

# ROAMIN' ROASTERS

SBE GOLD LEVEL CERTIFICATION  
School Based Enterprise Certification  
FOOD OPERATIONS

SCHOOL NAME: JOHN CHAMPE  
HIGH SCHOOL  
ADVISOR: SHANNON BROWN  
ADVISOR EMAIL:  
[SHANNON.BROWN@LCPS.ORG](mailto:SHANNON.BROWN@LCPS.ORG)  
SCHOOL ADDRESS: 41535 SACRED  
MOUNTAIN ST, ALDIE, VA, 20105  
SCHOOL NUMBER: 703-722-2680  
DATE: 01/14/2025



Durga Jyotsna Ghanta & Vasudha Kolluri



## TARGET MARKET

Our target market consists of all teachers and staff at John Champe High School. We encourage any teacher or staff member who enjoys a morning pick-me-up with a hot beverage to stop by our coffee cart, or even better, make sure to pre-order for guaranteed delivery to your room.. Whether you're in mood for a freshly brewed coffee, soothing tea or creamy hot cocoa , we are here to brighten your morning!

## REVENUE

Our SBE has been extremely successful over the last 12 months due to the promotional and marketing strategies that were used in order to create revenue. Last school year we had a gross revenue amount of \$1,280 and this year we have grossed about \$684 to date.

## LOCATION

John Champe High School's teachers and staffs' central location for hot beverages and snacks is Roamin' Roasters. It is located in The School Store for storage purposes, however, when running it is mobilized. Since our SBE is a mobilized cart, it allows teacher to purchase fresh beverages without needing to leave and disrupt their classroom. This strategic "location" allows for easy access and reliability for customers.

## PRODUCT MIX

The Roamin' Roasters cart offers high-quality items at fair prices. Since our main target is teachers, we provide a selection of coffee, herbal teas, and muffins/donuts that are customized to their preferences. Roamin' Roasters has a variety of different products from "cozy chamomile" to decaf coffee to meet the expectations of all of our customers.

## STRATEGIC GOALS FOR THE SCHOOL YEAR

Our main goal for this school year is to meet or exceed the gross amount from last year. We will do this by increasing our focus on marketing to the right target audience and enhancing our promotional strategies.

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# STANDARD 1: FINANCIAL ANALYSIS



## ROLE OF FINANCE IN BUSINESS

Finance plays an essential role in the success of Roamin' Roasters, acting as the foundation of the SBE. It is significant to nearly every aspect of our operations, from the planning stages to day-to-day activities. Without a solid financial structure, the SBE wouldn't be able to run smoothly or efficiently. Proper financial planning enables the business to function effectively and facilitates long-term success.

Finances also allows Roamin' Roasters to grow and develop. Strategic financial planning is crucial, especially before the launch of the SBE. This year, the early execution of financial planning gave the team and the DECA Advisor a clear understanding of the necessary products to offer, which directly contributed to our profitability. The introduction of a new menu item further boosted our success, leading to increased sales and helping the business expand. Managing finances is not only key for the SBE but also provides significant learning opportunities for students. It teaches them the importance of accountability as they track daily income and expenses, manage their spending, and make thoughtful financial decisions.

The financial success of Roamin' Roasters is tightly linked to the UNIFIED program, as all profits from the business go toward supporting special needs students. This connection allows our SBE to give back to the community in meaningful ways, not only by raising funds for special needs programs, but also by providing special needs students with valuable workplace skills. Additionally, it allows teachers and staff to access high-quality coffee at an affordable price. Involving students in fiscal management within the SBE provides them with hands-on, real-world experience in managing finances and preparing for future careers. Their participation in financial tasks helps them develop valuable skills that will serve them well beyond the classroom.

### INVENTORY MANAGEMENT:

Students are responsible for tracking inventory daily. Using an iPad, they record each sale, ensuring that stock levels are monitored. This process helps the team determine when to re-stock and buy more supplies. By managing inventory, students learn budgeting, purchasing decisions, and financial planning.

### MONEY HANDLING AND TRANSACTIONS:

Students are trained to handle money by operating the card reader, using the cash box, and ensuring that transactions are completed accurately. They also maintain correct change for customers. These tasks teach students the importance of precision in financial transactions and the role of money management in running a business.



## REAL-WORLD EXPERIENCE:

The experience gained through managing Roamin' Roasters provides students with practical business knowledge and prepares them for future roles in the workforce. The skills they develop in financial management, teamwork, and customer service are highly beneficial and provide them with a strong foundation for any career. Their engagement in the SBE deepens their understanding of business operations and equips them with essential skills for success in the professional world.

# DESCRIBE THE NEED FOR FINANCIAL INFORMATION

Financial information is needed to provide information about operations because it monitors and manages the day-to-day functioning of our business. Information about operations helps with tracking revenue, managing expenses, and analyzing profit. Revenue tracking measures income generated from sales and identifies top-selling products or services. Expense management identifies cost-heavy areas, helping to control and reduce unnecessary spending. Lastly, analyzing profits compares revenue and expenses, helping to determine if the SBE is profitable as well as efficient.

Economic outlook also requires financial information in order to assess the current and future viability of the SBE. Trend analysis, market positioning, and strategic planning are key components of the economic outlook that determine the financial analysis of our business. Marketing positions help to provide insights into how our business compares to our competitors or industry standards. An example of this would be analyzing year-to-year revenue growth to assess the economic health of our coffee cart. Finally, strategic planning helps to determine the viability of new ideas, such as introducing new flavors of creamers for coffee, new flavors of herbal tea, or new snack items. Mainly, understanding the economic outlook of the SBE ensures that it can adapt to changes and remain competitive.

# DESCRIBE THE NATURE OF BUDGETS

Budget planning is crucial, as it is a step that cannot afford to be overlooked. In other words, running an SBE without exceeding the budget is not an option, primarily due to our limited financial resources. Therefore, thorough pre-budget planning is essential, as it establishes a solid foundation for the entire operation of the SBE. The head students are responsible for scheduling weekly discussions with the DECA Advisor to order new items and review the budget. Periodically, the Roamin' Roasters team comes together to brainstorm ideas for increasing revenue and expanding the budget. In addition to budget planning, students gain valuable skills that can be applied in their everyday lives, such as tracking expenses, identifying cost-effective solutions, and continuously seeking innovative ways to ensure the business's success.

Starting Budget:	Money Spent on Supplies:	\$\$ Spent on Subscription Mugs:	Revenue Made:	Profit Made:	
\$150.00	-\$75.00	-\$350.00	\$684.00	= \$409	

Financial information is required to get information about cash flow in order to manage how much money the SBE is generating and to identify peak income periods. This information helps inform head students about how different pricing strategies are working and what products to offer. Cash flow is essential for our SBE because it not only ensures liquidity but also helps to plan for future growth. Cash flow ensures liquidity by making sure that we have enough money to pay for supplies and other essential expenses without delays. It also prevents disruptions in our SBE, such as running out of inventory or needing to postpone planned activities. Cash flow is also essential for planning growth in our business. A positive cash flow allows for upgrading equipment, expanding product offerings, and increasing marketing efforts.

Although our SBE is all about delivering quality products and goods to our customers, it's also important that we know how to read, understand, and analyze financial information because financial literacy is a key component of success. It helps with decision-making, sustainability, and maximizes learning opportunities for everyone involved. Financial data provides vital information about our SBE's performance and helps identify strengths and weaknesses. Therefore, it's important that all of our head students understand how to read and understand financial information in order to effectively improve the business. One example of decision-making based on financial data is adjusting pricing strategies to maximize our profits while also staying competitive. The impact of being able to read financial data on decision-making is crucial because it ensures that resources are being used wisely.

Being able to read financial data also helps with sustainability because it maintains a positive cash flow and identifies trends for long-term planning. Maintaining a positive amount of cash flow is essential to our SBE because it helps us cover daily operational costs and support the special needs programs. Reading financial data is key to tracking income and expenses, which in turn helps head students and DECA advisors make decisions that push the SBE to generate more revenue than it spends. Identifying trends for long-term planning can help our business adjust strategies for promotion and selling. An example of this is when we decided to launch hot chocolate mugs, which consisted of a hot chocolate bomb and peppermint spoon that came together in a cute winter-themed porcelain mug. This item sold pretty quickly from our cart due to the fact that we released them during the winter months before Christmas when peppermint and hot chocolate were especially popular.

## MAKE RESPONSIBLE FINANCIAL DECISIONS



Financial decisions have a significant impact on the operations of the SBE, both in the short term and long term. On a daily basis, students are responsible for managing inventory and making decisions that directly affect the day-to-day functioning of the business. Over the long term, these financial choices not only influence the SBE, however also have broader implications for the entire DECA program. While financial decisions are essential for smooth operations, guiding daily transactions and strategic planning, they also come with their own set of challenges.

## SUCCESSES:

Thanks to the solid foundation built through prior financial planning, the students of Roamin Roasters were able to quickly identify problems and implement immediate solutions. For example, early in our discussions, the team decided to add cookies as a sweet treat to the menu. However, it was soon realized that the inclusion of a dessert item didn't resonate with the customers; the main issue was the lack of interest from teachers, particularly in eating sweets early in the morning. By closely monitoring the financial reports, it was seen that the cookies were not generating additional sales. Understanding the financial burden of maintaining and purchasing the cookies, the students made the informed decision to remove the item from the menu.

## CHALLENGES:

Like any business, Roamin Roasters has faced its share of challenges. A recent example occurred when we discussed with the DECA Advisor whether to invest in a new coffee machine, as the current one, while reliable, had been in use for several years and was showing signs of wear. The students reviewed the financial budget to determine if there were enough funds to purchase a new machine. Upon careful analysis, we concluded that the budget did not have enough to cover the cost. This realization prompted the team to focus on securing external funding and exploring other avenues to raise the necessary money. This situation allowed the students to better understand financial priorities and develop the ability to make informed decisions based on available resources.

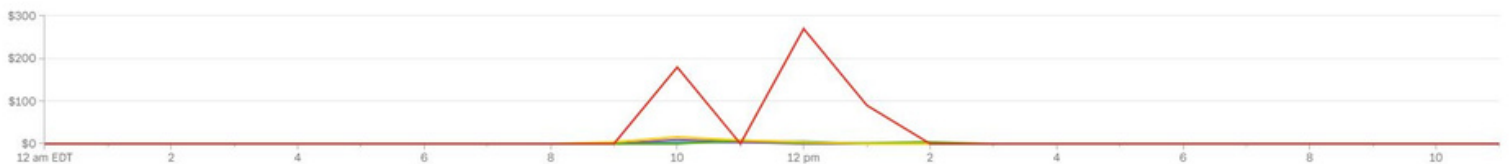
# MAINTAIN THE FINANCIAL RECORDS

Financial records are a crucial part of our decision-making process since they influence both day-to-day operations and long-term planning. They directly impact operations by tracking sales, revenue, and budgeting. We use daily sales reports from our point-of-sale system (Square) to help us monitor these metrics. For example, if a particular product shows a decrease in sales, we can make adjustments, such as removing it from the menu and replacing it with something more relevant. A good example of this in our SBE is when we first introduced caramel-flavored creamer, which initially saw high sales. However, after a few weeks, caramel wasn't as popular, leading to a significant decrease in sales. As a result, we decided to remove caramel creamer from our menu and surveyed customers on what flavor they would prefer instead. We received many requests for hazelnut, so we added it to the menu as a replacement.

Oct 1, 2024–Dec 30, 2024

Top 5 Items: Gross Sales

Subscription \$540.00 Coffee \$32.00 Tea \$16.00 Muffins \$14.00 Hot Cocoa \$14.00



Financial records also play a key role in creating budgets for future planning and preventing overstocking or stockouts, both of which can harm the business. For instance, we use financial records to determine the appropriate budget for snacks on our coffee cart based on past sales and customer feedback. This helps us avoid overstocking snacks that aren't popular, reducing waste and preventing unnecessary purchases. A specific example of how we used budgeting for this purpose was when we decided whether to order more snacks for the cart. We set aside a reasonable amount of cash specifically for snack purchases and then sent out a survey to teachers, asking them to select the snacks they would like to see on the cart. Based on the survey results, we only purchased the most popular items, ensuring we made financially responsible decisions and avoided overspending or overstocking.

