



# SET OF ALL ROLE-PLAYS

AS USED IN DECA'S  
**PRINCIPLES OF BUSINESS  
ADMINISTRATION EVENTS**



**2018**



# PRINCIPLES OF BUSINESS MANAGEMENT AND ADMINISTRATION

AS USED IN DECA'S  
PRINCIPLES OF BUSINESS  
ADMINISTRATION EVENTS



2018



# PRINCIPLES OF BUSINESS MANAGEMENT + ADMINISTRATION

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2018 ROLE-PLAYS

## INCLUDES:

INTEGRATE DECA'S ROLE-PLAYS AND CASE STUDIES INTO YOUR CLASSROOM

ROLE-PLAY 1: CUSTOMER RELATIONS

ROLE-PLAY 2: OPERATIONS

ROLE-PLAY 3: EMOTIONAL INTELLIGENCE



## **INTEGRATE DECA'S ROLE-PLAYS AND CASE STUDIES INTO YOUR CLASSROOM**

With its connection to National Curriculum Standards, DECA's Competitive Events Program is designed to be integrated into classroom instruction to help members apply learning and connect to business. As teaching tools, DECA's role-plays and case studies provide relevant, meaningful problems for students to solve, provide a standards-based evaluation, increase rigor of the instruction, result in evidence of student learning and expose students to DECA – all as part of classroom instruction.

### **STEP 1: FAMILIARIZE YOURSELF WITH EVENT GUIDELINES AND PERFORMANCE INDICATORS.**

Use the DECA Guide to familiarize yourself with event guidelines that explain how each competitive event will operate – time limits, exam specifications, interactions with a judge, etc.

Role-plays and case studies are developed using performance indicators – key concepts from national curriculum standards that students should learn during the school year. DECA uses five lists of performance indicators which are organized by career cluster – business administration core, business management and administration, finance, hospitality and tourism, and marketing, as well as personal financial literacy.

Each performance indicator list is arranged by instructional areas to assist advisors with planning units of instruction. Advisors teaching accounting courses, for example, can use the Finance Career Cluster performance indicator list to plan their curriculum while advisors teaching marketing courses can use the Marketing Career Cluster performance indicator list.

### **STEP 2: UNDERSTAND HOW ROLE-PLAYS AND CASE STUDIES ARE DESIGNED.**

The career cluster and primary instructional area for role-plays and case studies are identified at the top of the first page of the event.

Role-plays used for DECA's Principles of Business Administration Events measure four performance indicators from the business administration core.

Case studies used for DECA's Team Decision Making Events measure seven performance indicators. Usually, at least four of the seven performance indicators have been selected from the case study's instructional area. Therefore, if the event situation is asking the participant to develop a promotion plan, most of the performance indicators will be from the promotion instructional area.

Role-plays used for DECA's Individual Series Events measure five performance indicators. Usually, at least three of the five performance indicators have been selected from the event situation's instructional area. The career pathway is also identified on the role-play, which may include performance indicators from that specific pathway as well.

Role-plays used for DECA's Personal Financial Literacy event measure three performance indicators from the National Standards in K-12 Personal Finance Education, created and maintained by the Jump\$tart Coalition® for Personal Financial Literacy.

### **STEP 3: START ORGANIZING SAMPLE EVENTS.**

Each year, DECA posts sample role-plays and case studies on [deca.org](http://deca.org). Shop DECA also sells previously used events each year. Gather these samples and begin to categorize them by instructional area.

### **STEP 4: USE SAMPLE EVENTS AS A CLASSROOM ACTIVITY.**

As you teach different instructional areas during the year, use corresponding role-plays and case studies as learning tools. While the traditional competitive event setting requires interaction with judges, many advisors have used role-plays and case studies as:

- warm-up activities at the beginning of classes.
- writing exercises that require students to write their ideas for solving the problem presented in the role-play or case study.
- public speaking exercises that require students to deliver an oral report or recorded video that presents their ideas for solving the problem presented in the role-play or case study.
- assessment tools in lieu of a multiple-choice quiz/test.

Since the evaluation form for each role-play and case study assesses the performance indicators, you are assessing students' performance according to national curriculum standards which are industry validated and aligned to career clusters.

### **ADDITIONAL RESOURCES**

Event guidelines, performance indicator lists, sample events and sample exam questions are available at [www.deca.org/competitiveevents](http://www.deca.org/competitiveevents). Sample role-play presentations can be viewed at [www.deca.org](http://www.deca.org). Advisors may wish to show the videos and ask students to evaluate the presentations using the evaluation forms. Shop DECA sells many items to assist advisors with integrating DECA into curriculum at [shopdeca.org](http://shopdeca.org).



**CAREER CLUSTER**  
Business Management and Administration

**INSTRUCTIONAL AREA**  
Customer Relations

## **PRINCIPLES OF BUSINESS MANAGEMENT AND ADMINISTRATION EVENT**

### **PARTICIPANT INSTRUCTIONS**

- The event will be presented to you through your reading of the 21<sup>st</sup> Century Skills, Performance Indicators and Event Situation. You will have up to 10 minutes to review this information and prepare your presentation. You may make notes to use during your presentation.
- You will have up to 10 minutes to make your presentation to the judge (you may have more than one judge).
- You will be evaluated on how well you meet the performance indicators of this event.
- Turn in all of your notes and event materials when you have completed the event.

### **21<sup>st</sup> CENTURY SKILLS**

- Critical Thinking – Reason effectively and use systems thinking.
- Communication – Communicate clearly.
- Creativity and Innovation – Show evidence of creativity.

### **PERFORMANCE INDICATORS**

1. Handle customer/client complaints.
2. Reinforce service orientation through communication.
3. Identify a company's brand promise.
4. Build and maintain relationships with customers.

## EVENT SITUATION

You are to assume the role of customer service specialist at MAIN STREET HEATING & COOLING, a local company that provides the community with heating and cooling units, servicing and emergency calls. A customer (judge) has come to your office to complain and you must remedy the situation.

MAIN STREET HEATING & COOLING is located in a city of 50,000 people and has been providing the small community with heating and cooling units and service for over 35 years. While there are other heating and cooling companies in the area, most are chains or affiliated with companies from a much larger city 50 miles away. MAIN STREET HEATING & COOLING is proud to be the hometown choice for all heating and cooling needs.

Due to an unusual cold snap in the weather, many customers have called MAIN STREET HEATING & COOLING for repairs and/or upkeep of their heating and cooling units. When a customer calls to make an appointment for service, a half-day time frame is given for the customer to expect a MAIN STREET representative to arrive. The time frame is either 8:00 AM – Noon or 1:00 PM – 5:00 PM. The MAIN STREET representative calls the customer the day of the appointment to give a more precise time when he or she is on their way.

A customer (judge) has come to your office to complain that the MAIN STREET representative has not arrived during the given appointment time frame of 8:00 AM – Noon. It is now 12:30 PM. The customer (judge) had taken the morning off from work to wait for the MAIN STREET representative, yet nobody has arrived. Now the customer (judge) must take more time off from work to wait for the representative.

After checking in with the service department, you have found that the service representative will arrive at the customer's (judge's) house at 1:00 PM. The service representative is running behind schedule due to a flat tire.

You must provide a response to the customer (judge) regarding the new service time. You must try to maintain the relationship with the customer (judge) by offering a remedy to the problem.

You will try to appease the customer (judge) in a role-play to take place in the front office. The customer (judge) will begin the role-play by greeting you and asking to hear why the representative is late. After you have explained the situation and have answered the customer's (judge's) questions, the customer (judge) will conclude the role-play.

# **JUDGE'S INSTRUCTIONS**

## **DIRECTIONS, PROCEDURES AND JUDGE'S ROLE**

In preparation for this event, you should review the following information with your event manager and other judges:

1. Procedures
2. 21<sup>st</sup> Century Skills and Performance Indicators
3. Event Situation
4. Judge Situation Characterization  
Participants may conduct a slightly different type of meeting and/or discussion with you each time; however, it is important that the information you provide and the questions you ask be uniform for every participant.
5. Judge's Evaluation Instructions
6. Judge's Evaluation Form  
Please use a critical and consistent eye in rating each participant.

## **JUDGE SITUATION CHARACTERIZATION**

You are to assume the role of a customer of MAIN STREET HEATING & COOLING, a local company that provides the community with heating and cooling units, servicing and emergency calls. You have gone to the office to speak with a customer service specialist (participant) to complain and the customer service specialist (participant) must remedy the situation.

MAIN STREET HEATING & COOLING is located in a city of 50,000 people and has been providing the small community with heating and cooling units and service for over 35 years. While there are other heating and cooling companies in the area, most are chains or affiliated with companies from a much larger city 50 miles away. MAIN STREET HEATING & COOLING is proud to be the hometown choice for all heating and cooling needs.

Due to an unusual cold snap in the weather, many customers have called MAIN STREET HEATING & COOLING for repairs and/or upkeep of their heating and cooling units. When a customer calls to make an appointment for service, a half-day time frame is given for the customer to expect a MAIN STREET representative to arrive. The time frame is either 8:00 AM – Noon or 1:00 PM – 5:00 PM. The MAIN STREET representative calls the customer the day of the appointment to give a more precise time when he or she is on their way.

You have gone to meet the customer service specialist (participant) to complain that the MAIN STREET representative has not arrived during the given appointment time frame of 8:00 AM –

Noon. It is now 12:30 PM. You have taken the morning off from work to wait for the MAIN STREET representative, yet no one has arrived. Now you must take more time off from work to wait for the representative.

After checking in with the service department, the customer service specialist (participant) has found that the service representative will arrive at your house at 1:00 PM. The service representative is running behind schedule due to a flat tire.

The customer service specialist (participant) must provide a response to you regarding the new service time. The customer service specialist (participant) must try to maintain the relationship with you by offering a remedy to the problem.

The participant will offer solutions to you in a role-play to take place in the front office. You will begin the role-play by greeting the participant and asking to hear about his/her ideas.

During the course of the role-play you are to ask the following questions of each participant:

1. How are you going to ensure this does not happen to other customers like me in the future?
2. Would you have offered a different solution if I would have posted my complaint on social media?

Once the customer service specialist (participant) has explained the situation and has answered your questions, you will conclude the role-play by thanking the customer service specialist (participant) for the work.

You are not to make any comments after the event is over except to thank the participant.



# JUDGE'S EVALUATION INSTRUCTIONS

## Evaluation Form Information

The participants are to be evaluated on their ability to perform the specific performance indicators stated on the cover sheet of this event and restated on the Judge's Evaluation Form. Although you may see other performance indicators being demonstrated by the participants, those listed in the Performance Indicators section are the critical ones you are measuring for this particular event.

## Evaluation Form Interpretation

The evaluation levels listed below and the evaluation rating procedures should be discussed thoroughly with your event chairperson and the other judges to ensure complete and common understanding for judging consistency.

<b>Level of Evaluation</b>	<b>Interpretation Level</b>
Exceeds Expectations	Participant demonstrated the performance indicator in an extremely professional manner; greatly exceeds business standards; would rank in the top 10% of business personnel performing this performance indicator.
Meets Expectations	Participant demonstrated the performance indicator in an acceptable and effective manner; meets at least minimal business standards; there would be no need for additional formalized training at this time; would rank in the 70-89 <sup>th</sup> percentile of business personnel performing this performance indicator.
Below Expectations	Participant demonstrated the performance indicator with limited effectiveness; performance generally fell below minimal business standards; additional training would be required to improve knowledge, attitude and/or skills; would rank in the 50-69 <sup>th</sup> percentile of business personnel performing this performance indicator.
Little/No Value	Participant demonstrated the performance indicator with little or no effectiveness; a great deal of formal training would be needed immediately; perhaps this person should seek other employment; would rank in the 0-49 <sup>th</sup> percentile of business personnel performing this performance indicator.



**PRINCIPLES OF BUSINESS MANAGEMENT  
AND ADMINISTRATION, 2018**

Participant: \_\_\_\_\_

I.D. Number: \_\_\_\_\_

**JUDGE'S EVALUATION FORM**

**INSTRUCTIONAL AREA**

Customer Relations

Did the participant:

		Little/No Value	Below Expectations	Meets Expectations	Exceeds Expectations	Judged Score
<b>PERFORMANCE INDICATORS</b>						
1.	Handle customer/client complaints?	0-1-2-3-4-5	6-7-8-9-10	11-12-13-14	15-16-17-18	
2.	Reinforce service orientation through communication?	0-1-2-3-4-5	6-7-8-9-10	11-12-13-14	15-16-17-18	
3.	Identify company's brand promise?	0-1-2-3-4-5	6-7-8-9-10	11-12-13-14	15-16-17-18	
4.	Build and maintain relationships with customers?	0-1-2-3-4-5	6-7-8-9-10	11-12-13-14	15-16-17-18	
<b>21<sup>st</sup> CENTURY SKILLS</b>						
5.	Reason effectively and use systems thinking?	0-1	2-3	4-5	6-7	
6.	Communicate clearly?	0-1	2-3	4-5	6-7	
7.	Show evidence of creativity?	0-1	2-3	4-5	6-7	
8.	Overall impression and responses to the judge's questions	0-1	2-3	4-5	6-7	
<b>TOTAL SCORE</b>						



**CAREER CLUSTER**  
Business Management and Administration

**INSTRUCTIONAL AREA**  
Operations

## **PRINCIPLES OF BUSINESS MANAGEMENT AND ADMINISTRATION EVENT**

### **PARTICIPANT INSTRUCTIONS**

- The event will be presented to you through your reading of the 21<sup>st</sup> Century Skills, Performance Indicators and Event Situation. You will have up to 10 minutes to review this information and prepare your presentation. You may make notes to use during your presentation.
- You will have up to 10 minutes to make your presentation to the judge (you may have more than one judge).
- You will be evaluated on how well you meet the performance indicators of this event.
- Turn in all of your notes and event materials when you have completed the event.

