

**High School Marketing Plan Performance-Based Assessment  
Written Plan Score Sheet**

STANDARDS	BENCHMARKS/PERFORMANCE INDICATORS/PROFICIENCY DESCRIPTORS			
<p><b>BLK-1.0</b> Apply marketing principles to make informed decisions in a diverse, dynamic, global marketplace.</p>	<p><b>Market Research/Analysis</b> <b>BLK 1.1</b> – Conduct market research and analysis that is sensitive to cost and time constraints by using the marketing research process to prepare a research report.</p>			
	<b>Market Environment Analysis</b>			
	<b>4 – Exceeds</b>	<b>3 – Meets</b>	<b>2 – Nearly Meets</b>	<b>1 – Does Not Meet</b>
	Students <b>thoroughly</b> gather primary and secondary research. Students write a <b>clear and comprehensive</b> market environment analysis that applies <b>proficient</b> knowledge of macro environmental factors, <b>expertly</b> uncovers trends that will influence marketing decisions, and <b>effectively</b> justifies the identification of opportunities and threats.	Students <b>proficiently</b> gather primary and secondary research. Students write a <b>detailed</b> market environment analysis that applies <b>reasonable</b> knowledge of macro environmental factors, <b>insightfully</b> uncovers trends that will influence marketing decisions, and <b>thoughtfully</b> justifies the identification of opportunities and threats.	Students <b>satisfactorily</b> gather primary and secondary research. Students write an <b>acceptable</b> market environment analysis that applies <b>some</b> knowledge of macro environmental factors, <b>decently</b> uncovers trends that will influence marketing decisions, and <b>appropriately</b> justifies the identification of opportunities and threats.	Students <b>minimally</b> gather primary and secondary research. Students write an <b>unclear and inaccurate</b> market environment analysis that applies <b>little</b> knowledge of macro environmental factors, <b>barely</b> uncovers trends that will influence marketing decisions, and <b>hardly</b> justifies the identification of opportunities and threats.
	<b>Consumer Market Analysis</b>			
	<b>4 – Exceeds</b>	<b>3 – Meets</b>	<b>2 – Nearly Meets</b>	<b>1 – Does Not Meet</b>
	Students write a <b>detailed, logical and convincing</b> consumer market analysis that <b>expertly</b> applies market research information to evaluate how buyer characteristics influence buying behavior.	Students write a <b>detailed and logical</b> consumer market analysis that <b>competently</b> applies market research information to evaluate how buyer characteristics influence buying behavior.	Students write a <b>reasonable</b> consumer market analysis that <b>adequately</b> applies market research information to evaluate how buyer characteristics influence buying behavior.	Students write a <b>vague</b> consumer market analysis that <b>ineffectually</b> applies market research information to evaluate how buyer characteristics influence buying behavior.
	<b>Customer Profile</b>			
	<b>3 – Exceeds</b>	<b>2 – Meets</b>	<b>1 – Nearly Meets</b>	<b>0 – Does Not Meet</b>
	Students create a <b>clear and comprehensive</b> customer profile that <b>adeptly</b> applies knowledge of and analyzes influences affecting buying decisions.	Students create an <b>accurate</b> customer profile that <b>thoughtfully</b> applies knowledge of and analyzes influences affecting buying decisions.	Students create a <b>satisfactory</b> customer profile that <b>appropriately</b> applies knowledge of and analyzes influences affecting buying decisions.	Students create a <b>vague</b> customer profile that <b>inadequately</b> applies knowledge of and analyzes influences affecting buying decisions.
	<b>Situation Analysis</b>			
	<b>4 – Exceeds</b>	<b>3 – Meets</b>	<b>2 – Nearly Meets</b>	<b>1 – Does Not Meet</b>
	Students write a <b>detailed, logical and convincing</b> situation analysis that <b>clearly and comprehensively</b> examines current market conditions in which the product or service will be competing.	Students write a <b>detailed</b> situation analysis that <b>reasonably</b> examines current market conditions in which the product or service will be competing.	Students write a <b>detailed</b> situation analysis that <b>somewhat</b> examines current market conditions in which the product or service will be competing.	Students write a <b>vague</b> situation analysis that <b>inadequately</b> examines current market conditions in which the product or service will be competing.