Item	Unit	SKU	Category Name	Category	Unit	Items Sold	Units Sold	Gross Sales
Coffee				Uncategorized	ea	16	16	\$32.00
Regular					ea	16	16	\$32.00
Hot Cocoa				Uncategorized	ea	7	7	\$14.00
Regular					ea	7	7	\$14.00
Muffins				Uncategorized	ea	7	7	\$14.00
Regular		684414B			ea	7	7	\$14.00
Sub Hot Bev				Uncategorized	ea	2	2	\$0.00
Regular		665970F			ea	2	2	\$0.00
Subscription				Uncategorized	ea	6	6	\$540.00
Regular					ea	6	6	\$540.00
Tea				Uncategorized	ea	8	8	\$16.00

## DESCRIBE THE USE OF TECHNOLOGY IN FINANCIAL-INFORMATION MANAGEMENT FUNCTION

In Romain Roasters, keeping track of financial data is essential for making informed financial decisions for the coffee cart. We use a variety of technologies, including spreadsheets, Google Forms, and mobile payment systems, to manage our operations. Google Forms and spreadsheets help us conduct surveys, receive feedback, and take orders from customers. To communicate electronically with our customers, we use an app called Remind, which is widely used by teachers to connect with students and staff, making it an accessible tool for our SBE.

Point of Sale (POS) systems are crucial for processing sales transactions. They record sales, calculate totals for purchases, and apply discounts. We use Square in our SBE to seamlessly track sales trends and manage our business operations. Additionally, to track inventory, we use an iPad provided by the School Store. After every purchase, a student employee selects the item purchased from the menu and updates the inventory under Roamin' Roasters.

The POS software allows us to generate customized reports that help identify sales trends. For instance, it provides insights into the most popular beverages and snacks, which we can use to improve our menu offerings. Similarly, Google Sheets helps us create simple graphs to demonstrate the frequency of orders for particular items. This financial reporting is invaluable for Roamin' Roasters, as it enables us to clearly identify the products that are benefiting the SBE and make adjustments, such as removing or improving items that are not performing well.

# STANDARD 2: OPERATIONS



## OPEN/CLOSE REGISTER/TERMINAL

Roamin' Roasters operates during the second block on A days, from 11:08 AM to 1:08 PM, and during the fifth block on B days, from 9:30 to 11:02 AM. Each day, the student assigned to manage the business is responsible for both opening and closing operations. The day begins at around 8:30 AM, when the student arrives to prepare for the day. They start by brewing fresh batches of coffee, ensuring the coffee machine is set up and ready for service. Once the coffee is prepared, the student picks up the special education students from their designated room. Afterward, they visit the advisor's room to collect a schedule outlining the rooms the coffee cart will serve throughout the block. This ensures the team is organized and ready to visit all designated areas

Proper opening and closing procedures are crucial to the smooth operation of the SBE. Opening tasks establish structure and ensure that all preparations are completed on time, while also confirming that the necessary staff is in place for their assigned shifts. Closing tasks are just as important, as they provide an opportunity to thoroughly review the day's operations. This includes finalizing financials, noting any lessons learned, and ensuring that all equipment is cleaned and properly stored for the following day. By adhering to these procedures, Roamin' Roasters maintains a high level of organization, accountability, and efficiency, ensuring the continued success of the business each day.

At the end of the block, the students safely escort the special education students back to their classroom and ensure all equipment, including the coffee cart, is properly stored in its designated location. They also secure the money collected during the shift, safely storing it in the register, and make sure to safely place the inventory and the credit card reader in its designated location. If additional time is available, be sure to rinse out the coffee machine and tea kettle in preparation for the next day. If time runs short, plan to arrive early the following day to complete this task. Properly closing the business ensures that all tasks are completed, and the equipment is prepared for the next day's operations.



# FOLLOW INSTRUCTIONS FOR USE OF EQUIPMENT, TOOLS, AND MACHINERY

Roamin' Roasters utilizes several pieces of equipment to ensure smooth operations throughout the day. The key items include a coffee machine, tea kettle, cups, cup holders, coffee grounds, four different flavors of herbal tea (mint, lemon ginger, cranberry apple, and cozy chamomile), and a coffee cart to transport all the equipment.

The coffee machine is essential for brewing fresh coffee each morning, providing teachers with high-quality beverages. To begin, the machine must be thoroughly washed with soap to maintain safety standards. Once cleaned, it is filled with filtered water up to the 35-cup mark. Next, coffee grounds are measured and placed into the coffee filter until it reaches three-quarters full. After setting up, the machine is plugged in, and it's ready to brew once the light turns red. The tea kettle is used to heat water for herbal teas and to make hot chocolate for teachers. Each morning, it is washed with soap and water, wiped dry, and filled with clean water. The kettle is then plugged in and heated for the day's orders. When a customer orders tea, hot water is poured into a cup, and the selected tea bag (mint, lemon ginger, cranberry apple, or cozy chamomile) is added. If a customer orders hot chocolate, hot water is poured into a cup and then swiss miss hot chocolate powder is added and mixed in before giving to the customer.

The coffee cart, which carries all the necessary items for serving, circulates throughout the school. While there is no permanent location for the cart as it moves through the building, it is stored in the Armoury (the school store) when not in use. The cart is kept in a secure area, ensuring that no students have access to the equipment. Each morning, the cart is pulled from the storage area, stocked with supplies, and set up for the day's operations. Before preparing any beverages, the cart's surface is wiped down with a disinfectant wipe to ensure cleanliness and safety.



At the start of the workday, the assigned student arrives around 8:30 AM to prepare the equipment. Their tasks include wiping down the coffee machine, filling it with water and coffee grounds, and starting the brewing process. The student is also responsible for filling and plugging in the tea kettle to prepare for any hot tea or hot chocolate orders. While waiting for the coffee to brew and the water to heat, the student sends out a Remind message to teachers, notifying them that Roamin' Roasters will be open and providing the order form for easy access. This communication tool helps keep the team organized and ensures teachers have the information they need.

At the end of the day, the assigned student is responsible for cleaning the equipment. This includes disposing of any leftover coffee or tea, thoroughly washing the coffee machine and tea kettle, and preparing them for the next day. A rotating cleaning schedule is created weekly to divide responsibilities among students. The student assigned for cleaning must take the equipment to the school cafeteria to empty any remaining liquids, thoroughly wash the machines with soap, and ensure they are ready for use the following day. By following these procedures, Roamin' Roasters maintains cleanliness, organization, and proper care of the equipment, ensuring that everything operates smoothly and safely each day.

Training for students interested in operating the Roamin' Roasters cart begins 1-2 weeks prior to the business opening. Students are provided with a video outlining the rules and procedures, followed by a quiz they must complete with a score of at least 80%. After this, students attend in-person training sessions, where they learn to brew coffee, operate the coffee machine and tea kettle, interact with the special education students, and manage the cart. They are also trained on handling cash and credit card transactions and preparing hot chocolate and tea, guided by experienced students.

Once training is completed, the team finalizes the selection of individuals for positions and creates a weekly schedule to ensure an organized workflow. Each team member is assigned clear responsibilities to balance tasks like managing the cart, interacting with customers, and keeping the special education students engaged. This structure ensures smooth operations and accountability.

Checks and balances are maintained through defined roles, regular evaluations, and open communication among team members. This structure ensures that responsibilities are evenly distributed and prevents any one individual from holding too much control.

Students receive their training through in-person sessions led by head students, who provide practical guidance and mock scenarios to ensure students are fully prepared. New recruits are also taught how to track inventory. The head advisor of the school store supports the process and ensures safety protocols are followed to provide a safe working environment for all participants.

# DESCRIBE HEALTH AND SAFETY REGULATIONS IN BUSINESS

Roamin' Roasters adheres to strict health and safety regulations set forth by the Virginia Department of Health. Key health and hygiene practices focus on preventing contamination and ensuring employee safety. One of the primary requirements is proper handwashing. To meet these standards, all students involved in the operation of the business thoroughly wash and sanitize their hands before handling beverages or food items. Additionally, gloves are worn when handling any food, such as donuts or muffins, to avoid direct contact with food and maintain hygiene.

4. LCPS shall promote staff wellness by offering professional learning opportunities, workshops, and/or information that encourage physical, mental, nutritional, and relational health.

I. Strategies. The School Division shall continue providing strategies for teachers, parents, school administrators, students, school nutrition professionals, and community members to serve as models in practicing nutritious eating, physical activities, and mental and emotional hygiene, eliminating use of tobacco products, and not using drugs both in school and at home. Teachers are encouraged to consider their position as a wellness role model by modeling drinking water and consuming nutritious meals and snacks. School staff should practice sensitivity to remarks regarding body image, self-esteem, and media images.

J. Assessments. The appropriate staff and offices in the School Division shall assess and, if necessary, make needed improvements to make it safer and easier for students to walk or bike to school and to enter the school building when parent, guardian, or caregiver transportation is provided. When appropriate, the Division shall work with local public works, public safety, and/or police departments in those efforts. The School Division shall explore the availability of federal "safe routes to school" administered by the Virginia Department of Transportation, to finance such improvements.

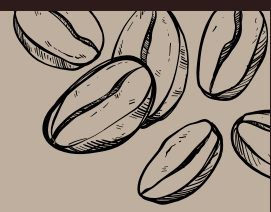
K. Compliance. School Nutrition Services staff, at the school or Division level, shall ensure compliance with USDA regulations within school nutrition service areas and shall report to the Assistant Superintendent for Support Services. The Division will retain records to document compliance with the requirements of the wellness policy.

Food safety is a top priority. All pre-packaged food is stored securely and in accordance with health regulations to prevent contamination. The team ensures that these items are kept in safe conditions and out of reach of unauthorized individuals. The coffee and tea kettles are cleaned and sanitized daily before use, in line with the requirement to maintain safe and sanitary conditions for brewing.

To ensure fire safety and prevent overheating, the tea kettle and coffee machine are unplugged immediately once they have completed their heating or brewing cycle. This practice helps avoid the risk of damage to the equipment and minimizes the potential for fire hazards.

In addition to these measures, students are trained on food safety and emergency procedures to ensure preparedness for any incidents. Regular practice of these safety protocols allows Roamin' Roasters to provide a safe and hygienic environment for both employees and customers. Any issues or violations that arise are immediately addressed, with corrective actions taken to ensure ongoing compliance with health and safety regulations.





# EXPLAIN ROUTINE SECURITY PRECAUTIONS

Routine security precautions are essential to ensure the safe and efficient operation of Roamin' Roasters. Students scheduled to run the cart for the day must arrive at school by 8:30 AM to begin preparations. They start by brewing coffee with the large coffee machine, followed by picking up the special education students. Next, students ensure the cart is fully stocked and retrieve a list of teachers' names to visit. Once prepared, the students transport the cart to the designated classrooms, serving customers in a professional manner while engaging with the special education students. At the end of the shift, the cart is returned to the school store, and the special education students are safely escorted back to their classroom.

Students are responsible for the safe transportation of the cart, ensuring that all tasks are completed efficiently, including brewing coffee and serving customers. They must maintain a professional and patient attitude while working with the special education students. The advisors play a critical role in supervising the students, particularly during the initial stages of operation, to ensure smooth operation and to answer any questions that may arise.

The activities and tasks required by the SBE have a positive impact on the school and district, particularly in terms of inclusivity and community-building. By involving special education students in the program, the SBE fosters a sense of inclusion and teamwork. These activities can inspire others within the district to implement similar programs and create more opportunities for students of different backgrounds to collaborate.