### **21<sup>st</sup> CENTURY SKILLS**

- Critical Thinking – Reason effectively and use systems thinking.
- Communication – Communicate clearly.
- Creativity and Innovation – Show evidence of creativity.

### **PERFORMANCE INDICATORS**

1. Explain the nature of operations.
2. Explain the concept of production.
3. Explain routine security precautions.
4. Protect company information and intangibles.

## **EVENT SITUATION**

You are to assume the role of an operations specialist at BLOOM FACTORY, a large factory that produces popular children's toy figurines. A new tour guide (judge) is being trained to lead tours of the factory to the public and has asked you why safety and security training is important.

BLOOM FACTORY produces thousands of toys every day. The factory has hundreds of employees that ensure efficient and effective production of products. The machinery and systems involved in production are expensive and can be hazardous to those not trained to use them.

Tours of the factory follow along the perimeter of the factory and have clearly designated areas for the tour guides to lead guests through the factory without getting hurt.

The new tour guide (judge) feels that the most important parts of the job are to speak well and have good customer relations skills. The tour guide (judge) has asked you to explain why safety and security training is important to the tour guide, the guests, the factory workers and the factory itself.

You will explain safety to the new tour guide (judge) in a role-play to take place in the front office. The tour guide (judge) will begin the role-play by greeting you and asking to hear about safety and security training. After you have explained why safety and security is important and have answered the new tour guide's (judge's) questions, the tour guide (judge) will conclude the role-play by thanking you for your work.

# **JUDGE'S INSTRUCTIONS**

## **DIRECTIONS, PROCEDURES AND JUDGE'S ROLE**

In preparation for this event, you should review the following information with your event manager and other judges:

1. Procedures
2. 21<sup>st</sup> Century Skills and Performance Indicators
3. Event Situation
4. Judge Situation Characterization  
Participants may conduct a slightly different type of meeting and/or discussion with you each time; however, it is important that the information you provide and the questions you ask be uniform for every participant.
5. Judge's Evaluation Instructions
6. Judge's Evaluation Form  
Please use a critical and consistent eye in rating each participant.

## **JUDGE SITUATION CHARACTERIZATION**

You are to assume the role of a new tour guide at BLOOM FACTORY, a large factory that produces popular children's toy figurines. You are being trained to lead tours of the factory to the public and have asked the operations specialist (participant) why safety and security training is important.

BLOOM FACTORY produces thousands of toys every day. The factory has hundreds of employees that ensure efficient and effective production of products. The machinery and systems involved in production are expensive and can be hazardous to those not trained to use them.

Tours of the factory follow along the perimeter of the factory and have clearly designated areas for the tour guides to lead guests through the factory without getting hurt.

You feel that the most important parts of the job are to speak well and have good customer relations skills. You have asked the operations specialist (participant) to explain why safety and security training is important to the tour guide, the guests, the factory workers and the factory itself.

The participant will explain safety and security to you in a role-play to take place in the front office. You will begin the role-play by greeting the participant and asking to hear about his/her ideas.

During the course of the role-play you are to ask the following questions of each participant:

1. What general safety advice should we give to the people taking the tours?
2. There will most likely be children on the tours, so how can we be certain they understand the importance safety?

Once the operations specialist (participant) has explained safety and security and has answered your questions, you will conclude the role-play by thanking the operations specialist (participant) for the work.

You are not to make any comments after the event is over except to thank the participant.

*Answers will vary but should demonstrate a basic understanding of the concepts.*

# JUDGE'S EVALUATION INSTRUCTIONS

## Evaluation Form Information

The participants are to be evaluated on their ability to perform the specific performance indicators stated on the cover sheet of this event and restated on the Judge's Evaluation Form. Although you may see other performance indicators being demonstrated by the participants, those listed in the Performance Indicators section are the critical ones you are measuring for this particular event.

## Evaluation Form Interpretation

The evaluation levels listed below and the evaluation rating procedures should be discussed thoroughly with your event chairperson and the other judges to ensure complete and common understanding for judging consistency.

<b>Level of Evaluation</b>	<b>Interpretation Level</b>
Exceeds Expectations	Participant demonstrated the performance indicator in an extremely professional manner; greatly exceeds business standards; would rank in the top 10% of business personnel performing this performance indicator.
Meets Expectations	Participant demonstrated the performance indicator in an acceptable and effective manner; meets at least minimal business standards; there would be no need for additional formalized training at this time; would rank in the 70-89 <sup>th</sup> percentile of business personnel performing this performance indicator.
Below Expectations	Participant demonstrated the performance indicator with limited effectiveness; performance generally fell below minimal business standards; additional training would be required to improve knowledge, attitude and/or skills; would rank in the 50-69 <sup>th</sup> percentile of business personnel performing this performance indicator.
Little/No Value	Participant demonstrated the performance indicator with little or no effectiveness; a great deal of formal training would be needed immediately; perhaps this person should seek other employment; would rank in the 0-49 <sup>th</sup> percentile of business personnel performing this performance indicator.



**PRINCIPLES OF BUSINESS MANAGEMENT AND ADMINISTRATION, 2018**

Participant: \_\_\_\_\_

I.D. Number: \_\_\_\_\_

**JUDGE'S EVALUATION FORM**

**INSTRUCTIONAL AREA**

Operations

Did the participant:

		Little/No Value	Below Expectations	Meets Expectations	Exceeds Expectations	Judged Score
<b>PERFORMANCE INDICATORS</b>						
1.	Explain the nature of operations?	0-1-2-3-4-5	6-7-8-9-10	11-12-13-14	15-16-17-18	
2.	Explain the concept of production?	0-1-2-3-4-5	6-7-8-9-10	11-12-13-14	15-16-17-18	
3.	Explain routine security precautions?	0-1-2-3-4-5	6-7-8-9-10	11-12-13-14	15-16-17-18	
4.	Protect company information and intangibles?	0-1-2-3-4-5	6-7-8-9-10	11-12-13-14	15-16-17-18	
<b>21<sup>st</sup> CENTURY SKILLS</b>						
5.	Reason effectively and use systems thinking?	0-1	2-3	4-5	6-7	
6.	Communicate clearly?	0-1	2-3	4-5	6-7	
7.	Show evidence of creativity?	0-1	2-3	4-5	6-7	
8.	Overall impression and responses to the judge's questions	0-1	2-3	4-5	6-7	
<b>TOTAL SCORE</b>						





**CAREER CLUSTER**  
Business Management and Administration

**INSTRUCTIONAL AREA**  
Emotional Intelligence

## **PRINCIPLES OF BUSINESS MANAGEMENT AND ADMINISTRATION EVENT**

### **PARTICIPANT INSTRUCTIONS**

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- You will have up to 10 minutes to make your presentation to the judge (you may have more than one judge).
- You will be evaluated on how well you meet the performance indicators of this event.
- Turn in all of your notes and event materials when you have completed the event.

### **21<sup>st</sup> CENTURY SKILLS**

- Critical Thinking – Reason effectively and use systems thinking.
- Communication – Communicate clearly.
- Creativity and Innovation – Show evidence of creativity.

### **PERFORMANCE INDICATORS**

1. Explain the concept of leadership.
2. Develop an achievement orientation.
3. Inspire others.
4. Enlist others in working toward a shared vision.

## **EVENT SITUATION**

You are to assume the role of a front desk worker at FAMILY MEDICAL CLINIC, a local medical clinic with five practicing physicians. A coworker (judge) has questioned you about an item on the annual employee evaluation and has asked you to explain its validity.

Front desk workers at FAMILY MEDICAL CLINIC have several responsibilities: greeting patients and visitors to the practice, checking in patients for appointments, collecting co-pays and fees, updating patient information, answering phone calls, directing visitors and printing all forms and documents needed by physicians, nurses or patients. Front desk workers are an important part of keeping the practice running smoothly.

Annual employee evaluations will be happening soon. In anticipation, supervisors have given employees a copy of the evaluation form to review. A coworker (judge) has read over the employee evaluation form and is wondering why front desk workers will be evaluated on leadership skills. Front desk workers are not in supervisory roles, so the coworker (judge) is uncertain how a nonsupervisory employee can demonstrate leadership skills.

You will explain how front desk workers at FAMILY MEDICAL CLINIC can demonstrate leadership skills to the coworker (judge) in a role-play to take place at the front desk. The coworker (judge) will begin the role-play by greeting you and asking to hear about leadership. After you have explained how front desk workers can demonstrate leadership skills and have answered the coworker's (judge's) questions, the coworker (judge) will conclude the role-play by thanking you for your work.

# **JUDGE'S INSTRUCTIONS**

## **DIRECTIONS, PROCEDURES AND JUDGE'S ROLE**

In preparation for this event, you should review the following information with your event manager and other judges:

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5. Judge's Evaluation Instructions
6. Judge's Evaluation Form  
Please use a critical and consistent eye in rating each participant.

## **JUDGE SITUATION CHARACTERIZATION**

You are to assume the role of a front desk worker at FAMILY MEDICAL CLINIC, a local medical clinic with five practicing physicians. You have questioned a coworker (participant) about an item on the annual employee evaluation and have asked the coworker (participant) to explain its validity.

Front desk workers at FAMILY MEDICAL CLINIC have several responsibilities: greeting patients and visitors to the practice, checking in patients for appointments, collecting co-pays and fees, updating patient information, answering phone calls, directing visitors and printing all forms and documents needed by physicians, nurses or patients. Front desk workers are an important part of keeping the practice running smoothly.

Annual employee evaluations will be happening soon. In anticipation, supervisors have given employees a copy of the evaluation form to review. You have read over the employee evaluation form and are wondering why front desk workers will be evaluated on leadership skills. Front desk workers are not in supervisory roles, so you are uncertain how a nonsupervisory employee can demonstrate leadership skills.

The participant will explain how front desk workers can demonstrate leadership skills to you in a role-play to take place at the front desk. You will begin the role-play by greeting the participant and asking to hear about leadership skills.

During the course of the role-play you are to ask the following questions of each participant:

1. Why is it important for an employee to have leadership skills?
2. How can an employee lacking in leadership skills improve?

Once the coworker (participant) has explained leadership and has answered your questions, you will conclude the role-play by thanking the coworker (participant) for the work.

You are not to make any comments after the event is over except to thank the participant.

*Answers will vary but should demonstrate a basic understanding of the concepts.*

# JUDGE'S EVALUATION INSTRUCTIONS

## Evaluation Form Information

The participants are to be evaluated on their ability to perform the specific performance indicators stated on the cover sheet of this event and restated on the Judge's Evaluation Form. Although you may see other performance indicators being demonstrated by the participants, those listed in the Performance Indicators section are the critical ones you are measuring for this particular event.

## Evaluation Form Interpretation

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Exceeds Expectations	Participant demonstrated the performance indicator in an extremely professional manner; greatly exceeds business standards; would rank in the top 10% of business personnel performing this performance indicator.
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Below Expectations	Participant demonstrated the performance indicator with limited effectiveness; performance generally fell below minimal business standards; additional training would be required to improve knowledge, attitude and/or skills; would rank in the 50-69 <sup>th</sup> percentile of business personnel performing this performance indicator.
Little/No Value	Participant demonstrated the performance indicator with little or no effectiveness; a great deal of formal training would be needed immediately; perhaps this person should seek other employment; would rank in the 0-49 <sup>th</sup> percentile of business personnel performing this performance indicator.



