Unit 1: Introduction to Merchandising and Retail / Product & Assortment Planning

Content Area: **Business Management and Information**
Course(s):
Time Period: **Marking Period 1**
Length: **4-5weeks**
Status: **Published**

Summary

In the increasingly competitive world of business, merchandising is an essential process to increase sales and meet business goals. Merchandising introduces students to the dynamic world of merchandising, with a focus on the essential roles and responsibilities of buyers and merchandisers across industries. Students will explore tools and strategies used to market products in both brick-and-mortar stores and online platforms. The course emphasizes collaboration with product developers and designers, encouraging creative solutions and adaptability in response to emerging trends such as pop-up shops, live streaming, and seasonal shifts. Through the strategic study of store layouts, product presentation, and merchandising frameworks, students will learn how to influence consumer behavior. They will also analyze market trends and consumer data to gain the insights needed to thrive in the evolving merchandising landscape.

This unit is part of the larger aforementioned course sequence and specifically focuses on the fundamentals of merchandising and retail & product assortments. By the end of this unit, students will be able to identify and apply key merchandising concepts like discussing the retail landscape, supply chain functions, assortment planning, and inventory management systems. Ultimately students will understand that there is a direct correlation between the way products are merchandised and the items that consumers purchase.

Students in Business Management and Information Systems classes develop skills that are intended to give them a competitive advantage in the workplace. Through the study of core business topics and current events, this curriculum encourages students to refine their speaking and listening skills, collaborate with their peers, and explore and research potential career paths.

Revision Date: August 2025

Standards

9.3.MK□MER.1 Plan, organize and lead merchandising staff to enhance selling and merchandising skills.

9.3.MK□MER.2 Plan, manage and monitor day□to□day merchandising activities.

9.3.MK□MER.3 Move, store, locate and/or transfer ownership of retail goods and services.

9.3.MK□MER.4 Access, evaluate and disseminate marketing information to facilitate merchandising decisions and activities.

9.3.MK□MER.5 Determine and adjust prices to maximize return and meet customers' perceptions of value.

9.3.MK□MER.6 Obtain, develop, maintain and improve a product or service mix to respond to market opportunities.

9.3.MK□MER.7 Communicate information about retail products, services, images and/or ideas.

9.3.MK□MER.8 Create and manage merchandising activities that provide for client needs and wants.

9.3.MK□MGT.1 Plan, organize and lead marketing staff to achieve business goals.

9.3.MK□MGT.2 Plan, manage and monitor day□to□day marketing management operations.

9.3.MK□MGT.3 Plan, manage and organize to meet the requirements of the marketing plan.

9.3.MK□MGT.4 Access, evaluate and disseminate information to aid in making marketing management decisions.

9.3.MK□MGT.5 Determine and adjust prices to maximize return and meet customers' perceptions of value.

9.3.MK□MGT.6 Obtain, develop, maintain and improve a product or service mix in response to market opportunities.

9.3.MK□MGT.7 Communicate information about products, services, images and/or ideas.

RI.CI.9–10.2. Determine one or more central ideas of an informational text and analyze how it is developed

and refined over the course of a text, including how it emerges and is shaped by specific details; provide an objective summary of the text.

RI.MF.9–10.6. Analyze, integrate, and evaluate multiple interpretations (e.g., charts, graphs, diagrams, videos) of a single text or text/s presented in different formats (visually, quantitatively) as well as in words in order to address a question or solve a problem.

RI.AA.9–10.7. Describe and evaluate the argument and specific claims in an informational text, assessing whether the reasoning is valid and the evidence is relevant and sufficient; identify false statements and reasoning.

RI.CT.9–10.8. Analyze and reflect on (e.g., practical knowledge, historical/cultural context, and background knowledge) seminal and informational text of historical and scientific significance, including how they relate in terms of themes and significant concepts.

W.AW.9–10.1. Write arguments to support claims in an analysis of substantive topics or texts, using valid reasoning and relevant and sufficient textual and non-textual evidence.

A. Introduce precise claim(s), distinguish the claim(s) from alternate or opposing claims, and create an organization that establishes clear relationships among claim(s), counterclaims, reasons, and evidence.