Operational safety procedures are vital to ensuring a safe working environment, and they provide students with valuable learning experiences. Special education students benefit from these procedures by learning the importance of safety and responsibility. For example, they understand the "why" behind safety protocols, such as avoiding burns or contamination, and they gain skills in attention to detail and personal responsibility. They learn to wear gloves and masks when needed, take ownership of safety tasks, and operate machinery with care to prevent accidents. In return, the special education students are always well supported, with both a head student and a special education teacher assistant present to ensure they are closely guided. Their needs are carefully attended to, helping them stay focused, comfortable, and never overwhelmed.

## List of Rules for Employees

Through these safety procedures, students also gain knowledge of food and beverage safety, including proper handwashing, glove usage, and ingredient handling. They are trained in the safe operation of equipment such as the coffee machine and tea kettle, ensuring they can work independently while minimizing the risk of accidents.

Cleanliness is emphasized, and students are taught how to clean themselves and the equipment properly before and after serving customers, ensuring both safety and hygiene standards are upheld. These measures not only promote a safe work environment but also provide the students with valuable skills that can be applied in various work settings in the future.

**Wash your hands thoroughly, tie hair up, and wear an apron**

**Keep working area clean at all times & treat all property with respect**

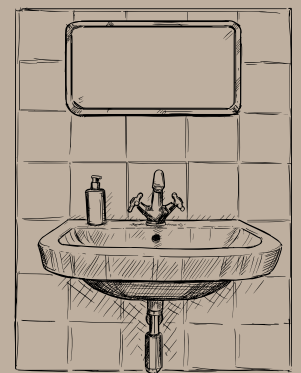
**Be respectful to the Special Education Students**

**Return iPad and card reader to DECA Advisor's room after using**

**Return coffee cart to the School Store after running everyday**

## In case of an Emergency...

**In case of a fire drill, leave the coffee cart safely against the nearest wall. Make sure it is not in the middle of the hallway in order to avoid a hazard. Then, leave the building by taking the closet exit with your special education student. We value the safety of our students over the coffee cart during emergencies. In such situations, please focus on ensuring your safety first and do not worry about the cart.**



# STANDARD 3:

## MARKETING INFORMATION MANAGEMENT



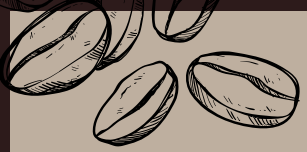
## DESCRIBE THE NEED FOR MARKETING DATA

Data-driven marketing is a strategy where businesses gather customer data and use it to craft personalized marketing campaigns, aimed at enhancing customer satisfaction. The process begins with the collection of data, which can be gathered both offline and online. Examples of data collection methods include surveys, in-person check-ins, and social media interactions. After data is collected, the next step involves analyzing and visualizing trends. This analysis is key to gaining insights that can inform marketing decisions and help improve products or services based on customer preferences.

For Roamin' Roasters, the advantages of data-driven marketing are clear. Target marketing, for instance, allows us to directly connect with our customers and offer them precisely what they are looking for. By analyzing trends in customer preferences, we are able to tailor our offerings to meet their needs more effectively. This not only strengthens customer relationships but also boosts the effectiveness of our marketing efforts and drives increased sales.

However, there are also challenges that businesses, especially Small Business Enterprises (SBEs) like Roamin' Roasters, must navigate when implementing data-driven marketing. One significant challenge is the lack of resources. Many businesses struggle to find the right balance between creative marketers and data experts, which can hinder the collection and analysis of meaningful data. At Roamin' Roasters, we are fortunate to have the support of our advisor, but our limited budget and resources restrict the number of items we can purchase or invest in, which limits our ability to acquire all necessary tools in a timely manner.

At Roamin' Roasters, we collect valuable marketing data to improve our services and products. For example, we conducted a poll among teachers and faculty to determine their preferences for coffee or tea. This survey was instrumental in shaping the product offerings at the start of our business. By gathering this data, we discovered that iced coffee was less popular, while hot tea and coffee were in higher demand. This insight helped us curate a menu that better aligned with the preferences of our target customers, ensuring that we could meet their needs within our budget constraints.



As the Roamin' Roasters cart continued to operate, we further refined our offerings by collecting feedback from teachers who had become regular customers. A follow-up survey was sent out after one month of operation to gather their opinions and suggestions for improvement. The responses revealed that while customers were satisfied with our products, there was a desire for more variety, particularly in snacks. This feedback is crucial for our ongoing development and will help us expand our menu with new snack options, further enhancing the customer experience.

In summary, marketing data plays a vital role in the success of Roamin' Roasters. It allows us to understand customer preferences, make informed decisions, and continuously improve our offerings to meet the needs of our customers. Despite some challenges, such as limited resources, the use of data has proven to be an invaluable tool in driving our business forward.


## IDENTIFY DATA MONITORED FOR MARKETING DECISION-MAKING

In running the Roamin' Roasters SBE, we gather and analyze data to make informed decisions about product offerings, pricing, distribution, and promotion. These data-driven decisions are crucial for ensuring the cart meets customer preferences, remains competitive, and continues to grow.

After analyzing the data feedback collected through order data, surveys, and direct communication with teachers, we understood their preferences for different coffee and tea flavors, as well as menu items. This data helps inform product decisions, such as customizing the menu to feature seasonal flavors like pumpkin spice in the fall and peppermint in the winter. Additionally, we considered adding non-coffee items, like decaf coffee, teas, hot chocolate, and snacks, to cater to non-caffeine drinkers. By regularly analyzing customer feedback, we introduce new items or remove unpopular ones, increasing customer satisfaction and encouraging repeat purchases.

We analyze spending patterns and survey teachers to assess price sensitivity, ensuring the SBE offers affordable prices while remaining profitable. Before launching, a survey asked teachers about their ideal price range for a cup of coffee, with most responses falling between \$2 and \$3. Based on this data, the SBE set the price of a small to medium cup at \$2, striking a balance between affordability and profitability. This pricing strategy not only meets customer expectations but also encourages continued support.

Students are deeply involved in every aspect of the SBE's operations, making critical decisions based on data analysis. These responsibilities include product development, pricing strategies, and promotional efforts. For instance, students use customer surveys and feedback to improve menu offerings, such as introducing a \$90 subscription model for unlimited refills throughout the year. This subscription model helps secure consistent revenue and strengthens customer loyalty.



## Roamin' Roasters

Roamin' Roasters is a student-operated cart that collaborates with special-needs students to raise funds and help them develop valuable workplace skills. Together, we serve and deliver delicious treats right to your convenience!

**What types of beverages/snacks would you love to see offered on our cart?**

Your opinions will help us decide the final items on the cart! Thank you!

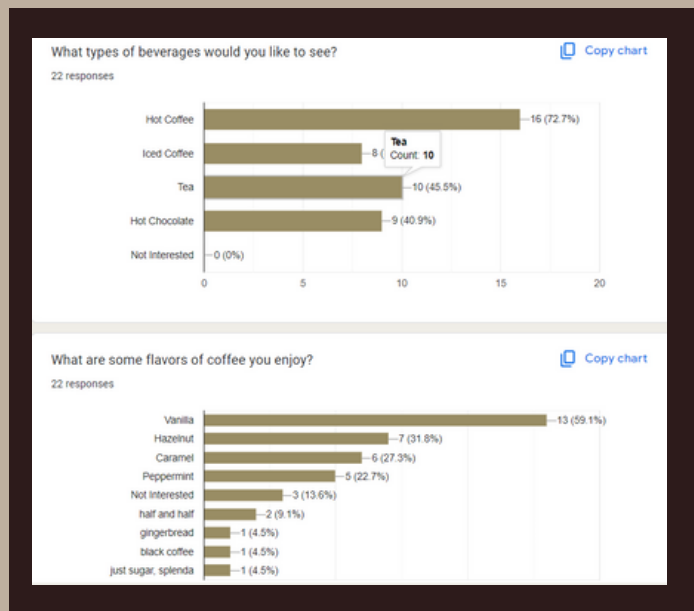
1033756@lcpa.org [Switch account](#)

Not shared

\* Indicates required question

Have you ever bought from Roamin' Roasters? If yes, what did you like about the cart and what would you add to it? \*

Your answer



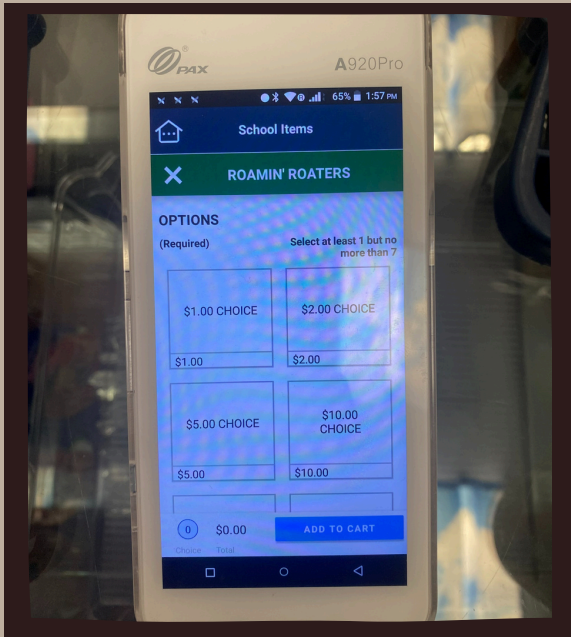
**\*\*Only a sample of our survey and results\*\***

As the Roamin' Roasters cart continued to operate, we further refined our offerings by collecting feedback from teachers who had become regular customers. A follow-up survey was sent out after running the Roamin' Roasters SBE, we gather and analyze data to make informed decisions about product offerings, pricing, distribution, and promotion. These data-driven decisions are crucial for ensuring the cart meets customer preferences, remains competitive, and continues to grow. After analyzing the data feedback collected through order data, surveys, and direct communication with teachers, we understood their preferences for different coffee and tea flavors, as well as menu items. This data helps inform product decisions, such as customizing the menu to feature seasonal flavors like pumpkin spice in the fall and peppermint in the winter. Additionally, we considered adding non-coffee items, like decaf coffee, teas, hot chocolate, and snacks, to cater to non-caffeine drinkers. By regularly analyzing customer feedback, we introduce new items or remove unpopular ones, increasing customer satisfaction and encouraging repeat purchases.

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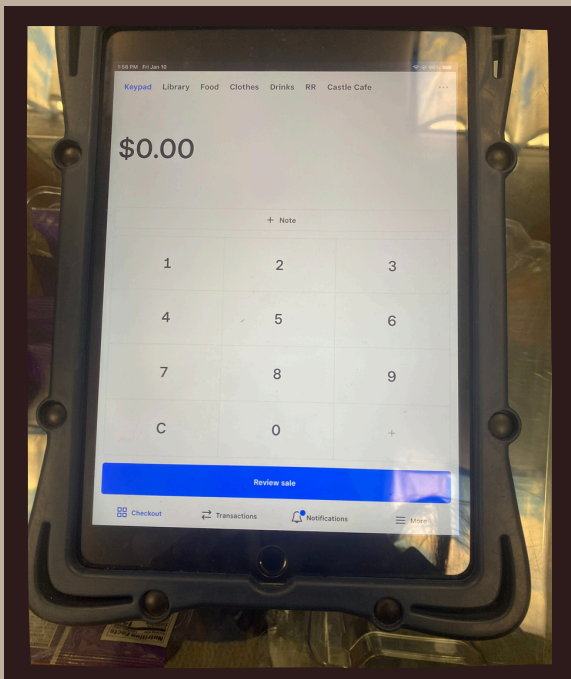
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In addition, students create and implement marketing strategies by designing promotional materials like flyers and digital announcements. These efforts are tracked for effectiveness, with a particular focus on highlighting the SBE's collaboration with special education students to maintain connections with the customers.