	<b>Target Market</b>			
	<b>3 – Exceeds</b>	<b>2 – Meets</b>	<b>1 – Nearly Meets</b>	<b>0 – Does Not Meet</b>
	Students <b>adeptly</b> select a <b>clearly-defined</b> and <b>viable</b> target market based on research and findings.	Students <b>thoughtfully</b> select an <b>appropriate</b> and <b>feasible</b> target market based on research and findings.	Students select a <b>reasonable</b> target market based on research and findings.	Students select an <b>inappropriate</b> target market based on research and findings.
	<b>Marketing Strategy Proposal</b> <b>BLK-1.2</b> – Develop viable marketing mix strategies based on an assessment of market research results. Select, explain, and justify product service planning and management, pricing, distribution, and marketing communication strategy decisions for the identified target market based on market research information, and support for the goals and expected outcomes of the marketing plan.			
	<b>Product/Service Planning</b>			
	<b>4 – Exceeds</b>	<b>3 – Meets</b>	<b>2 – Nearly Meets</b>	<b>1 – Does Not Meet</b>
	Students do all of the following <b>creatively and exceptionally well</b> : describe a product and/or product mix and its features/ benefits; delineate strengths and weaknesses of the product in relation to its position on product life cycle and in market; create a complete product service plan that includes branding, labeling, packaging, and extended product features; forecast strategies for future product viability.	Students do all of the following <b>proficiently</b> : describe a product and/or product mix and its features/benefits; delineate strengths and weaknesses of the product in relation to its position on product life cycle and in market; create a complete product service plan that includes branding, labeling, packaging, and extended product features; forecast strategies for future product viability.	Students do all of the following <b>sufficiently</b> : describe a product and/or product mix and its features/benefits; delineate strengths and weaknesses of the product in relation to its position on product life cycle and in market; create a complete product service plan that includes branding, labeling, packaging, and extended product features; forecast strategies for future product viability.	Students do all of the following <b>inadequately</b> : describe a product and/or product mix and its features/benefits; delineate strengths and weaknesses of the product in relation to its position on product life cycle and in market; create a complete product service plan that includes branding, labeling, packaging, and extended product features; forecast strategies for future product viability.
	<b>Pricing</b>			
	<b>4 – Exceeds</b>	<b>3 – Meets</b>	<b>2 – Nearly Meets</b>	<b>1 – Does Not Meet</b>
	Students <b>thoroughly</b> research and <b>effectively</b> apply pricing concepts and techniques; explain price elasticity and sensitivity to product and the effects of both on buying.	Students <b>proficiently</b> research and <b>thoughtfully</b> apply pricing concepts and techniques; explain price elasticity and sensitivity to product and the effects of both on buying.	Students <b>sufficiently</b> research and <b>adequately</b> apply pricing concepts and techniques; explain price elasticity and sensitivity to product and the effects of both on buying.	Students <b>minimally</b> research and <b>poorly</b> apply pricing concepts and techniques; explain price elasticity and sensitivity to product and the effects of both on buying.
	<b>Distribution</b>			
	<b>4 – Exceeds</b>	<b>3 – Meets</b>	<b>2 – Nearly Meets</b>	<b>1 – Does Not Meet</b>
	Students <b>clearly and comprehensively</b> explain how and where the product will be distributed and sold in the marketplace; describe inventory control policies chosen for effective inventory management.	Students <b>proficiently and thoughtfully</b> explain how and where the product will be distributed and sold in the marketplace; describe inventory control policies chosen for effective inventory management.	Students <b>sufficiently</b> explain how and where the product will be distributed and sold in the marketplace; describe inventory control policies chosen for effective inventory management.	Students <b>vaguely</b> explain how and where the product will be distributed and sold in the marketplace; describe inventory control policies chosen for effective inventory management.