B. Develop claim(s) and counterclaims using sound reasoning, supplying data and evidence for each while pointing out the strengths and limitations of both claim(s) and counterclaims in a discipline-appropriate manner that anticipates the audience's knowledge level and concerns.

W.IW.9–10.2. Write informative/explanatory texts (including the narration of historical events, scientific procedures/ experiments, or technical processes) to examine and convey complex ideas, concepts, and information clearly and accurately through the effective selection, organization, and analysis of content.

A. Introduce a topic; organize complex ideas, concepts, and information to make important connections and distinctions; include formatting (e.g., headings), graphics (e.g., figures, tables), and multimedia when useful to aid in comprehension.

B. Develop the topic with well-chosen, relevant, and sufficient facts, extended definitions, concrete details, quotations, or other information and examples appropriate to the audience's knowledge of the topic.

C. Use appropriate and varied transitions to link the major sections of the text, create cohesion, and clarify the relationships among complex ideas and concepts.

D. Use precise language and domain-specific vocabulary to manage the complexity of the topic.

E. Establish and maintain a style and tone appropriate to the audience and purpose (e.g., formal and objective for academic writing) while attending to the norms and conventions of the discipline in which they are writing.

W.WP.9–10.4. Develop and strengthen writing as needed by planning, revising, editing, rewriting, trying a new approach; sustaining effort to complete complex writing tasks; seeking out feedback and reflecting on personal writing progress; consulting a style manual (such as MLA or APA Style), focusing on addressing what is most significant for a specific purpose and audience.

W.WR.9–10.5. Conduct short as well as more sustained research projects to answer a question (including a self-generated question) or solve a problem; narrow or broaden the inquiry when appropriate; synthesize multiple sources on the subject, demonstrating understanding of the subject under investigation.

W.SE.9–10.6. Gather relevant information from multiple authoritative print and digital sources, using advanced searches effectively; assess the usefulness of each source in answering the research question; integrate information into the text selectively to maintain the flow of ideas, avoiding plagiarism and following a standard format for citation (MLA or APA Style Manuals).

W.RW.9–10.7. Write routinely over extended time frames (time for research, reflection, and revision) and shorter time frames (a single sitting or a day or two) for a range of tasks, purposes, and audiences.

SL.PE.9–10.1. Initiate and participate effectively in a range of collaborative discussions (one-on-one, in groups, and teacher-led) with peers on grades 9–10 topics, texts, and issues, building on others' ideas and expressing their own clearly and persuasively.

A. Come to discussions prepared, having read and researched material under study; explicitly draw on that preparation by referring to evidence from texts and other research on the topic or issue to stimulate a thoughtful, well-reasoned exchange of ideas.

B. Collaborate with peers to set rules for discussions (e.g., informal consensus, taking votes on key issues, presentation of alternate views); develop clear goals and assessment criteria (e.g., student developed rubric) and assign individual roles as needed.

C. Propel conversations by posing and responding to questions that relate the current discussion to broader themes or larger ideas; actively incorporate others into the discussion; and clarify, verify, or challenge ideas and conclusions.

D. Respond thoughtfully to various perspectives, summarize points of agreement and disagreement, and justify own views. Make new connections in light of the evidence and reasoning presented.

SL.II.9–10.2. Integrate multiple sources of information presented in diverse media or formats (e.g., visually, quantitatively, qualitatively, orally) evaluating the credibility and accuracy of each source.

SL.PI.9–10.4. Present information, findings, and supporting evidence clearly, concisely, and logically. The content, organization, development, and style are appropriate to task, purpose, and audience.

SL.UM.9–10.5. Make strategic use of digital media (e.g., textual, graphical, audio, visual, and interactive elements) in presentations to enhance findings, reasoning, and evidence and to add interest.

In accordance with New Jersey's Chapter 32 Diversity and Inclusion Law, this unit includes instructional materials that highlight and promote diversity, including: economic diversity, equity, inclusion, and tolerance.

The standards in this unit reflect a developmental progression and make interdisciplinary connections across content areas including the humanities, technology, career readiness, cultural awareness, and global citizenship.