Tracking trends is essential for staying competitive and adapting to changing customer preferences. By analyzing trends, businesses can anticipate shifts in demand and make proactive decisions. For example, technological trends in the industry have improved Roamin' Roasters' efficiency. Students use a school-managed iPad for inventory management, a credit card reader for digital payments, and Google Sheets to organize team schedules. These tools streamline operations and enhance customer experience.



Financial trends also play a role in decision-making. By monitoring changes in financial markets and business performance, students ensure the SBE manages cash flow effectively and remains financially stable. Recognizing these trends enables businesses to grow and remain profitable by making informed, data-driven decisions.

Overall, by carefully tracking and analyzing a wide range of data—from customer preferences and purchasing habits to technological and financial trends—students are able to make informed, strategic marketing decisions. These insights not only enhance the effectiveness of the Roamin' Roasters SBE's operations but also contribute to its long-term success and sustainability.

	A	B	C	D	E	F	G	H	I	J	K
		Day	Student Employee	Special ED Student			Coffee Maker		Block	A Day	B Day
1											
2											
3	10/1	Tuesday	Durga, Vasudha	Arman			Arushi		1st		
4	10/2	Wednesday	Arushi, Asmitha	Ashwin, Arman			Vasudha		2nd		
5	10/7	Monday	Vasudha, Arushi	Saleh, Arman			Arushi		1st		
6	10/8	Tuesday	Yesh, Asmitha	Saleh, Arman			Vasudha		2nd		
7	10/9	Wednesday	Arushi, Asmitha	Ashwin, Saleh			Asmitha		1st		
8	10/10	Thursday	Pragya, Asmitha	Ashwin			Arushi		2nd		
9	10/11	Friday	Vasudha, Durga	Arman			Yesh		1st		
10	10/15	Tuesday	Pragya, Arushi	Saleh, Arman			Vasudha		2nd		
11	10/16	Wednesday	Zia, Pragya	Ashwin			Arushi		1st		
12	10/17	Thursday	Durga, Zia	Saleh, Arman			Asmitha		2nd		
13	10/18	Friday	Durga, Asmitha	Arman, Ashwin			Yesh		1st		
14	10/21	Monday	Yesh, Pragya	Saleh			Arushi		2nd		
15	10/22	Tuesday	Asmitha, Vasudha	Arman			Zia		1st		
16	10/23	Wednesday	Durga, Asmitha	Ashwin			Zia		2nd		
17	10/24	Thursday	Zia, Arushi	Ashwin			Arushi		1st		
18	10/25	Friday	Vasudha, Arushi	Arman, Saleh			Durga		2nd		
19	10/28	Monday	Yesh, Asmitha	Ashwin, Arman			Vasudha		1st		



# TRACK TRENDS



Tracking trends in the SBE provides significant opportunities for growth, but it also presents challenges. One major challenge is our small customer base, which consists of only 45% of the teacher population at our school. This limits the volume and diversity of customer data, which can affect the applicability of trends to a broader market. Additionally, the lack of advanced data collection tools forces us to rely on manual methods such as surveys, anecdotal feedback, and basic spreadsheets. These methods are time-consuming and prone to human error. To address this, we've started using digital tools like Google Forms to streamline data collection and improve accuracy. Another challenge is inconsistent customer feedback, which makes it difficult to track trends and understand customer preferences. To improve this, we are actively encouraging more teachers to provide complete feedback or reaching out directly to gather insights.

Despite these challenges, there are numerous opportunities in tracking trends. One key opportunity is understanding customer preferences, which helps students tailor the menu and promotions to meet customer needs. For example, when data reveals that seasonal drinks are popular, we can plan promotions around holidays or events, driving sales and increasing customer satisfaction. Additionally, monitoring marketing success allows us to assess the effectiveness of promotional strategies such as flyers, email announcements, and social media posts. By analyzing customer responses, we can refine our approach and develop more effective marketing strategies. Tracking buying patterns also allows us to create loyalty programs or special deals to build stronger customer relationships. For instance, we identified frequent buyers and offered them rewards, which helped strengthen our connection with them and encourage repeat purchases.

Understanding customer behavior is essential for making informed business decisions. By analyzing customer acquisition, retention, and growth, we can better meet their needs and drive business success.

## ANALYZE CUSTOMER BEHAVIOR

### CUSTOMER ACQUISITION

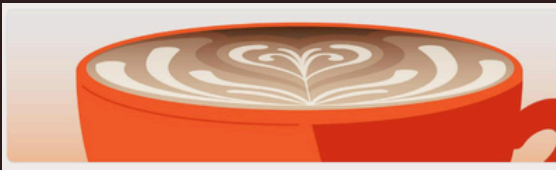
Acquiring new customers is crucial for growth. By analyzing consumer behavior, we can identify target markets and determine the best strategies for attracting new customers.

### CUSTOMER RETENTION

Retaining existing customers is more cost-effective than acquiring new ones. By understanding customer behaviors, businesses can identify what keeps customers satisfied and ensure that their needs are met, encouraging repeat business.

### CUSTOMER GROWTH

Encouraging repeat purchases and cross-selling are key to growing the customer base. By analyzing buying behaviors, businesses can identify opportunities to offer complementary products and incentivize loyalty.



### Roamin' Roasters Hot Beverage Cart Order Form

**\*NO ICED COFFEE ON MONDAYS!\***

1033756@lcps.org [Switch account](#)

🔒 Not shared

\* Indicates required question

Teacher/Staff Name \*

Your answer

What date are you ordering for? \*

Date

mm/dd/yyyy

Would you like cream with your beverage today? \*

☐ Hazelnut

☐ French Vanilla

☐ Half & Half

☐ No Creamer

If you are having a spot of tea, what flavor would you like?

☐ Cozy Chamomile

☐ Mint Medley (spearmint + peppermint)

☐ Lemon Ginger (lemon blend + pinch of ginger)

☐ Cranberry Apple (sweet apple + cranberry)

☐ Sweet Dreams (chamomile + soothing mint)

☐ Did not order tea

Students actively participate in analyzing customer behavior and making decisions that impact the SBE. For example, after gathering feedback from teachers through surveys, students adjusted the coffee cart's operating hours. Initially, the cart ran during the second block of the day, but feedback indicated that many teachers were not interested in purchasing coffee at that time, as they had just come back from lunch. After analyzing this information, students decided to move the operating hours to 9:30 a.m., which resulted in nearly double the revenue and positive feedback from teachers.

Another example of student decision-making is the creation of a pre-order form. Initially, teachers were inconvenienced by the disruption caused by knocking on their doors to take orders. To address this, students developed a Google Form where teachers could submit their orders before school began, minimizing disruption in their classrooms. The pre-order form was well-received and became a popular solution for teachers, making it easier for them to order coffee and snacks without interrupting their classes.

These decisions, made by analyzing customer behavior, demonstrate the importance of tracking trends and adapting the business model to meet customer needs, ultimately leading to increased customer satisfaction and business success.



# STANDARD 4:

## MARKETING PLANNING



### DEVELOP CUSTOMER PROFILE

Primary	John Champe High School Teachers/Faculty/Staff
Demographic	<ul style="list-style-type: none"><li>• All Ages (adult)</li><li>• Male/Female</li><li>• Able to spend \$2-\$4</li></ul>
Pyschographic	<ul style="list-style-type: none"><li>• Enjoys caffeinated drinks and beverages</li><li>• Wants room delivery</li><li>• DECA Member</li><li>• Desire to help UNIFIED (special education students)</li></ul>



The average amount spent by customers is approximately \$2 per item. Most teachers typically purchase either a cup of coffee, tea, or a muffin 2-3 days a week, resulting in an estimated weekly spend of \$25-\$30. However, those who opt for the Roamin' Roasters subscription, which includes a durable, insulated steel coffee mug for a one-time payment of \$90, enjoy unlimited free refills throughout the entire school year. This subscription influences customer behavior by offering a cost-effective alternative for teachers who drink coffee daily. Rather than paying for individual cups multiple times a week, teachers can make a one-time payment for the subscription, significantly reducing the cost per drink while enjoying the convenience of unlimited refills.



Students use customer profiles to make more informed business decisions, including in areas like target marketing, product development, and customer engagement.

### Product Development:

Customer profiles help students understand what their customers want and need. With this knowledge, students can develop products that better align with customer interests. The feedback from these profiles can inform decisions on pricing, beverage options, and even new offerings that resonate with the audience.

### Target Marketing:

By creating detailed customer profiles, students can more effectively target their audience, tailoring their efforts to meet the needs and preferences of the faculty, staff, and teachers who are their primary customers. This approach allows for more strategic improvements and adjustments based on demographic insights.

### Customer Engagement:

Understanding customer profiles enables students to engage with customers on a more personal level. This personalized communication fosters stronger relationships, leading to enhanced loyalty and repeat business. By knowing their customers better, students can create an experience that feels tailored and valued.



# CONDUCT MARKET ANALYSIS

YEAR	POPULATION
2010	315,486
2015	374,176
2020	422,784
2025 (projection)	452,512

The growth and demographic shifts in Loudoun County have had a significant impact on local institutions, including John Champe High School. Over the past several years, as the population in the area has increased, so has the enrollment at the school. As a result, the student-to-teacher ratio at John Champe High School has evolved, with current calculations placing it at 13:1. This surge in student numbers, which reached 1,744 students in the most recent recorded year, has naturally led to an increase in the demand for teaching staff. At present, there are 142 teachers, and projections for the 2024-2025 school year indicate continued growth in student enrollment, which will likely necessitate additional hires. This growth will not only impact staffing levels but will also influence changes in school infrastructure and resources. Renovations and new job openings are expected to accompany the increase in student population, ensuring the school's capacity to accommodate the rising demand for education. As the student body expands, so does the potential for further growth in programs and product offerings within the school environment.



Similarly, market analysis plays a crucial role in shaping product development and customer approval at Romain Roasters, the student-run business within John Champe High School. Each year, the Romain Roasters team conducts a survey at the beginning of the school year to gather feedback from previous customers. The survey includes questions about current trends, potential new products, and suggestions for improvements. This feedback is used to analyze customer preferences and identify any new items they would like to see offered. For example, this year, teachers specifically requested the addition of snacks such as muffins and bagels, with flavor preferences leaning heavily towards chocolate, blueberry, and banana nut muffins.

By leveraging the insights gained from the survey, Romain Roasters is able to make informed decisions on which products to introduce. When a new product is proposed, it is initially ordered in small quantities to gauge its popularity. If the new items prove successful, the team, in collaboration with the DECA Advisor, will assess whether to increase the quantity and/or add the product to the permanent menu, as was done with the muffins. Additionally, feedback from teachers regarding pricing helps ensure that the proposed products are within the school's budget. This dynamic approach, rooted in market analysis, ensures that Romain Roasters continually meets customer demands while maintaining fiscal responsibility and aligning with the school's overall needs and trends.

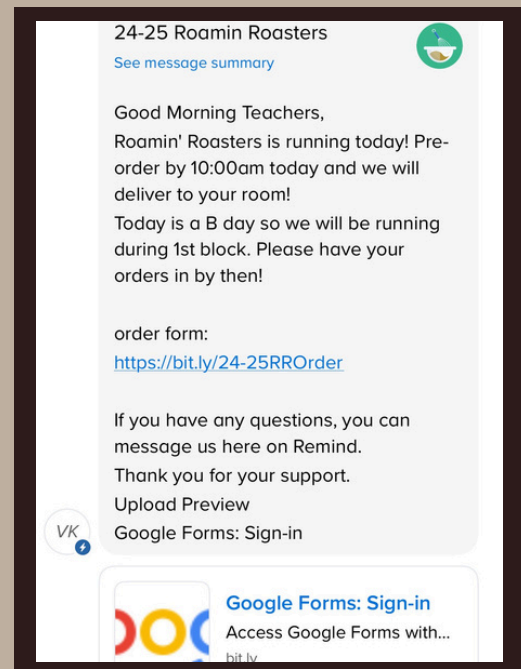
Through both the expansion of John Champe High School and the market-driven decision-making at Romain Roasters, it is clear that effective market analysis not only supports the growth of educational resources but also strengthens product offerings that resonate with customers. By continuously adapting to changing demands and leveraging feedback, the school community is able to create a sustainable and relevant service for students, teachers, and staff alike.



