Step 1:** Take the “Body Language Skills Quiz.” This quiz features 10 multiple choice questions, and each question has one correct answer.



[Body  
Language  
Skills Quiz](#)

**Step 2:** Discuss the following questions with your partner:

What did you learn about body language from this quiz?

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How can body language enhance a presentation?

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How can body language negatively impact a presentation?

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What can you do to improve your body language when presenting?

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## UNIT 7 | CAPSTONE ACTIVITY

# Rubric

**Project deliverable:** Presentation.

CRITERIA	PROFESSIONAL	EXPERIENCED	DEVELOPING	NOVICE	SCORE
<b>Opening</b>  <i>10 points</i>	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.	
<b>Description of research study design</b>  <i>20 points</i>	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.	
<b>Interpretation of research data</b>  <i>20 points</i>	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.	
<b>Description of strategies for change</b>  <i>20 points</i>	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.	
<b>Description of budget/budget proposal</b>  <i>20 points</i>	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.	
<b>Professional standards</b>  <i>10 points</i>	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)**

## 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