Essential Questions

Essential Questions:

- How does effective merchandising directly influence consumer purchasing decisions and business success?
- In what ways does merchandising require adaptability and creative problem-solving in response to a dynamic marketplace?
- How do effective merchandising practices contribute to a competitive advantage in the business world?
- How can an understanding of store layouts and product presentation influence consumer behavior?

Enduring Understandings:

- Merchandising practices, such store layouts, product presentation, and merchandising frameworks, influence consumer behavior.

Objectives

Students will know:

- The fundamental concept of merchandising can be applied to increase sales and achieve business goals in a competitive environment.

- The different business models stores can utilize
- The different types of retailers and the challengers that come with each type
- The importance of the supply chain and its role in moving products from creation to the consumer.
- Assortment planning strategies used to select and manage a store's optimal product mix.
- The role of inventory management systems in tracking, controlling, and optimizing stock levels for operational efficiency.
- The relationship between merchandising strategies and consumer purchasing behavior.
- The key differences and similarities in merchandising strategies for both physical retail spaces and online platforms.
- Tools and techniques used to market products in various retail environments.
- Ways to analyze market trends and consumer data to support smart merchandising decisions.
- Approaches to adjusting merchandising practices in response to trends like pop-up shops, livestream selling, and seasonal shifts.
- The value of collaboration with product developers and designers in successful merchandising.
- Methods for fostering creativity and adaptability in a fast-changing retail landscape.
- Strategies for influencing consumer behavior through thoughtful merchandising.
- The role of strong merchandising practices in gaining a competitive edge in the marketplace.
- Essential business skills such as communication, teamwork, and research within the context of merchandising.

Students will be skilled at:

- Identifying different types of retailers (department stores, specialty stores, big-box retailers, e-commerce, discount stores, convenience stores, etc.) and their business models.
- Explaining how products move from manufacturers to consumers, including logistics, warehousing, and distribution.
- Outlining how products are grouped (e.g., electronics, home goods, groceries, apparel, sporting goods, health & beauty).
- Identifying the phase of the product life cycle and how they impact merchandising decisions.
- Determining the range of products, sizes, colors, and styles a retailer will offer to meet customer demand and business goals.
- Understanding concepts like stock levels, turnover, and basic inventory control methods.

Learning Plan

- **Retail Landscape Snapshot Gallery Walk:** Divide students into small groups. Assign each group a different type of retail environment (e.g., department store, specialty boutique, discount retailer, e-commerce giant, pop-up shop). Have them create a small "snapshot" poster or digital slide summarizing the key characteristics, target customer, and typical merchandising challenges/opportunities of their assigned retail type

- **Merchandiser's Dilemma Scenario Card Sort**: Create a set of scenario cards. Each card describes a task or problem related to product acquisition or presentation (ex: "Negotiating prices with a new supplier," "Deciding on the color palette for the spring collection display," "Analyzing sales data to determine markdown strategies," "Coordinating with the marketing team for a new product launch"). Students work in pairs or small groups to sort these cards into categories: "Buyer Responsibility," "Merchandiser Responsibility," or "Shared/Collaborative Responsibility."

- **Supply Chain Flow Map Sketch/Diagram**: Provide students with a blank piece of paper or a blank flow chart. Ask them to sketch out/fill out a simplified supply chain flow for a specific product (e.g., a new smartphone, a pair of sneakers, a box of cereal). They should label key stages (e.g., raw materials, manufacturing, distribution, retail store, consumer) and indicate the flow of goods and information throughout a supply chain

- **Assortment Planning Power Play Mini-Case Study**: Present students with a short (1-2 paragraph) scenario about a small fictional retail store (e.g., "A new coffee shop opening in a college town" or "A small online boutique selling handmade jewelry"). Ask them to propose a basic product assortment for the store, justifying their choices based on target customers, potential trends, and available space/online categories. (Option to later build on this and have the students create a model of the store layout based on their responses)

- **Product Presentation Makeover**: Teacher provides 2-3 examples of product presentations (ideally one less effective and one more effective) from both a brick-and-mortar setting (ex: photos of a messy shelf vs. a well-organized display, a crowded aisle vs. a clear path) and an online platform (e.g., a confusing product page vs. a clear, engaging one). The students will be divided into groups to analyze the current product presentation. Identify 2-3 specific strengths and 2-3 specific weaknesses based on merchandising principles (e.g., visual appeal, clarity, ease of finding, compelling description, influencing behavior). Propose 1-2 actionable "makeover" suggestions to improve the presentation, explaining how their suggestions would influence consumer behavior.