<b>Promotion</b>				
<b>4 – Exceeds</b>		<b>3 – Meets</b>		<b>2 – Nearly Meets</b>
Students <b>clearly</b> assess appropriate forms of communication that informs, persuades or reminds consumers about the product (including internet/web-based options) and <b>creatively</b> create a complete and appropriate promotional mix.		Students <b>proficiently</b> assess appropriate forms of communication that informs, persuades or reminds consumers about the product (including internet/web-based options) and <b>thoughtfully</b> create a complete and appropriate promotional mix.		Students <b>sufficiently</b> assess appropriate forms of communication that informs, persuades or reminds consumers about the product (including internet/web-based options) and create an <b>adequate</b> promotional mix.
<b>1 – Does Not Meet</b>				
Students <b>insufficiently</b> assess appropriate forms of communication that informs, persuades or reminds consumers about the product (including internet/web-based options) and create an <b>incomplete</b> and <b>inappropriate</b> promotional mix.				
<b>Budget</b>				
<b>BLK-1.3- Determine the cost of the implementation of the marketing plan and expected revenues to be generated upon full implementation of the marketing plan.</b>				
<b>4 – Exceeds</b>		<b>3 – Meets</b>		<b>2 – Nearly Meets</b>
Students <b>clearly</b> and <b>realistically</b> determine the costs for advertising and promotional plan; develop a list of advertising and promotional materials; list of advertising media to be used and an estimate of cost for each medium; provide and justify revenue projections.		Students <b>reasonably</b> determine the costs for advertising and promotional plan; develop a list of advertising and promotional materials; list of advertising media to be used and an estimate of cost for each medium; provide and justify revenue projections.		Students <b>satisfactorily</b> determine the costs for advertising and promotional plan; develop a list of advertising and promotional materials; list of advertising media to be used and an estimate of cost for each medium; provide and justify revenue projections.
<b>1 – Does Not Meet</b>				
Students <b>insufficiently</b> determine the costs for advertising and promotional plan; develop a list of advertising and promotional materials; list of advertising media to be used and an estimate of cost for each medium; provide and justify revenue projections.				
<b>Evaluation Plan</b>				
<b>BLK-1.4 – Utilize control and evaluation processes to measure the success and profitability of the marketing plan.</b>				
<b>4 – Exceeds</b>		<b>3 – Meets</b>		<b>2 – Nearly Meets</b>
Students list a <b>proficient amount</b> of methods to track and assess expenditures relative to the forecasted data and information; write a <b>clear</b> justification for the application of market research indicators such as market share, and sales growth to measure market plan effectiveness; <b>thoroughly</b> document methods used to gather and report market research findings to be used first as a benchmark, and then as a measure of the plan's effectiveness.		Students list a <b>reasonable amount</b> of methods to track and assess expenditures relative to the forecasted data and information; write a <b>competent</b> justification for the application of market research indicators such as market share, and sales growth to measure market plan effectiveness; <b>proficiently</b> document methods used to gather and report market research findings to be used first as a benchmark, and then as a measure of the plan's effectiveness.		Students list <b>some</b> methods to track and assess expenditures relative to the forecasted data and information; write a <b>satisfactory</b> justification for the application of market research indicators such as market share, and sales growth to measure market plan effectiveness; <b>sufficiently</b> document methods used to gather and report market research findings to be used first as a benchmark, and then as a measure of the plan's effectiveness.
<b>1 – Does Not Meet</b>				
Students <b>minimally</b> list methods to track and assess expenditures relative to the forecasted data and information; write a <b>vague</b> justification for the application of market research indicators such as market share, and sales growth to measure market plan effectiveness; <b>inadequately</b> document methods used to gather and report market research findings to be used first as a benchmark, and then as a measure of the plan's effectiveness.				