# EXPLAIN STRATEGIES FOR LINKING PERFORMANCE MEASURES TO FINANCIAL OUTCOMES

As head of the Romain Roasters, we play an essential role in tracking sales and customer demand, directly influencing business operations. Key responsibilities include identifying sales patterns, gathering customer feedback, and adjusting marketing strategies to meet evolving customer needs. By analyzing sales data to recognize trends, such as best-selling items or popular beverages, we can focus on high-demand products, ensuring inventory is optimized and the business aligns with customer interests. We also monitor frequently requested items and underperforming products to avoid overstocking unpopular items. Equally important is collecting customer feedback through surveys, social media, and direct interactions, which helps us understand their preferences and adjust our offerings accordingly. This allows Romain Roasters to stay relevant and meet the ever-changing demands of the school community. Customer satisfaction is paramount, and in cases of fluctuating demand, we prioritize effective communication to keep customers informed about any stock shortages or delays. Using REMIND, we provide alternative solutions to maintain positive relationships, which helps preserve the business's reputation and retain customer loyalty.

Demand fluctuations also influence pricing and staffing. When demand increases, we may raise prices to capitalize on higher interest, whereas a drop in demand may prompt us to offer discounts or promotions to clear excess inventory. Additionally, changes in demand affect staffing levels, and we adjust by coordinating with team members to ensure we have the right number of workers, preventing inefficiency or increased costs. By monitoring sales, collecting feedback, and adjusting strategies, we help ensure that Romain Roasters operates smoothly, meets customer demand, and remains financially healthy. This ongoing analysis ultimately contributes to the business's success and profitability.



An example of product demand influencing our SBE decisions was through the incorporation of decaf coffee and dairy free creamer. When the head students were going through the monthly survey feedback from our customers, they noticed that two teachers had special requests. One of them requested for the addition of decaf coffee to our cart and expressed their feelings about how they would love to buy from our coffee cart and support our cause if there was a decaf coffee option. Another customer requested a dairy free creamer and wondered if we would be willing to add that to our coffee cart. After reviewing this feedback, the head students and DECA Advisors decided to add those options to our menu in order to recognize the importance of customer preference and satisfaction. Since only one customer requested these items, we ordered a sample size of each item and added it to our inventory. This way, if other customers liked these new products we could order more in the future and not waste the inventory products.

# STANDARD 5: PRODUCT/ SERVICE MANAGEMENT



## IDENTIFY COMPONENTS OF A RETAIL IMAGE



Teachers view Roamin Roasters as a convenient way to get a high-quality beverage without having to leave their classrooms, as we deliver directly to their rooms. We provide more than just drinks and snacks; we create a positive and friendly environment. Faculty, administration, district staff, and the wider community see us as a hardworking business that fosters inclusivity, particularly by involving special needs students. This provides them with valuable real-world experience and helps them develop skills that will be useful in future careers. The concept of Roamin Roasters may vary from person to person, but one thing remains consistent: we are dedicated to making a positive difference in our community.

## PRICE - ORIENTED

While pricing isn't our main focus, it's an important factor in how customers view us. We make sure everything on our cart is affordable, with prices lower than those at local coffee shops. For instance, our hot coffees and teas are just \$2, and iced coffees are \$4. We believe this pricing offers the perfect balance, giving teachers a convenient and budget-friendly option that meets their needs.

Romain Roasters is viewed as an community-oriented, service-oriented and price-oriented business by customers in the following ways:



## SERVICE - ORIENTED

Roamin' Roasters is all about providing exceptional service, which is at the heart of what makes us a service-oriented business. This is seen by how we offer the convenience of delivering beverages/snacks directly to teachers' classrooms, allowing them to enjoy their drinks without interrupting their teaching or having to leave their classrooms.

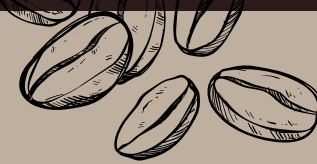
This school year, we've made several changes to improve Roamin Roasters image. We introduced new items to our cart and refined our marketing strategies. One strategy involved posting flyers in teacher workrooms, where they are likely to see them. We included a QR code linking to a survey to gather feedback on what items teachers would like to see on the cart. However, when the flyer response rate was lower than expected, we adapted by going door-to-door to personally ask teachers the survey questions and record their answers. This method proved much more effective, and we received a wealth of valuable feedback.

## COMMUNITY - ORIENTED

Roamin Roasters is seen as a community-oriented business because we work closely with special education students to provide valuable services to teachers. This collaboration not only promotes inclusivity but also strengthens the bonds within our school community. The DECA team takes pride in knowing that our SBE helps special needs students develop essential workplace skills, which fosters a strong sense of support and pride for Roamin Roasters throughout the school.

We also emailed teachers who had previously ordered from Roamin Roasters, asking for their input on our offerings and any improvements they'd like to see, while also emailing new teachers for potential addition of customers. These efforts helped us better understand the needs of our customers and align our products and services with their preferences.

# CHOOSE VENDORS



Before selecting our main vendor, the head students and the DECA Advisor held discussions to evaluate the qualifications of potential vendors. We considered several key factors such as the proximity of the vendor to our school, delivery options, and whether the delivery fees were reasonable. We also assessed the quality of their products and whether the cost was justified by the product's value. As an SBE, we aim to create an environment that not only provides quality products but also promotes student interaction and learning. Choosing vendors with strong qualifications is essential to the success of our business, as they directly impact the quality and reliability of the products and services we offer.

After careful consideration, we decided that Sam's Club was the best fit for our needs. Their competitive bulk pricing allows us to purchase products at a lower cost, which in turn helps us maintain affordable prices for our customers. This aligns with our mission of being a cost-effective option. Additionally, Sam's Club is located less than 20 minutes from John Champe High School, making it convenient for our DECA Advisor to restock supplies when needed. Since our menu is simple, we've found that one vendor is sufficient to meet our needs, and Sam's Club fulfills all of our requirements efficiently.

Roamin' Roasters is a student-led program, so student decisions play a critical role in shaping the operation and growth of our SBE. From marketing to merchandise selection, customer engagement, and operational improvements, student involvement is key to our success. For example, our student employees actively gather customer feedback and identify trends to suggest changes or new offerings. One example of a student-driven decision was improving the aprons we use. This year, we updated the aprons, which not only improved the look of our business but also positively impacted the overall visual appeal and professionalism of Roamin' Roasters.

The vendor selection process had some challenges, mainly when it came to deciding between Costco, Target, Walmart, and Sam's Club. Each vendor had its advantages and drawbacks, which required careful consideration. Sam's Club stood out because it offered bulk pricing and discounts, which allowed us to stretch our budget and secure competitive pricing for popular items like snacks and beverages. Costco also offered bulk pricing but in larger quantities, which often led to overstocking and waste, making it less practical for our needs. Target's higher prices would have increased our costs significantly, while Walmart, though affordable in some areas, didn't provide the same level of savings as Sam's Club. In the end, Sam's Club offered the best balance of bulk pricing, quality products, and convenience, making it the ideal choice for our business.



# PLAN MERCHANDISE ASSORTMENT



## CONSISTENCY

We ensure consistency by aligning all products and designs—like the cart and custom mugs—with our commitment to high quality and a customer-focused experience, reflecting our brand's image..

## BRAND MIX

All of our products from the coffee grounds to the snacks all are purchased from Sams Club. This creates a well-rounded product offering, enhancing the overall customer experience while maintaining our reputation for high standards and community support.

## WIDTH

- Hot/Iced Coffee
- Tea (with different flavors)
- Hot Chocolate
- Muffins (flavor options)
- Donuts

## LENGTH


- Coffee Creamers Flavors: Hazelnut, Half and Half, French Vanilla
- Herbal Tea Flavors: Chamomile, Mint Medley, Lemon Ginger, Sweet Dreams
- Muffin Flavors: Chocolate, Blueberry, Banana Nut

## DEPTH

- No size variety
- coffee/tea are served in medium cup
- amount of creamers--> up to the customers liking we ask for preferences

Planning merchandise assortment at our SBE involves strategic steps that helps with product offerings that are tailored to our customer's needs. This process makes sure that we offer the right balance between variety and efficiency. Some key steps in planning merchandise assortment include understanding customer needs, creating different product categories and considering trends. We understand customer needs by analysing our customer preferences through surveys and tracking purchase patterns. For instance, by tracking trends in our sales we observed that Lemon Ginger Tea flavor was most common in customers that purchased tea. This allowed us to order stock based on those trends and find other herbal tea flavors that were close to Lemon Ginger.

We also make sure to group different products into categories (e.g., beverages and snacks) to organize our assortment of items. This helps us ensure that each category has a clear focus and purpose in our overall offerings. During the beginning stage of our coffee cart, many of our customers thought that we only offered freshly brewed coffee. In order to fix that issue, we decided to showcase our other products on the cart more effectively by placing them in the front and center. This not only allowed customers to visually see all of our options but to also consider getting something other than coffee.



Our student employees are great assistance with determining products lines and mix of brands. Their active participation not only supports the operation but also provides them with valuable hands-on experience in business and the real world. Student employees are tasked with conducting market research by analyzing customer preference through surveys, feedback forms and direct interactions with customers. They learn how to observe trends and gather data to identify which product or categories are most popular. Student employees are trained on how to read data and track trends at the beginning of the year when they first get hired. The DECA Advisor goes through main points on how to properly be able to read sales data which helps them track trends in the future. Student employees are also tasked with testing and coming up with new items to add on our coffee cart. They accomplish this goal by asking our customers questions like, “What are some new items you would like to see on the cart?”, “Are you happy with the sweet snacks on our cart, or would you like to see some savory options?”, “Do you enjoy the flavor of coffee being provided, or would you like to provide a different coffee blend we could use?”. These questions help student employees come up with new items to add to our coffee cart that give customers satisfaction which then increase our sales.

## DETERMINE STOCK TURNOVER

Stock turnover is a very important system for our SBE because it helps us measure how efficiently inventory is being sold and replaced. High stock turnover means that inventory is being sold quickly which is good for minimizing storage costs and reducing waste of unsold goods. On the other hand, low stock turnover indicates overstocking or inefficient sales. By closely monitoring stock turnover, we can identify trends and adjust sales strategies for our SBE. Maintaining a proper stock turnover is important for sustaining cash flow, meeting customer demand and improving our operational efficiency.

In order to avoid overstocking of our inventory items, we monitor the average usage of our easily perishable items such as muffins, donuts, and creamers. Depending on the specific products required, we make sure to place orders once every two weeks or monthly. Our student employees play a key role in this process by actively checking the expiration date on our stock items from time to time. In order to manage excess inventory, we decided to sell items that were extra for a reduced price so they can sell before their expiration date. For instance, when we ordered extra muffins, we decided to use the “Buy one get one free” method to sell the extra muffins before they reached their expiration date. They are tasked with checking our stock items at least 2-3 times a week to make sure we don’t sell expired items to our customers. We also make sure to restock items that are close to their expiration before they impair in order to keep up sales.





# PLAN REDUCTIONS

At Roamin Roasters, student employees play a key role in merchandise planning. They are responsible for promoting and advertising special discounts, offers, and seasonal events to engage customers and encourage sales. Throughout the school year, we provide opportunities for discounted or free items during special occasions. Recently, in December, for the holidays, we gave away free beverages to our best customers as a token of appreciation. These types of events are planned and communicated by the team of Roamin Roasters, who work to generate interest and attract customers. Additionally, we offer the Roamin Roasters mug, an insulated, conveniently-sized cup featuring our logo, which can be purchased for \$90. This one-time purchase provides customers with free refills of coffee and/or tea for the rest of the school year. Students are responsible for marketing this offer and encouraging customers to take advantage of it. Their role involves not just promoting the products, but also fostering customer loyalty through these special opportunities.