**PRINCIPLES OF BUSINESS MANAGEMENT AND ADMINISTRATION, 2018**

Participant: \_\_\_\_\_

I.D. Number: \_\_\_\_\_

**JUDGE'S EVALUATION FORM**

**INSTRUCTIONAL AREA**

Emotional Intelligence

Did the participant:

		Little/No Value	Below Expectations	Meets Expectations	Exceeds Expectations	Judged Score
<b>PERFORMANCE INDICATORS</b>						
1.	Explain the concept of leadership?	0-1-2-3-4-5	6-7-8-9-10	11-12-13-14	15-16-17-18	
2.	Develop an achievement orientation?	0-1-2-3-4-5	6-7-8-9-10	11-12-13-14	15-16-17-18	
3.	Inspire others?	0-1-2-3-4-5	6-7-8-9-10	11-12-13-14	15-16-17-18	
4.	Enlist others in working toward a shared vision?	0-1-2-3-4-5	6-7-8-9-10	11-12-13-14	15-16-17-18	
<b>21<sup>st</sup> CENTURY SKILLS</b>						
5.	Reason effectively and use systems thinking?	0-1	2-3	4-5	6-7	
6.	Communicate clearly?	0-1	2-3	4-5	6-7	
7.	Show evidence of creativity?	0-1	2-3	4-5	6-7	
8.	Overall impression and responses to the judge's questions	0-1	2-3	4-5	6-7	
<b>TOTAL SCORE</b>						



**\$8.00** | 18PBAB



# PRINCIPLES OF FINANCE

AS USED IN DECA'S  
**PRINCIPLES OF BUSINESS  
ADMINISTRATION EVENTS**



**2018**





# PRINCIPLES OF FINANCE

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2018 ROLE-PLAYS

## INCLUDES:

INTEGRATE DECA'S ROLE-PLAYS AND CASE STUDIES INTO YOUR CLASSROOM

ROLE-PLAY 1: FINANCIAL ANALYSIS

ROLE-PLAY 2: EMOTIONAL INTELLIGENCE

ROLE-PLAY 3: OPERATIONS



## **INTEGRATE DECA'S ROLE-PLAYS AND CASE STUDIES INTO YOUR CLASSROOM**

With its connection to National Curriculum Standards, DECA's Competitive Events Program is designed to be integrated into classroom instruction to help members apply learning and connect to business. As teaching tools, DECA's role-plays and case studies provide relevant, meaningful problems for students to solve, provide a standards-based evaluation, increase rigor of the instruction, result in evidence of student learning and expose students to DECA – all as part of classroom instruction.

### **STEP 1: FAMILIARIZE YOURSELF WITH EVENT GUIDELINES AND PERFORMANCE INDICATORS.**

Use the DECA Guide to familiarize yourself with event guidelines that explain how each competitive event will operate – time limits, exam specifications, interactions with a judge, etc.

Role-plays and case studies are developed using performance indicators – key concepts from national curriculum standards that students should learn during the school year. DECA uses five lists of performance indicators which are organized by career cluster – business administration core, business management and administration, finance, hospitality and tourism, and marketing, as well as personal financial literacy.

Each performance indicator list is arranged by instructional areas to assist advisors with planning units of instruction. Advisors teaching accounting courses, for example, can use the Finance Career Cluster performance indicator list to plan their curriculum while advisors teaching marketing courses can use the Marketing Career Cluster performance indicator list.

### **STEP 2: UNDERSTAND HOW ROLE-PLAYS AND CASE STUDIES ARE DESIGNED.**

The career cluster and primary instructional area for role-plays and case studies are identified at the top of the first page of the event.

Role-plays used for DECA's Principles of Business Administration Events measure four performance indicators from the business administration core.

Case studies used for DECA's Team Decision Making Events measure seven performance indicators. Usually, at least four of the seven performance indicators have been selected from the case study's instructional area. Therefore, if the event situation is asking the participant to develop a promotion plan, most of the performance indicators will be from the promotion instructional area.

Role-plays used for DECA's Individual Series Events measure five performance indicators. Usually, at least three of the five performance indicators have been selected from the event situation's instructional area. The career pathway is also identified on the role-play, which may include performance indicators from that specific pathway as well.

Role-plays used for DECA's Personal Financial Literacy event measure three performance indicators from the National Standards in K-12 Personal Finance Education, created and maintained by the Jump\$tart Coalition® for Personal Financial Literacy.

### **STEP 3: START ORGANIZING SAMPLE EVENTS.**

Each year, DECA posts sample role-plays and case studies on [deca.org](http://deca.org). Shop DECA also sells previously used events each year. Gather these samples and begin to categorize them by instructional area.

### **STEP 4: USE SAMPLE EVENTS AS A CLASSROOM ACTIVITY.**

As you teach different instructional areas during the year, use corresponding role-plays and case studies as learning tools. While the traditional competitive event setting requires interaction with judges, many advisors have used role-plays and case studies as:

- warm-up activities at the beginning of classes.
- writing exercises that require students to write their ideas for solving the problem presented in the role-play or case study.
- public speaking exercises that require students to deliver an oral report or recorded video that presents their ideas for solving the problem presented in the role-play or case study.
- assessment tools in lieu of a multiple-choice quiz/test.

Since the evaluation form for each role-play and case study assesses the performance indicators, you are assessing students' performance according to national curriculum standards which are industry validated and aligned to career clusters.

### **ADDITIONAL RESOURCES**

Event guidelines, performance indicator lists, sample events and sample exam questions are available at [www.deca.org/competitiveevents](http://www.deca.org/competitiveevents). Sample role-play presentations can be viewed at [www.deca.org](http://www.deca.org). Advisors may wish to show the videos and ask students to evaluate the presentations using the evaluation forms. Shop DECA sells many items to assist advisors with integrating DECA into curriculum at [shopdeca.org](http://shopdeca.org).



**CAREER CLUSTER**  
Finance

**INSTRUCTIONAL AREA**  
Financial Analysis

## **PRINCIPLES OF FINANCE EVENT**

### **PARTICIPANT INSTRUCTIONS**

- The event will be presented to you through your reading of the 21<sup>st</sup> Century Skills, Performance Indicators and Event Situation. You will have up to 10 minutes to review this information and prepare your presentation. You may make notes to use during your presentation.
- You will have up to 10 minutes to make your presentation to the judge (you may have more than one judge).
- You will be evaluated on how well you meet the performance indicators of this event.
- Turn in all of your notes and event materials when you have completed the event.

### **21<sup>st</sup> CENTURY SKILLS**

- Critical Thinking – Reason effectively and use systems thinking.
- Communication – Communicate clearly.
- Creativity and Innovation – Show evidence of creativity.

### **PERFORMANCE INDICATORS**

1. Explain the concept of accounting.
2. Describe the need for financial information.
3. Discuss the role of ethics in accounting.
4. Explain the nature of balance sheets.

## **EVENT SITUATION**

You are to assume the role of an accountant doing private consulting work. The owner (judge) of a new online business, ACCESSORY HUT, does not understand the need for an accountant and has asked you to explain why it is important.

ACCESSORY HUT is a new online business. The owner (judge) creates jewelry, hair accessories and small purses and sells the merchandise on the ACCESSORY HUT website. The owner (judge) has one employee that works part-time. The owner (judge) uses the sales profits to purchase supplies, pay the part-time employee, shipping and postage costs, and routine servicing of equipment.

Several people have told the owner (judge) that the expertise of an accountant is needed to ensure ACCESSORY HUT is maintaining accurate financial records. The owner (judge) is not convinced that an accountant is needed. You will meet with the business owner (judge) to explain why even a small business needs an accountant. You must explain the need for financial information and explain a company needs to create and maintain balance sheets and other financial documents.

You will explain the need for and importance of accounting to the business owner (judge) in a role-play to take place in the business owner's (judge's) office. The business owner (judge) will begin the role-play by asking you about the role of accounting in a business. After you have explained accounting to the business owner (judge) and have answered the business owner's (judge's) questions, the new business owner (judge) will conclude the role-play by thanking you for your work.

# JUDGE'S INSTRUCTIONS

## DIRECTIONS, PROCEDURES AND JUDGE'S ROLE

In preparation for this event, you should review the following information with your event manager and other judges:

1. Procedures
2. 21<sup>st</sup> Century Skills and Performance Indicators
3. Event Situation
4. Judge Situation Characterization  
Participants may conduct a slightly different type of meeting and/or discussion with you each time; however, it is important that the information you provide and the questions you ask be uniform for every participant.
5. Judge's Evaluation Instructions
6. Judge's Evaluation Form  
Please use a critical and consistent eye in rating each participant.

## JUDGE SITUATION CHARACTERIZATION

You are to assume the role of an owner of a new online business, ACCESSORY HUT. You do not understand the need for an accountant and have asked a private accounting consultant (participant) to explain why it is important.

ACCESSORY HUT is a new online business. You create jewelry, hair accessories and small purses and sell the merchandise on the ACCESSORY HUT website. You have one employee that works part-time. You use the sales profits to purchase supplies, pay the part-time employee, shipping and postage costs, and routine servicing of equipment.

Several people have told you that the expertise of an accountant is needed to ensure ACCESSORY HUT is maintaining accurate financial records. You are not convinced that an accountant is needed. You will meet with an accounting consultant (participant) to hear why even a small business needs an accountant. The accounting consultant (participant) must explain the need for financial information and explain why a company needs to create and maintain balance sheets and other financial documents.

The accounting consultant (participant) will explain the importance of accounting to you in a role-play to take place in your office. You will begin the role-play by asking about the role accounting plays in a business. During the course of the role-play you are to ask the following questions of each participant:

1. What can an accountant do that I cannot accomplish for my business myself?
2. Can an accountant also manage my business's annual taxes? How?

After the consultant (participant) has given you an explanation and has answered your questions, you will conclude the role-play by thanking the consultant (participant).

You are not to make any comments after the event is over except to thank the participant.

# JUDGE'S EVALUATION INSTRUCTIONS

## Evaluation Form Information

The participants are to be evaluated on their ability to perform the specific performance indicators stated on the cover sheet of this event and restated on the Judge's Evaluation Form. Although you may see other performance indicators being demonstrated by the participants, those listed in the Performance Indicators section are the critical ones you are measuring for this particular event.

## Evaluation Form Interpretation

The evaluation levels listed below and the evaluation rating procedures should be discussed thoroughly with your event chairperson and the other judges to ensure complete and common understanding for judging consistency.

<b>Level of Evaluation</b>	<b>Interpretation Level</b>
Exceeds Expectations	Participant demonstrated the performance indicator in an extremely professional manner; greatly exceeds business standards; would rank in the top 10% of business personnel performing this performance indicator.
Meets Expectations	Participant demonstrated the performance indicator in an acceptable and effective manner; meets at least minimal business standards; there would be no need for additional formalized training at this time; would rank in the 70-89 <sup>th</sup> percentile of business personnel performing this performance indicator.
Below Expectations	Participant demonstrated the performance indicator with limited effectiveness; performance generally fell below minimal business standards; additional training would be required to improve knowledge, attitude and/or skills; would rank in the 50-69 <sup>th</sup> percentile of business personnel performing this performance indicator.
Little/No Value	Participant demonstrated the performance indicator with little or no effectiveness; a great deal of formal training would be needed immediately; perhaps this person should seek other employment; would rank in the 0-49 <sup>th</sup> percentile of business personnel performing this performance indicator.



**PRINCIPLES OF FINANCE, 2018**

Participant: \_\_\_\_\_

**JUDGE'S EVALUATION FORM**

I.D. Number: \_\_\_\_\_

**INSTRUCTIONAL AREA**

Financial Analysis

Did the participant:

		Little/No Value	Below Expectations	Meets Expectations	Exceeds Expectations	Judged Score
<b>PERFORMANCE INDICATORS</b>						
1.	Explain the concept of accounting?	0-1-2-3-4-5	6-7-8-9-10	11-12-13-14	15-16-17-18	
2.	Describe the need for financial information?	0-1-2-3-4-5	6-7-8-9-10	11-12-13-14	15-16-17-18	
3.	Discuss the role of ethics in accounting?	0-1-2-3-4-5	6-7-8-9-10	11-12-13-14	15-16-17-18	
4.	Explain the nature of balance sheets?	0-1-2-3-4-5	6-7-8-9-10	11-12-13-14	15-16-17-18	
<b>21<sup>st</sup> CENTURY SKILLS</b>						
5.	Reason effectively and use systems thinking?	0-1	2-3	4-5	6-7	
6.	Communicate clearly?	0-1	2-3	4-5	6-7	
7.	Show evidence of creativity?	0-1	2-3	4-5	6-7	
8.	Overall impression and responses to the judge's questions	0-1	2-3	4-5	6-7	
<b>TOTAL SCORE</b>						





## **CAREER CLUSTER**

Finance

## **INSTRUCTIONAL AREA**

Emotional Intelligence

# **PRINCIPLES OF FINANCE EVENT**

## **PARTICIPANT INSTRUCTIONS**

- The event will be presented to you through your reading of the 21<sup>st</sup> Century Skills, Performance Indicators and Event Situation. You will have up to 10 minutes to review this information and prepare your presentation. You may make notes to use during your presentation.
- You will have up to 10 minutes to make your presentation to the judge (you may have more than one judge).
- You will be evaluated on how well you meet the performance indicators of this event.
- Turn in all of your notes and event materials when you have completed the event.

## **21<sup>st</sup> CENTURY SKILLS**

- Critical Thinking – Reason effectively and use systems thinking.
- Communication – Communicate clearly.
- Creativity and Innovation – Show evidence of creativity.

## **PERFORMANCE INDICATORS**

1. Describe the nature of emotional intelligence.
2. Identify desirable personality traits important to business.
3. Respect the privacy of others.
4. Foster positive working relationships.

## **EVENT SITUATION**

You are to assume the role of a bank teller at SMALL CITY BANK, a local banking institution in a city of 10,000 people. You work with three other bank tellers, one of them is a new hire. The new bank teller (judge) has asked you to talk about the non-financial aspects of the job.

While SMALL CITY BANK is located in a small town, it services the financial needs of a majority of citizens of the town and the surrounding region. Everyday the lobby is full of bank customers waiting in line to deposit or withdraw money, pay on a line of credit, apply for a line of credit or open new accounts. The bank offers savings accounts, certificates of deposits and low interest rates on automobile, housing and personal loans.