<b>Analysis of Implementation</b>					
<b>4 – Exceeds</b>		<b>3 – Meets</b>		<b>2 – Nearly Meets</b>	<b>1 – Does Not Meet</b>
Students <b>thoroughly</b> document methods used to gather and report market research findings to be used first as a benchmark, and then as a measure of the plan’s effectiveness; <b>proficiently</b> evaluate methods used to implement the plan; and explain <b>in detail</b> which methods were most effective and why or why not.		Students <b>competently</b> document methods used to gather and report market research findings to be used first as a benchmark, and then as a measure of the plan’s effectiveness; <b>thoughtfully</b> evaluate methods used to implement the plan; and <b>reasonably</b> explain which methods were most effective and why or why not.		Students <b>sufficiently</b> document methods used to gather and report market research findings to be used first as a benchmark, and then as a measure of the plan’s effectiveness; <b>adequately</b> evaluate methods used to implement the plan; and <b>satisfactorily</b> explain which methods were most effective and why or why not.	Students <b>inadequately</b> document methods used to gather and report market research findings to be used first as a benchmark, and then as a measure of the plan’s effectiveness; <b>minimally</b> evaluate methods used to implement the plan; and <b>poorly</b> explain which methods were most effective and why or why not.
<b>BLK-2.0</b> Apply the conventions and principles of communication in business and industry to inform and influence marketing decisions.	<b>General Written Communication Expectations and Executive Summary</b> <b>BLK-2.1</b> – Select the structure, format and features appropriate to the purpose, audience and context of the written marketing plan and materials for the oral presentation. <b>BLK-2.2</b> – Exhibit mastery of written and oral English language rules in the marketing plan and in materials for the oral presentation <b>BLK-2.3</b> – Prepare a written marketing plan in accordance with industry expectations.				
	<b>4 – Exceeds</b>		<b>3 – Meets</b>		<b>2 – Nearly Meets</b>
Students do all of the following <b>creatively</b> and <b>exceptionally well</b> : check accuracy and relevance of information; develop documentation cognizant of neatness and audience appeal; anticipate reader’s problem and questions; use a variety of formatting techniques; ensure the proper application of grammar, sentence structure, punctuation, sentence and construction, spelling, and word usage; develop a formal written marketing plan to support facts, analysis and conclusions; develop an executive summary that encapsulates the marketing plan and includes the main points of the project goals, assumptions, highlighted details of the marketing plan, and recommended course of action.		Students do all of the following <b>competently well</b> : check accuracy and relevance of information; develop documentation cognizant of neatness and audience appeal; anticipate reader’s problem and questions; use a variety of formatting techniques; ensure the proper application of grammar, sentence structure, punctuation, sentence and construction, spelling, and word usage; develop a formal written marketing plan to support facts, analysis and conclusions; develop an executive summary that encapsulates the marketing plan and includes the main points of the project goals, assumptions, highlighted details of the marketing plan, and recommended course of action.		Students do all of the following <b>satisfactorily</b> : check accuracy and relevance of information; develop documentation cognizant of neatness and audience appeal; anticipate reader’s problem and questions; use a variety of formatting techniques; ensure the proper application of grammar, sentence structure, punctuation, sentence and construction, spelling, and word usage; develop a formal written marketing plan to support facts, analysis and conclusions; develop an executive summary that encapsulates the marketing plan and includes the main points of the project goals, assumptions, highlighted details of the marketing plan, and recommended course of action.	Students do all of the following <b>poorly</b> : check accuracy and relevance of information; develop documentation cognizant of neatness and audience appeal; anticipate reader’s problem and questions; use a variety of formatting techniques; ensure the proper application of grammar, sentence structure, punctuation, sentence and construction, spelling, and word usage; develop a formal written marketing plan to support facts, analysis and conclusions; develop an executive summary that encapsulates the marketing plan and includes the main points of the project goals, assumptions, highlighted details of the marketing plan, and recommended course of action.