Stock shortages are seen from time to time in our SBE. When inventory runs low, the process for addressing this depends on the availability of our DECA Advisor. If certain items are out of stock, we might need to inform customers through a message on Remind, notifying them that Roamin Roasters will not be running the next day. Alternatively, the DECA Advisor may be able to source additional stock to keep the business running smoothly.

Since all profits generated by Roamin Roasters go toward supporting the UNIFIED program, it is essential that we maintain a balance between profitability and customer engagement. We must ensure that we are both making a profit and creating meaningful experiences for our customers. We focus on maintaining consistent product offerings and maximizing sales through customer-centered activities. These strategies help us stay aligned with our goals while continuing to meet the needs of our customers.



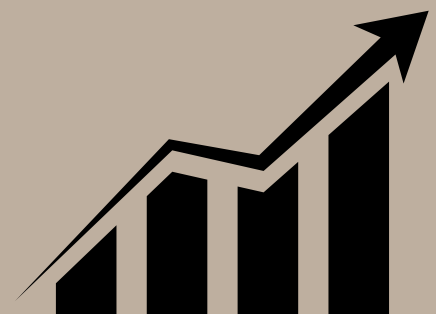
# STANDARD 6: PRICING



## EXPLAIN THE NATURE AND SCOPE OF THE PRICING FUNCTION

The pricing function is a critical component of any SBE, as it directly influences profitability and competitiveness. The nature and scope of pricing involve assessing a variety of factors, including production costs, market demand, and customer preferences. For Roamin' Roosters, this process began with a thorough consideration of production expenses, which include materials, supplies, and equipment, as well as marketing costs. By carefully calculating these initial expenses—such as the cost of coffee beans, the necessary equipment, and marketing expenditures—we determined a price that would cover these costs and still allow for a profitable operation. This careful consideration ensures that the business remains financially viable, covering its operational costs while also generating profit.

Additionally, market demand plays a crucial role in shaping the pricing function. Prices need to be adjusted based on consumer interest and the volume of sales. For example, when demand for a product is high, the price can be raised slightly, whereas when demand is low, a more competitive price may be necessary to attract customers. At Roamin' Roosters, we closely monitor customer interest and sales volume to ensure that our prices are in line with market demand. This approach helps us remain competitive and meet customer expectations while continuing to drive profitability.



# EXPLAIN FACTORS AFFECTING PRICING DECISIONS



Several factors influence the pricing decisions at Roamin' Roasters, with the primary considerations being production costs, market demand, and customer behavior. One effective pricing strategy employed by our SBE is bundling pricing, where multiple products or services are sold together for a single price. This strategy is designed to encourage customers to purchase more by offering a perceived higher value. For example, we introduced a subscription mug for \$90, which includes free refills for the entire year. This offer appeals to regular customers who prefer not to pay a fee each time they purchase a coffee, providing both cost savings and customer retention. The strategy incentivizes customers to commit to our service for the long term, increasing customer loyalty and ensuring steady revenue.

Another key strategy employed at Roamin' Roasters is psychological pricing, which aims to influence consumer perceptions of value. This approach focuses on setting price points that seem more attractive to customers, such as rounding prices to the nearest dollar. For instance, menu items are priced at \$2.00 rather than \$1.99, making them appear more affordable and straightforward, thereby encouraging customers to make a purchase without second-guessing the price.

Students are actively involved in both the creation and execution of these pricing strategies. They contributed to the development of the bundling strategy, recognizing an opportunity to introduce a subscription model to attract frequent customers. Students were also responsible for determining the pricing structure, overseeing marketing efforts, and monitoring customer interest. The decision to use psychological pricing was made collaboratively by the students, with the goal of enhancing the appeal of the menu and maximizing sales. Students were tasked with continuously assessing the effectiveness of these strategies, adjusting prices as necessary to maintain competitiveness and profitability.

Pricing decisions at Roamin' Roasters are regularly evaluated to ensure their effectiveness. Methods such as profitability analysis and customer feedback are used to assess the success of pricing strategies. The results from these evaluations provide valuable insights into customer behavior and allow the students to refine their approach. By studying the impact of pricing decisions, students can learn from both successes and challenges, gaining a deeper understanding of market dynamics and the ethical considerations involved in setting prices. These outcomes also foster a sense of responsibility in students, helping them make more informed and responsible pricing decisions in the future.



# **STANDARD 7:**

## **DISTRIBUTION/ CHANNEL MANAGEMENT**



## **EXPLAIN THE RELATIONSHIP BETWEEN CUSTOMER SERVICE AND DISTRIBUTION**

In our SBE, students play an important role in building a strong relationship with customers that go beyond basic customer service. We engage with our customers in a meaningful way which makes them want to come back and buy from our coffee cart from time to time. Customer service is vital to our SBE and our student employees play a huge role by taking ownership of their interactions, helping to build a loyal customer base and a positive reputation for the SBE.

At Roamin' Roasters the student employees are trained on how to interact with customers in a way that forms a positive relationship and ensures a memorable experience. This training goes beyond regular customer service, because we make sure to teach our employees on how to handle various different types of customer situations. For example, they are taught on how to greet teachers, how to approach teachers who are in the middle of a lesson, and how to engage in meaningful conversations to understand their preferences.

Included in the order form is a question that asks "How would you like us to approach your classroom?" This question is asked to every customer in order to make sure we are not distributing lesson time in classrooms. It allows teachers to specify their method of interaction, such as waiting patiently by the door, knocking on the door quietly or simply walking into the classroom. This method is efficient because it provides control over how we approach their classroom and demonstrates our respect for customer schedules.

Attitude is another attribute that all of our student employees learn about when running the coffee cart. We focus on staying positive and professional because it makes a huge difference in how customers feel and how smoothly things run. We also encourage the special education students to greet the customer and ask them how their day is going. This not only puts a smile on the customers face but it also makes the special needs student feel happy and increase their communication skills. Sometimes, when the special needs students are shy around customers, we help them interact with customers by initiating the conversation first. That way there is no pressure on the special needs student to start the conversation. By practicing a positive attitude like this, we help create a welcoming atmosphere that keeps customers coming back!



Timing of orders, stock rotation and product availability are some of the factors that are important to our SBE's ability to consistently meet customer needs and maintain smooth operations. They also directly impact customer satisfaction and the overall success of our business. Since we order from our vendors once a month for snack items and on a biweekly basis for coffee items, customers can place their orders on a regular basis. We make sure that our inventory levels are monitored closely so we don't run out of popular items and decrease sales. Additionally, we prioritize proper stock rotation to ensure that all products are fresh and of the highest quality. There have been times when we have had vendor issues and did not receive items on time which delayed our sales. During these times, we made sure to notify our customers of our short stock and assured them that we will be fully stocked in no time. Ordering snack items every two weeks and coffee items once a month has helped us keep a proper schedule in stocking up our inventory without disrupting our sales.

## EXPLAIN THE RECEIVING PROCESS

The merchandise receiving process is crucial for keeping track of our inventory and ensuring that all products are in good condition. It plays a key role in the smooth operation of our SBE by helping us maintain an organized and well-stocked cart. For our coffee cart, we receive coffee ingredients once a month and snacks every two weeks. We order coffee beans in larger quantities each month, while snacks are ordered more frequently to ensure freshness. Our DECA Advisor handles picking up the orders to save on delivery costs, which is a great way to keep our expenses down.

Students are responsible for carefully unpacking the merchandise when it arrives and inspecting it for any damage or defects. They also check expiration dates to ensure the products are still good to sell. After inspecting the goods, students take inventory of everything received, including coffee grounds, creamer flavors, herbal teas, muffins, donuts, cups, lids, sleeves, and coffee stirrers. They record the quantities of each item and note any damaged products. Once the inventory is taken, students organize the stock properly and clean up any packaging and boxes.

This process is important to our SBE because it ensures accuracy and accountability in managing our inventory. By double-checking that we receive the correct items and quantities, we can avoid mistakes that lead to financial losses. It also helps us maintain the right balance of stock, preventing overstocking or running out of popular items.

Recently, we noticed that our inventory was running low, so we placed an order for more supplies. Since it was our first time restocking, we made sure to be especially careful in checking everything. When the DECA Advisor delivered the order, we went through the items carefully, and one student discovered that the muffins were close to their expiration date. Thanks to our thorough receiving process, we caught this issue early. We were able to contact the vendor, return the expired muffins, and get a fresh batch along with a refund. This experience highlighted the value of paying attention to the details and following the proper process.



# COMPLETE INVENTORY COUNTS

In order to maintain proper inventory control in our SBE, we record all sales and stock usage into Square after every transaction. This helps us track inventory in real-time and ensures we know when specific items are running low but still in high demand. By monitoring low stock alerts and visually inspecting inventory levels from time to time, we can identify which items need to be replaced. Student employees are responsible for keeping a close eye on the inventory and physically checking the coffee cart periodically to ensure everything is stocked and ready. If something is running low, they are required to notify the head students and DECA Advisor immediately so they can order new stock.

The Square system also plays a key role in tracking inventory after each sale, making it easier for us to detect any inventory shrinkage. Each time a customer places an order, the item is deducted from the inventory, providing real-time updates on stock levels. This process helps students learn the appropriate amount of stock needed before making new orders and prevents overstocking. When inventory levels drop to a certain point, as determined by the DECA Advisor, the system flags that item, alerting the head student that it's time to restock.

This inventory control process provides valuable learning opportunities for student employees. They are able to see how inventory numbers change with each sale and recognize when an item needs to be restocked. Students also learn about minimum stock levels, which helps them run the coffee cart efficiently even during low stock periods. This ensures that our SBE continues to make sales without interruption. While students are primarily responsible for deciding when to reorder stock, the DECA Advisor ultimately makes the final decision.

Through proper control of inventory receipts and distribution, students have learned the importance of inventory management in a running business. The process allows them to analyze the dynamics of an evolving business, where values fluctuate daily. Additionally, it instills a sense of responsibility, as students feel they are directly contributing to the success of the sales and marketing efforts. Though this process can be time-consuming, requiring careful monitoring of inventory levels and numerical values for ordering, the sense of accomplishment and the impact of their decisions are highly rewarding.





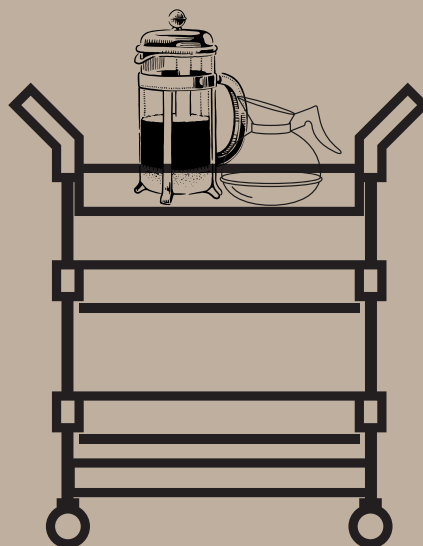
# DETERMINE INVENTORY SHRINKAGE

Shrinkage in our SBE mainly comes in two forms: damage to products and theft. We take these seriously and try to minimize them as much as possible. Damage usually happens during shipping or delivery, and although it's not common, it does happen from time to time. For example, sometimes the coffee ground packages arrive with slight punctures in the packaging. While it might seem like a small issue, we make sure not to sell damaged items to our customers, therefore we document these issues in our inventory for future reference.

The other form of shrinkage we've noticed is theft, which can be difficult to spot. With so many individuals mobilizing around the Roamin' Roasters cart during busy school hours, it can be hard to tell if maximum safety is ensured. We've had some issues with missing muffins, and after analyzing, we realized that people are stealing from the cart with no consent. To prevent this, we've started making sure that only head students or those on shift are allowed in the school store, and the DECA Advisor has restricted who gets access to the keys. This helps us limit opportunities for theft and keep track of what's happening.