The new bank teller (judge) has completed the appropriate industry-related training involved with starting a job as a bank teller. The new bank teller (judge) has asked you to explain other, softer skills, the job entails. The new bank teller (judge) wants to know about communications among bank customers and employees and how positive relationships are made among both.

You will explain your knowledge of emotional intelligence to the new bank teller (judge) in a role-play to take place at the bank counter. The new bank teller (judge) will begin the role-play by asking you about soft skills. After you have given the new bank teller (judge) an explanation and have answered the new bank teller's (judge's) questions, the new bank teller (judge) will conclude the role-play by thanking you for your work.

# **JUDGE'S INSTRUCTIONS**

## **DIRECTIONS, PROCEDURES AND JUDGE'S ROLE**

In preparation for this event, you should review the following information with your event manager and other judges:

1. Procedures
2. 21<sup>st</sup> Century Skills and Performance Indicators
3. Event Situation
4. Judge Situation Characterization  
Participants may conduct a slightly different type of meeting and/or discussion with you each time; however, it is important that the information you provide and the questions you ask be uniform for every participant.
5. Judge's Evaluation Instructions
6. Judge's Evaluation Form  
Please use a critical and consistent eye in rating each participant.

## **JUDGE SITUATION CHARACTERIZATION**

You are to assume the role of a new bank teller at SMALL CITY BANK, a local banking institution in a city of 10,000 people. You work with three other bank tellers. You have asked one of the bank tellers (participant) to talk about the non-financial aspects of the job.

While SMALL CITY BANK is located in a small town, it services the financial needs of a majority of citizens of the town and the surrounding region. Everyday the lobby is full of bank customers waiting in line to deposit or withdraw money, pay on a line of credit, apply for a line of credit or open new accounts. The bank offers savings accounts, certificates of deposits and low interest rates on automobile, housing and personal loans.

You have completed the appropriate industry-related training involved with starting a job as a bank teller. You have asked one of the other bank tellers (participant) to explain other skills the job entails. You want to know about communications among bank customers and employees and how positive relationships are made among both.

Your coworker (participant) will explain knowledge of emotional intelligence to you in a role-play to take place in your office. You will begin the role-play by asking about emotional intelligence. During the course of the role-play you are to ask the following questions of each participant:

1. Why is having good emotional skills as important as good financial skills?
2. Why do bank customers care so much about confidentiality?

After your coworker (participant) has given you an explanation and has answered your questions, you will conclude the role-play by thanking your coworker (participant).

You are not to make any comments after the event is over except to thank the participant.

*Answers will vary but should demonstrate a basic understanding of the concepts.*

# JUDGE'S EVALUATION INSTRUCTIONS

## Evaluation Form Information

The participants are to be evaluated on their ability to perform the specific performance indicators stated on the cover sheet of this event and restated on the Judge's Evaluation Form. Although you may see other performance indicators being demonstrated by the participants, those listed in the Performance Indicators section are the critical ones you are measuring for this particular event.

## Evaluation Form Interpretation

The evaluation levels listed below and the evaluation rating procedures should be discussed thoroughly with your event chairperson and the other judges to ensure complete and common understanding for judging consistency.

<b>Level of Evaluation</b>	<b>Interpretation Level</b>
Exceeds Expectations	Participant demonstrated the performance indicator in an extremely professional manner; greatly exceeds business standards; would rank in the top 10% of business personnel performing this performance indicator.
Meets Expectations	Participant demonstrated the performance indicator in an acceptable and effective manner; meets at least minimal business standards; there would be no need for additional formalized training at this time; would rank in the 70-89 <sup>th</sup> percentile of business personnel performing this performance indicator.
Below Expectations	Participant demonstrated the performance indicator with limited effectiveness; performance generally fell below minimal business standards; additional training would be required to improve knowledge, attitude and/or skills; would rank in the 50-69 <sup>th</sup> percentile of business personnel performing this performance indicator.
Little/No Value	Participant demonstrated the performance indicator with little or no effectiveness; a great deal of formal training would be needed immediately; perhaps this person should seek other employment; would rank in the 0-49 <sup>th</sup> percentile of business personnel performing this performance indicator.



**PRINCIPLES OF FINANCE, 2018**

Participant: \_\_\_\_\_

**JUDGE'S EVALUATION FORM**

I.D. Number: \_\_\_\_\_

**INSTRUCTIONAL AREA**

Emotional Intelligence

Did the participant:

Did the participant:		Little/No Value	Below Expectations	Meets Expectations	Exceeds Expectations	Judged Score
<b>PERFORMANCE INDICATORS</b>						
1.	Describe the nature of emotional intelligence?	0-1-2-3-4-5	6-7-8-9-10	11-12-13-14	15-16-17-18	
2.	Identify desirable personality traits important to business?	0-1-2-3-4-5	6-7-8-9-10	11-12-13-14	15-16-17-18	
3.	Respect the privacy of others?	0-1-2-3-4-5	6-7-8-9-10	11-12-13-14	15-16-17-18	
4.	Foster positive working relationships?	0-1-2-3-4-5	6-7-8-9-10	11-12-13-14	15-16-17-18	
<b>21<sup>st</sup> CENTURY SKILLS</b>						
5.	Reason effectively and use systems thinking?	0-1	2-3	4-5	6-7	
6.	Communicate clearly?	0-1	2-3	4-5	6-7	
7.	Show evidence of creativity?	0-1	2-3	4-5	6-7	
8.	Overall impression and responses to the judge's questions	0-1	2-3	4-5	6-7	
<b>TOTAL SCORE</b>						



## **CAREER CLUSTER**

Finance

## **INSTRUCTIONAL AREA**

Operations

# **PRINCIPLES OF FINANCE EVENT**

## **PARTICIPANT INSTRUCTIONS**

- The event will be presented to you through your reading of the 21<sup>st</sup> Century Skills, Performance Indicators and Event Situation. You will have up to 10 minutes to review this information and prepare your presentation. You may make notes to use during your presentation.
- You will have up to 10 minutes to make your presentation to the judge (you may have more than one judge).
- You will be evaluated on how well you meet the performance indicators of this event.
- Turn in all of your notes and event materials when you have completed the event.

## **21<sup>st</sup> CENTURY SKILLS**

- Critical Thinking – Reason effectively and use systems thinking.
- Communication – Communicate clearly.
- Creativity and Innovation – Show evidence of creativity.

## **PERFORMANCE INDICATORS**

1. Explain routine security precaution.
2. Protect company information and intangibles.
3. Explain information privacy, security, and confidentiality considerations in business.
4. Maintain data security.

## EVENT SITUATION

You are to assume the role of an accountant at GEORGE & KEEN, an accounting firm that manages over 300 business clients. The firm recently began allowing employees to work from home. A coworker (judge) does not understand why security training is necessary to be able to work from home. You will describe basic reasons why security is important when working away from the office.

GEORGE & KEEN is the most trusted accounting firm in the region. With over 300 business clients and over 200 employees, the firm is well-known. Since it opened in 1967, GEORGE & KEEN has kept traditional office space, offering executives full offices and other staff members cubicles. The majority of the accounting work is done via computer rather than face-to-face client interaction, so not much space is needed.

To keep up with current business trends, executives at GEORGE & KEEN have begun letting accountants work from home. Accountants are issued a company laptop and other equipment and must have high speed internet capabilities in their workspace. Before the new work from home initiative begins, executives have insisted that all employees that want to work from home must attend a mandatory security training regarding company information, client information and company equipment.

A coworker that plans to work from home (judge) is unhappy about the mandatory security training and does not understand why it is necessary. You must explain to the coworker (judge) basic reasons why the training is essential.

You will explain basic reasons for security training to the coworker (judge) in a role-play to take place at your coworker's (judge's) cubicle. The coworker (judge) will begin the role-play by asking you about the training. After you have explained reasons to the coworker (judge) and have answered the coworker's (judge's) questions, the coworker (judge) will conclude the role-play by thanking you for your work.



# **JUDGE'S INSTRUCTIONS**

## **DIRECTIONS, PROCEDURES AND JUDGE'S ROLE**

In preparation for this event, you should review the following information with your event manager and other judges:

1. Procedures
2. 21<sup>st</sup> Century Skills and Performance Indicators
3. Event Situation
4. Judge Situation Characterization  
Participants may conduct a slightly different type of meeting and/or discussion with you each time; however, it is important that the information you provide and the questions you ask be uniform for every participant.
5. Judge's Evaluation Instructions
6. Judge's Evaluation Form  
Please use a critical and consistent eye in rating each participant.

## **JUDGE SITUATION CHARACTERIZATION**

You are to assume the role of an accountant at GEORGE & KEEN, an accounting firm that manages over 300 business clients. The firm recently began allowing employees to work from home. You do not understand why security training is necessary to be able to work from home. A coworker (participant) will describe basic reasons why security is important when working away from the office.

GEORGE & KEEN is the most trusted accounting firm in the region. With over 300 business clients and over 200 employees, the firm is well-known. Since it opened in 1967, GEORGE & KEEN has kept traditional office space, offering executives full offices and other staff members cubicles. The majority of the accounting work is done via computer rather than face-to-face client interaction, so not much space is needed.

To keep up with current business trends, executives at GEORGE & KEEN have begun letting accountants work from home. Accountants are issued a company laptop and other equipment and must have high speed internet capabilities in their workspace. Before the new work from home initiative begins, executives have insisted that all employees that want to work from home must attend a mandatory security training regarding company information, client information and company equipment.

You are unhappy about the mandatory security training and do not understand why it is necessary. The coworker (participant) must explain to you the basic reasons why the training is essential.

Your coworker (participant) will explain basic reasons for security training to you in a role-play to take place in your cubicle. You will begin the role-play by asking about the training. During the course of the role-play you are to ask the following questions of each participant:

1. Should the company provide security training to ALL employees?
2. How does allowing employees to work from home benefit the company?

After your coworker (participant) has given you an explanation and has answered your questions, you will conclude the role-play by thanking your coworker (participant).

You are not to make any comments after the event is over except to thank the participant.

*Answers will vary but should demonstrate a basic understanding of the concepts.*

# JUDGE'S EVALUATION INSTRUCTIONS

## Evaluation Form Information

The participants are to be evaluated on their ability to perform the specific performance indicators stated on the cover sheet of this event and restated on the Judge's Evaluation Form. Although you may see other performance indicators being demonstrated by the participants, those listed in the Performance Indicators section are the critical ones you are measuring for this particular event.

## Evaluation Form Interpretation

The evaluation levels listed below and the evaluation rating procedures should be discussed thoroughly with your event chairperson and the other judges to ensure complete and common understanding for judging consistency.

<b>Level of Evaluation</b>	<b>Interpretation Level</b>
Exceeds Expectations	Participant demonstrated the performance indicator in an extremely professional manner; greatly exceeds business standards; would rank in the top 10% of business personnel performing this performance indicator.
Meets Expectations	Participant demonstrated the performance indicator in an acceptable and effective manner; meets at least minimal business standards; there would be no need for additional formalized training at this time; would rank in the 70-89 <sup>th</sup> percentile of business personnel performing this performance indicator.
Below Expectations	Participant demonstrated the performance indicator with limited effectiveness; performance generally fell below minimal business standards; additional training would be required to improve knowledge, attitude and/or skills; would rank in the 50-69 <sup>th</sup> percentile of business personnel performing this performance indicator.
Little/No Value	Participant demonstrated the performance indicator with little or no effectiveness; a great deal of formal training would be needed immediately; perhaps this person should seek other employment; would rank in the 0-49 <sup>th</sup> percentile of business personnel performing this performance indicator.



**PRINCIPLES OF FINANCE, 2018**

Participant: \_\_\_\_\_

**JUDGE'S EVALUATION FORM**

I.D. Number: \_\_\_\_\_

**INSTRUCTIONAL AREA**

Operations

Did the participant:

Did the participant:		Little/No Value	Below Expectations	Meets Expectations	Exceeds Expectations	Judged Score
<b>PERFORMANCE INDICATORS</b>						
1.	Explain routine security precautions?	0-1-2-3-4-5	6-7-8-9-10	11-12-13-14	15-16-17-18	
2.	Protect company information and intangibles?	0-1-2-3-4-5	6-7-8-9-10	11-12-13-14	15-16-17-18	
3.	Explain information privacy, security, and confidentiality considerations in business?	0-1-2-3-4-5	6-7-8-9-10	11-12-13-14	15-16-17-18	
4.	Maintain data security?	0-1-2-3-4-5	6-7-8-9-10	11-12-13-14	15-16-17-18	
<b>21<sup>st</sup> CENTURY SKILLS</b>						
5.	Reason effectively and use systems thinking?	0-1	2-3	4-5	6-7	
6.	Communicate clearly?	0-1	2-3	4-5	6-7	
7.	Show evidence of creativity?	0-1	2-3	4-5	6-7	
8.	Overall impression and responses to the judge's questions	0-1	2-3	4-5	6-7	
<b>TOTAL SCORE</b>						



**\$8.00** | 18PBAF



# PRINCIPLES OF HOSPITALITY AND TOURISM

AS USED IN DECA'S  
PRINCIPLES OF BUSINESS  
ADMINISTRATION EVENTS



2018



# PRINCIPLES OF HOSPITALITY + TOURISM

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2018 ROLE-PLAYS

## INCLUDES:

INTEGRATE DECA'S ROLE-PLAYS AND CASE STUDIES INTO YOUR CLASSROOM

ROLE-PLAY 1: EMOTIONAL INTELLIGENCE

ROLE-PLAY 2: CUSTOMER RELATIONS

ROLE-PLAY 3: OPERATIONS



## **INTEGRATE DECA'S ROLE-PLAYS AND CASE STUDIES INTO YOUR CLASSROOM**

With its connection to National Curriculum Standards, DECA's Competitive Events Program is designed to be integrated into classroom instruction to help members apply learning and connect to business. As teaching tools, DECA's role-plays and case studies provide relevant, meaningful problems for students to solve, provide a standards-based evaluation, increase rigor of the instruction, result in evidence of student learning and expose students to DECA – all as part of classroom instruction.