- **Merchandising Strategy Development Project**: Students work individually to choose a hypothetical new product (ex: a sustainable fashion line, a smart home gadget, a unique food product) and develop a complete merchandising strategy for its launch.

- **Retailer's Challenge Case Study**: Provide students with a detailed case study (could be a simplified version of a real business scenario or a fictional but realistic one) that presents a merchandising challenge (ex:, declining sales for a specific product category, issues with inventory overstock/understock, a new competitor impacting market share, difficulty adapting to online sales). The case study should include some relevant data (ex: sales figures, customer feedback excerpts, competitor information, inventory reports). The students will identify the key issues and propose specific suggestions to solve the issues.

Assessment

When taking a Business Management and Information Technology course, students demonstrate differentiated proficiency according to their ability to answer the essential questions through formative and summative assessments. Many of the performance tasks below can be implemented as formative and/or summative assessments. As teachers strive for students to demonstrate proficiency, they will need to create additional or alternative assessments based on demonstration or absence of skill.

Formative Assessments:

- Retail Landscape Snapshot Gallery Walk
- Merchandiser's Dilemma Scenario Card Sort
- Supply Chain Flow Map Sketch/Diagram
- Assortment Planning Power Play Mini-Case Study
- Product Presentation Makeover

Summative Assessments:

- Business Models Quiz
- Merchandising Strategy Development Project
- Retailer's Challenge- Case Study

Alternative Assessment:

Create Your Own Retail Store: The students will first choose their store type (clothing, tech, home goods, beauty). They will be required to define their target market. Then they will be required to create the following: logo, mission statement, store design, product mix, promotional campaign, and finish with an end of project presentation.

Materials

The design of this course allows for the integration of a variety of instructional, supplemental, and intervention materials that support student learners at all levels in the school and home environments. Associated web content and media sources are infused into the unit as applicable and available In addition to the materials below, the following link connects to district approved textbooks and resources utilized in this course.

The following are approved resources that teachers can include to further unit related objectives:

Retail Inventory Management: What It Is, Steps, Practices and Tips | NetSuite (NetSuite)

Inventory Control (DECA)

8 Types of Business Models & the Value They Deliver (Harvard Business School)

18.2: Major Types of Retailers - Business LibreTexts (Business LibreTexts)

A Plan Is Not a Strategy (Harvard Business Review- Video)

What influences consumer behavior? (Product Marketing Alliance-Video)

Pop-Up Shops Are Anything But A Temporary Trend (Forbes)

Live streaming ushers in a new era for e-commerce | Vogue Business (Vogue Business)

How Long Should You Wait Before Changing Your Retail Displays? (Dimensional Design)

How to Master Grouping in Visual Merchandising (Spring and Autumn Fair-Video)

Product Life Cycle Explained: Stage and Examples (Investopedia)

Any additional resources that are not included in this list will be presented to and reviewed by the supervisor before being included in lesson plans. This ensures resources are reviewed and vetted for relevance and appropriateness prior to implementation.

Integrated Accommodations and Modifications

This link includes content specific accommodations and modifications for all populations:

https://docs.google.com/spreadsheets/d/1g8M7CZ5VVwvFk2Ay9DZbjdewOYDyNOzpNeEBgSXPvr0/edit?usp=sharing

These additional strategies are helpful when learning Business Management and Information Systems content and skills:

- Bold terms in directions.
- Read texts aloud for students to assist in comprehension and analysis.
- Provide opportunities for text-to-speech for written responses.

- Use visual presentations of all materials and instructions.
- Provide step-by-step instructions for mathematical problems that require calculation.
- Model of practices to support student understanding.