Student employees play a huge role in preventing shrinkage. We trust the team members we've chosen to act responsibly, and we expect them to set a good example. They're trained to report anything unusual, and because we know they're honest, we rely on them to keep shrinkage under control.

When shrinkage happens, it directly impacts our finances. If products are damaged or stolen, it means we lose money that we could have used for the business. Since all our profits go toward supporting the UNIFIED program, every lost item hurts our ability to fund those important efforts. Shrinkage might seem like a small issue, but over time, it adds up and affects both our budget and our mission.



# STANDARD 8: PROMOTION



## EXPLAIN THE NATURE OF A PROMOTIONAL PLAN

Our SBE set several promotional goals for the school year, with two main objectives: to acquire new customers ( teachers and faculty), and to sell all 12 of our subscription mugs. At the start of the school year, we analyzed the previous year's customer list and compared it with the current year's staff roster. We found that most of our customers from the 2023-2024 school year were repeat customers, meaning that we had not been reaching out to new potential customers. We decided that we needed to expand our customer base by targeting new faculty and staff members. To achieve this, we implemented strategies such as advertising on social media, creating flyers, and emailing new teachers and faculty members. While the response was somewhat modest, we continued to push for expansion.

To promote the subscription mugs and help reach our promotional goals, we came up with a strategy that combined both objectives. We began advertising the subscription mugs to the teachers and faculty members we knew by explaining the benefits and convenience of the mugs. Surprisingly, many teachers expressed interest and were willing to purchase one. We focused particularly on the new staff members, as they were our primary target audience. As head students, we personally made time to visit each new teacher, introducing them to Romain Roasters and explaining the benefits of the subscription mugs. This effort sparked a lot of interest and curiosity about our SBE, and we began receiving many questions from faculty members.

Once Romain Roasters was up and running, it became essential to retain our new customers. This led us to implement additional marketing activities to keep our customers engaged. One of our strategies was a holiday promotion designed to increase customer retention and attract new customers. For the month of December, we offered a "buy one, get one free" promotion for all customers who had been frequent buyers of hot coffee (at least 2-3 times a week). These loyal customers received free hot chocolate three times during the month as a holiday treat. This promotion not only rewarded our regular customers but also provided an incentive for new customers to purchase coffee or tea multiple times to enjoy free hot chocolate. The goal of this initiative was to nurture relationships with our existing customers while welcoming new ones into the fold.

Our promotional budget is essentially zero, as we've been fortunate to have all the necessary resources for advertising and marketing. The DECA Advisor was able to print all of our flyers without any additional cost for paper or ink. Additionally, we utilized social media posts and school announcements for further promotion, both of which came at no extra expense. As a result, our promotional budget has been effectively incorporated into our overall promotional strategy, without requiring additional funds. We're incredibly grateful for the resources provided, as they've allowed us to build strong relationships with many of the staff members and foster great public relations within the school.

# EXPLAIN THE USE OF VISUAL MERCHANDISING IN RETAILING



Visual merchandising plays an important role in our SBE because it helps attract customers by showcasing our products effectively and enhancing the overall coffee ordering experience. We carefully plan and execute our displays to ensure they align with what our customers are looking for. The head students are responsible for deciding the most efficient way to showcase our items. For example, the coffee machine and tea kettle are placed to the side of the cart because they aren't as visually appealing as the creamers, muffins, and donuts, which are placed in the center. Customers who stop by for the donuts and muffins often eventually order coffee, which is conveniently located nearby. During the winter season, we made sure to highlight hot chocolate and marshmallows near the front of the cart to capture customers' attention. Additionally, we put up a menu for customers who didn't place their order through the order form, so they could easily see all the options we offer. The menu is designed with bright colors and easy-to-read fonts to grab the attention of customers walking by the coffee cart. By keeping the menu visually appealing and easily accessible, we enhance the customer experience and encourage spontaneous orders.

Students have several key roles in the visual merchandising component of our SBE. Our student employees are responsible for properly presenting and making our items and coffee cart more appealing to customers. While the head student makes final decisions on how and where to place each item on the cart, all other employees are encouraged to contribute suggestions. We've experimented with different arrangements to find the most aesthetically pleasing setup. As one of our student employees recommended purchasing more attractive and presentable coffee cups, we took it into consideration, the cups represent our SBE's brand and need to match the overall ambiance of the coffee cart. Visual merchandising is an essential part of Romain Roasters, and by working together, students help create an appealing environment that enhances the customer experience and reflects the creativity of the student employees.



# USE CROSS-MERCHANDISING TECHNIQUES

Cross-merchandising is a key strategy for our SBE, and we implement it by placing complementary items next to each other to boost sales. As listed above, we position our coffee next to muffins and donuts, which encourages customers to purchase both items together. This not only increases sales but also creates a more appealing and organized cart. In addition to cross-merchandising within our own products, we collaborate with the retail SBE, the School Store, to expand our reach. The store changed its entrance, and we're now able to display our coffee cart within a section of the store. This visibility attracts customers who might not have otherwise noticed our cart.

We continuously focus on keeping our products visible and enticing to customers. If an item is unavailable on the cart, we display pictures of it or have an updated menu posted to keep customers informed. The goal is to ensure that every product we offer is visible, appealing, and easy to find. We aim to sell as many products as possible within our budget and adapt our display to grab the attention of potential buyers. By emphasizing cross-merchandising, we ensure our products are presented in a way that makes customers more likely to purchase.

If our SBE only had one product, we would likely choose our vanilla creamer hot coffee, as it's our best-seller. In this case, we could explore partnerships with other organizations within the school to enhance sales. For instance, we could collaborate with the School Store to offer discounted school spirit wear when customers purchase our coffee. This would create an attractive promotion for both our SBE and the School Store, benefiting both businesses. By marketing this idea through both the Roamin Roasters and the Armory (school store) social media channels, we could attract a wider audience and boost sales for both sides. If successful, this cross-promotion would generate profit and increase customer satisfaction.

## PLAN SPECIAL EVENTS

One special event in our SBE was our snack selection competition, which took place at the beginning of the year when the coffee cart first began operating. All student employees were given the opportunity to choose snacks they believed would be popular with our customers. This event served as a fun way for everyone to get to know each other, while also allowing students to showcase their teamwork and creativity. Students were encouraged to visit different teachers and gather input, ensuring that customer preferences were taken into account when selecting the final snack choices.

Afterward, a survey was sent out to our customers, allowing them to vote on their favorite snack options. The head students then reviewed the results and selected the top three student employees whose snack choices received the most votes. These winners were awarded free coffee and snack privileges from both our coffee cart and the School Store for the next two weeks. The event proved to be a success, since it not only helped us identify popular snacks to feature on our cart, but also ensured that the selections reflected our customers' preferences.

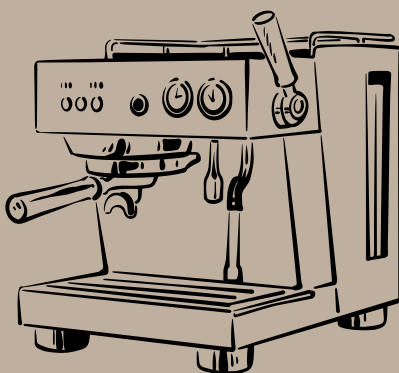


# IDENTIFY WAYS TO TRACK MARKETING-COMMUNICATIONS ACTIVITIES

Our main target market for the coffee cart is teachers, so we actively ask for their feedback. Every 2-3 weeks, we send out surveys to gather their opinions on various aspects of our service, including the quality of the coffee, the convenience of the service, and suggestions for new products or promotions. These surveys help us adjust our offerings to better meet customer preferences and add new items they would like to see.

In addition to the surveys, we also post announcements on Remind, an application that teachers can easily access. This has proven to be an effective promotional strategy that many teachers appreciate. While our promotional efforts have been effective overall, we recognize the need to focus more on attracting new customers to support our coffee cart and cause. Moving forward, we plan to improve our advertising efforts and better communicate the mission behind Roamin Roasters.

Through this experience, our student employees have learned the importance of adapting and adjusting our approach when things aren't going well. For example, when we initially struggled to generate interest in the coffee cart, we decided to take a more personal approach. The head students led the team in speaking directly to teachers to explain the mission behind the coffee cart and how it supports special education programs. This direct communication helped our customers see the value in the cart, and by building personal relationships with them, we not only increased sales but also created a sense of community and purpose around our SBE.



# STANDARD 9: SELLING



## DETERMINE CUSTOMER/CLIENT NEEDS

Students are trained to identify and meet customer needs while running the Roamin' Roasters cart, which is especially evident during the ordering and delivery process. When customers pre-order their beverages or snacks, the student workers ensure the orders are delivered directly to the classroom. They are trained to be mindful of the classroom environment—if the teacher is engaged with the class, the students are to wait before knocking. If the environment seems more relaxed, a special education student may greet the customer and hand over the order along with one of the team members. Once the order is delivered, students ask if the customer prefers to pay by cash or card. If the teacher is not in a rush, students may take the opportunity to ask if they'd like to add another beverage or snack to their order. Finally, students politely express gratitude and quietly exit the room.

When teachers or faculty members decide to purchase on the spot instead of pre-ordering, students are trained to assess whether there is enough time to make a purchase. If there are only a few pre-orders and enough time, students stop the cart in a quiet area, ensuring not to block hallways or disturb other classrooms. They then greet the customer, take the order, and serve the snack or beverage with the help of special education students. After completing the transaction, students briefly explain the pre-ordering system and how communication through Remind is incorporated, encouraging customers to use the service for guaranteed delivery in the future. If students are busy and cannot immediately serve the customer, they politely ask for the customer's room number and promise to return if time permits, while politely reminding them about the benefits of pre-ordering.

When students engage with indecisive or unhappy customers, they are taught to handle the situation with patience and understanding. For indecisive customers, students ask a few questions to help narrow down their preferences, such as whether they prefer coffee or tea, or if they would like it hot or iced. Students also offer personal recommendations to help make the decision easier, ensuring that the menu is clearly displayed on the cart for reference. If a customer is unhappy, students strive to make things right by offering a discount or providing an item "on the house" to improve the customer's experience. Fortunately, Roamin' Roasters has rarely encountered dissatisfied customers, however students continue to prioritize maintaining positive relationships.

# ESTABLISH RELATIONSHIP WITH CUSTOMER/CLIENT

Our student employees are trained to build strong, lasting relationships with customers that go beyond a simple greeting and thank you. We believe in creating genuine connections through consistent interactions and personalized service. When we take the Roamin Roasters cart around the school, we make it a point to greet every teacher we pass and ask how they are doing. Over time, some teachers begin to recognize our students from previous visits and often stop to chat. Beyond just delivering coffee, our employees take the extra step to remember personal preferences, such as a teacher's favorite creamer or the exact amount of sugar they like. It's the small, thoughtful details that show our customers we truly care about them.

## DEMONSTRATE SUGGESTION SELLING

Suggestive selling is a skill that develops naturally with experience and customer interaction. When students engage with a variety of customers, they gradually learn effective communication techniques and strategies. These skills don't always need to be explicitly taught; rather, they evolve through practice. For example, when a customer asks for recommendations, more experienced students can confidently respond with tailored suggestions based on their previous encounters. While some students receive initial training in suggestive selling techniques, it's clear that experience plays a significant role in refining these skills. By understanding the degree of suggestion selling, Roamin Roasters can increase sales when an experienced student interacts with customers. Additionally, customers tend to trust the recommendations of more seasoned students, often perceiving their opinions as more valid than those of newer team members. As a result, suggestive selling by experienced students not only enhances the customer experience but also drives potential sales growth.

Although Roamin Roasters fosters a friendly and positive environment, occasional interactions with negative customers may arise. While these instances are rare, students are trained to handle them with professionalism and empathy. They are taught to de-escalate conflicts by offering solutions and maintaining a calm, pleasant demeanor. If a customer remains dissatisfied despite the students' efforts, the team has a clear protocol in place: they can involve a nearby teacher or the DECA Advisor to address the issue further. This approach ensures that even in challenging situations, the customer feels heard and valued, while also preserving the overall positive atmosphere of the business.