### **STEP 1: FAMILIARIZE YOURSELF WITH EVENT GUIDELINES AND PERFORMANCE INDICATORS.**

Use the DECA Guide to familiarize yourself with event guidelines that explain how each competitive event will operate – time limits, exam specifications, interactions with a judge, etc.

Role-plays and case studies are developed using performance indicators – key concepts from national curriculum standards that students should learn during the school year. DECA uses five lists of performance indicators which are organized by career cluster – business administration core, business management and administration, finance, hospitality and tourism, and marketing, as well as personal financial literacy.

Each performance indicator list is arranged by instructional areas to assist advisors with planning units of instruction. Advisors teaching accounting courses, for example, can use the Finance Career Cluster performance indicator list to plan their curriculum while advisors teaching marketing courses can use the Marketing Career Cluster performance indicator list.

### **STEP 2: UNDERSTAND HOW ROLE-PLAYS AND CASE STUDIES ARE DESIGNED.**

The career cluster and primary instructional area for role-plays and case studies are identified at the top of the first page of the event.

Role-plays used for DECA's Principles of Business Administration Events measure four performance indicators from the business administration core.

Case studies used for DECA's Team Decision Making Events measure seven performance indicators. Usually, at least four of the seven performance indicators have been selected from the case study's instructional area. Therefore, if the event situation is asking the participant to develop a promotion plan, most of the performance indicators will be from the promotion instructional area.

Role-plays used for DECA's Individual Series Events measure five performance indicators. Usually, at least three of the five performance indicators have been selected from the event situation's instructional area. The career pathway is also identified on the role-play, which may include performance indicators from that specific pathway as well.

Role-plays used for DECA's Personal Financial Literacy event measure three performance indicators from the National Standards in K-12 Personal Finance Education, created and maintained by the Jump\$tart Coalition® for Personal Financial Literacy.

### **STEP 3: START ORGANIZING SAMPLE EVENTS.**

Each year, DECA posts sample role-plays and case studies on [deca.org](http://deca.org). Shop DECA also sells previously used events each year. Gather these samples and begin to categorize them by instructional area.

### **STEP 4: USE SAMPLE EVENTS AS A CLASSROOM ACTIVITY.**

As you teach different instructional areas during the year, use corresponding role-plays and case studies as learning tools. While the traditional competitive event setting requires interaction with judges, many advisors have used role-plays and case studies as:

- warm-up activities at the beginning of classes.
- writing exercises that require students to write their ideas for solving the problem presented in the role-play or case study.
- public speaking exercises that require students to deliver an oral report or recorded video that presents their ideas for solving the problem presented in the role-play or case study.
- assessment tools in lieu of a multiple-choice quiz/test.

Since the evaluation form for each role-play and case study assesses the performance indicators, you are assessing students' performance according to national curriculum standards which are industry validated and aligned to career clusters.

### **ADDITIONAL RESOURCES**

Event guidelines, performance indicator lists, sample events and sample exam questions are available at [www.deca.org/competitiveevents](http://www.deca.org/competitiveevents). Sample role-play presentations can be viewed at [www.deca.org](http://www.deca.org). Advisors may wish to show the videos and ask students to evaluate the presentations using the evaluation forms. Shop DECA sells many items to assist advisors with integrating DECA into curriculum at [shopdeca.org](http://shopdeca.org).





**CAREER CLUSTER**  
Hospitality and Tourism

**INSTRUCTIONAL AREA**  
Emotional Intelligence

## **PRINCIPLES OF HOSPITALITY AND TOURISM EVENT**

### **PARTICIPANT INSTRUCTIONS**

- The event will be presented to you through your reading of the 21<sup>st</sup> Century Skills, Performance Indicators and Event Situation. You will have up to 10 minutes to review this information and prepare your presentation. You may make notes to use during your presentation.
- You will have up to 10 minutes to make your presentation to the judge (you may have more than one judge).
- You will be evaluated on how well you meet the performance indicators of this event.
- Turn in all of your notes and event materials when you have completed the event.

### **21<sup>st</sup> CENTURY SKILLS**

- Critical Thinking – Reason effectively and use systems thinking.
- Communication – Communicate clearly.
- Creativity and Innovation – Show evidence of creativity.

### **PERFORMANCE INDICATORS**

1. Exhibit a positive attitude.
2. Solicit feedback.
3. Explain the use of feedback for personal growth.
4. Use social media to solicit new ideas and solutions.

## EVENT SITUATION

You are to assume the role of wait staff supervisor at a local OLD TOWNE, a family-style restaurant chain. The restaurant just started participating in the chain's national online customer survey program and a new social media contest. You must demonstrate to a member of the wait staff (judge) how to communicate the two new programs to restaurant customers.

OLD TOWNE has served customers standard American cuisine for over forty years. The chain was the first to promote a "fun" wait staff with informal uniforms and zany accessories. Management encouraged wait staff to be overly friendly to customers and offer many menu suggestions.

While the company-owned OLD TOWNE restaurants have participated in customer survey programs for over five years, this locally-owned OLD TOWNE has not, until now. At the bottom of each customer's receipt, a special invitation and instructions are printed for customers to either go online or call a phone number to participate in a survey. The survey is designed for feedback for the restaurant, and more specifically, details about the experience with the wait staff. The survey is one component of the restaurant's overall continuous improvement model.

As well as the customer survey program, this locally-owned OLD TOWNE is asking customers to "like" the local restaurant's page on Facebook and then make a suggestion for a new menu item.

As wait staff supervisor, you must train all wait staff on the new customer survey and the Facebook initiative. You will meet with a member of the wait staff (judge) to demonstrate how team members should communicate the customer survey and the Facebook initiative to each customer. It is important that all wait staff explain why the customer survey and the Facebook initiative are important to the local OLD TOWNE.

You will explain the new forms of feedback to a member of the wait staff (judge) in a role-play to take place in the back office. The wait staff member (judge) will begin the role-play by asking you about the feedback surveys. After you have given the wait staff member (judge) an explanation and have answered the wait staff member's (judge's) questions, the wait staff member (judge) will conclude the role-play by thanking you for your work.

# JUDGE'S INSTRUCTIONS

## DIRECTIONS, PROCEDURES AND JUDGE'S ROLE

In preparation for this event, you should review the following information with your event manager and other judges:

1. Procedures
2. 21<sup>st</sup> Century Skills and Performance Indicators
3. Event Situation
4. Judge Situation Characterization  
Participants may conduct a slightly different type of meeting and/or discussion with you each time; however, it is important that the information you provide and the questions you ask be uniform for every participant.
5. Judge's Evaluation Instructions
6. Judge's Evaluation Form  
Please use a critical and consistent eye in rating each participant.

## JUDGE SITUATION CHARACTERIZATION

You are to assume the role of a member of the wait staff at a local OLD TOWNE, a family-style restaurant chain. The restaurant just started participating in the chain's national online customer survey program and a new social media contest. The wait staff supervisor (participant) must demonstrate to you how to communicate the two new programs to restaurant customers.

OLD TOWNE has served customers standard American cuisine for over forty years. The chain was the first to promote a "fun" wait staff with informal uniforms and zany accessories. Management encouraged wait staff to be overly friendly to customers and offer many menu suggestions.

While the company-owned OLD TOWNE restaurants have participated in customer survey programs for over five years, this locally-owned OLD TOWNE has not, until now. At the bottom of each customer's receipt, a special invitation and instructions are printed for customers to either go online or call a phone number to participate in a survey. The survey is designed for feedback for the restaurant, and more specifically, details about the experience with the wait staff. The survey is one component of the restaurant's overall continuous improvement model.

As well as the customer survey program, this locally-owned OLD TOWNE is asking customers to "like" the local restaurant's page on Facebook and then make a suggestion for a new menu item.

The wait staff supervisor (participant) must train all wait staff on the new customer survey and the Facebook initiative. The supervisor (participant) will meet with you to demonstrate how team members should communicate the customer survey and the Facebook initiative to each customer. It is important that all wait staff explain why the customer survey and the Facebook initiative are important to the local OLD TOWNE.

The supervisor (participant) will explain the feedback surveys and give a demonstration to you in a role-play to take place at the back office. You will begin the role-play by asking about the survey. During the course of the role-play you are to ask the following questions of each participant:

1. Should customer ratings affect a server's performance review? Why or why not?
2. Should our local OLD TOWNE offer incentives for customers to participate in the Facebook initiative?

After the wait staff supervisor (participant) has given you a demonstration and has answered your questions, you will conclude the role-play by thanking the supervisor (participant).

You are not to make any comments after the event is over except to thank the participant.

# JUDGE'S EVALUATION INSTRUCTIONS

## Evaluation Form Information

The participants are to be evaluated on their ability to perform the specific performance indicators stated on the cover sheet of this event and restated on the Judge's Evaluation Form. Although you may see other performance indicators being demonstrated by the participants, those listed in the Performance Indicators section are the critical ones you are measuring for this particular event.

## Evaluation Form Interpretation

The evaluation levels listed below and the evaluation rating procedures should be discussed thoroughly with your event chairperson and the other judges to ensure complete and common understanding for judging consistency.

<b>Level of Evaluation</b>	<b>Interpretation Level</b>
Exceeds Expectations	Participant demonstrated the performance indicator in an extremely professional manner; greatly exceeds business standards; would rank in the top 10% of business personnel performing this performance indicator.
Meets Expectations	Participant demonstrated the performance indicator in an acceptable and effective manner; meets at least minimal business standards; there would be no need for additional formalized training at this time; would rank in the 70-89 <sup>th</sup> percentile of business personnel performing this performance indicator.
Below Expectations	Participant demonstrated the performance indicator with limited effectiveness; performance generally fell below minimal business standards; additional training would be required to improve knowledge, attitude and/or skills; would rank in the 50-69 <sup>th</sup> percentile of business personnel performing this performance indicator.
Little/No Value	Participant demonstrated the performance indicator with little or no effectiveness; a great deal of formal training would be needed immediately; perhaps this person should seek other employment; would rank in the 0-49 <sup>th</sup> percentile of business personnel performing this performance indicator.



**PRINCIPLES OF HOSPITALITY AND TOURISM,  
2018**

Participant: \_\_\_\_\_

I.D. Number: \_\_\_\_\_

**JUDGE'S EVALUATION FORM**

**INSTRUCTIONAL AREA**

Emotional Intelligence

Did the participant:

		Little/No Value	Below Expectations	Meets Expectations	Exceeds Expectations	Judged Score
<b>PERFORMANCE INDICATORS</b>						
1.	Exhibit a positive attitude?	0-1-2-3-4-5	6-7-8-9-10	11-12-13-14	15-16-17-18	
2.	Solicit feedback?	0-1-2-3-4-5	6-7-8-9-10	11-12-13-14	15-16-17-18	
3.	Explain the use of feedback for personal growth?	0-1-2-3-4-5	6-7-8-9-10	11-12-13-14	15-16-17-18	
4.	Use social media to solicit new ideas and solutions?	0-1-2-3-4-5	6-7-8-9-10	11-12-13-14	15-16-17-18	
<b>21<sup>st</sup> CENTURY SKILLS</b>						
5.	Reason effectively and use systems thinking?	0-1	2-3	4-5	6-7	
6.	Communicate clearly?	0-1	2-3	4-5	6-7	
7.	Show evidence of creativity?	0-1	2-3	4-5	6-7	
8.	Overall impression and responses to the judge's questions	0-1	2-3	4-5	6-7	
<b>TOTAL SCORE</b>						



**CAREER CLUSTER**  
Hospitality and Tourism

**INSTRUCTIONAL AREA**  
Customer Relations

## **PRINCIPLES OF HOSPITALITY AND TOURISM EVENT**

### **PARTICIPANT INSTRUCTIONS**

- The event will be presented to you through your reading of the 21<sup>st</sup> Century Skills, Performance Indicators and Event Situation. You will have up to 10 minutes to review this information and prepare your presentation. You may make notes to use during your presentation.
- You will have up to 10 minutes to make your presentation to the judge (you may have more than one judge).
- You will be evaluated on how well you meet the performance indicators of this event.
- Turn in all of your notes and event materials when you have completed the event.

### **21<sup>st</sup> CENTURY SKILLS**

- Critical Thinking – Reason effectively and use systems thinking.
- Communication – Communicate clearly.
- Creativity and Innovation – Show evidence of creativity.

### **PERFORMANCE INDICATORS**

1. Demonstrate a customer service mindset.
2. Handle customer/client complaints.
3. Interpret business policies to customers/clients.
4. Reinforce service orientation through communication.

## EVENT SITUATION

You are to assume the role of a crew member working at an entrance admission counter at FANTASTIC LAND, a large amusement park. A customer in your line (judge) is upset because today's special admission promotion is not applicable to the customer's (judge's) party.

FANTASTIC LAND has several promotions throughout the year to encourage visits to the park. The amusement park has coupons available on its mobile app, website and in local newspapers and also participates in weekly promotions. On Tuesdays, FANTASTIC LAND has a special "Kids Free on Tuesdays" promotion. The promotion reads that every Tuesday, kids ages 11-years-old and under are granted free admission into the park with an adult admission.

A customer (judge) at your counter has purchased admission for two adults and has requested two free kids' admissions since it is Tuesday. When asked the ages of the two children, the customer (judge) answered that one child is 5-years-old and the other is 12-years-old. You then replied that the 5-year-old could gain free admission, but the 12-year-old is older than the 11-years-old or younger rule.

The customer (judge) is upset that the 12-year-old is not considered a kid and must pay full admission price. You have access to a coupon that gives 50% off an adult admission and may offer it to the customer (judge), if needed.

You must explain the "Kids Free on Tuesdays" promotion to the customer (judge) in a role-play to take place at the admissions counter. The customer (judge) will begin the role-play by asking you about the promotion. After you satisfied the customer (judge) have answered the customer's (judge's) questions, the customer (judge) will conclude the role-play by thanking you for your work.



# JUDGE'S INSTRUCTIONS

## DIRECTIONS, PROCEDURES AND JUDGE'S ROLE

In preparation for this event, you should review the following information with your event manager and other judges:

1. Procedures
2. 21<sup>st</sup> Century Skills and Performance Indicators
3. Event Situation
4. Judge Situation Characterization  
Participants may conduct a slightly different type of meeting and/or discussion with you each time; however, it is important that the information you provide and the questions you ask be uniform for every participant.
5. Judge's Evaluation Instructions
6. Judge's Evaluation Form  
Please use a critical and consistent eye in rating each participant.

## JUDGE SITUATION CHARACTERIZATION

You are to assume the role of a customer purchasing entrance admission to FANTASTIC LAND, a large amusement park. You are upset because today's special admission promotion is not applicable to your party. A crew member working the entrance admission counter (participant) will help you.

FANTASTIC LAND has several promotions throughout the year to encourage visits to the park. The amusement park has coupons available on its mobile app, website and in local newspapers and also participates in weekly promotions. On Tuesdays, FANTASTIC LAND has a special "Kids Free on Tuesdays" promotion. The promotion reads that every Tuesday, kids ages 11-years-old and under are granted free admission into the park with an adult admission.

You have purchased admission for two adults and have requested two free kids' admissions since it is Tuesday. When the crew member (participant) asked the ages of the two children, you answered that one child is 5-years-old and the other is 12-years-old. The crew member (participant) replied that the 5-year-old could gain free admission, but the 12-year-old is older than the 11-years-old or younger rule.

You are upset that the 12-year-old is not considered a kid and must pay full admission price. The crew member (participant) has access to a coupon that gives 50% off an adult admission and may offer it to you, if needed. You are not aware of the coupon.

The crew member (participant) will respond to your complaint in a role-play to take place at the admissions counter. You will begin the role-play by asking why the 12-year-old cannot receive free admission. During the course of the role-play you are to ask the following questions of each participant:

1. Why does your amusement park have so many promotions and coupons?
2. Why do tourist attractions have different rates for adults and children?

After the crew member (participant) has responded to your complaint and has answered your questions, you will conclude the role-play by thanking the crew member (participant).

You are not to make any comments after the event is over except to thank the participant.

*Answers will vary but should demonstrate a basic understanding of the concepts.*

# JUDGE'S EVALUATION INSTRUCTIONS

## Evaluation Form Information

The participants are to be evaluated on their ability to perform the specific performance indicators stated on the cover sheet of this event and restated on the Judge's Evaluation Form. Although you may see other performance indicators being demonstrated by the participants, those listed in the Performance Indicators section are the critical ones you are measuring for this particular event.

## Evaluation Form Interpretation

The evaluation levels listed below and the evaluation rating procedures should be discussed thoroughly with your event chairperson and the other judges to ensure complete and common understanding for judging consistency.

<b>Level of Evaluation</b>	<b>Interpretation Level</b>
Exceeds Expectations	Participant demonstrated the performance indicator in an extremely professional manner; greatly exceeds business standards; would rank in the top 10% of business personnel performing this performance indicator.
Meets Expectations	Participant demonstrated the performance indicator in an acceptable and effective manner; meets at least minimal business standards; there would be no need for additional formalized training at this time; would rank in the 70-89 <sup>th</sup> percentile of business personnel performing this performance indicator.
Below Expectations	Participant demonstrated the performance indicator with limited effectiveness; performance generally fell below minimal business standards; additional training would be required to improve knowledge, attitude and/or skills; would rank in the 50-69 <sup>th</sup> percentile of business personnel performing this performance indicator.
Little/No Value	Participant demonstrated the performance indicator with little or no effectiveness; a great deal of formal training would be needed immediately; perhaps this person should seek other employment; would rank in the 0-49 <sup>th</sup> percentile of business personnel performing this performance indicator.



**PRINCIPLES OF HOSPITALITY AND TOURISM,  
2018**

Participant: \_\_\_\_\_

I.D. Number: \_\_\_\_\_

**JUDGE'S EVALUATION FORM**

**INSTRUCTIONAL AREA**

Customer Relations

Did the participant:

		Little/No Value	Below Expectations	Meets Expectations	Exceeds Expectations	Judged Score
<b>PERFORMANCE INDICATORS</b>						
1.	Demonstrate a customer service mindset?	0-1-2-3-4-5	6-7-8-9-10	11-12-13-14	15-16-17-18	
2.	Handle customer/client complaints?	0-1-2-3-4-5	6-7-8-9-10	11-12-13-14	15-16-17-18	
3.	Interpret business policies to customers/clients?	0-1-2-3-4-5	6-7-8-9-10	11-12-13-14	15-16-17-18	
4.	Reinforce service orientation through communication?	0-1-2-3-4-5	6-7-8-9-10	11-12-13-14	15-16-17-18	
<b>21<sup>st</sup> CENTURY SKILLS</b>						
5.	Reason effectively and use systems thinking?	0-1	2-3	4-5	6-7	
6.	Communicate clearly?	0-1	2-3	4-5	6-7	
7.	Show evidence of creativity?	0-1	2-3	4-5	6-7	
8.	Overall impression and responses to the judge's questions	0-1	2-3	4-5	6-7	
<b>TOTAL SCORE</b>						



**CAREER CLUSTER**  
Hospitality and Tourism

**INSTRUCTIONAL AREA**  
Operations

## **PRINCIPLES OF HOSPITALITY AND TOURISM EVENT**

### **PARTICIPANT INSTRUCTIONS**

- The event will be presented to you through your reading of the 21<sup>st</sup> Century Skills, Performance Indicators and Event Situation. You will have up to 10 minutes to review this information and prepare your presentation. You may make notes to use during your presentation.
- You will have up to 10 minutes to make your presentation to the judge (you may have more than one judge).
- You will be evaluated on how well you meet the performance indicators of this event.
- Turn in all of your notes and event materials when you have completed the event.

### **21<sup>st</sup> CENTURY SKILLS**

- Critical Thinking – Reason effectively and use systems thinking.
- Communication – Communicate clearly.
- Creativity and Innovation – Show evidence of creativity.

### **PERFORMANCE INDICATORS**

1. Explain the nature of operations.
2. Explain routine security precautions.
3. Maintain a safe work environment.
4. Explain information privacy, security, and confidentiality considerations in business.

## **EVENT SITUATION**

You are to assume the role of the head of the housekeeping department at HOTEL LUCK, an independently owned and operated hotel located in a tourist destination. You have been asked to explain to a new member of the housekeeping staff (judge) how and why strict employee operations helps maintain the safety of guests, employees and the property.

HOTEL LUCK gives all housekeeping, security staff and front desk employees their own personalized room entry key. Each key is unique to track use among the employees. The room entry keys are able to open all guestrooms, supply rooms and can be used to access guest records. Management can view the data and determine which employee entered which room in the hotel and the duration of time spent in each room.

A new housekeeping staff member (judge) does not understand why the hotel needs to track the rooms entered and the amount of time in each room. The new housekeeping staff member (judge) has asked you to explain how tracking an employees' movements in and out of rooms is considered part of operational safety, keeping guests, employees and HOTEL LUCK safe.

You must explain how tracking employee movement in and out of rooms is part of operational security to the new housekeeping staff member (judge) in a role-play to take place at the hotel. The new housekeeping staff member (judge) will begin the role-play by asking you why tracking employee movements is needed. After you explain operational safety to the new housekeeping staff member (judge) and have answered the new housekeeping staff member's (judge's) questions, the new housekeeping staff member (judge) will conclude the role-play by thanking you for your work.

# JUDGE'S INSTRUCTIONS

## DIRECTIONS, PROCEDURES AND JUDGE'S ROLE

In preparation for this event, you should review the following information with your event manager and other judges:

1. Procedures
2. 21<sup>st</sup> Century Skills and Performance Indicators
3. Event Situation
4. Judge Situation Characterization  
Participants may conduct a slightly different type of meeting and/or discussion with you each time; however, it is important that the information you provide and the questions you ask be uniform for every participant.
5. Judge's Evaluation Instructions
6. Judge's Evaluation Form  
Please use a critical and consistent eye in rating each participant.

## JUDGE SITUATION CHARACTERIZATION

You are to assume the role of a new member of the housekeeping staff at HOTEL LUCK, an independently owned and operated hotel located in a tourist destination. You have asked the head of the housekeeping department (participant) to explain how and why strict employee operations helps maintain the safety of guests, employees and the property.

HOTEL LUCK gives all housekeeping, security staff and front desk employees their own personalized room entry key. Each key is unique to track use among the employees. The room entry keys are able to open all guestrooms, supply rooms and can be used to access guest records. Management can view the data and determine which employee entered which room in the hotel and the duration of time spent in each room.

You do not understand why the hotel needs to track the rooms entered and the amount of time in each room. You have asked the head of the department (participant) to explain how tracking an employees' movements in and out of rooms is considered part of operational safety, keeping guests, employees and HOTEL LUCK safe.

The head of the housekeeping department (participant) must explain how tracking employee movement in and out of rooms is part of operational security to you in a role-play to take place at the hotel. You will begin the role-play by asking why tracking employee movements is needed.

During the course of the role-play you are to ask the following questions of each participant:

1. What should I do if I lose my personalized room entry key?
2. If I forget my personalized room entry key, can I borrow another employee's key? Why or why not?

After the head of the housekeeping department (participant) has explained operational security and has answered your questions, you will conclude the role-play by thanking the head of the housekeeping department (participant).

You are not to make any comments after the event is over except to thank the participant.

*Answers will vary but should demonstrate a basic understanding of the concepts.*



# JUDGE'S EVALUATION INSTRUCTIONS

## Evaluation Form Information

The participants are to be evaluated on their ability to perform the specific performance indicators stated on the cover sheet of this event and restated on the Judge's Evaluation Form. Although you may see other performance indicators being demonstrated by the participants, those listed in the Performance Indicators section are the critical ones you are measuring for this particular event.

## Evaluation Form Interpretation

The evaluation levels listed below and the evaluation rating procedures should be discussed thoroughly with your event chairperson and the other judges to ensure complete and common understanding for judging consistency.

<b>Level of Evaluation</b>	<b>Interpretation Level</b>
Exceeds Expectations	Participant demonstrated the performance indicator in an extremely professional manner; greatly exceeds business standards; would rank in the top 10% of business personnel performing this performance indicator.
Meets Expectations	Participant demonstrated the performance indicator in an acceptable and effective manner; meets at least minimal business standards; there would be no need for additional formalized training at this time; would rank in the 70-89 <sup>th</sup> percentile of business personnel performing this performance indicator.
Below Expectations	Participant demonstrated the performance indicator with limited effectiveness; performance generally fell below minimal business standards; additional training would be required to improve knowledge, attitude and/or skills; would rank in the 50-69 <sup>th</sup> percentile of business personnel performing this performance indicator.
Little/No Value	Participant demonstrated the performance indicator with little or no effectiveness; a great deal of formal training would be needed immediately; perhaps this person should seek other employment; would rank in the 0-49 <sup>th</sup> percentile of business personnel performing this performance indicator.