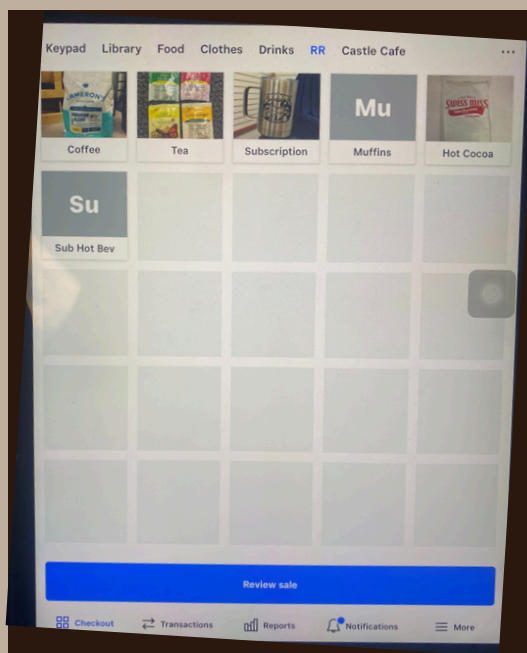
## PROCESS SALES DOCUMENTATION



The tracking of sales plays a crucial role in the success of our SBE as it informs decision-making and helps with inventory management. By maintaining a structured process for documenting and tracking sales, our student employees gain valuable hands-on experience in financial management. Sales data offers key insights into product performance, allowing us to assess which items are popular and which are not. When Roamin' Roasters was first launched, we stocked up on hazelnut and French vanilla creamers, but we quickly found that most of our customers, primarily teachers, preferred stronger, less sugary options like half and half. Recognizing this, we adjusted our inventory to focus more on half and half and reduce overstocking on less popular flavors.

Tracking sales data has proven essential for making inventory decisions. By observing sales trends, we can ensure that our stock aligns with customer preferences, minimizing waste and optimizing resources. Furthermore, analyzing these trends enables us to identify peak sales periods for specific items. We noticed that sales of Triple Chocolate flavored muffins surged in the morning. This insight prompted us to stock up on these muffins ahead of time, ensuring that we met customer demand during busy periods without running out. This data-driven approach not only boosts operational efficiency but also enhances customer satisfaction. Additionally, our student employees develop critical skills in data analysis, learning to make informed decisions that will benefit their future careers in business and entrepreneurship.

A typical customer transaction at Roamin Roasters begins when a customer places their order at our coffee cart. Once the order is received, the student employee promptly asks the customer whether they would like to pay with cash or card. While the customer decides on their preferred payment method, the employee quickly enters the order into our system to ensure accurate inventory tracking. If the customer chooses to pay with cash, the employee accepts the payment and securely stores the money in our cash box. Alternatively, if the customer prefers to pay with a credit card, they are asked to insert or swipe their card on our card reader. We use Square as our transaction system to streamline the process, ensuring that each sale is processed efficiently and without errors. This approach helps keep operations running smoothly and enhances the overall customer experience.



## PROCESS RETURNS/EXCHANGES

In our SBE, we don't have a formal return policy, but we're committed to ensuring our customers are happy with their experience. If a customer isn't satisfied with a product, we're more than happy to take it back and offer a replacement. An example of this could be if someone tries a new creamer flavor in their coffee and it's not to their liking, we'll gladly swap it out or issue a refund—no questions asked. We believe that building strong, trusting relationships with our customers is key to fostering loyalty. By being flexible and showing genuine care for their concerns, we create a customer-focused environment where everyone feels valued and heard.

# STANDARD 10: HUMAN RESOURCES MANAGEMENT



## DISCUSS THE NATURE OF HUMAN RESOURCES MANAGEMENT

The selection process for our SBE focuses on pairing the right candidates with the needs of the business. We start by recruiting students who we believe would be a good fit for the coffee cart, reaching out to marketing students, posting on social media, and putting up flyers around the school. We also collaborate with special education students to see who might be interested in working with us and benefiting from the program. Afterward, we schedule interviews and training sessions, where both students and special needs students join. During the training, we talk to students about which roles they're interested in and introduce the special needs students to our operations, using a slideshow and a video we created to demonstrate how to make beverages and handle money. We then give hands-on training to all the candidates, showing them how to prepare drinks and handle money, while closely observing their skills. Throughout this, we take notes on each candidate's skills in beverage making, money handling, and social interaction. Based on these observations, we make final decisions about who will take on specific roles in the coffee cart.

Training is essential to ensuring the smooth operation of the coffee cart every day. After assigning students to specific tasks, such as money handling, beverage making, or supporting the special needs students, we provide them with thorough training for their roles. For example, employees responsible for money handling are taught how to use the card reader, manage the cash box, and track inventory on the iPad. These tasks are crucial because managing inventory allows us to track sales trends, which in turn helps us improve and grow the SBE. To ensure everyone is comfortable and capable, we have employees demonstrate their understanding of these tasks after we explain them. Additionally, a head student works alongside the new team members during the first week to guide them and answer any questions. Employees are encouraged to take pride in their work, understanding the positive impact our coffee cart has on the community, especially in providing opportunities for special needs students to develop workplace skills. Every month, we recognize an employee who demonstrates dedication, such as showing up for shifts, picking up extra shifts, or treating the special needs students with respect. This employee is presented with a gift card as a token of appreciation. Working for our SBE provides students with volunteer hours, which count toward their high school graduation requirements. Each student is guaranteed at least two shifts a week, earning them two hours of volunteer work. If students need more hours, they can request additional shifts. We also offer the remaining coffee after every shift, encouraging employees to take any leftover coffee before it's disposed of, ensuring nothing goes to waste.

# FOSTER THE “RIGHT” ENVIRONMENT FOR EMPLOYEES.



To foster a positive and supportive environment for our student employees, we prioritize an open-door policy that encourages students to approach their supervisors and head students with any concerns, suggestions, or ideas. This creates a space where everyone feels comfortable sharing their thoughts, knowing that their opinions will be heard and respected. Since student employees play a key role in decision-making within our SBE, it's essential that we maintain an inclusive atmosphere. At the start of their journey with us, we pair new employees with mentors who offer guidance and answer any questions they might have. This approach helps students feel confident asking for help without the fear of judgment.

We also use appreciation boards to highlight and celebrate the contributions of our team. Whenever there's a significant sale or someone goes above and beyond in their role, we display a photo of the employee on the board as a way to publicly acknowledge their efforts. It's a simple yet meaningful way to show gratitude and boost morale, reinforcing a culture of appreciation.

Understanding that our student employees balance academics and personal commitments, we offer flexible scheduling that allows them to prioritize these responsibilities. Running the coffee cart can be overwhelming, so we offer 2-3 emergency shift cancellations per month to help alleviate any stress when students need to manage other commitments. In addition, we hold regular check-ins where employees can provide feedback on challenges, preferences, and goals.



**“BEST COFFEE MAKER”:**  
Asmitha Chimata was the best coffee maker for the month of December.

To further boost morale, we have recognition programs such as “Employee of the Month” and “Best Coffee Maker” to celebrate hard-working employees. Each winner receives a small certificate or gift card as a token of appreciation. We also extend these recognitions to our special needs students, ensuring that their participation is valued equally. At the end of each semester, we host a small celebration party for everyone involved in the SBE – including special needs students, student employees, and the assistant teachers who support them. These parties not only serve as a fun way to celebrate everyone's hard work but also help raise funds for special needs programs. It's our way of showing gratitude and encouraging everyone to work towards a shared goal.



**“EMPLOYEE OF THE MONTH”:**  
Arushi Raghavendra and Zia Kotadiya got awarded the employee of the month for December.

# TRAIN STAFF



## ●○○ INFORMAL TRAINING

Formal training in our SBE consists of onboarding sessions. New employees participate in an orientation program that covers rules, safety regulations and expectations for the coffee cart.

Students will also receive a video which shows specifically how to brew and make coffee, tea, and hot chocolate. Another video is given on how to add items to the inventory, how to work the cash reader and the expectation of students when they work the cart and safety rules they must follow.

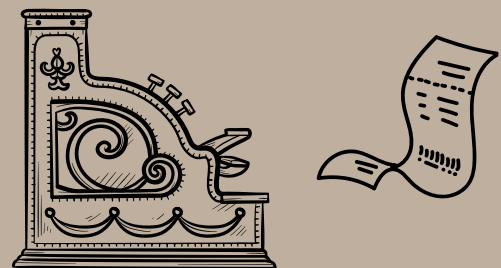
After watching all of these videos, students will take a short quiz on the rules and regulations. The results of the quiz for each individual needs to be at least 80% or higher accuracy in order to show that they understand what we are looking for.

## ●○○ FORMAL TRAINING

Informal training in our SBE consists of on-the-job training, this allows students to learn by performing tasks under the guidance of a supervisor or experienced student employee. The

benefits of this type of training include immediate application of skills, opportunity for real time feedback and corrections. Students will learn how to brew, make coffee for customers and how to make hot chocolate and tea. This will be taught to them by the DECA Advisor and head students on training day to ensure that everyone that is employed knows how to run the coffee machine and tea kettle since they are vital to making all the other beverages.

Roamin' Roasters serves as a dynamic learning laboratory for students by blending real world work experiences with academic and personal skill developments. It trains students in hands-on learning opportunities by workplace skills development and task rotation. Student employees gain practical experience in customer service, teamwork and cash handling. The special needs students benefit from our SBE because they also have the opportunity to develop workplace skills by getting experience in service, teamwork and communication. Task rotation helps students rotate through different roles to gain experience by being a barista, cashier, inventory manager and working with the special needs students. Problem solving and critical thinking can also help students tackle issues such as handling customer complaints and resolving inventory shortages.





# ASSESS EMPLOYEE PERFORMANCE

Evaluating employee performance is very important for ensuring productivity, growth and a positive environment, which is why in our SBE we use a mix of methods to assess the performance of all student employees. Firstly, we made sure to observe all employees during their shifts for the first few weeks after the coffee cart started running. Some of the areas that we focused more were in customer service, beverage making, money handling and teamwork. We made sure to give employees feedback on things that looked good and things that needed to be improved. Self assessments were also implemented in order for employees to reflect on their own performance. They used a self evaluation that was provided with a couple of guided questions asking, “What tasks do you feel most confident performing?”, “What areas do you think need improvement?”, and “How can your supervisors help you succeed?”. A form with the questions listed above was sent to employees at the end of every month in order to perform a self evaluation. These questions helped employees with self awareness and encouraged them to take responsibility for their personal growth and development. We also took customer feedback about our staff through surveys and informal conversations to help our employees understand the impact of their work on customer satisfaction

As head students of the SBE, we have responsibility in evaluating employee performance. We must take on roles such as peer evaluators and self assessors which not only enhance employee learning but also contribute to the overall success of our SBE. When it comes to peer evaluation, we provide employees with constructive feedback after observing their performance and assessing specific areas like beverage making, money handling and teamwork. Head students are always polite when they provide feedback and do it in a professional manner. Peer evaluation helps employees enhance their communication and other skills through constructive feedback and helps head students develop empathy and teamwork by being able to understand the diverse perspectives of employees.

Student employees also assess their own performance and reflect on their strengths and weaknesses. Reflection of this happens in the form that is provided to student employees at the end of every month and is documented for head students and advisors to see outcomes of the self evaluation. This not only increases self awareness and accountability but also improves goal setting and problem solving abilities

These responsibilities are very important for the growth and development of our SBE because participating in these evaluations helps students and employees learn responsibility for their actions. It also helps develop critical thinking and leadership skills and strengthen the workplace skills such as communication, teamwork and accountability of actions. Overall responsibilities help strengthen our SBE and foster a supportive and growth oriented work environment.