**PRINCIPLES OF HOSPITALITY AND TOURISM,  
2018**

Participant: \_\_\_\_\_

I.D. Number: \_\_\_\_\_

**JUDGE'S EVALUATION FORM**

**INSTRUCTIONAL AREA**

Operations

Did the participant:

		Little/No Value	Below Expectations	Meets Expectations	Exceeds Expectations	Judged Score
<b>PERFORMANCE INDICATORS</b>						
1.	Explain the nature of operations?	0-1-2-3-4-5	6-7-8-9-10	11-12-13-14	15-16-17-18	
2.	Explain routine security precautions?	0-1-2-3-4-5	6-7-8-9-10	11-12-13-14	15-16-17-18	
3.	Maintain a safe work environment?	0-1-2-3-4-5	6-7-8-9-10	11-12-13-14	15-16-17-18	
4.	Explain information privacy, security, and confidentiality considerations in business?	0-1-2-3-4-5	6-7-8-9-10	11-12-13-14	15-16-17-18	
<b>21<sup>st</sup> CENTURY SKILLS</b>						
5.	Reason effectively and use systems thinking?	0-1	2-3	4-5	6-7	
6.	Communicate clearly?	0-1	2-3	4-5	6-7	
7.	Show evidence of creativity?	0-1	2-3	4-5	6-7	
8.	Overall impression and responses to the judge's questions	0-1	2-3	4-5	6-7	
<b>TOTAL SCORE</b>						



**\$8.00** | 18PBAH



# PRINCIPLES OF MARKETING

AS USED IN DECA'S  
**PRINCIPLES OF BUSINESS  
ADMINISTRATION EVENTS**



**2018**



# PRINCIPLES OF MARKETING

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## 2018 ROLE-PLAYS

### INCLUDES:

INTEGRATE DECA'S ROLE-PLAYS AND CASE STUDIES INTO YOUR CLASSROOM

ROLE-PLAY 1: MARKETING

ROLE-PLAY 2: COMMUNICATION SKILLS

ROLE-PLAY 3: CUSTOMER RELATIONS



## **INTEGRATE DECA'S ROLE-PLAYS AND CASE STUDIES INTO YOUR CLASSROOM**

With its connection to National Curriculum Standards, DECA's Competitive Events Program is designed to be integrated into classroom instruction to help members apply learning and connect to business. As teaching tools, DECA's role-plays and case studies provide relevant, meaningful problems for students to solve, provide a standards-based evaluation, increase rigor of the instruction, result in evidence of student learning and expose students to DECA – all as part of classroom instruction.

### **STEP 1: FAMILIARIZE YOURSELF WITH EVENT GUIDELINES AND PERFORMANCE INDICATORS.**

Use the DECA Guide to familiarize yourself with event guidelines that explain how each competitive event will operate – time limits, exam specifications, interactions with a judge, etc.

Role-plays and case studies are developed using performance indicators – key concepts from national curriculum standards that students should learn during the school year. DECA uses five lists of performance indicators which are organized by career cluster – business administration core, business management and administration, finance, hospitality and tourism, and marketing, as well as personal financial literacy.

Each performance indicator list is arranged by instructional areas to assist advisors with planning units of instruction. Advisors teaching accounting courses, for example, can use the Finance Career Cluster performance indicator list to plan their curriculum while advisors teaching marketing courses can use the Marketing Career Cluster performance indicator list.

### **STEP 2: UNDERSTAND HOW ROLE-PLAYS AND CASE STUDIES ARE DESIGNED.**

The career cluster and primary instructional area for role-plays and case studies are identified at the top of the first page of the event.

Role-plays used for DECA's Principles of Business Administration Events measure four performance indicators from the business administration core.

Case studies used for DECA's Team Decision Making Events measure seven performance indicators. Usually, at least four of the seven performance indicators have been selected from the case study's instructional area. Therefore, if the event situation is asking the participant to develop a promotion plan, most of the performance indicators will be from the promotion instructional area.

Role-plays used for DECA's Individual Series Events measure five performance indicators. Usually, at least three of the five performance indicators have been selected from the event situation's instructional area. The career pathway is also identified on the role-play, which may include performance indicators from that specific pathway as well.

Role-plays used for DECA's Personal Financial Literacy event measure three performance indicators from the National Standards in K-12 Personal Finance Education, created and maintained by the Jump\$tart Coalition® for Personal Financial Literacy.

### **STEP 3: START ORGANIZING SAMPLE EVENTS.**

Each year, DECA posts sample role-plays and case studies on [deca.org](http://deca.org). Shop DECA also sells previously used events each year. Gather these samples and begin to categorize them by instructional area.

### **STEP 4: USE SAMPLE EVENTS AS A CLASSROOM ACTIVITY.**

As you teach different instructional areas during the year, use corresponding role-plays and case studies as learning tools. While the traditional competitive event setting requires interaction with judges, many advisors have used role-plays and case studies as:

- warm-up activities at the beginning of classes.
- writing exercises that require students to write their ideas for solving the problem presented in the role-play or case study.
- public speaking exercises that require students to deliver an oral report or recorded video that presents their ideas for solving the problem presented in the role-play or case study.
- assessment tools in lieu of a multiple-choice quiz/test.

Since the evaluation form for each role-play and case study assesses the performance indicators, you are assessing students' performance according to national curriculum standards which are industry validated and aligned to career clusters.

### **ADDITIONAL RESOURCES**

Event guidelines, performance indicator lists, sample events and sample exam questions are available at [www.deca.org/competitiveevents](http://www.deca.org/competitiveevents). Sample role-play presentations can be viewed at [www.deca.org](http://www.deca.org). Advisors may wish to show the videos and ask students to evaluate the presentations using the evaluation forms. Shop DECA sells many items to assist advisors with integrating DECA into curriculum at [shopdeca.org](http://shopdeca.org).



## **CAREER CLUSTER**

Marketing

## **INSTRUCTIONAL AREA**

Marketing

# **PRINCIPLES OF MARKETING EVENT**

## **PARTICIPANT INSTRUCTIONS**

- The event will be presented to you through your reading of the 21<sup>st</sup> Century Skills, Performance Indicators and Event Situation. You will have up to 10 minutes to review this information and prepare your presentation. You may make notes to use during your presentation.
- You will have up to 10 minutes to make your presentation to the judge (you may have more than one judge).
- You will be evaluated on how well you meet the performance indicators of this event.
- Turn in all of your notes and event materials when you have completed the event.

## **21<sup>st</sup> CENTURY SKILLS**

- Critical Thinking – Reason effectively and use systems thinking.
- Communication – Communicate clearly.
- Creativity and Innovation – Show evidence of creativity.

## **PERFORMANCE INDICATORS**

1. Describe marketing functions and related activities.
2. Explain factors that influence customer/client/business buying behavior.
3. Discuss actions employees can take to achieve the company's desired results.
4. Demonstrate connections between company actions and results.

## **EVENT SITUATION**

You are to assume the role of regional sales director for BLOSSOMS, a regional chain of florist shops. The company will soon launch a new customer loyalty card. You will meet with one of BLOSSOMS' general managers (judge) to discuss the loyalty card and how it can be used in marketing.

BLOSSOMS offers customers fresh assortments of plants and flowers to be purchased as arrangements, bouquets or as stems. Each location has a steady stream of customers that tend to shop for special occasions, but not many customers that purchase flowers or plants without a special occasion in mind.

Beginning next month, BLOSSOMS will launch a new customer loyalty card. Membership is free, and points will be accrued for every dollar spent. The customer can choose to use the points for discounts or save points to redeem a free arrangement.

The general manager (judge) wants to know how the customer loyalty card will influence additional purchases and how the card can be used in marketing functions within the shop.

You will meet with one of the general managers (judge) to discuss the customer loyalty card in a role-play to take place in the manager's (judge's) office. The general manager (judge) will begin the role-play by asking you about the loyalty card. After you have discussed the customer loyalty card with the general manager (judge) and have answered the manager's (judge's) questions, the general manager (judge) will conclude the role-play by thanking you for your work.



# JUDGE'S INSTRUCTIONS

## DIRECTIONS, PROCEDURES AND JUDGE'S ROLE

In preparation for this event, you should review the following information with your event manager and other judges:

1. Procedures
2. 21<sup>st</sup> Century Skills and Performance Indicators
3. Event Situation
4. Judge Situation Characterization  
Participants may conduct a slightly different type of meeting and/or discussion with you each time; however, it is important that the information you provide and the questions you ask be uniform for every participant.
5. Judge's Evaluation Instructions
6. Judge's Evaluation Form  
Please use a critical and consistent eye in rating each participant.

## JUDGE SITUATION CHARACTERIZATION

You are to assume the role of a general manager at a local BLOSSOMS, a regional chain of florist shops. The company will soon launch a new customer loyalty card. You will meet with the regional sales director (participant) to discuss the loyalty card and how it can be used in marketing.

BLOSSOMS offers customers fresh assortments of plants and flowers to be purchased as arrangements, bouquets or as stems. Each location has a steady stream of customers that tend to shop for special occasions, but not many customers that purchase flowers or plants without a special occasion in mind.

Beginning next month, BLOSSOMS will launch a new customer loyalty card. Membership is free, and points will be accrued for every dollar spent. The customer can choose to use the points for discounts or save points to redeem a free arrangement.

You want to know how the customer loyalty card will influence additional purchases and how the card can be used in marketing functions within the shop.

You will meet with the regional sales director (judge) to discuss the customer loyalty card in a role-play to take place in your office. You will begin the role-play by asking the regional sales

director (participant) about the card. During the course of the role-play you are to ask the following questions of each participant:

1. With the introduction of the new loyalty program, what training will I need to give my staff?
2. Is it important that the loyalty cards be honored at every BLOSSOMS location? Why or why not?

After the regional sales director (participant) has given you an explanation and has answered your questions, you will conclude the role-play by thanking the regional sales director (participant).

You are not to make any comments after the event is over except to thank the participant.

# JUDGE'S EVALUATION INSTRUCTIONS

## Evaluation Form Information

The participants are to be evaluated on their ability to perform the specific performance indicators stated on the cover sheet of this event and restated on the Judge's Evaluation Form. Although you may see other performance indicators being demonstrated by the participants, those listed in the Performance Indicators section are the critical ones you are measuring for this particular event.

## Evaluation Form Interpretation

The evaluation levels listed below and the evaluation rating procedures should be discussed thoroughly with your event chairperson and the other judges to ensure complete and common understanding for judging consistency.

<b>Level of Evaluation</b>	<b>Interpretation Level</b>
Exceeds Expectations	Participant demonstrated the performance indicator in an extremely professional manner; greatly exceeds business standards; would rank in the top 10% of business personnel performing this performance indicator.
Meets Expectations	Participant demonstrated the performance indicator in an acceptable and effective manner; meets at least minimal business standards; there would be no need for additional formalized training at this time; would rank in the 70-89 <sup>th</sup> percentile of business personnel performing this performance indicator.
Below Expectations	Participant demonstrated the performance indicator with limited effectiveness; performance generally fell below minimal business standards; additional training would be required to improve knowledge, attitude and/or skills; would rank in the 50-69 <sup>th</sup> percentile of business personnel performing this performance indicator.
Little/No Value	Participant demonstrated the performance indicator with little or no effectiveness; a great deal of formal training would be needed immediately; perhaps this person should seek other employment; would rank in the 0-49 <sup>th</sup> percentile of business personnel performing this performance indicator.



**PRINCIPLES OF MARKETING, 2018**

Participant: \_\_\_\_\_

**JUDGE'S EVALUATION FORM**

I.D. Number: \_\_\_\_\_

**INSTRUCTIONAL AREA**

Marketing

Did the participant:

Did the participant:		Little/No Value	Below Expectations	Meets Expectations	Exceeds Expectations	Judged Score
<b>PERFORMANCE INDICATORS</b>						
1.	Describe marketing functions and related activities?	0-1-2-3-4-5	6-7-8-9-10	11-12-13-14	15-16-17-18	
2.	Explain factors that influence customer/client/business buying behavior?	0-1-2-3-4-5	6-7-8-9-10	11-12-13-14	15-16-17-18	
3.	Discuss actions employees can take to achieve the company's desired results?	0-1-2-3-4-5	6-7-8-9-10	11-12-13-14	15-16-17-18	
4.	Demonstrate connections between company actions and results?	0-1-2-3-4-5	6-7-8-9-10	11-12-13-14	15-16-17-18	
<b>21<sup>st</sup> CENTURY SKILLS</b>						
5.	Reason effectively and use systems thinking?	0-1	2-3	4-5	6-7	
6.	Communicate clearly?	0-1	2-3	4-5	6-7	
7.	Show evidence of creativity?	0-1	2-3	4-5	6-7	
8.	Overall impression and responses to the judge's questions	0-1	2-3	4-5	6-7	
<b>TOTAL SCORE</b>						



**CAREER CLUSTER**  
Marketing

**INSTRUCTIONAL AREA**  
Communication Skills

## **PRINCIPLES OF MARKETING EVENT**

### **PARTICIPANT INSTRUCTIONS**

- The event will be presented to you through your reading of the 21<sup>st</sup> Century Skills, Performance Indicators and Event Situation. You will have up to 10 minutes to review this information and prepare your presentation. You may make notes to use during your presentation.
- You will have up to 10 minutes to make your presentation to the judge (you may have more than one judge).
- You will be evaluated on how well you meet the performance indicators of this event.
- Turn in all of your notes and event materials when you have completed the event.

### **21<sup>st</sup> CENTURY SKILLS**

- Critical Thinking – Reason effectively and use systems thinking.
- Communication – Communicate clearly.
- Creativity and Innovation – Show evidence of creativity.

### **PERFORMANCE INDICATORS**

1. Explain the nature of staff communication.
2. Explain the nature of effective verbal communications.
3. Explain the nature of effective written communications.
4. Choose and use appropriate channel for workplace communication.

## **EVENT SITUATION**

You are to assume the role of a sales associate at PIZAZZ, a retail chain specializing in apparel for men, women and children. The store manager (judge) has asked for your advice on the best way to communicate regularly with the store's sales associates.

PIZAZZ is known for fast fashion, receiving new merchandise twice a month. It is very important to the store manager (judge) that all sales associates are familiar with the new merchandise, including the colors, sizes and styles offered, before it is placed on the sales floor. This store has 20 sales associates total; three to seven sales associates are working at any given time.

The store manager (judge) has asked for your advice on the best way to communicate with sales associates about the new merchandise that arrives twice a month.

You will meet with the store manager (judge) to discuss the staff communication in a role-play to take place in the manager's (judge's) office. The store manager (judge) will begin the role-play by asking you for your advice. After you have discussed the staff communication with the store manager (judge) and have answered the manager's (judge's) questions, the store manager (judge) will conclude the role-play by thanking you for your work.

# **JUDGE'S INSTRUCTIONS**

## **DIRECTIONS, PROCEDURES AND JUDGE'S ROLE**

In preparation for this event, you should review the following information with your event manager and other judges:

1. Procedures
2. 21<sup>st</sup> Century Skills and Performance Indicators
3. Event Situation
4. Judge Situation Characterization  
Participants may conduct a slightly different type of meeting and/or discussion with you each time; however, it is important that the information you provide and the questions you ask be uniform for every participant.
5. Judge's Evaluation Instructions
6. Judge's Evaluation Form  
Please use a critical and consistent eye in rating each participant.

## **JUDGE SITUATION CHARACTERIZATION**

You are to assume the role of the store manager of PIZZAZZ, a retail chain specializing in apparel for men, women and children. You have asked for a sales associate's (participant's) advice on the best way to communicate regularly with the store's sales associates.

PIZZAZZ is known for fast fashion, receiving new merchandise twice a month. It is very important to you that all sales associates are familiar with the new merchandise, including the colors, sizes and styles offered, before it is placed on the sales floor. This store has 20 sales associates total; three to seven sales associates are working at any given time.

You have asked a sales associate (participant) for advice on the best way to communicate with sales associates about the new merchandise that arrives twice a month.

You will meet with the sales associate (participant) to discuss staff communication in a role-play to take place in your office. You will begin the role-play by asking the sales associate (participant) for advice. During the course of the role-play you are to ask the following questions of each participant:

1. How can I be certain every sales associate has received the necessary information?

2. Why is it important for sales associates to be familiar with new merchandise before it is placed on the sales floor?

After the sales associate (participant) has given you advice and has answered your questions, you will conclude the role-play by thanking the sales associate (participant).

You are not to make any comments after the event is over except to thank the participant.

*Answers will vary but should demonstrate a basic understanding of the concepts.*



# JUDGE'S EVALUATION INSTRUCTIONS

## Evaluation Form Information

The participants are to be evaluated on their ability to perform the specific performance indicators stated on the cover sheet of this event and restated on the Judge's Evaluation Form. Although you may see other performance indicators being demonstrated by the participants, those listed in the Performance Indicators section are the critical ones you are measuring for this particular event.

## Evaluation Form Interpretation

The evaluation levels listed below and the evaluation rating procedures should be discussed thoroughly with your event chairperson and the other judges to ensure complete and common understanding for judging consistency.

<b>Level of Evaluation</b>	<b>Interpretation Level</b>
Exceeds Expectations	Participant demonstrated the performance indicator in an extremely professional manner; greatly exceeds business standards; would rank in the top 10% of business personnel performing this performance indicator.
Meets Expectations	Participant demonstrated the performance indicator in an acceptable and effective manner; meets at least minimal business standards; there would be no need for additional formalized training at this time; would rank in the 70-89 <sup>th</sup> percentile of business personnel performing this performance indicator.
Below Expectations	Participant demonstrated the performance indicator with limited effectiveness; performance generally fell below minimal business standards; additional training would be required to improve knowledge, attitude and/or skills; would rank in the 50-69 <sup>th</sup> percentile of business personnel performing this performance indicator.
Little/No Value	Participant demonstrated the performance indicator with little or no effectiveness; a great deal of formal training would be needed immediately; perhaps this person should seek other employment; would rank in the 0-49 <sup>th</sup> percentile of business personnel performing this performance indicator.



**PRINCIPLES OF MARKETING, 2018**

Participant: \_\_\_\_\_

**JUDGE'S EVALUATION FORM**

I.D. Number: \_\_\_\_\_

**INSTRUCTIONAL AREA**

Communication Skills

Did the participant:

Did the participant:		Little/No Value	Below Expectations	Meets Expectations	Exceeds Expectations	Judged Score
<b>PERFORMANCE INDICATORS</b>						
1.	Explain the nature of staff communication?	0-1-2-3-4-5	6-7-8-9-10	11-12-13-14	15-16-17-18	
2.	Explain the nature of effective verbal communications?	0-1-2-3-4-5	6-7-8-9-10	11-12-13-14	15-16-17-18	
3.	Explain the nature of effective written communications?	0-1-2-3-4-5	6-7-8-9-10	11-12-13-14	15-16-17-18	
4.	Choose and use appropriate channel for workplace communication?	0-1-2-3-4-5	6-7-8-9-10	11-12-13-14	15-16-17-18	
<b>21<sup>st</sup> CENTURY SKILLS</b>						
5.	Reason effectively and use systems thinking?	0-1	2-3	4-5	6-7	
6.	Communicate clearly?	0-1	2-3	4-5	6-7	
7.	Show evidence of creativity?	0-1	2-3	4-5	6-7	
8.	Overall impression and responses to the judge's questions	0-1	2-3	4-5	6-7	
<b>TOTAL SCORE</b>						



**CAREER CLUSTER**  
Marketing

**INSTRUCTIONAL AREA**  
Customer Relations

## **PRINCIPLES OF MARKETING EVENT**

### **PARTICIPANT INSTRUCTIONS**

- The event will be presented to you through your reading of the 21<sup>st</sup> Century Skills, Performance Indicators and Event Situation. You will have up to 10 minutes to review this information and prepare your presentation. You may make notes to use during your presentation.
- You will have up to 10 minutes to make your presentation to the judge (you may have more than one judge).
- You will be evaluated on how well you meet the performance indicators of this event.
- Turn in all of your notes and event materials when you have completed the event.

### **21<sup>st</sup> CENTURY SKILLS**

- Critical Thinking – Reason effectively and use systems thinking.
- Communication – Communicate clearly.
- Creativity and Innovation – Show evidence of creativity.

### **PERFORMANCE INDICATORS**

1. Handle difficult customers.
2. Interpret business policies to customers/clients.
3. Demonstrate a customer service mindset.
4. Reinforce service orientation through communication.

## **EVENT SITUATION**

You are to assume the role of the ticket sales manager at HOMETOWN CINEMA, a local movie theater. An angry customer (judge) has asked to speak to you regarding children younger than 17 years old attending a rated R movie.

HOMETOWN CINEMA, like most movie theaters, has a strict policy for allowing minors to view rated R movies. As per the rating guidelines, minors are only allowed to view a rated R movie if a parent or guardian is accompanying them. If a parent or guardian is not present, the minor is not allowed into the theater. HOMETOWN CINEMA has its own rule that no minors whatsoever are allowed into rated R movies after 6:00PM, regardless if accompanied by a parent or guardian.

One of the ticket sales associates has asked you to come to the box office to speak with an angry customer (judge). The customer (judge) is angry because there are several minors in the theater of the 3:00PM showing of a rated R movie the customer (judge) is attending. All of the minors are accompanied by parents or guardians. The customer (judge) feels that the minors should not be allowed in the theater showing the rated R movie.

You will meet with the angry customer (judge) to discuss the situation in a role-play to take place at the box office. The customer (judge) will begin the role-play by asking you why there are minors in the movie theater. After you have discussed the situation and offered a solution, you will then answer the customer's (judge's) questions. Once you have answered the customer's (judge's) questions, the customer (judge) will conclude the role-play by thanking you for your work.

# JUDGE'S INSTRUCTIONS

## DIRECTIONS, PROCEDURES AND JUDGE'S ROLE

In preparation for this event, you should review the following information with your event manager and other judges:

1. Procedures
2. 21<sup>st</sup> Century Skills and Performance Indicators
3. Event Situation
4. Judge Situation Characterization  
Participants may conduct a slightly different type of meeting and/or discussion with you each time; however, it is important that the information you provide and the questions you ask be uniform for every participant.
5. Judge's Evaluation Instructions
6. Judge's Evaluation Form  
Please use a critical and consistent eye in rating each participant.

## JUDGE SITUATION CHARACTERIZATION

You are to assume the role of an angry customer at HOMETOWN CINEMA, a local movie theater. You have asked to speak with the ticket sales manager (participant) regarding children younger than 17 years old attending a rated R movie.

HOMETOWN CINEMA, like most movie theaters, has a strict policy for allowing minors to view rated R movies. As per the rating guidelines, minors are only allowed to view a rated R movie if a parent or guardian is accompanying them. If a parent or guardian is not present, the minor is not allowed into the theater. HOMETOWN CINEMA has its own rule that no minors whatsoever are allowed into rated R movies after 6:00PM, regardless if accompanied by a parent or guardian.

One of the ticket sales associates has asked the ticket sales manager (participant) to come to the box office to speak with you. You are angry because there are several minors in the theater of the 3:00PM showing of a rated R movie you are attending. All of the minors are accompanied by parents or guardians. You feel that the minors should not be allowed in the theater showing the rated R movie.

The ticket sales manager (participant) will meet with you to discuss the situation in a role-play to take place at the box office. You will begin the role-play by asking the ticket sales manager (participant) why there are minors in the movie theater. During the course of the role-play you are to ask the following questions of each participant:

1. Why is it so important for you to make sure I am happy?
2. Do you think it would help customer relations if the policy was displayed at the ticket box office?

After the ticket sales manager (participant) has given solved the issue and has answered your questions, you will conclude the role-play by thanking the ticket sales manager (participant).

You are not to make any comments after the event is over except to thank the participant.

*Answers will vary but should demonstrate a basic understanding of the concepts.*

# JUDGE'S EVALUATION INSTRUCTIONS

## Evaluation Form Information

The participants are to be evaluated on their ability to perform the specific performance indicators stated on the cover sheet of this event and restated on the Judge's Evaluation Form. Although you may see other performance indicators being demonstrated by the participants, those listed in the Performance Indicators section are the critical ones you are measuring for this particular event.

## Evaluation Form Interpretation

The evaluation levels listed below and the evaluation rating procedures should be discussed thoroughly with your event chairperson and the other judges to ensure complete and common understanding for judging consistency.

<b>Level of Evaluation</b>	<b>Interpretation Level</b>
Exceeds Expectations	Participant demonstrated the performance indicator in an extremely professional manner; greatly exceeds business standards; would rank in the top 10% of business personnel performing this performance indicator.
Meets Expectations	Participant demonstrated the performance indicator in an acceptable and effective manner; meets at least minimal business standards; there would be no need for additional formalized training at this time; would rank in the 70-89 <sup>th</sup> percentile of business personnel performing this performance indicator.
Below Expectations	Participant demonstrated the performance indicator with limited effectiveness; performance generally fell below minimal business standards; additional training would be required to improve knowledge, attitude and/or skills; would rank in the 50-69 <sup>th</sup> percentile of business personnel performing this performance indicator.
Little/No Value	Participant demonstrated the performance indicator with little or no effectiveness; a great deal of formal training would be needed immediately; perhaps this person should seek other employment; would rank in the 0-49 <sup>th</sup> percentile of business personnel performing this performance indicator.



**PRINCIPLES OF MARKETING, 2018**

Participant: \_\_\_\_\_

**JUDGE'S EVALUATION FORM**

I.D. Number: \_\_\_\_\_

**INSTRUCTIONAL AREA**

Customer Relations

Did the participant:

Did the participant:		Little/No Value	Below Expectations	Meets Expectations	Exceeds Expectations	Judged Score
<b>PERFORMANCE INDICATORS</b>						
1.	Handle difficult customers?	0-1-2-3-4-5	6-7-8-9-10	11-12-13-14	15-16-17-18	
2.	Interpret business policies to customers/clients?	0-1-2-3-4-5	6-7-8-9-10	11-12-13-14	15-16-17-18	
3.	Demonstrate a customer service mindset?	0-1-2-3-4-5	6-7-8-9-10	11-12-13-14	15-16-17-18	
4.	Reinforce service orientation through communication?	0-1-2-3-4-5	6-7-8-9-10	11-12-13-14	15-16-17-18	
<b>21<sup>st</sup> CENTURY SKILLS</b>						
5.	Reason effectively and use systems thinking?	0-1	2-3	4-5	6-7	
6.	Communicate clearly?	0-1	2-3	4-5	6-7	
7.	Show evidence of creativity?	0-1	2-3	4-5	6-7	
8.	Overall impression and responses to the judge's questions	0-1	2-3	4-5	6-7	
<b>TOTAL SCORE</b>						





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